

# FAR SOUTH COAST

Regional Economic Development Strategy | 2018 – 2022



## VISION

To build a sustainable path to long-term economic prosperity and quality of life for businesses and residents in the Far South Coast by building on industry specialisations, attracting new residents who bring economic, social and cultural capital, and leveraging the significant natural amenity.

# 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.



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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 Regional Economic Development Strategy, prepared by Sensing Value on behalf of the region, was formed in collaboration with the Bega Valley Shire Council, the Eurobodalla Shire Council and the regional community. It benefited from economic-analytical assistance from the NSW Government’s Centre for Economic and Regional Development (CERD).

It is presented in two documents, the *Far South Coast Regional Economic Development Strategy 2018–2022 (this document)* which allows the reader to quickly and easily determine key content, while the accompanying *Far South Coast 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.



# INTRODUCTION

The *Far South Coast Regional Economic Development Strategy 2018–2022* (the Strategy) sets out a long term economic vision and associated strategy for the two local government areas (LGAs) of Bega Valley and Eurobodalla (the Region). It builds on the Region's endowments and specialisations to guide investment over the next four years; as well as taking account of regional risks.<sup>1</sup> Economic principles suggest that endowments and specialisations play a key role in the development of regional economies.<sup>2</sup> The Strategy aims to leverage the region's endowments: its unique natural amenity; productive climate, soils and water for food production purposes; access to Sydney, Canberra and Melbourne; lifestyle appeal, particularly for retirees; intellectual, cultural and social capital; and strong local institutions and businesses. These endowments are the basis of the Region's current and future specialisations in dairy cattle farming, food product manufacturing, health care and tourism. These endowments and specialisations were identified through data analysis and subsequently informed and confirmed through the community consultation process.

The Strategy, which builds on the endowments and specialisations, aims to ensure a long-term, sustainable future for the Region through a number of priorities.

These include sector-specific strategies as well as more general cross-sector strategies:

- Support the development and growth of the tourism sector and overall lifestyle appeal.
- Continue to grow the agricultural, aquaculture and food production sectors.
- Grow the participation and supply of skilled labour and enhance regional economic resilience.
- Improve the reliability of infrastructure, utilities and telecommunications.

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

While the order of these strategies reflects current opportunities to be leveraged or issues to be addressed, each priority should be considered as part of a holistic package that will be important for the overall growth of the regional economy of the Far South Coast into the future.

The Strategy is the culmination of collaboration between the Bega Valley Shire and Eurobodalla Shire Councils, their respective communities and the NSW Government's 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](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.

