

# SHOALHAVEN REGIONAL ECONOMIC DEVELOPMENT STRATEGY 2018–2022



## VISION

A productive, entrepreneurial, connected and sustainable regional economy built on its strengths in the health and social assistance, manufacturing, defence and tourism industries supported by appropriately skilled human capital and offering a healthy lifestyle.



## Preface

*The NSW Government has assisted local councils and their communities to develop 37 Regional Economic Development Strategies (REDS) across regional NSW. Each strategy is designed around one or more local government areas (LGAs) 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 on-going 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 on other economic opportunities.*

*This Strategy, prepared by AgEconPlus, on behalf of the region, was developed in collaboration with the Shoalhaven City Council, key stakeholders and the broader regional community, and benefited from economic-analytical assistance from the NSW Government's Centre for Economic and Regional Development (CERD).*

*It is presented in two documents, the **Shoalhaven Regional Economic Development Strategy 2018–2022** which allows the reader to quickly and easily determine key content, while the accompanying **Shoalhaven Regional Economic Development Strategy - Supporting Analysis 2018–2022** details the strategy methodology, evidence and the strategy 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](mailto:CERD@dpc.nsw.gov.au).*

## INTRODUCTION

The *Shoalhaven Regional Economic Development Strategy 2018–2022* (the Strategy) sets out a long-term economic vision and associated strategy for the Shoalhaven City Council local government area (LGA) (the Region). It builds on the endowments, economic strengths and specialisations in the Region to guide investment over the next four years<sup>1</sup>. Economic principles suggest that endowments and specialisations play a key role in regional economic development<sup>2</sup>.

The Strategy aims to leverage the Region's endowments: its coastal and natural environments, proximity to Wollongong, Sydney and Canberra (including rail and road access), lifestyle advantages, towns and villages with distinct features, Royal Australian Navy Bases, hospital and health care facilities, education facilities, supportive local institutions, Aboriginal and historic heritage, labour supply and specialist skills.

These endowments are the basis of the Region's current specialisations in tourism, health care and social assistance, defence and manufacturing.

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

- Build on the Region's strength in health and social assistance
- Facilitate industrial development for the defence and manufacturing sectors
- Drive tourism growth in the Region
- Invest in rail, road and electronic infrastructure to address recognised connectivity opportunities

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

Derived through detailed research and analysis, the Strategy is the culmination of detailed data analysis and of collaboration between the Shoalhaven City Council, the Shoalhaven community and the NSW Government's Centre for Economic and Regional Development (CERD).

<sup>1</sup> *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)).

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

## BACKGROUND

In 2016, the Region was home to 99,650 people. The major urban centre is Nowra with a population of 20,039. The population of Shoalhaven has been growing strongly, with the growth rate just below that of NSW since 2006. Compared to Regional NSW, Shoalhaven has a higher proportion of couples without children and lone person households and a lower proportion of couples with children, one parent families, other families and group households.

As with many coastal regions, Shoalhaven has an aged population when compared to Regional NSW, with a higher median age (48 years old compared to 43 years old) and a higher proportion of people in the 55+ age group.

People who work in Shoalhaven typically live in the Region: 90% of the jobs in the Region are held by residents. However, 11% of the employed labour force residing in Shoalhaven commute to a work location outside the region<sup>3</sup>.

Figure 1: Map of Shoalhaven Functional Economic Region



<sup>3</sup> The main location of work for those commuting outside the Region is to Greater Sydney (3.0%), Wollongong (1.9%), Kiama (0.9%), Eurobodalla (0.9%) and Shellharbour (0.8%).

