



2018-2022

Southern Tablelands Regional Economic Development Strategy

VISION

To grow the region's core strengths in agriculture, energy, extractive industries, aged care, transport, and tourism and deliver a highly liveable community which attracts and rewards residents and visitors.

Developed with the support of the NSW Government as part of the Regional Economic Development Strategies program to assist local councils and their communities in regional NSW. June 2018.



Preface

The NSW Government has assisted local councils and their communities to develop 37 Regional Economic Development Strategies across regional NSW. Each strategy is designed around one or more local government areas that form a functional economic region as defined by economic data and community input.

While the strategies have been developed using consistent methodology, each is a product of detailed data analysis and local community consultation to ensure ownership through a 'bottom-up' process: it sets out a vision for the region, the strategies, and early stage actions required to achieve the vision.

Regional Economic Development Strategies articulate a framework for identifying actions crucial to achieving the regional vision. Projects listed within this Strategy should therefore be viewed as example projects that have emerged from the initial application of the framework. Adoption of these projects would be subject to further evaluative processes.

The power of the Strategy is its ability to be used on an ongoing basis to identify additional high value projects over time. By complementing existing funding processes, these strategies

present new opportunities to strengthen and increase investment in regional development across NSW.

Importantly, the Strategy should be viewed as the first stage of a process that will assist those with an interest in the economic development of the Region, particularly councils, communities and local businesses, in planning their future economic activities. It provides a vehicle for engaging the community in a 'conversation' about regional needs and priorities, assists in bringing together key stakeholders and mobilising resources, and in so doing, can facilitate faster access to dedicated NSW Government funding, such as the Growing Local Economies Fund, as well as helping to capitalise upon other economic opportunities.

This Strategy, prepared by AgEconPlus, was formed in collaboration with the Goulburn-Mulwaree Council, Upper Lachlan Shire Council, Yass Valley

Council, key stakeholders and the broader regional community which benefited from economic-analytical assistance from the NSW Government's Centre for Economic and Regional Development (CERD).

It is presented in two documents, the Southern Tablelands Regional Economic Development Strategy 2018–2022, which allows the reader to quickly and easily determine key content, while the accompanying Southern Tablelands Regional Economic Development Strategy – Supporting Analysis 2018–2022 details the Strategy methodology, evidence and development process.

For further information about the Regional Economic Development Strategies program please contact the CERD on 02 6391 3025 or CERD@dpc.nsw.gov.au.

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Introduction

The Southern Tablelands Regional Economic Development Strategy 2018–2022 (the Strategy) sets out a long term economic vision and associated strategy for the three local government areas (LGAs) of Goulburn-Mulwaree, Upper Lachlan Shire and Yass Valley (the Region).

It builds on the endowments and specialisations of the Region to guide investment over the next four years.¹ Economic principles suggest that endowments and specialisations play a key role in regional economy development.²

The Strategy aims to leverage the Region's endowments: its topography, water, climate and soils, natural resources, proximity to Sydney and Canberra (including the road and rail access), extractive and mineral resources, lifestyle advantages, historic heritage and villages, public order and safety institutions, hospitals, local institutions and strong leadership, labour supply and specialist labour skills. These endowments are the basis of the Region's current specialisations in Sheep and Beef Cattle Farming, Meat and Meat Product Manufacturing, Public Order and Safety Services, Construction Material Mining, Road Freight Transport, Residential Care Services and Tourism, as well as the potentially emerging specialisation in renewable energy generation. These endowments and specialisations were identified through data analysis and subsequently informed and confirmed through community consultation.

The Strategy, which builds on the Region's endowments and its economic strengths and specialisations, aims to:

SUSTAIN

the Region's agriculture and agricultural processing advantage, especially in livestock

BUILD

on the Region's core strength in energy generation and natural resource extraction

REALISE

the economic opportunity presented by public order, safety and aged care

DRIVE

growth in the transport, access and logistics sector

ENHANCE

the liveability of the Region and grow its visitor economy.³

The Strategy also takes account of regional risks and how they might be addressed.

Derived through detailed research and analysis, this Strategy is the culmination of collaboration between the Goulburn-Mulwaree, Upper Lachlan Shire and Yass Valley Councils, their respective communities and the NSW Government's Centre for Economic and Regional Development (CERD).

¹ Regional Economic Development Strategies, Centre for Economic and Regional Development (https://www.dpc.nsw.gov.au/programs_and_services/centre_for_economic_and_regional_development/projects).

² *Regional Economic Growth Enablers Report (2017)*, Centre for Economic and Regional Development.

³ These strategies are in no particular order of priority. Economic development priorities will vary over time according to industry demand, market conditions and access to infrastructure and other funding.

Background

In 2016, the Region was home to 53,446 people, with 29,609 residing in the Goulburn-Mulwaree LGA, 16,142 residing in the Yass Valley LGA and 7,695 residing in the Upper Lachlan Shire LGA. People who work in the Region typically live in the Region: 89% of the jobs in these three LGAs are held by residents.

However, at least 29% of the employed labour force residing in the Region commutes to a work location outside the Region.⁴ This indicates substantial commuting flows are occurring out of the Region, in particular from the Yass Valley LGA to the ACT, (but also with a substantial commuter flow from Goulburn to Canberra), with the Yass area fast becoming a dormitory area for Canberra and being intricately integrated into the ACT's economy. This is likely to become more significant into the future.

