



Wingecarribee

Regional Economic Development Strategy:

2018 - 2022

VISION

Wingecarribee will be a region with sustainable development underpinned by its high liveability attracting residents and businesses and making strategic use of its unique endowments to grow the visitor economy and building on its strengths in agriculture and manufacturing, education and health care

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.



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 an economic vision for the region. Actions and projects listed within this strategy should therefore be viewed as example projects that have emerged from the initial application of the framework. Adoption of those 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 complimenting 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 economic development 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 helping to capitalise upon other economic opportunities.

The economic development strategy for the Wingecarribee region is presented in the 'Wingecarribee Regional Economic Development Strategy 2018–2022' (the Strategy). This document, the 'Wingecarribee Regional Economic Development Strategy 2018-2022: Supporting Analysis' (Supporting Analysis), prepared by AgEconPlus, details the Strategy's methodology, evidence and development process. Both documents are publically available at dpc.nsw.gov.au/cerd.

Both the Strategy and Supporting Analysis have been 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.

For further information about the program please contact the Centre for Economic and Regional Development (CERD) on 02 6391 3025 or CERD@dpc.nsw.gov.au.



Introduction

The *Wingecarribee Regional Economic Development Strategy 2018–2022* (the Strategy) sets out a long term economic vision and associated strategy for the Wingecarribee local government area (region). It builds on the region's endowments, core competencies, and specialisations to guide investment over the next four years¹. Economic principles suggest that endowments and specialisations play a key role in regional economy development².

The Strategy aims to leverage the region's endowments, its topography, water, climate and soils; natural and mineral resources; access to Sydney, Canberra and Wollongong; agricultural, healthcare and education infrastructure; lifestyle advantages; Aboriginal heritage, historic heritage and villages; and strong local institutions. These endowments are the basis of the region's current economic strengths and specialisations in Manufacturing, Beef Cattle Farming, Residential Care Services and Secondary Education. They also support the region's potentially emerging specialisation in Tourism.

The Strategy was developed after considering endowments/specialisations, emerging directions and community expectations. The Strategy aims to:

- enhance liveability of the Wingecarribee region,
- facilitate the development of agriculture as a key strength and specialisation and grow the visitor economy based on food, wine and events,
- grow the education, health and aged care sectors, and
- strengthen the manufacturing base and monitor opportunities in the natural resource sector.

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

This Strategy is the culmination of collaboration between the Wingecarribee Shire Council (WSC), AgEconPlus and the NSW Government's Centre for Economic and Regional Development (CERD), and a consultation process engaging key regional stakeholders.

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).

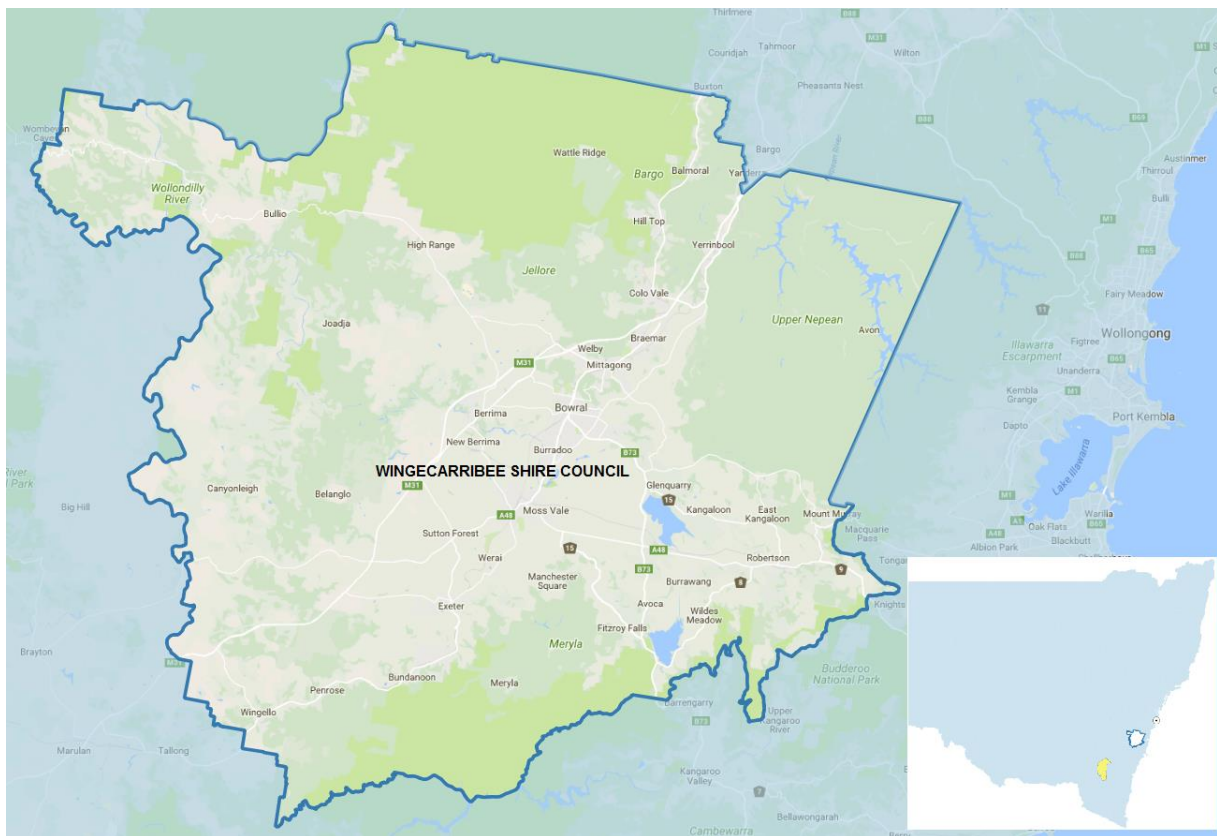
² *Regional Economic Growth Enablers Report (2017)*, Centre for Economic and Regional Development.