Source: Department of Premier and Cabinet (DPC), May 2018

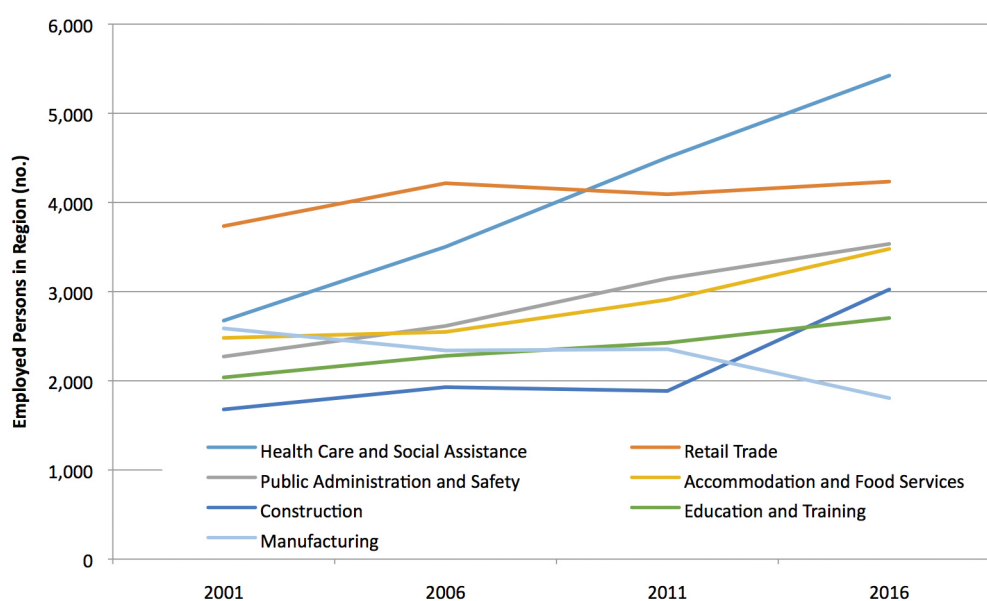


The main location of work for those commuting outside the Region is to Greater Sydney (3.0%), Wollongong (1.9%), Kiama (0.9%), Eurobodalla (0.9%) and Shellharbour (0.8%).

Historically, the largest industries in the Region in terms of employment, have been Retail Trade, Health Care and Social Assistance, and Manufacturing. As shown in Figure 2, employment in Manufacturing has declined - it is now the seventh most significant sector in terms of employment.

Employment in Health Care and Social Assistance has increased significantly and it is now the largest employer. Employment in the Retail Trade sector has also increased, albeit to a lesser degree, and is now the second largest employer. Employment in both Public Administration and Safety (which includes defence) and Accommodation and Food services has increased over time and these are now the third and fourth largest employing sectors. Employment in the Construction sector increased significantly between 2011 and 2016.

Figure 2: Employment in the Region, 2001–2016



Source: DPC, 2017



## 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>4</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.

*Table 1: Endowments of the Region identified through analysis and community consultation.*

<p><b>Coastal, Rural and Natural Environments</b></p> <p>The Region has scenically beautiful and diverse landscapes, including lush rainforests, woodlands, rocky terrain, coastal plains, farmland and floodplains. The area also has more than 165 kilometres of diverse coastline, the longest of any local government area in NSW, containing ten national parks. The natural amenity of the area is a strong attractor for new residents, holiday makers and day trippers.</p>	<p><b>Location, Accessibility and Lifestyle Benefits</b></p> <p>The Region is conveniently located close to the major regional employment centres of Wollongong, Sydney and Canberra. It is connected to Wollongong and Sydney by rail. The Region's relatively affordable house prices, rural and coastal lifestyle choices, small community feel, natural beauty, and diverse economy also make the Region liveable and an attractive place to raise a family, retire or semi-retire.</p>
<p><b>Towns and Villages</b></p> <p>The largest urban centre in Shoalhaven is Nowra. The Region also has two regional centres at Vincentia (Jervis Bay &amp; St Georges Basin) and Ulladulla-Milton, 49 towns and villages, and 109 beaches. These regional centres, towns and villages each have their own unique character and history and are within an easy drive of each other. They provide a diversity of choice for residents and visitors.</p>	<p><b>Royal Australian Navy Bases</b></p> <p>Shoalhaven contains two Royal Australian Navy bases, HMAS Albatross and HMAS Creswell. HMAS Albatross is the largest operational Naval establishment and the Navy's only air station. HMAS Albatross is also home to the Fleet Air Arm Museum (formerly known as, and now incorporating, Australia's Museum of Flight), which is a high-profile tourist attraction.</p> <p>HMAS Creswell is located on the south-western shores of Jervis Bay in the Jervis Bay Territory. As part of a large national park and in recognition of its historical significance, Creswell was placed on the Australian Heritage Commission's National Estate register in 1981.</p> <p>These navy bases provide significant economic activity to the Region.</p>