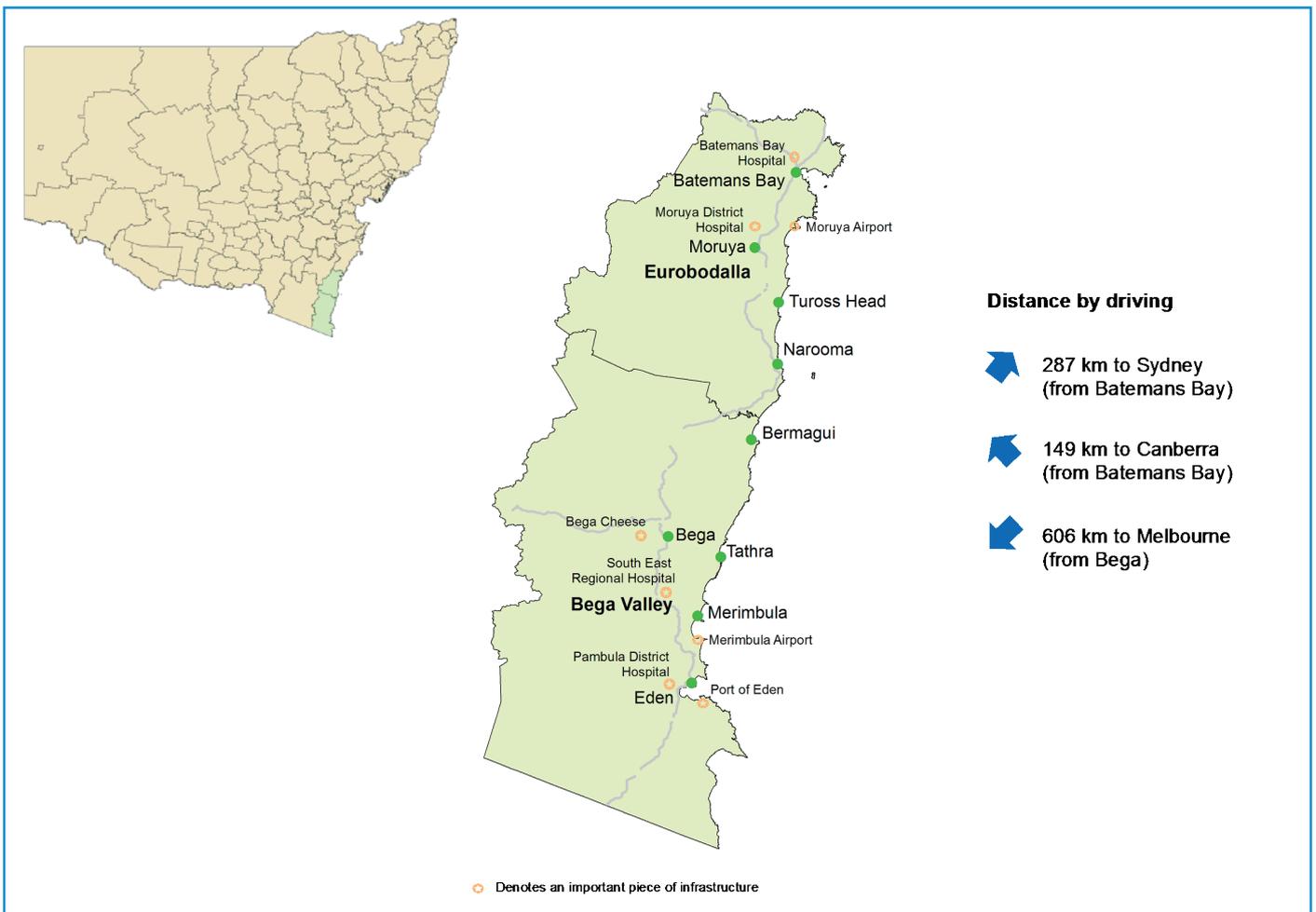


# BACKGROUND

In 2016, the Far South Coast was home to 70,485 people, with 33,253 people residing in the Bega Valley Shire and 37,232 people residing in Eurobodalla Shire<sup>3</sup>. People who work in the Region typically live in the Region, with both LGAs having a high level of self-containment; approximately 90 per cent of the jobs in each LGA are held by people who live in those LGAs. Despite this figure, the two LGAs do share a number of employment, economic and tourism linkages, as well as a cooperative and collaborative approach between their councils. These linkages underpin the basis for the treatment of the two LGAs as a functional economic region.

Demographically, the Region is characterised by a significant ageing population. As of 2016, the population of the Far South Coast has a much higher proportion of older and retirement-aged individuals compared to the NSW state average, as well as a significantly smaller proportion of younger working aged individuals (ages 15 to 49).<sup>4</sup> Anecdotal evidence from stakeholders suggest that this is due to the younger cohort leaving the Region to pursue education and employment opportunities in larger cities, combined with its status as an attractive retirement destination for individuals of higher age.

Figure 1: Far South Coast boundaries



3. Australian Bureau of Statistics Census data, August 2016  
 4. Australian Bureau of Statistics Census data, August 2016

## BACKGROUND CONTINUED

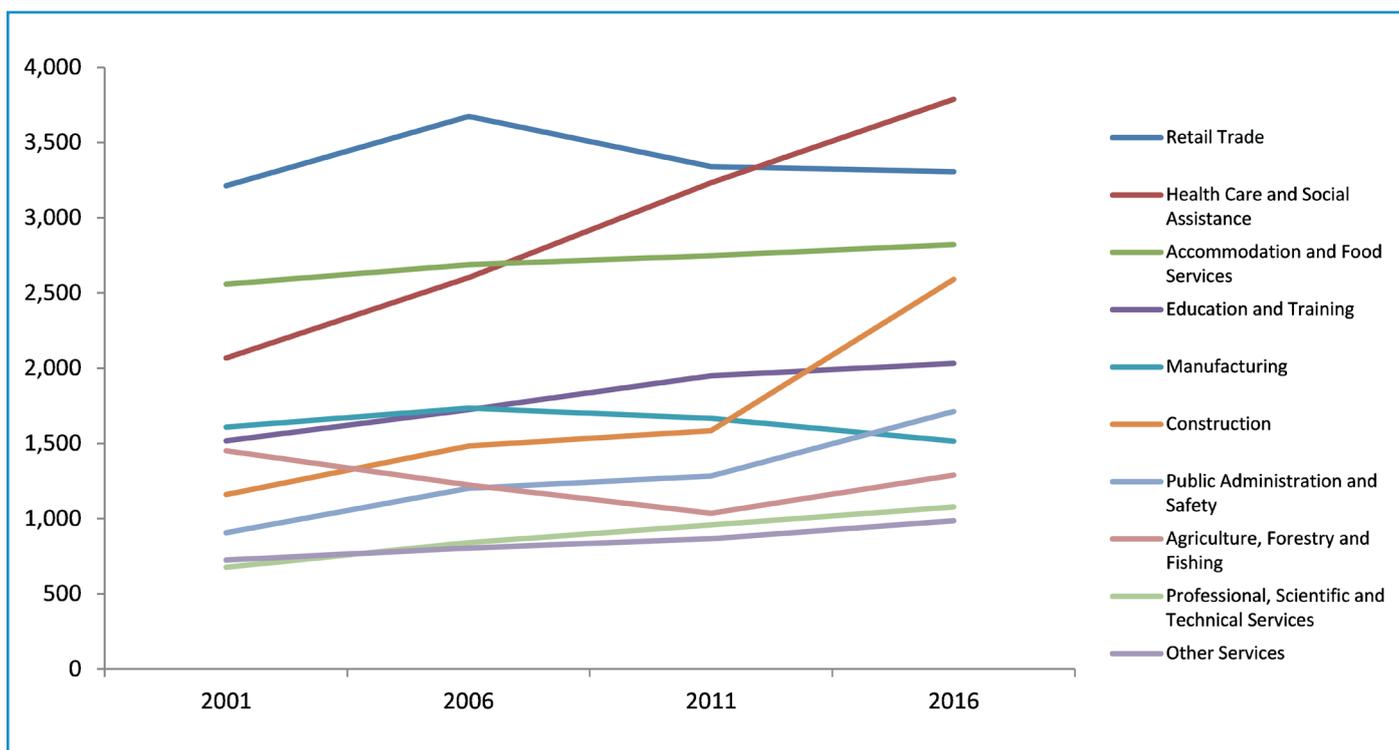
Health Care and Social Assistance is the Region's major employing sector, having significantly increased over the past 15 years (see Figure 2 below). This has been driven by consistent growth in the number of people aged 65 years or older in the Region. As of 2016, this cohort accounts for over 28 per cent of the Region's total population. Tourism is also a major employing sector in the Region, which can be seen to an extent by the high number of workers employed in the Accommodation and Food Services and Retail Trade sectors.