According to the 2016 Census of Population and Housing, the median age of the Southern Tablelands was 43 while the median age of the NSW population was 38 years. The Region has a higher proportion of people in the younger aged groups (under 15) and 40 to 54 age cohort, and a lower proportion in the 20 to 34 age group and over 60 years of age. There is a substantial proportion of people with post-secondary education and qualifications. The population has also been growing strongly, at a rate greater than for NSW between 2006 and 2011 and slightly less than for NSW between 2011 and 2016. The population is forecast to grow at a slower pace than NSW in the 2016-2036 period.

The regional economy is based on strengths and specialisations in a number of industry sectors.

Historically, the largest employing industries in the Southern Tablelands have been Agriculture, Forestry and Fishing, Health Care and Social Assistance and Retail Trade. As shown in Figure 2, these sectors are still the most significant sectors for employment, with Health Care and Social Assistance now the largest employer. Employment in Agriculture, Forestry and Fishing declined between 2001 and 2011 but grew from 2011 to 2016 to be the second largest employer. Employment in the Retail Trade sector has declined slightly over time from 2006. The next largest employing sectors, Accommodation and Food Services, Public Administration & Safety and Education and Training, all grew from 2011 to 2016.

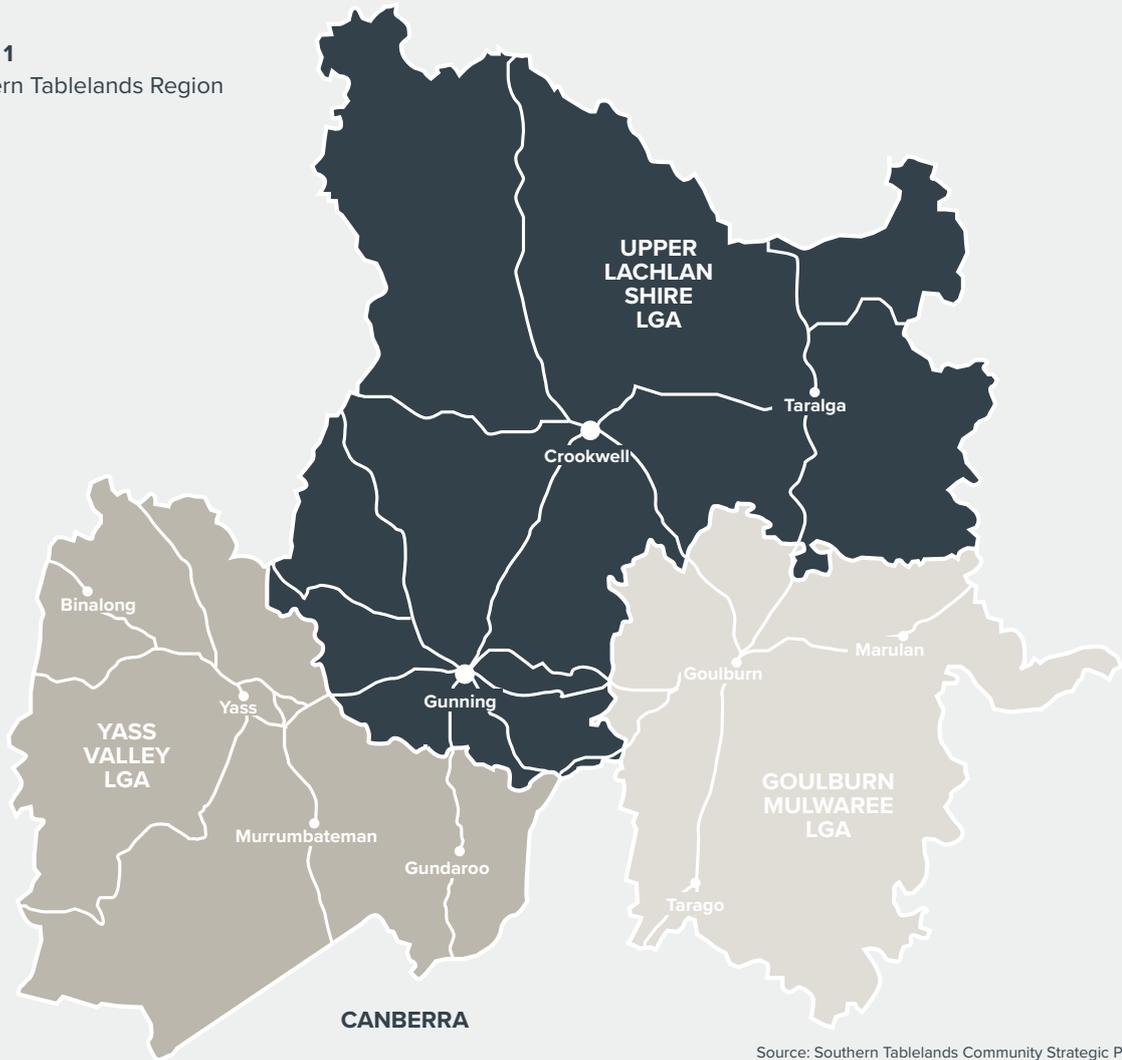
Employment size is one important indicator of a region's industry structure or specialisations. Another is the generation of values of output from industry sectors. Based on Input-Output industry classifications, the main contributors to Gross Regional Product (GRP) are Sheep, Grains, Beef and Dairy Cattle, Retail Trade, Public Administration and Residential Care and Social Assistance.