Background

In 2016 the Wingecarribee LGA was home to 47,882 people. Eighty-one per cent of people who work in the LGA also live in the region. Seventy-one per cent of the workforce works in the region³. Thus, there is considerable in and out commuting.

Figure 1: Wingecarribee Functional Economic Region Boundary⁴



³ The most popular places of work for the region’s residents outside the Wingecarribee LGA were Sydney (13.5 percent), Wollondilly (2.4 percent), Wollongong (1.8 percent), Camden (1.5 percent) and Goulburn Mulwaree (1.4 percent).

⁴ Source: Department of Premier and Cabinet.



According to the 2016 Census of Population and Housing, the median age of the Wingecarribee LGA was 47 while the median age of the NSW population was 38 years. There is a 'hollowing-out' of some of the workforce age population cohort, while the aged population is quite dominant and growing. The population has also been growing at a slower rate than NSW and is also forecast to grow at a slower pace than NSW in the 2016-2036 period. There is quite strong representation of professionals in the region.

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

An important employment sector is Health Care and Social Assistance, leveraging off the Bowral and District Hospital and the region's location relative to Sydney. The region also has a significant Accommodation and Food Service Sector and Retail Sector. Education is also a significant sector with a number of prestige private high schools attracting children from outside the region and serving as feeder schools to Sydney Private Schools.

Employment in two of the previously largest industries in the region - Retail Trade and Manufacturing - has declined recently after previously being the highest and third highest employing sectors in 2011 (Figure 2). That employment decline is consistent with broader trends associated with employment in those sectors in Australia. However, the region still has a large and diverse Manufacturing base focusing on Machinery & Equipment, Non-Metallic Mineral Products, Wood Products and Fabricated Metal Products.

Employment size is one important indicator of a region's industries structure or specialisations. Another is the generation of value of output from industry sectors. The main contributors to Gross Regional Product are Manufacturing (\$241 million or 10.8%), Health Care and Social Assistance (\$175 million or 7.9%) and Retail Trade (\$160 million or 7.3%).