While not as prominent as in the past from an employment perspective, Agriculture, Forestry and Fishing (predominantly Dairy Cattle Farming) and Manufacturing (primarily Food Product Manufacturing) still play critical roles in the regional economy. Employment declines in these sectors are consistent with broader trends in these industries seen across Australia. However, both sectors are showing trends that suggest future employment growth potential and they remain in the Region's top sectors in terms of value-added.

Aquaculture is emerging as a potential sector of competitive advantage for the Region, which offers a range of distinctive and differentiated products (such as the Sydney Rock and Angasi Oysters). While Manufacturing employment has broadly declined across the Region, the Dairy Product Manufacturing sector is important to the Region, with increased employment between 2011 and 2016.

Employment size can be one indicator of a natural endowment or specialisation within a region. Using this employment data in conjunction with other sources, such as community consultation and online surveys, as well as other indicators like sector value-added, exports and imports (which can be found in the *Far South Coast Regional Economic Development Strategy – Supporting Analysis 2018–2022*), the Region's specialisations can be established.

Figure 2: Employment in the Region, 2001–2016



Source: ABS 2001, 2006, 2011, 2016 Census data.

# 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 (2017) 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.*<sup>5</sup>

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.

## Endowments of the Region identified through analysis and community consultation

### Natural assets and amenity

The Far South Coast is located in a highly desirable destination which includes natural attractions such as the coastline and marine environment, national parks, temperate climate and overall lifestyle amenity that can attract both tourists and potential residents to the Region.

The clean and green nature of the Region, including access to available land and high quality water, can also provide potential competitive benefits for producers in agricultural and aquaculture industries, who can create opportunities for product differentiation for commodities they produce in the Region. The Far South Coast is also endowed with a number of state forests which support the forestry and timber processing sectors, which have been identified as a competitive advantage for the Region.

### Health care infrastructure and services

The Region contains a number of assets that can benefit the health care and social assistance sector, including a major health care asset in the South East Regional Hospital based in Bega, which is the largest and most well-equipped hospital in the South East of NSW. There are also a number of other health assets, including the Batemans Bay Hospital, Pambula Hospital, Moruya District Hospital and Katungal Medical Clinics. The growing ageing population in the Region is also a key driver of demand for the sector.

### Port of Eden Wharf

The Port of Eden Wharf is the most southerly declared port in NSW; and is the only regional port on the South Coast which can allow cruise passengers to board and disembark outside of major cities. Eden is also the only deepwater port on the South Coast apart from Jervis Bay.

The wharf has the potential to be a major driver of economic activity via cruise ship attraction. This would drive other industries, such as retail, food and beverage and accommodation.

### Location

The Far South Coast is located within easy driving distance from the capital cities of Melbourne and Sydney. It is also only 2–3 hours' drive from Canberra. This location provides access to freight routes for both imports and exports. It also offers connections for visitors and potential residents to the Region, via road, air and cruise ship access.

### Intellectual, cultural and social capital

The Bega Valley and Eurobodalla have a number of residents who have migrated from capital cities to retire, as such there are a number of highly skilled individuals including former public servants and academics who could potentially be assets to the Region through the provision of their skills and knowledge.

The Far South Coast also has a relatively high indigenous population. The Region already has a number of significant indigenous cultural heritage initiatives in place (including identification of these opportunities in documents such as the *Sapphire Coast Heritage Tourism Strategy*). There are opportunities to develop these initiatives and increase awareness to grow this segment of the Region's cultural tourism offering.

### Cultural festivals and events

The Far South Coast is home to a number of cultural events and festivals that attract visitors to the Region, as well as improve the attractiveness of the Region to potential residents. These include, but are not limited to: the Four Winds Festival, Narooma Oyster Festival, Eden Whale Festival, Cobargo Folk Festival and the River of Art Festival.

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

# ENDOWMENTS CONTINUED

## Education infrastructure

The Region is home to a range of education facilities for all ages, from primary schools and high schools (which are amongst the major employers in the Region) to campuses of the University of Wollongong and TAFE, both of which offer courses responsive to local industry needs. The regionally increasing ageing population with its high level of education and professional background is a driver of adult education demand, including the U3A (University of the Third Age).

## Dairy industry

The Far South Coast is home to Bega Cheese, an industry leader in Dairy Product Manufacturing, as well as a number of specialist cheesemakers and milk processors, such as Tilba Real Dairy and Bodalla Dairy Shed. These manufacturers provide a significant level of expertise and reputation to the Region, which increases the appeal of many of the products that are exported out of the Region.