Some of those economic sector specialisations generating jobs and some of the sectors that are the main generators of Gross Regional Product are the 'engines of growth' for the Region's economy on which the Region's economic development can be built. These include the Agriculture sector, Manufacturing and Mining. Some of the services sectors are also in that category, especially public administration and the safety functions. Others are more 'population serving' activities, such as Retail, Trade and Residential Care and Social Assistance. In the Region there are also 'enabling industries' that support the engines of growth, such as Freight Transport and Logistics that are important if not particularly activities of high regional specialisation.

Using these economic performance data in conjunction with other sources, such as community consultation and online surveys, the Region's endowments and specialisations can be established.

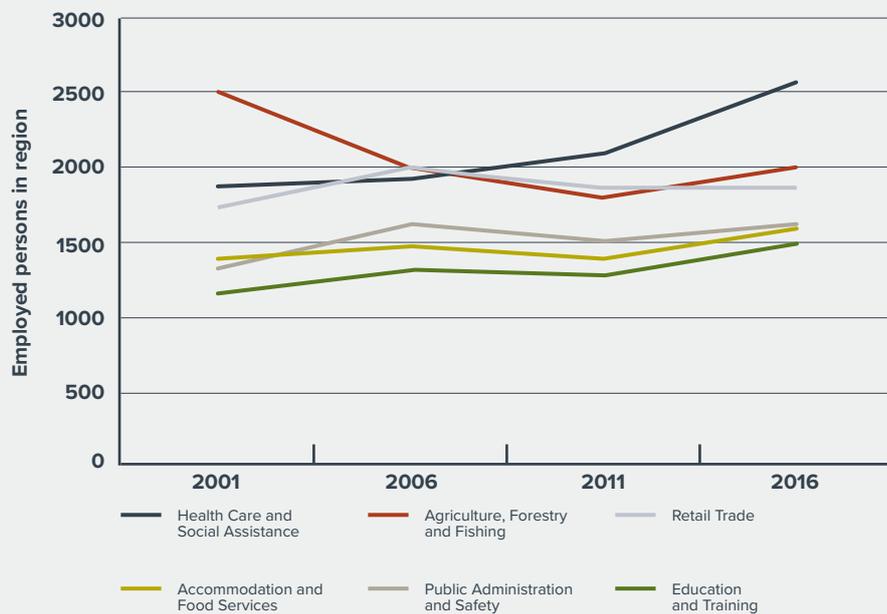
⁴ The main location of work for those commuting outside the region is ACT (63%), No Fixed Address NSW (15%), Queanbeyan (5%), Wingecarribee (5%) and Sydney (4%).

Figure 1
Southern Tablelands Region



Source: Southern Tablelands Community Strategic Plan (2016).

Figure 2
Employment in the Region, 2001–2016



Endowments

Endowments are strengths that a regional economy possesses and can capitalise on. Economic principles suggest that endowments play a key role in the economic development of each region.

The CERD in its Regional Economic Enablers Report (2016) found that:

the future of individual regional economies is inexorably linked to their natural endowments, and attempts to retain or establish industries without an underpinning endowment are unlikely to succeed.⁵

A region seeking to encourage economic development should concentrate on the factors that enable the growth of endowment-based industries, as well as building local leadership capacity, to capitalise on the opportunities that the region's endowments present. Endowments can lead to opportunities from which commercial and industrial interests may leverage and develop specialisations.

⁵ Regional Economic Growth Enablers Report (2017), Centre for Economic and Regional Development



Topography, water, climate and soil

The soils, climate, topography and land use vary significantly across the Region, with high and medium rainfall production zones and a range of farming enterprises. Although the predominant farm enterprises are focused around livestock (in particular sheep and beef, and mixed farming production) Crookwell is renowned as a potato growing area, and became the premier certified seed potato growing area in NSW. Viticulture for cool climate wine is developing in Region.

Location, accessibility and lifestyle benefits

The Region is serviced by both road and rail access to the major cities of Sydney and Canberra. Canberra Airport has domestic and international passenger and freight capability. This provides the Southern Tablelands with expanded access to domestic and international markets. The Region's affordable land and house prices, rural lifestyle choices, small community feel, natural beauty and diverse economy also impact the Region's liveability and enhance it as an attractive place to raise a family, retire or semi-retire.

Extractive and mineral resources

The Region has unique geology containing extractive materials such as sand, gravel, rock and limestone. The Southern Tablelands is an important source of construction materials for the Sydney Region.

Natural resources

The Region is also endowed with a range of nature resources and features, including a number of national parks and State forests, Wombeyan Caves and over 5,000km of waterways. These are an important resource for regional tourism.

Public order and safety institutions

The Region contains significant public order and safety infrastructure in the form of the Goulburn Correctional Centre and the Goulburn Policy Academy. These are major employers in the Region with the Goulburn Policy Academy having significant land resources for future expansions of scale and scope of activities.

Aboriginal heritage, historic heritage and villages

The Region has a rich and varied Aboriginal and European heritage. Aboriginal people have lived in the Region for at least 21,000 years. At the time of the first explorers there were two major language groups identified in the Region, the Gandangara to the north of Goulburn, and the Ngunawal to the south. From the earliest years of settlement, this Region has been important in the development of Australia. The Region encompasses the first inland city of Goulburn (officially declared in 1863) as well as numerous towns and villages with extensive built heritage. A number of bushrangers were active in the area from the 1830s to the 1860s, notably Ben Hall's gang. Historic heritage and the villages throughout the Region are a potentially important resource for regional tourism.