<p><b>Healthcare infrastructure</b></p> <p>Shoalhaven contains the Shoalhaven District Memorial Hospital at Nowra. This is an acute care facility which provides emergency care, medical, surgical and orthopaedic services. A purpose-built regional Cancer Care Centre is now under construction and the hospital has been identified for future expansion. Ramsey Health Care operates a large private hospital in Nowra and there is a small, seasonal public facility servicing Milton Ulladulla. This healthcare infrastructure enhances the liveability of the Region and is an important regional resource for the aged care sector.</p>	<p><b>Education Infrastructure</b></p> <p>In addition to the large Royal Australian Navy training bases, Shoalhaven also has TAFE campuses at Nowra and Ulladulla, and the University of Wollongong's Shoalhaven Campus in West Nowra, both providing strong opportunities for reinforcing localised pathways to tertiary education. These endowments provide opportunities to address skills shortages in the Region and retain and attract youth.</p>
<p><b>Aboriginal and Historic Heritage</b></p> <p>Historic heritage in Shoalhaven is a product of the interaction of settlement patterns with the natural environment. Over 800 buildings, sites or landscape elements of significance have been identified in the Shoalhaven Region. The Region also has a rich Aboriginal cultural heritage, with nearly one in 20 residents identifying as Aboriginal or Torres Strait Islander. Aboriginal and historic heritage is spread throughout the Region and is potentially an important resource for regional tourism.</p>	<p><b>Local Institutions</b></p> <p>The Region is well supported by regional development institutions including the Shoalhaven City Council, Shoalhaven Business Chamber and other local Chambers of Commerce, Shoalhaven Professional Business Association, Shoalhaven Business Forum and the Shoalhaven Defence Industry Group.</p>
<p><b>Labour Resources</b></p> <p>Shoalhaven has a high proportion of vocational qualifications and part time workers. Labour supply exceeds the internal demand for labour with 11% of residents commuting to jobs outside the Region.</p>	

<sup>4</sup> *Regional Economic Growth Enablers Report (2017), Centre for Economic and Regional Development.*



## SPECIALISATIONS

Important indicators of a Region's industry sector strengths and specialisations are the concentration of jobs, value-added and export focus of industry sectors.

An understanding of the concentration of jobs in a Region and its competitive advantages<sup>5</sup> 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 NSW. For the purpose of this analysis, specialisations as defined by LQs, are 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 Strategy.

At the time of the 2016 ABS Census of Population and Housing, Health Care and Social Assistance, Retail Trade and Accommodation and Food Services (indicative of tourism) were key sectors in Shoalhaven, making up 16%, 13% and 10%, of employment in the Region, respectively.

The Region also has a specialisation in these sectors with a LQ of 1.3 for Health Care and Social Assistance, 1.3 for Retail Trade and 1.5 for Accommodation and Food Services. Employment in these sectors slightly outgrew the NSW average between 2011 and 2016.