## Local institutions and strong leadership

The Region is well supported by an array of education, health, tourism and business institutions; as well as two Councils who have strong relationships between them and share a unified view of the Region. These institutions support organisations and individuals to develop skills and networks by enabling innovation, drive change and provide leadership. Currently, there is not a great deal of collaboration between some of these organisations, so encouraging efforts to work together will be key to driving major change.



# SPECIALISATIONS

A simple form of analysis that can be used to gain an understanding of a region's competitive advantages<sup>6</sup> is the Location Quotient (LQ) which measures 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 Far South Coast Regional Economic Development Strategy.

While Health Care and Social Assistance is the largest sector in the Region, employing 14.5 per cent of the workforce,<sup>7</sup> a more granular analysis may identify specific sectors in which the Far South Coast has a regional specialisation. In this analysis, key sectors fall into one of three categories:

## Important sectors experiencing employment growth

In assessing the LQ of the sectors in the Region, a number of sectors were identified as important and growing sectors and thus likely to be sectors of regional specialisation (coloured blue in Figure 3). These sectors are major employers in the sector, which also have a high LQs. Dairy Product Manufacturing, Aquaculture, Forestry and Logging, Timber and Hardware Goods Wholesaling, Bakery Product Manufacturing, Residential Care Services and Local Government Administration were all sectors identified as having high LQs. Employment in each of these sectors grew at a faster rate in the Region than it did across NSW between 2011 and 2016.

6. A region's 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).

## Potentially emerging sectors

Emerging sectors are those whose LQs are lower than the state average, but whose employment growth nonetheless grew faster than the NSW state average over the period between 2011 and 2016 (coloured green in Figure 3). In the Far South Coast, this includes Sheep, Beef Cattle and Grain Farming, Medical Services, Hospitals and Other Administrative Services. If relative employment growth in these sectors continues, they could eventually develop into regional specialisations.

## Important sectors experiencing declining employment

There were also a number of key sectors that had high LQs, but whose employment grew by less than the overall state average for that sector (coloured red in Figure 3). Most notable of these is Accommodation, which acts as a proxy for the tourism sector, and Dairy Cattle Farming. There appears to have been a decline in total employment in the Accommodation sector in the period 2011 to 2016, although anecdotal evidence suggests that the sector is growing strongly and continues to be an increasingly important part of the Far South Coast economy. Dairy Cattle Farming also appears to be a specialisation for the Region based on its LQ, although its employment growth was 3 per cent slower than NSW between 2011 and 2016.

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

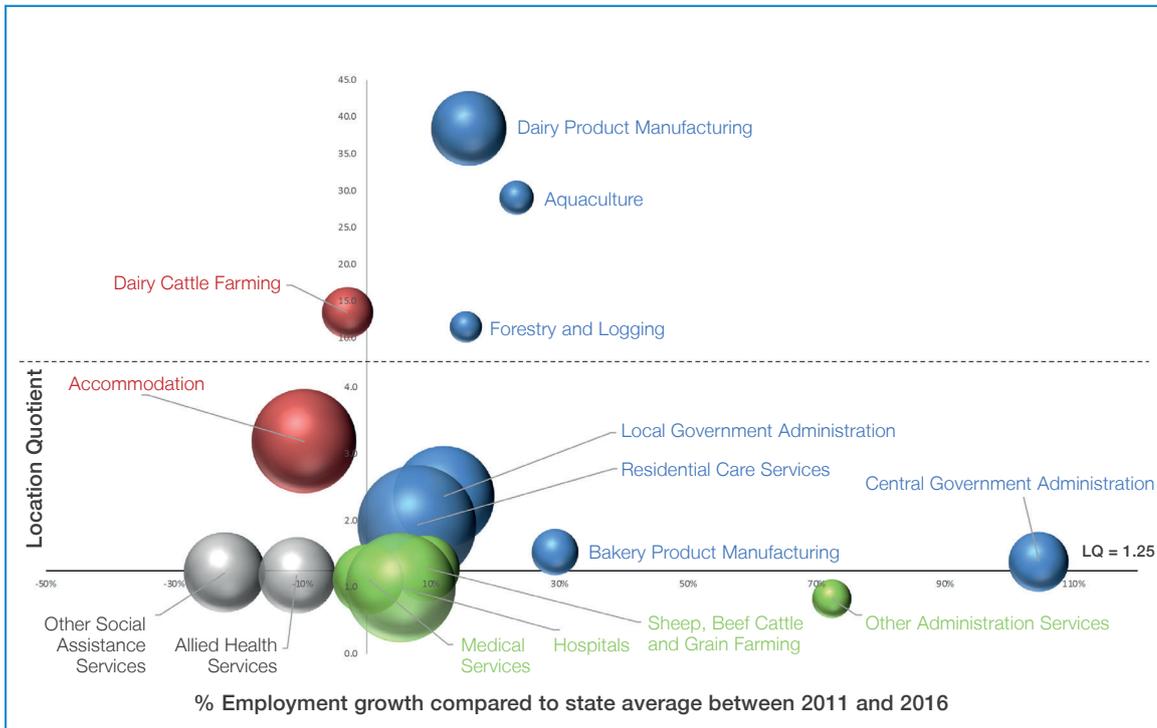
- Industries with larger 'bubbles' employed more people
- Industries further above the horizontal line are more specialised when compared to NSW (i.e. they have a LQ greater than or equal to 1.25)<sup>8</sup>
- Industries to the right of the vertical line grew faster between 2011 and 2016 (in terms of employment) than comparable industries across NSW.