Hospitals

The Region contains the Goulburn Base Hospital which is currently undergoing a \$120 million redevelopment, as well as Crookwell District Hospital and Yass District Hospital. The abundance of choice provides additional amenity to residents and supports the increasing ageing population.

Labour resources

The Region has substantial labour resources that well exceeds the internal demand for labour. Compared to Regional NSW, the Region has a higher proportion of people who have completed Year 12 or equivalent and a higher proportion of people holding university qualifications.

Local institutions and strong leadership

The Goulburn region is well supported with a chamber of commerce in Goulburn, a business council in Yass and a progress association in Crookwell. Together with village based progress associations these institutions provide ideas and support for economic development. In addition, the three councils in the Region have strong relationships with businesses and economic development institutions. The three councils have a strong working relationship and collaborate on relevant projects and meet regularly through a variety of forums including Canberra Region Joint Organisation and South East Regional Organisation of councils. Each council funds an Economic Development Officer. The Economic Development Officer in Yass Valley and Upper Lachlan Shire works with the community through an Economic Development Committee of Council. Goulburn-Mulwaree Council prefers to establish working groups for specific purposes e.g. working groups to support extractive industry development, the motor sport sector and aged care.

Specialisations

An understanding of a region's competitive advantages⁶ can be gained from Location Quotients (LQs). LQs measure the employment concentration in industry sectors within a regional economy, compared with the same sectors across NSW. The higher the LQ, the more specialised a region is in that industry relative to the rest of NSW.

For the purpose of this analysis, specialisations as defined by LQs, are in turn used as a proxy measure for those sectors and industries that represent a region's true competitive advantages.

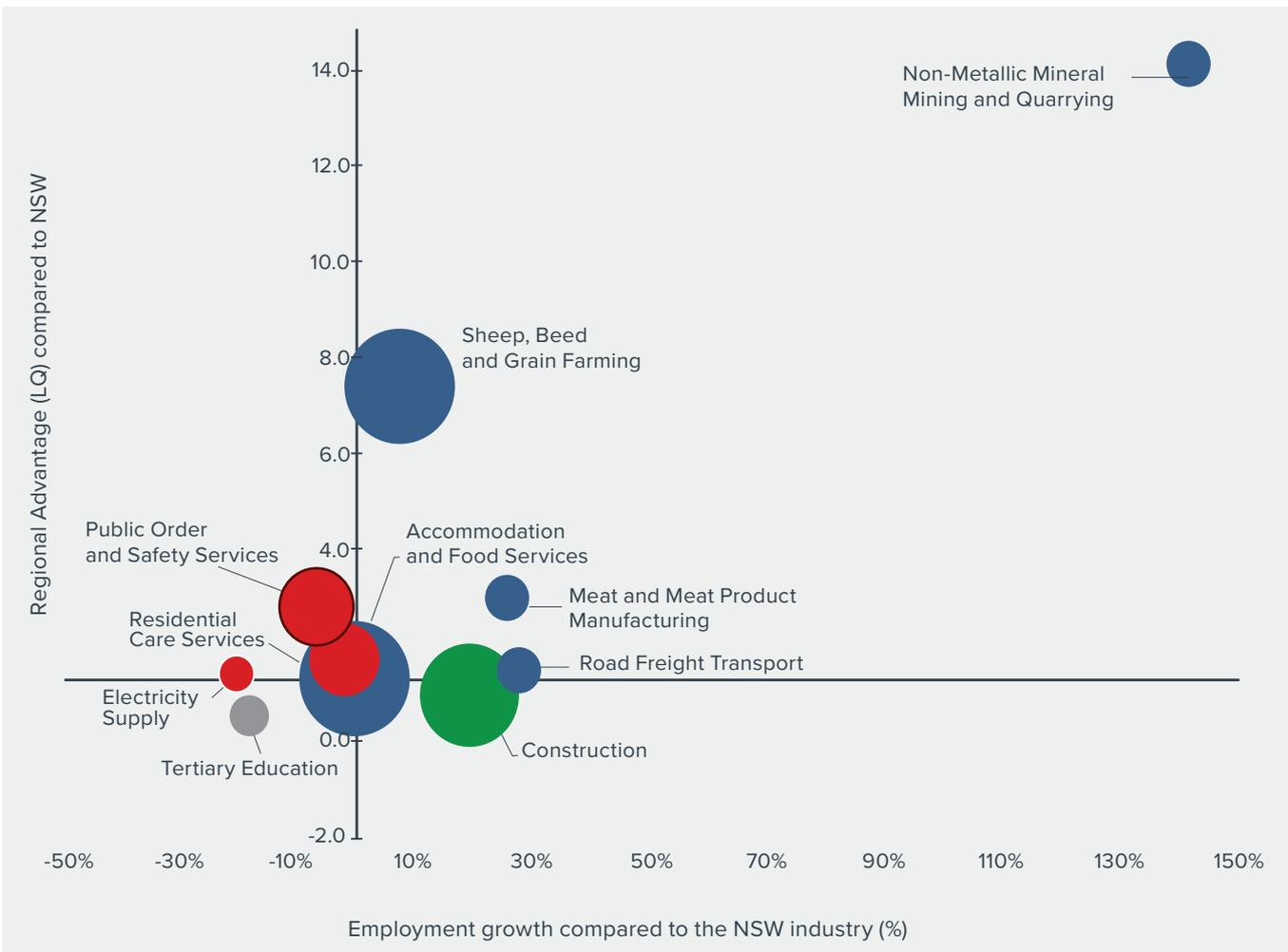
Importantly, while LQs are used in this document for that purpose, they are only a partial measure of those competitive advantages. Hence, they have been considered alongside

additional qualitative evaluations and data analysis, such as Input-Output analysis, to arrive at the findings for the Southern Tablelands Regional Economic Development Strategy.