The sector with the highest specialisation, Defence (LQ of 7.9), also grew in employment relative to these sectors in the NSW economy. The Region has specialisation in a number of niche manufacturing sectors, including Grain Mill and Cereal Product Manufacturing (LQ of 5.4), Bakery Product Manufacturing (LQ of 1.6), Transport Equipment Manufacturing (LQ of 1.5) and Wood Product Manufacturing (LQ of 1.8). These sectors all grew in employment between 2011 and 2016 relative to the equivalent sector in the NSW economy, with the exception of Wood Product Manufacturing. The Region also has a specialisation in Dairy Cattle Farming (LQ of 6.5), although it provides less than 1% of employment in the Region. This sector also grew in employment relative to the equivalent sector in NSW. However, as most production is now concentrated outside the Region, the small residual enterprises leftover in Shoalhaven mainly serve local and niche markets. Their long term viability outside of niche markets will be challenged by high land values and the inability to achieve economies of scale.

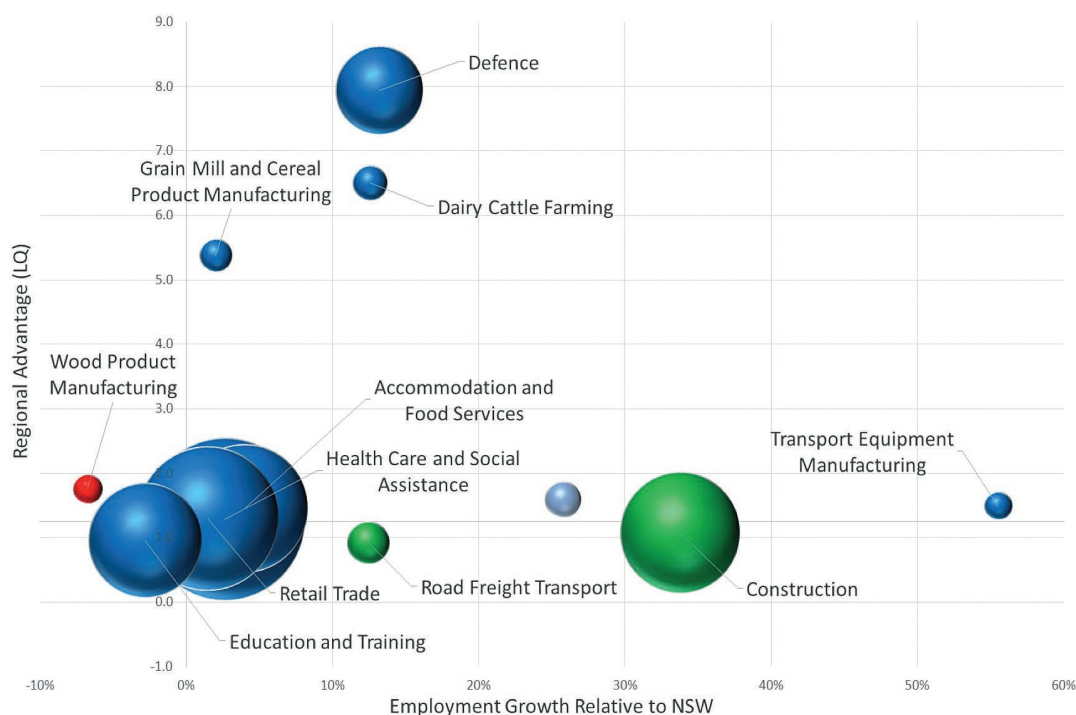
<sup>5</sup> A regions competitive advantage for an industry includes its ability to produce goods and services at a lower cost or differentiate its products from other regions, along with access to external factors which enhance business and operations/minimize risk (Stimson, Stough and Roberts, 2006).



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. a LQ greater than 1.25<sup>6</sup>), industries below the line are less specialised when compared to NSW.
- Employment in industries to the right of the vertical line grew faster or contracted more slowly between 2011 and 2016 than in comparable industries across NSW.
- Employment in industries on the left grew more slowly or contracted faster than in comparable industries across NSW.
- Specialisation industries are in blue and red.

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



<sup>6</sup> A LQ of greater than 1.25 is identified in the literature as denoting a specialisation.