7. Australian Bureau of Statistics 2016 Census data, August 2016.

8. A LQ of 1.25 is identified in the literature as denoting a regional specialisation.

# SPECIALISATIONS CONTINUED

Figure 3: Location Quotients and Employment Growth for Industries in the Region



- Blue sectors with growing employment over the period relative to the NSW industry average
- Green sectors are potentially emerging sectors
- Red sectors are important sectors with declining employment over the period relative to the NSW industry average
- Grey sectors are supporting sectors which are unlikely to be areas of regional specialisation

Source: ABS 2016 Census and Sensing Value analysis.



# STRATEGY

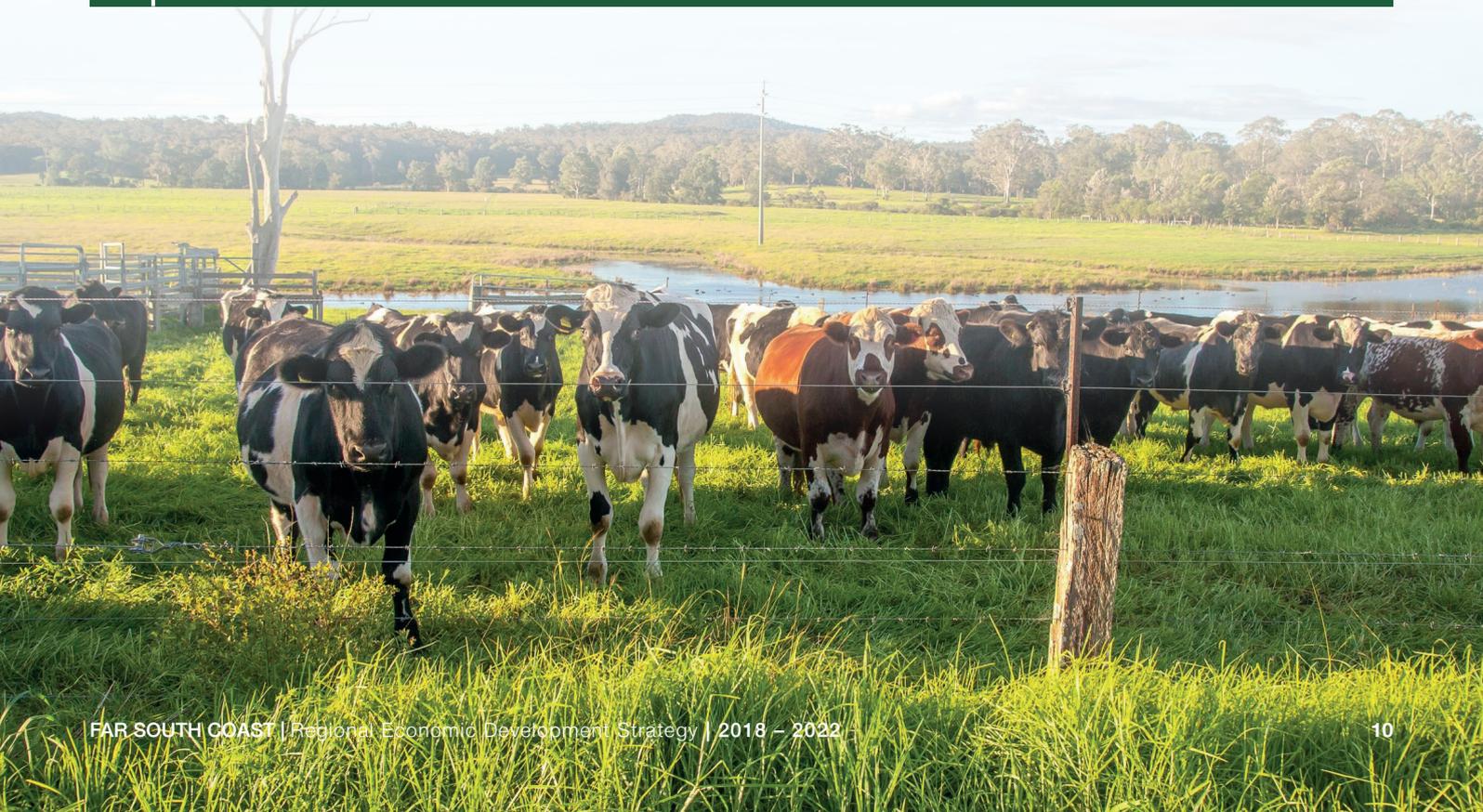
The Strategy for the Region builds upon the opportunities presented by its endowments and specialisations and also aims to address some of the key risks identified in the Region. The four Strategy elements were derived from an analysis of the endowments that underpin the Region's strengths, followed by examination of current industry specialisations and emerging specialisations, identified in consultation with the community and councils.

While the order of these strategies reflects current opportunities to be leveraged or issues to be addressed, each priority should be considered as part of a holistic package that will be important for the overall growth of the regional economy of the Far South Coast into the future.