Sheep, Beef Cattle and Grain Farming is a large sector in the Region, employing 8.6% of the workforce.⁷ It is also an industry in which the Region specialises when compared to the rest of NSW

(LQ of 7.4). Between 2011 and 2016 employment in the industry grew at a faster rate in the Region than it did across NSW (exceeding the industry employment growth rate across NSW by 6.7%.

The Meat and Meat Product Manufacturing sector, which is associated with the Sheep, Beef Cattle and Grain Farming sector, is also



a specialisation sector (LQ of 2.9). This is a capital intensive sector which provided 1.3% of the Region's employment in 2016, and between 2011 and 2016 grew at a much faster rate than the sector did across NSW.

Non-Metallic Mineral Mining and Quarrying also exhibited a very high level of specialisation (LQ of 14.4). It is a capital intensive sector that provided 1.1% of employment in the Region in 2016, and exhibited very strong growth relative to NSW.

Large employment sectors with specialisations include Accommodation and Food Services (indicative of tourism), Public Order and Safety, and Residential Care Services. The latter two specialisation sectors experienced employment growth less than the average growth of these sectors across the NSW economy.

Other specialisations include Road Freight Transport and Electricity Supply. However, the latter sector did not perform as well (in terms of employment growth) as the equivalent sector in the NSW economy between 2011 and 2016.

Construction is another of the Region's large sectors, employing around 7.3% of the workforce in 2016. However, the Region does not have a specialisation in this sector.

Figure 3 charts selected industries in the regional economy in 2016:

- Industries with a larger 'bubble' employed more people.
- Industries further above the horizontal line are more specialised when compared to NSW (i.e. an LQ greater than 1.25), industries below the line are less specialised when compared to NSW.
- Industries to the right of the vertical line grew faster between 2011 and 2016 than comparable industries across NSW, industries on the left grew more slowly.

Focusing on the industry employment specialisations that are job generators is one aspect, but to get a more balanced view in understanding the region's economic strengths is to identify the industry sectors that are the main generators of GRP. The Input-Output analysis conducted for the Region shows that those sectors generating greatest GRP are Sheep, Grains, Beef and Dairy Cattle (\$170 million), Retail Trade (\$144 million), Public Administration (\$121 million) and Residential Care and Social Assistance (\$99 million).

In Figure 3 those sectors with an employment specialisation are coloured blue and red. Specialisation sectors, or potentially emerging specialisations (coloured green), that have a reliance on local endowments and/or are traded

outside the Region i.e. exported, or are servicing more than just the local population, are the focus of the Strategy.

The Southern Tablelands is a net importer, with exports out of the Region of \$665 million and imports into the Region of \$1,136 million. The Region's largest exporting industries by value of output are:

- Sheep, Grain and Beef (\$266 million); and
- Meat and Meat Product Manufacturing (\$34 million).

In addition, the Southern Tablelands is increasingly a commuter area for the ACT – particularly from the Yass Valley LGA – and hence the Region is essentially exporting significant levels of labour.

Conversely, the largest importing industries in the region are:

- Sheep, Grains, Beef and Dairy Cattle (\$77 million);
- Construction Services (\$33 million); and
- Heavy and Civil Engineering Construction (\$30 million).⁸

⁶ A regions competitive advantage for an industry includes its ability to produce goods and services at a lower cost or differentiate its products from other regions, along with access to external factors which enhance business and operations/ minimize risk (Stimson, Stough and Roberts, 2006).

⁷ Australian Bureau of Statistics Census of Population and Housing, August 2016.

⁸ Although the household sector is the largest importer in the economy, it is not an industry Sector as such.



Strategy

The five Strategy elements for the Southern Tablelands Region link directly to the opportunities presented by the Region’s endowments and specialisations and also aim to address some key regional risks.

The Strategy elements were derived from an analysis of the endowments that underpin the Region’s strengths, followed by examination of current industry specialisations and emerging specialisations, identified in consultation with the community and councils.

Each element is accompanied by a set of early actions, which should be interpreted simply as example actions derived from the preliminary application of the strategy framework. It is therefore expected that there will be other actions capable of contributing to the attainment of the Region’s vision that are yet to be identified.

Consequently, an action’s alignment with the Strategy is the primary strategic consideration, rather than it being listed in this document, and all proposed actions will be subject to further qualitative and quantitative evaluative processes.



Sustain the Region’s agriculture and agricultural processing advantage, especially in livestock



Build on the Region’s core strength in energy generation and natural resource extraction



Realise the economic opportunity presented by public order, safety and aged care



Drive growth in the transport, access and logistics sector



Enhancing the liveability of the Region and grow its visitor economy

1. Sustain the Region's agriculture and agricultural processing advantage, especially in livestock

The Southern Tablelands has a specialisation in Agriculture, especially sheep and beef cattle farming. Relative to the rest of NSW, it has a strong Meat and Meat Products Processing sector. In addition to these long standing specialisations, economic growth in the Sydney Basin provides the Southern Tablelands with the opportunity to expand its 'footprint' in intensive livestock production, especially chicken meat and its processing. The goal of this strategy is to expand the regional economy by growing the Region's agriculture and agricultural processing advantage, especially in livestock production and processing.