Source: DPC, 2017

Based on Input-Output industry classifications, the main contributors to value added are Defence (\$337 million), Retail Trade (\$261 million), Health Care Services (\$201 million), Residential Care and Social Assistance Services (\$184 million). A separate analysis of the tourism sector estimated value-added of \$277 million and 2,748 full-time equivalent jobs, making it also one of the most significant sectors in the Shoalhaven regional economy.

In general these findings suggest the Region's economy is highly dependent on sectors that are largely government funded, as well as being driven by consumption of population-serving activities.

Shoalhaven is a net importer, with exports out of the Region of \$1.0 billion and imports into the Region of \$1.6 billion. Using the Input-Output industry classifications, the largest exporting industries by output value are:

- Grain Mill and Cereal Product Manufacturing (\$84.6 million);
- Accommodation (\$78.8 million);
- Basic Chemical Manufacturing (\$49.6 million); and
- Wholesale Trade (\$49.1 million).

Being a desirable area for people to retire, the Region attracts people of higher age bands and hence in a sense also exports retirement services, although this is not reflected in Input-Output analysis.

In general the findings from the specialisation analysis suggest the Region's economy is highly dependent on public funding and consumption in population-serving industries.





## STRATEGY

The four strategy elements for Shoalhaven link directly to the opportunities presented by the Region's endowments, specialisations and core competencies 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.

*Build on the Region's strength in **health and social assistance***

*Facilitate industrial development for the **defence and manufacturing** sectors*

*Drive **tourism** growth in the Region*

*Invest in rail, road and electronic **infrastructure** to address recognised **connectivity** opportunities*

## 1. Build on Region's strength in health and social assistance

Nationally, the services sector continues to grow and provide a range of skilled employment opportunities. Shoalhaven has a strength within the services sector in health and aged care services, as well as the complementary provision of health and aged care training. This strength sees Shoalhaven's health and social assistance sector attract patients from the surrounding regions.

Shoalhaven has access to both a soon to be upgraded district hospital and a well-resourced private hospital. This strategy targets ongoing growth of these industries to deliver both services and local employment opportunity.

### Infrastructure Priorities

- **Health infrastructure:** additional capacity required in the upgraded Shoalhaven Hospital to accommodate centres of excellence and requested retail/café space.

### Early Stage Priority Actions

- Develop 'centres of excellence' in the upgraded Shoalhaven Hospital (e.g. dementia care).
- Engage with the University of Wollongong to instate a local Chair in Gerontology.
- Work with and facilitate medical specialists looking to open new facilities or expand existing operations.
- Work with the Illawarra Shoalhaven Health District to secure any outstanding planning approvals associated with the upgrade of the Shoalhaven Hospital.
- Engage TAFE Nowra to support local training of nurses, welfare and aged-care staff.
- Lobby government for a Palliative Care Hospice in Nowra.
- Work with aged-care providers and Shoalhaven Hospital to deliver additional dementia care capacity.
- Investigate opportunities to localise the health and social assistance supply chain.





## 2. Facilitate industrial development for the defence and manufacturing sectors

Relative to NSW, Shoalhaven has specialised manufacturing capability in defence sector manufacturing, the production of starch and grain mill products and metal and wood fabrication. The Region has the labour force and training competencies to augment current growth or relocation of other manufacturing industries.

The two sectors have been brought together as a single strategy as they require the same infrastructure priorities.

To facilitate growth in these specialised sectors investment is required in industrial estates, roads, utilities and electronic communications.

### *Infrastructure Priorities*

- **Industrial land supply:** to remove a bottleneck to the expansion of existing businesses and the creation of new businesses in Shoalhaven.
- **Rail freight infrastructure:** to improve the rail line between Bomaderry and Berry and develop an intermodal hub.
- **Main road infrastructure:** to improve the crossing of the Shoalhaven River, the Princess Highway, linkages to the Hume Highway and deliver vehicle rest areas.
- **Local road infrastructure:** to address shortfalls in Nowra's internal road network and address 'last mile' issues in industrial estates.
- **Utility supply:** gas and electricity connections to new business and residential areas.
- **Digital connectivity:** fast and reliable internet access (NBN rollout) as well as improved mobile reception in southern Shoalhaven villages and key business and learning areas.