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.

## The Four Elements of the Strategies

1	Support the development and growth of the Region's <b>tourism</b> sector and overall lifestyle appeal
2	Continue to grow the sector's <b>agricultural, aquaculture</b> and <b>food production</b> sectors
3	Grow the participation and supply of <b>skilled labour</b> and enhance regional <b>economic resilience</b>
4	Improve the <b>reliability of infrastructure</b> and <b>telecommunications</b>



## 1 | Support the development, diversification and growth of the Region's tourism sector and the Region's overall lifestyle appeal

The Far South Coast has numerous natural endowments and amenities (beaches, state forests and natural parks) which provide a major competitive advantage for the tourism sector. Tourism-related sectors such as Accommodation and Food Services and Retail Trade are amongst the largest employment sectors in the region. Many of these sectors draw on local produce that can provide the basis for a differentiated tourism product.

The Region has identified inclusive tourism that is accessible to people of all ages and all levels of mobility as a key factor; this has been the focus of infrastructure funding and tourism initiatives in recent years. International tourism is also expected to grow, due to successfully leveraging the nearby Canberra International Airport. There are also opportunities that could exist in the tourism sector that leverage other key sectors, such as food-trail based tourism offerings built off the Region's strong food production sectors (including the establishment of destination restaurants) and health tourism for visitors who come to the Region for health care services. The actions regarding development of local and renewable energy solutions (in Strategy 4: Improve the reliability of infrastructure, utilities and telecommunications) can complement nature-based tourism initiatives

The tourism sector must develop offerings that can attract visitors all year round and attract a diverse range of tourists (in particular, high spending tourists). This will require both substantial diversification of the tourism products and specialised marketing. This can include the development of the industry-supporting cruise ship visitation, with Eden as a port call destination.

Another element of this strategy is a group of priorities that improve the overall appeal of the Region for current and future residents. The natural amenities and lifestyle of the Region have become a strong drawcard for retirees moving into the Region and increased demand for health services in the Region, could act as a potential driver for developing the healthcare and social assistance sectors into regional specialisations.

### Infrastructure Priorities

- **Improved coastal access and inclusive infrastructure:** deliver an integrated and comprehensive network of roads and trails that provide access and inclusion to the Region's major coastal assets for as many people as possible, particularly people with disabilities.
- **Nature-based tourism product development:** development of products such as the Bundian Way, Gulaga Trails, Eden Marine Discovery Centre, Bingi Dreaming Track, Murramarang National Park Walking Experience and the 23km Batemans Bay Coastal Headland Walk to effectively leverage the Region's natural assets.
- **Marine infrastructure:** development and implementation of key marine infrastructure projects including Eden Wharf, Multipurpose Wharf in Twofold Bay and Snug Cove Marina.
- **Regional airport development:** to improve access to the Region for tourists and potential migrants.

### Early Stage Priority Actions

- Secure funding for investment into accessible coastal infrastructure across the Region, including walking trails, accessible pontoons, beach access, inclusive signage and boat ramp extensions and upgrades.
- Implement projects identified in Bega Valley Shire Council's CBD Landscape Masterplans for Merimbula, Bega, Bermagui and Eden.
- Undertake planning and implementation of revitalisation plans for Eurobodalla's main town centres of Batemans Bay, Moruya and Narooma.
- Develop food, culture and artisan products, experiences and trails, along with a Regional Food Brand.
- Develop and capitalise on Australia's Oyster Tourism Trail.
- Develop key product tourism offerings based around major attractions in the Region.
- Undertake Eurobodalla Product and Experience audit to inform future product development projects.
- Identify and develop tourism products based on National Parks and State Forests, such as the proposed Mogo Deep Creek Mountain bike trails.
- Continue work to develop Moruya and Merimbula airports.
- Redevelop Moruya Regional Hospital.

## 2 | Continue to grow the sector's agricultural, aquaculture and food production sectors

Bega Cheese, one of the most significant employers in the sector, is an industry leader with highly sophisticated technology, business practices and supply chains that provide a significant competitive advantage to the Far South Coast. The sector also enjoys a world-class reputation and linkages to both domestic and international markets. Proximity and access to local milk supplies also provides a significant benefit to the sector.

The Region also has a significant competitive advantage in its natural amenities, availability of land and quality of inputs that provide a basis for opportunities in a number of primary industries, such as Dairy Cattle Farming and Aquaculture. The Region also has a unique offering in oysters, which could be further developed to enhance export capacity and attraction of food-based tourism. The action regarding the development of local and renewable energy solutions (in Strategy 4: Improve the reliability of infrastructure, utilities and telecommunications) can complement agriculture and food manufacturing by being marketed on the basis of the Region's largely 'pristine' natural environment.

Given strong natural endowments (good access to water and land), supporting infrastructure and key employers and institutions in the Region, food production (both growing and manufacturing) has an opportunity to become a major part of the Far South Coast's economy. However, risks relating to disruptions to road transport (on which the Food Production sector is highly reliant) and shortages of spat (oyster larvae) in the Aquaculture sector need to be overcome to help the sector realise its full potential.

### Infrastructure Priorities

- **Sector assets:** Investment into a range of infrastructure to ensure the sector's competitive advantage.
- **Access to markets:** Improvements to road infrastructure in and out of the Region will improve the competitiveness of businesses in the sector.