Infrastructure Priorities

- **Road transport infrastructure:** cost effective freight is important to agricultural businesses in the Region. Successful advocacy (potentially in coordination with other Regions) for upgrade to the highway and secondary roads would reduce the long-term cost profile of agricultural enterprises in the Region.
- **Digital connectivity infrastructure:** fast and reliable internet access (NBN rollout) as well as mobile reception in additional parts of the Southern Tablelands would facilitate on-farm uptake of spatial technology to enhance productivity.
- **Agricultural infrastructure:** additional training and agricultural education infrastructure would communicate the importance of the sector to visitors and help sustain a supply of agricultural labour. It may also be appropriate to develop infrastructure to support value adding associated with the South Eastern Livestock Exchange Yass.



Early Stage Action Priorities

- Register of skilled service providers.
- Poultry industry development strategy.
- Land use planning for seed potatoes.
- Investigate feasibility of Australian Agricultural Centre, Crookwell.
- Yennora Wool Selling Centre relocation to Goulburn (longer term opportunity).
- Work with Southern Meats to ensure abattoir continues to meet its environmental standards.
- Recognise and promote South Eastern Livestock Exchange, Yass.
- Feasibility of value adding enterprises, South Eastern Livestock Exchange, Yass.
- Work with agricultural producers to ensure transfer of skills to make the most of spatial technology.
- Train staff for intensive agriculture.
- Attract migrant labour to the Region.
- Attract agricultural education to Region.
- Localise the agricultural processing supply chain.

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2. Build on the Region's core strength in energy generation and natural resource extraction

The Southern Tablelands has become a powerhouse for renewable energy generation in the 21st century. The Region generates large scale and commercial energy from waste projects, solar farms and wind turbines. In addition, the Region is a crossroads for electricity transmission lines and is on the route of the Moomba to Melbourne natural gas pipeline. This strategy aims to build on both the Region's natural and constructed energy endowments to grow economic activity and employment.

Relative to the rest of NSW, the Southern Tablelands has a core advantage in Non-metallic Mineral Mining and Quarrying. On the ground this manifests itself as a large construction material quarrying sector based in the Goulburn LGA at Marulan. The sector creates employment and economic activity in the Region, is vital for Sydney's ongoing growth and has scope for expansion.



Infrastructure Priorities

- **Rail freight:** assessment of the economic feasibility of managing the expansion of Marulan quarrying activities through the use of rail.
- **Utilities infrastructure:** give further consideration of the economic feasibility of connecting Crookwell to the natural gas pipeline.



Early Stage Action Priorities

- Develop a renewable energy plan for specific parts of the Region.
- Work with Veolia, Woodlawn to ensure sustainable energy generation from waste.
- Further explore the economic feasibility of, and seek funding support for, Crookwell's and Gunning's connection to natural gas.
- Protect and expand mining and quarrying activities in the Goulburn area.
- Request a NSW Government investigation of the feasibility of rail as the principal means of transporting quarry material to Sydney. Rail transport for Marulan quarry material is a central recommendation of the Planning and Assessment Commission.
- Investigate opportunities to localise the energy supply chain given the success Goulburn-Mulwaree Council has had in showcasing and localising the natural resource extraction supply chain.

3. Realise the economic opportunity presented by public order, safety and aged care

The Southern Tablelands has a long-standing specialisation in public order and safety. Key institutions delivering these services are based in Goulburn and include the NSW Police Academy and the Goulburn Correctional Centre. Both institutions are major employers and wages and salaries generated and spent in the community add to the Region's economic base. This strategy aims to maximise economic opportunities associated with the academy and the correctional centre.

All three LGAs making up the Southern Tablelands Region have a specialisation in aged care and the sector is forecast to grow over the medium term. With the ageing of the population, aged care is a major employer and offers jobs to young people who might otherwise find it necessary to leave their community to secure employment. This strategy will support growth in the aged care sector including provision of auxiliary infrastructure.

Infrastructure Priorities



- **Aged care infrastructure:** provision of complementary infrastructure such as hydrotherapy pools in Crookwell and Yass that would also be used by the Southern Tablelands community.

Early Stage Action Priorities



- Liaise with the NSW Police Academy and allied sectors to maximise economic opportunities for Goulburn.
- Liaise with the NSW Department of Corrective Services to maximise economic opportunities for Goulburn (e.g. input supply).
- Publicise the Region's comparative advantage in aged care to appropriate providers and developers.
- Liaise with NSW Health to ensure retention and investment in the Crookwell Hospital.
- Advance the proposal for an indoor pool/ hydrotherapy pool for Crookwell District Hospital and Yass District Hospital.
- Investigate opportunities to localise the aged care supply chain given the success Goulburn-Mulwaree Council has had in showcasing and localising the natural resource extraction supply chain. Localising the aged care supply chain may include additional local sourcing of food and beverage requirements, training and the servicing of invalid equipment.

4. Drive growth in the transport, access and logistics sector

The Southern Tablelands is strategically located between Sydney and Canberra. Additionally, Goulburn and Yass lie on the main north south road between Australia's two most populous cities, Sydney and Melbourne. The Southern Tablelands geographic position provides it with core advantages in road transport and freight logistics. The Region has an opportunity to capitalise on these endowments and become a nexus for people and freight movements between Sydney, Canberra and Melbourne.