### *Early Stage Priority Actions*

- Work towards establishing a Shoalhaven Economic Development Corporation where the manufacturing and defence sectors play a key role.
- Upgrade water pressure on the existing North Nowra industrial estate to support an increase in output from the manufacturing sector.
- Release additional stages of established employment lands.
- Develop new employment lands on local Crown land to help grow the manufacturing and defence support industries.
- Address 'last mile' issues in Nowra industrial precincts to increase productivity of freight movements.
- Address shortfalls in the Nowra internal road network.
- Augment electricity and gas supply to growing business areas.
- Address extensive NBN and mobile phone blackspots in industrial areas.
- Develop the Region's renewable energy sources.

### 3. Drive tourism growth in the Region

Shoalhaven is endowed with a world class marine environment and national parks that appeal to both residents and visitors. To retain and grow its population base while maintaining its competitiveness with other holiday destinations, the Region must continue to invest in actions and infrastructure that enhance visitation and regional

liveability. A desirable place to visit and live provides both a floor in economic development and a foundation from which to grow. The goal of this strategy is to grow the economy and regional employment through an enhanced tourist offering and a more liveable environment.

#### *Infrastructure Priorities*

- **Civic infrastructure:** to enhance the CBDs and main streets of towns and villages in Shoalhaven.
- **Sport and recreation infrastructure:** including upgraded ovals, marine, motorsport and equestrian facilities.
- **Culture and entertainment infrastructure:** a new civic centre to better serve growing population areas.

#### *Early Stage Priority Actions*

- Prepare a cultural tourism strategy for the Shoalhaven.
- Revitalise Stewart Place, Nowra CBD to better serve tourists and residents.
- Activate Shoalhaven River foreshore at Nowra.
- Construct the proposed Shoalhaven Community and Recreation Precinct.
- Work towards operating a ferry service between Nowra and the Bundanon Art Facility.
- Work with National Parks, Crown Lands and other agencies to maximise the tourist potential of existing walk and bike tracks.
- Grow the marine tourism sector in Shoalhaven by developing marinas.
- Investigate opportunities to resurrect the proposed Shoalhaven Motorsport Centre.
- Address accommodation supply issues to make sure day trippers are encouraged to become overnighters.
- Better utilise services through Albion Park Airport to attract more intrastate and interstate visitors.





#### 4. Invest in rail, road and electronic infrastructure to address recognised connectivity opportunities

According to Council and community consultation, connectivity is very important to the people of Shoalhaven. Effective connections drive economic growth and employment. The Region is bifurcated by the Shoalhaven River and residents and businesses south of the river face difficulties with linkages to the train that terminates in Bomaderry, a road system that will not accommodate

B-doubles and poor digital connectivity. There are also issues with connectivity in the Nowra urban area and these include the road network servicing business and gas and electricity connections. This strategy proposes to address those connectivity issues that most impact business and community.

##### **Infrastructure Priorities**

- **Rail freight infrastructure:** to improve the rail line between Bomaderry and Berry and develop an intermodal hub.
- **Main road infrastructure:** to improve the Shoalhaven River crossing, the Princess Highway, linkages to the Hume Highway and deliver vehicle rest areas.
- **Local road infrastructure:** to address shortfalls in Nowra's internal road network and address 'last mile' issues in industrial estates.
- **Utility supply:** gas and electricity connections to new business and residential areas.
- **Digital connectivity:** fast and reliable internet access (NBN rollout) as well as improved mobile reception in southern Shoalhaven villages, key business and learning areas.