### Early Stage Priority Actions

- Invest in a shellfish hatchery, tourism and education facility at Moruya Airport.
- Develop an Export Accredited Packing Facility for the Region at Moruya Airport.
- Invest in meat product and manufacturing infrastructure, including abattoir and saleyards.
- Support and promote key administration and service delivery retention in regional areas (e.g. Bega Cheese).
- Fund Producers Groups, such as Sustainable Agriculture and Gardening Eurobodalla (SAGE) and SCPA – South East Producers<sup>9</sup> business and training projects.

9. Sapphire Coast Producers Association – South East Producers.

## 3 | Grow the participation and supply of skilled labour and enhance regional economic resilience

The Far South Coast has a gap in the number of working-aged individuals between the ages of 15 and 40. This is compounded by many skilled workers leaving the Region to pursue employment elsewhere, resulting in a skills gaps and reduced business growth. This could potentially be improved by focusing on strategies that improve the attractiveness of the Region as a place to live and work, and providing opportunities, not only for skilled workers, but for partners and families as well.

The Region can also seek to leverage the strategic skills and experience of many of those that retire to the area by promoting semi-retirement and mentoring opportunities, as well as seeking opportunities to develop additional employment capacity through the South East Regional Hospital.

Many businesses in the Far South Coast are vulnerable to potential economic downturns and competition from other markets due to a lack of economic diversity and sophistication and a sole focus on meeting local demand. Projects aimed at improving innovative capabilities and developing new approaches to employment creation could all work to improve the resilience of the economy of the Region. The actions regarding developing local and renewable energy solutions (in Strategy 4: Improve the reliability of infrastructure, utilities and telecommunications) could provide innovation and resilience to the local economy.

### Infrastructure Priorities

- **Training facilities:** create training and development opportunities for young people to pursue career pathways rather than having to leave the Region.
- **Amenity improvements:** improvements to the lifestyle amenities in the Region to increase the attractiveness of the Region to skilled workers.
- **Transport infrastructure:** improve the accessibility and ease of travel to, from and throughout the Region.

### Early Stage Priority Actions

- Develop the Surf Beach Innovation Park Precinct.
- Promote and support the establishment of iAccelerate Bega and Batemans Bay.
- Establish Country Universities Centres in Batemans Bay, Moruya, Narooma, Bega.
- Investigate the opportunity to establish training facilities aligned with industry strengths, including an Aquaculture Training Facility and a CARE College Training Facility for health, aged care and disability services.
- Establish the role of the South East Regional Hospital as a training and research base.
- Undertake a strategic approach to the planning and provision of regional employment land and associated infrastructure.

## 4 | Improve the reliability of infrastructure, utilities and telecommunications

While the Far South Coast has access to major corridors in and out of the Region, both by air and road, the size of the Region often creates issues when traveling and moving products. In these corridors, road infrastructure is particularly restrictive; the Region is unable to move freight efficiently with very limited access to higher productivity vehicles both at local and larger regional scales. Addressing this issue, including the roll-out of Integrated Transport Strategies for towns like Batemans Bay, Merimbula and Bega, could strengthen the appeal of the Region to tourists, potential migrants and potential businesses. From a business perspective, stakeholders from the manufacturing and agricultural sectors identified issues created by fire and infrastructure disruptions that create issues for the import and export of goods, as well as increasing the costs of freight transport.

Beyond issues relating to access, the reliability of transport, telecommunications and energy were identified as major risks for the Region. This suggests that potential strategic projects that can improve the reliability of access to and from the Region, as well as improvements to the telecommunications and energy networks, could have wide-ranging effects for the Region. In addition to this, safe and secure water and sewer related infrastructure underpins community and business confidence; as such, further investment is required to provide safe and long term secure supplies. The specific sectors this initiative plans to improve are in construction (through infrastructure development) and maintenance specialists once projects are completed.

More specifically, increased investment into telecommunications would increase operational efficiency of businesses by removing barriers to expansion and day-to-day operation and also provide increased resilience to natural disasters. Investments into renewable energy options would improve the sustainability and resilience of businesses in the Region. Increasing focus on transportation, connectivity and water/ sewerage treatment would also improve quality of life for current and future residents.

### Infrastructure Priorities

- **Road upgrades:** improve the accessibility and ease of travel to, from and throughout the Region.
- **Water infrastructure:** improvements to ensure all towns in the Region have good water, waste and sewerage facilities.
- **Digital connectivity:** provide fast and reliable internet access (NBN rollout), as well as improved mobile reception in parts of the Region.

### Early Stage Priority Actions

- Invest in improvements into the Region's water, waste and sewerage infrastructure to meet industry demand and service growing populations.
- Improve East – West Road Connections, including Brown Mountain, Imlay Road, Kings Highway (including detailed route planning).
- Improve North – South Road Connections, including the Princes Highway and Batemans Bay Link Road intersection with Princes Highway.
- Enable B-double access into and throughout the Region.
- Duplication of the highway from South Nowra to the Victorian border.
- Support the regional road renewal program while upgrading and renewing key bridges, including Batemans Bay Bridge, Nelligen Bridge, Narooma Bridge, and Cuttagee Bridge.
- Investigate the option for rail linkage between Eden and the Monaro, with connections to fast rail.
- Improve freight connections to Port of Eden.
- Support the development of Brown Mountain Hydro, potentially related to Snowy Hydro 2.0 or other mechanism.
- Investigate and implement ways to reach a 100% renewable energy target, including a proactive planning approach to large-scale solar farms.