Infrastructure Priorities



- **Road infrastructure linkages to the ACT:** of which the highest priority is duplication of the Barton Highway between the ACT border and Yass. Other priorities include sealing of Fairlight Road and a new bridge and sealing of Mulligans Flat Road.
- **Hume Highway access:** to facilitate the development of new industrial estates in both Goulburn and Marulan.
- **Road infrastructure to improve agriculture and other industry competitiveness:** upgrade of a number of key regional roads will improve the competitiveness of a number of regional industries including agriculture. Key roads include, but are not limited to, Main Road 92 from Nowra to Nerriga, livestock supply routes Range Road, Gurrundah, Windellema Road and Bungonia Road, and the Dalton/ Rye Park Road (MR241).
- **Rail infrastructure:** upgrade of existing passenger and freight rail services.

Early Stage Action Priorities



- Invest to enhance ACT commuting opportunities.
- Complete duplication of the Barton Highway between the ACT and Yass.
- Advocate to secure an efficient passenger and freight rail service.
- Improve the northern access to Goulburn from the Hume Highway at Murrays Flat.
- Improve central access to Goulburn from the Hume Highway at Windellema Road.
- Investigate the construction of a southern exit to the Hume Highway Marulan.
- Lobby for construction and sealing of Fairlight Road linking Yass to the ACT.
- Advocate for a new bridge and sealing of Mulligans Flat Road.
- Lobby for the upgrade of the Dalton/Rye Park Road (MR241).
- Advocate for the continued funding of upgrades to MR54 Goulburn to Bathurst Road
- Advocate for widening and straightening of key routes to market for livestock.
- Lobby for the upgrade of Main Road 92 from Nowra to Nerriga to the Hume Highway via Collector.
- Investigate the feasibility of low cost warehousing on the old Goulburn Saleyards site.
- Ensure appropriately zoned employment lands are available to accommodate business.
- Invest to retain the heavy vehicle inspection station in Crookwell.

5. Enhance the liveability of the Region and grow its visitor economy

A buoyant and sustainable region is one that attracts both residents and visitors. To achieve this, the community must invest in infrastructure that enriches the lives of its residents and attracts visitors from outside the Region. One of the Region's key endowments is the provision of a cost effective and desirable lifestyle that can be combined with employment, particularly as a dormitory area (especially the Yass valley) for workers commuting to the large and specialised public service labour market of the ACT. This strategy subsequently focusses on community priorities to enrich the liveability of the Region, especially for commuters to Canberra from Yass Valley. Enhancing liveability is also important to grow the visitor economy potential of the Region. This requires attention to long term land use planning, water and sewerage infrastructure, education and training for residents, connectivity, arts and culture and sport and recreation.



Infrastructure Priorities

- **Water and sewerage infrastructure:** investment is particularly targeted at village locations with desirable lifestyles.
- **Education infrastructure:** for primary and tertiary students so that they might study successfully while remaining resident in their community.
- **Digital connectivity:** reliable internet access, improved mobile reception to foster connections within the community.
- **Arts and culture infrastructure:** visual and performing arts and museum spaces for the benefit of residents and visitors.
- **Sport and recreation infrastructure:** including upgrade of local grounds and ovals, making hydrotherapy and swimming pools into year round venues and the creation of equestrian spaces.
- **Tourism infrastructure:** including new destinations for visitors based on walking and cycling tracks and opportunities linked to wine tourism and motor sport.



Early Stage Action Priorities

- Construct a water supply pipeline for Murrumbateman.
- Marulan water and sewerage upgrade.
- Yass water and sewerage upgrade.
- Facilitate the development of the Goulburn Country Universities Hub.
- Primary school for Murrumbateman – students currently face long bus rides to Yass.
- Lobby for better mobile phone and internet coverage.
- Convert the existing Goulburn town hall into an arts centre.
- Investigate and seek funding for Community Civic Centre in Crookwell.
- Mount Carmel Music conservatorium, Yass.
- Grow wine tourism in Murrumbateman.
- Cycleway rail trail Crookwell to Goulburn.
- Upgrade Wombeyan Caves Road MR258
- Upgrade Wyangala Dam access road.
- Upgrade Tablelands Way MR256 (Goulburn to Oberon Road).
- Localise the tourism supply chain.
- Build on the People, Place, Produce Theme of the Destination Southern NSW Destination Management Plan.

2018-2022

Strategies and Early Stage Actions

Sustain the Region's agriculture and agricultural processing advantage, especially in livestock

People and skills

- Prepare and distribute a register of skilled agricultural service providers.
- Build on current programs aimed at increasing the supply of staff for intensive livestock.
- Attract migrant labour to the Region.
- Attract agricultural education to Region.

Government, regulation and information

- Formulate a poultry industry development strategy.
- Complete a land use planning strategy for seed potato production.
- Support further consideration of the Australian Agricultural Centre, Crookwell.
- Support Yennora Wool Selling Centre relocation to Goulburn (longer term opportunity).
- Work with Southern Meats to ensure abattoir continues to meet its environmental standards.
- Recognise and promote South Eastern Livestock Exchange, Yass.
- Investigate the feasibility of value adding enterprises, South Eastern Livestock Exchange, Yass.
- Localise the agricultural processing supply chain.

Infrastructure

- Upgrade livestock supply routes Range Road, Gurrundah Road, Windellema Road and Bungonia Road and the Dalton/Rye Park Road (MR241).

Utilities

- Improved digital connectivity including fast and reliable internet rollout (NBN rollout) as well as mobile reception in additional parts of the Southern Tablelands.