##### **Early Stage Priority Actions**

- Upgrade of rail freight service linking Shoalhaven to Sydney.
- Develop a road/rail intermodal at Bomaderry.
- Improve the bus service offered to rail passengers at Bomaderry.
- Work towards providing public transport to southern Shoalhaven villages.
- Improve freight efficiency south of Nowra Bridge through a road separation.
- Advocate for a new road bridge over the Shoalhaven River.
- Augment electricity and gas supply to growing residential and business areas.
- Address NBN and mobile phone blackspots, especially in the southern part of the Region.

Enablers	Build on the Region's strength in health and social assistance	Facilitate industrial development for the defence and manufacturing sectors	Drive tourism growth in the Region	Invest in rail, road and electronic infrastructure to address recognised connectivity opportunities
<p><b>People and skills</b></p> <ul style="list-style-type: none"> <li>Facilitate and work with medical specialists looking to open new facilities or expand existing operations in the Shoalhaven.</li> <li>Develop 'centres of excellence' in the upgraded Shoalhaven Hospital e.g. dementia care.</li> <li>Engage in a dialogue with the University of Wollongong to understand if a local Chair in Gerontology is possible.</li> <li>Engage in a dialogue with TAFE Nowra to ensure local training of nurses, welfare and aged-care staff is ongoing.</li> </ul>	<ul style="list-style-type: none"> <li>Work with the Illawarra Shoalhaven Health District to secure any outstanding planning approvals associated with the upgrade of the Shoalhaven Hospital.</li> <li>Publicise the Region's strength in aged-care services to appropriate providers and developers.</li> <li>Work with aged-care providers and Shoalhaven Hospital to deliver additional dementia care capacity.</li> </ul>	<ul style="list-style-type: none"> <li>Release additional stages of established employment lands.</li> <li>Develop new employment lands on local Crown land.</li> <li>Complete a feasibility study into establishing a Shoalhaven Economic Development Corporation.</li> <li>Develop and implement a renewable energy/solar plan for the Shoalhaven.</li> </ul>	<ul style="list-style-type: none"> <li>Activate Shoalhaven River foreshore at Nowra.</li> <li>Prepare a cultural tourism strategy for the Shoalhaven.</li> <li>Investigate the feasibility of operating a ferry service between Nowra and the Bundanon Art Facility.</li> <li>Work with National Parks, Crown Lands and others to maximise the tourist potential of existing walk and bike tracks.</li> </ul>	<ul style="list-style-type: none"> <li>Improve the bus service offered to rail passengers at Bomaderry.</li> <li>Provide public transport to southern Shoalhaven villages.</li> </ul>
<p><b>Government, regulation and information</b></p>				



Enablers	Build on the Region's strength in health and social assistance	Facilitate industrial development for the defence and manufacturing sectors	Drive tourism growth in the Region	Invest in rail, road and electronic infrastructure to address recognised connectivity opportunities
<p><b>Government, regulation and information (Continued)</b></p>			<ul style="list-style-type: none"> <li>Investigate opportunities to resurrect the proposed Shoalhaven Motorsport Centre.</li> <li>Address accommodation supply issues to make sure day trippers are encouraged to become overnigheters.</li> <li>Better utilise services through Albion Park Airport to attract more far-reaching intrastate and interstate visitors.</li> </ul>	
<p><b>Infrastructure</b></p>	<ul style="list-style-type: none"> <li>Lobby government for a Palliative Care Hospice in Nowra.</li> <li>Work with Shoalhaven Hospital to identify retail and café opportunities at the upgraded hospital.</li> <li>Investigate opportunities to localise the health and social assistance supply chain.</li> </ul>	<ul style="list-style-type: none"> <li>Address shortfalls in the Nowra internal road network.</li> </ul>	<ul style="list-style-type: none"> <li>Revitalise Stewart Place, Nowra CBD to better serve tourists and residents.</li> <li>Upgrade the Ulladulla CBD.</li> <li>'Makeover' Vincentia Plaza.</li> <li>Construct a new 'Bay and Basin' civic centre/council service hub, Vincentia.</li> <li>Construct the proposed Shoalhaven Community and Recreation Precinct.</li> <li>Grow the marine tourism sector in the Shoalhaven e.g. develop marinas.</li> <li>Develop an equestrian centre and agricultural showcase in Berry.</li> </ul>	<ul style="list-style-type: none"> <li>Advocate for upgrade of rail freight service linking Shoalhaven to Sydney.</li> <li>Advocate for development of a road/rail intermodal at Bomaderry.</li> <li>Advocate for road separation to improve freight efficiency south of Nowra Bridge.</li> <li>Advocate for a new road bridge over the Shoalhaven River.</li> <li>Upgrade the Princess Highway to dual carriageway between Nowra and Ulladulla.</li> <li>Advocate for safety improvements to the Princess Highway Nowra to Ulladulla.</li> <li>Work with RMS to ensure construction of the Milton-Ulladulla bypass.</li> </ul>