## Strategies and Early Stage Actions

Strategies and Early Stage Actions				
Enablers	Support the development and growth of the Region's tourism sector	Continue to grow the sector's agricultural, aquaculture and food production sectors	Grow the participation and supply of skilled labour and enhance regional economic resilience	Improve the reliability of infrastructure and telecommunications
People and skills		<ul style="list-style-type: none"> <li>➤ Fund Producers Groups SAGE and SCPA business and training projects</li> </ul>	<ul style="list-style-type: none"> <li>➤ Promote and support the establishment of iAccelerate Bega and Batemans Bay</li> <li>➤ Establish Country Universities Centres in Batemans Bay, Moruya, Narooma and Bega</li> <li>➤ Investigate the opportunity to establish training facilities aligned with industry strengths, including an Aquaculture Training Facility and a CARE College Training Facility for health, aged care and disability services</li> <li>➤ Establish the role of the South East Regional Hospital as a training and research base</li> </ul>	
Government, regulation, services and information	<ul style="list-style-type: none"> <li>➤ Development of food, culture and artisan products, experiences and trails, along with a Regional Food Brand</li> <li>➤ Develop and capitalise on Australia's Oyster Tourism Trail</li> <li>➤ Develop key product tourism offerings based around major attractions in the Region</li> <li>➤ Undertake Eurobodalla Product and Experience audit to inform future product development projects</li> <li>➤ Identify and develop tourism products based on National Parks and State Forests</li> </ul>	<ul style="list-style-type: none"> <li>➤ Support and promote key administration and service delivery retention in regional areas (e.g. Bega Cheese)</li> </ul>	<ul style="list-style-type: none"> <li>➤ Undertake a strategic approach to the planning and provision of regional employment land and associated infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>➤ Support the development of Brown Mountain Hydro potentially related to Snowy Hydro 2.0 or other mechanism</li> <li>➤ Investigate and implement ways to reach a 100% renewable energy target</li> </ul>

## Strategies and Early Stage Actions

Enablers	Support the development and growth of the Region's tourism sector	Continue to grow the sector's agricultural, aquaculture and food production sectors	Grow the participation and supply of skilled labour and enhance regional economic resilience	Improve the reliability of infrastructure and telecommunications
Infrastructure	<ul style="list-style-type: none"> <li>➤ Implement projects identified in the Bega Valley Shire Council's CBD Landscape Masterplans</li> <li>➤ Undertake planning and implementation of revitalisation plans for Eurobodalla's main town centres of Batemans Bay, Moruya and Narooma</li> <li>➤ Secure funding for investment into accessible coastal infrastructure targeting the visitor economy across the Region</li> <li>➤ Continue work to develop Moruya and Merimbula airports</li> </ul>	<ul style="list-style-type: none"> <li>➤ Invest in a shellfish hatchery, tourism and education facility at Moruya Airport</li> <li>➤ Development of an Export Accredited Packing Facility for the Region at Moruya Airport</li> <li>➤ Investment into meat product and manufacturing infrastructure, including abattoir and saleyards</li> </ul>	<ul style="list-style-type: none"> <li>➤ Develop the Surf Beach Innovation Park Precinct</li> </ul>	<ul style="list-style-type: none"> <li>➤ Improve East – West Road Connections including Brown Mountain, Imlay Road, Kings Highway (including detailed route planning)</li> <li>➤ Improve North – South Road Connections, including the Princes Highway, Batemans Bay Link Road intersection with Princes Highway</li> <li>➤ Enable B-double access throughout the Region</li> <li>➤ Duplication of the highway from South Nowra to the Victorian border</li> <li>➤ Support the regional road renewal program while upgrading and renewing key bridges, including Batemans Bay Bridge, Nelligen Bridge, Narooma Bridge, and Cuttagee Bridge</li> <li>➤ Investigate the option for rail linkage between Eden and the Monaro, with connections to fast rail</li> <li>➤ Improve freight connections to Port of Eden</li> </ul>
Utilities				<ul style="list-style-type: none"> <li>➤ Invest in improvements into the Region's water, waste and sewerage infrastructure to service growing populations</li> </ul>

# IMPLEMENTATION

The Strategy will be implemented by both Bega Valley and Eurobodalla Shire Councils with support from NSW Government Agencies, The Australian Government, local entities and other stakeholders.

To support the implementation of the Strategic key representatives from each council will be identified to facilitate the progress of the actions, identify key performance indicators and evaluate outcomes. These key representatives will meet regularly and present progress on actions to the joint executive meeting of the Council's through the existing Memorandum of Understanding. As

an extension of this process, key Council representatives will meet every six months with the Regional Director – Far South Coast, NSW Department of Premier and Cabinet to check the Strategy's progress and review grant opportunities.

Both Council's own Strategic Plans and Economic Development Strategies will play an important role in actioning this Regional Economic Development Strategy. Future reviews of the Strategy will be timed so as to align to its status and support from NSW Agencies and each council.



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First published: June 2018

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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.