Build on the Region's core strength in energy generation and natural resource extraction

People and skills

Government, regulation and information

- Develop a renewable energy plan for specific parts of the Region.
- Work with Veolia, Woodlawn to ensure sustainable energy generation from Sydney's waste.
- Protect and expand mining and quarrying activities in the Goulburn area.
- Request a NSW Government investigation of the feasibility of rail as the principle means of transporting quarry material to Sydney.
- Localise the energy supply chain.

Infrastructure

- Investigate the construction of a southern exit to the Hume Highway, Marulan.

Utilities

- Further explore the economic feasibility and seek funding support for Crookwell and Gunning's connection to natural gas.

Realise the economic opportunity presented by public order, safety and aged care

People and skills

- Liaise with the NSW Police Academy and allied sectors to maximise economic opportunities for Goulburn.
- Liaise with the NSW Department of Corrective Services to maximise economic opportunities for Goulburn.

Government, regulation and information

- Publicise the Region's comparative advantage in aged care to appropriate providers and developers.
- Liaise with NSW Health to ensure retention and investment in the Crookwell Hospital.
- Investigate opportunities to localise the aged care supply chain.

Infrastructure

- Investigate the feasibility for an indoor pool / hydrotherapy pool for Crookwell and Yass.

Utilities

Drive growth in the transport, access and logistics sector

People and skills

Government, regulation and information

- Advocate to secure an efficient passenger and freight rail service.
- Investigate the feasibility of low cost warehousing on the old Goulburn Saleyards site.
- Advocate for the upgrade and retention of the heavy vehicle inspection station in Crookwell.

Infrastructure

- Invest to enhance ACT commuting opportunities.
- Complete duplication of the Barton Highway between the ACT and Yass.
- Improve the northern access to Goulburn from the Hume Highway at Murrays Flat.
- Improve central access to Goulburn from the Hume Highway at Windellema Road.
- Investigate the construction of a southern exit to the Hume Highway Marulan.
- Advocate for construction and sealing of Fairlight Road linking Yass to the ACT.
- Advocate for a new bridge and sealing Mulligans Flat Rd.
- Advocate for the upgrade of the Dalton / Rye Park Road (MR241).
- Advocate for heavy vehicle upgrade of key routes to market for livestock.
- Advocate for the upgrade of Main Road 92 from Nerriga to the Hume Highway via Collector.
- Advocate for the continued funding of upgrades to Main Road 54 Goulburn to Bathurst Road
- Advocate for the upgrade of MR54 Goulburn to Bathurst Road

Utilities

Strategies and Early Stage Actions continued

Enhance the liveability of the Region and grow its visitor economy

People and skills

- Goulburn Country Universities Hub.
- Train staff for the tourism sector.

Government, regulation and information

- Long term vision and land use plan.
- Ensure land is zoned for growth.
- Develop Self-guided heritage walks.
- Grow wine tourism in Murrumbateman.
- Encourage motorcycle road circuit tours.
- Focus on motor sport opportunities.
- Localise the tourism supply chain.

Infrastructure

- Implement streetscape study.
- Primary school for Murrumbateman.
- Lobby for better mobile phone and internet coverage.
- Goulburn town hall arts.
- Mount Carmel Music conservatorium, Yass.
- Upgrade community facilities.
- Upgrade Rocky Hill War Memorial.
- Develop bike and walking trails.
- Play equipment Victoria Park, Goulburn.
- Upgrade of the Goulburn aquatic centre.
- Refurbish Yass Valley ovals.
- Capitalise on hockey heritage.
- Equestrian facility in Murrumbateman.
- Cycleway rail trail Crookwell to Goulburn.
- Upgrade Wombeyan Caves Road MR258.
- Upgrade Wyangala Dam access road.
- Build on the People, Place, Produce Theme of the Destination Southern NSW Destination Management Plan.
- Seek funding for a new Community Civic Centre, Crookwell.
- Upgrade Tablelands Way MR256 (Goulburn to Oberon Road).
- Advocate for joint use high school hall and indoor basketball stadium in Yass.

Utilities

- Murrumbateman water supply pipeline.
- Marulan water and sewerage upgrade.
- Investigate the provision of reticulated water and sewer, Collector.
- Construction of sewer, Gundaroo.
- Digital connectivity: reliable 4G and NBN internet access, improved mobile reception to foster connections within the community.

Implementation

The effective implementation of the Strategy will involve the key stakeholders and regional community that contributed to its development, including all three councils as well as state government agencies and local entities.

The completion of this document is intended to be the first stage of an ongoing process where new actions to further progress the Vision are identified through the application of the Strategy framework. It is recommended that an Advisory Committee be established, comprising representatives from each council and other stakeholder groups, such as business chambers, to oversight the implementation of the Strategy, apply the Strategy's framework to identify new actions to be added to the Action Plan, develop key performance

indicators and evaluate outcomes. The Economic Development Officers from each of the councils should be included in, or closely associated with, the Advisory Committee to ensure progress of the REDS actions. The Advisory Committee would meet every two months as a side meeting of the CBR Joint Organisation and would report progress on actions to each council.

After two years, the Advisory Committee will conduct a formal review of the Action Plan and produce a brief report

to be published as an addendum to the Economic Development Strategy. This will also provide an opportunity to update the Action Plan for new or modified actions in view of key economic, social, environmental and policy changes.

After four years, the Advisory Committee will also begin the process of updating the Economic Development Strategy.



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