Enablers	Build on the Region's strength in health and social assistance	Facilitate industrial development for the defence and manufacturing sectors	Drive tourism growth in the Region	Invest in rail, road and electronic infrastructure to address recognised connectivity opportunities
<b>Infrastructure (Continued)</b>				<ul style="list-style-type: none"> <li>• Improve road access Shoalhaven, the Hume Highway and Canberra.</li> <li>• Develop heavy vehicle rest areas north and south of Nowra.</li> <li>• Address shortfalls in the Nowra internal road network.</li> </ul>
<b>Utilities</b>		<ul style="list-style-type: none"> <li>• Upgrade water pressure on the existing north Nowra industrial estate.</li> <li>• Address 'last mile' issues in Nowra industrial precincts e.g. gas and power.</li> <li>• Augment electricity and gas supply to growing residential and business areas.</li> <li>• Address NBN and mobile phone blackspots especially southern part of the LGA.</li> <li>• Develop and implement a renewable energy/solar plan for the Shoalhaven.</li> </ul>	<ul style="list-style-type: none"> <li>• Activate Shoalhaven River foreshore at Nowra.</li> <li>• Prepare a cultural tourism strategy for the Shoalhaven.</li> <li>• Investigate the feasibility of operating a ferry service between Nowra and the Bundanon Art Facility.</li> <li>• Work with National Parks, Crown Lands and others to maximise the tourist potential of existing walk and bike tracks.</li> <li>• Investigate opportunities to resurrect the proposed Shoalhaven Motorsport Centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Address 'last mile' issues in Nowra industrial precincts e.g. gas and power.</li> <li>• Augment electricity and gas supply to growing residential and business areas.</li> <li>• Address NBN and mobile phone blackspots especially southern part of the LGA.</li> </ul>

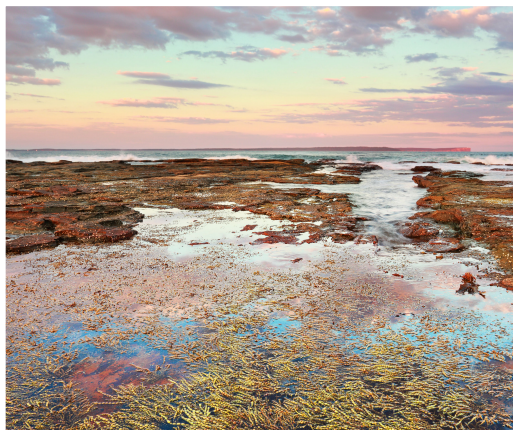
## **IMPLEMENTATION**

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

The completion of this document is intended to be the first stage of an ongoing process where new specific actions to further progress towards the Vision are identified through application of the framework. It is therefore recommended that an Advisory Committee made up of representatives from council's Business and Employment Development Committee and other groups be established to progress the implementation of actions listed to implement this Strategy, apply the Strategy's framework to identify new actions to be added to the Action Plan, develop key performance indicators and evaluate outcomes.

After two years, the Advisory Committee will initiate the conduct of a formal review of the Action Plan and associated governance processes, producing a brief report card to be published as an addendum to the Regional 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 or refreshing the Strategy.







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