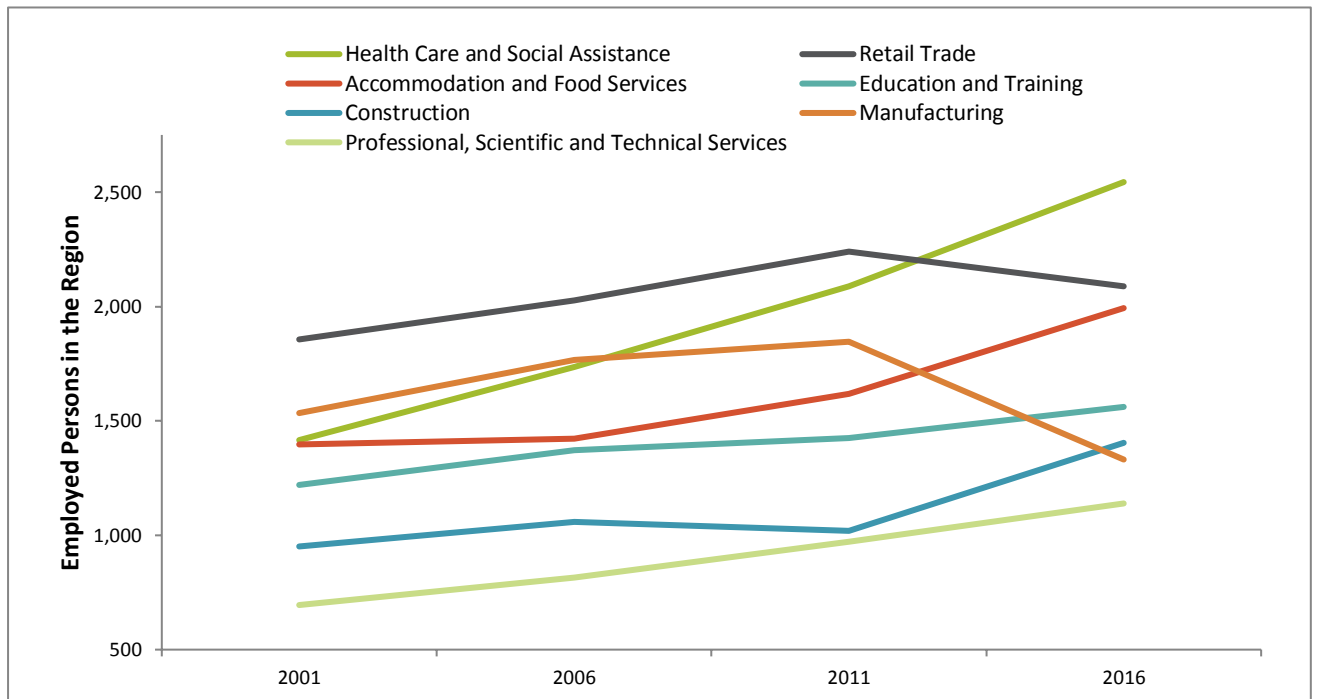


Figure 2: Employment in the Region 2001–2016

Using these economic performance data in conjunction with other sources - such as community consultation, the region's endowments can be established within the region.





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 Growth 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’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.

Table1: Endowments of the region identified through analysis and community consultation.

Water, climate and soil

Wingecarribee is a highly regarded rural locality due to its temperate climate, rich soils, proximity to Sydney and its reasonably reliable rainfall. The most common genuine rural land use in the LGA is Beef Cattle Farming. The next most significant agricultural activity is Horse Farming, Vineyards, Dairy Cattle Farming, Mushroom Growing and Nursery Production (Outdoors) and Vegetable Growing (Outdoors). There is a significant number of smaller rural home sites and hobby farms.

Location, accessibility and lifestyle benefits

Wingecarribee is strategically located at the geographic centre of Sydney, Canberra and the Illawarra. This enables road and rail access for residents and businesses to the social and business infrastructure associated with major cities, while enjoying lower housing and land prices, rural lifestyle, small community feel, numerous rural towns and villages and natural beauty.

Mineral resources

The region is endowed with access to commercial coal resources. The LGA is located in the Southern Coalfield of NSW. The main coal seam of economic significance in the region is the Wongawilli seam.

Natural resources

Wingecarribee is also endowed with a range of nature resources and features including part of the Blue Mountains World Heritage Area, two Wilderness Areas, State Forest, National Parks and other protected lands that form part of the Sydney water catchment area.

Aboriginal heritage, historic heritage and villages

The region has a rich Aboriginal and European heritage. The original inhabitants of the area were the Gundungurra and Tharawal Aboriginal people and preservation of Aboriginal heritage is significant. The region contains numerous towns and villages with extensive built heritage. These offer new residents and businesses a diverse range of locational choices and are potentially important resources for regional tourism.

Healthcare infrastructure

The region contains a major public rural hospital with close links with a range of Sydney's teaching and referring hospitals including Liverpool, Fairfield, Bankstown and Campbelltown hospitals. It also has a private hospital and considerable aged care infrastructure.

Human Endowments

Wingecarribee has a substantial labour supply that well exceeds the internal demand for labour. This labour supply is well educated with a higher proportion working in skilled occupations.

Local institutions and strong leadership

The region maintains an Economic Development and Tourism Committee and is well supported with a Southern Highlands Chamber of Commerce and Industry (SHCCI) and the Moss Vale and Rural Chamber of Commerce. In addition, the Council has strong relationships with businesses and economic development institutions. Wingecarribee Shire Council Employs an Economic Development Manager who is appropriately resourced to support, encourage and facilitate economic development in the region. The council employs a Tourism Manager along with support staff. Destination Southern NSW is also a multi-award winning tourism service.

Education infrastructure

The region has a large number of both public and private, primary and secondary schools that attract children from outside the region. It also has a University of Wollongong Campus and TAFE. These endowments provide opportunities to address skills shortages in the region and retain and attract youth.





Specialisations

A simple form of analysis that can be used to gain an understanding of a region's competitive advantages⁶ 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 LQ, and 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 using Input-Output Analysis to arrive at the findings for the Wingecarribee region Strategy.

Accommodation and Food Services is a large sector in the region, employing 11.1% of the workforce⁷. It is also an industry in which the region specialises when compared to the rest of NSW. 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 18%). This is an Australian and New Zealand Standard Industrial Classification (ANZSIC) industry that reflects the effects of tourism, but does not capture all of its impacts. Analysis by the CERD indicates that 6.7% of direct employment in the region is associated with tourism⁸.

The region has a specialisation in a number of manufacturing industries including Non-Metallic Mineral Product Manufacturing, Machinery and Equipment Manufacturing, Wood Product Manufacturing and Fabricated Metal Product Manufacturing. All of these industries, with the exception of Machinery and Equipment Manufacturing, have grown more strongly in the region than in NSW.

Residential Care Services is also a sector in which the region has a specialisation and this sector grew 28% faster than for NSW from 2011 to 2016.

⁶ A region's competitive advantage for an industry enables it to produce goods and services at a lower cost or differentiate its products from other regions.

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

⁸ *Regional Tourism Study (2017)*, Centre for Economic and Regional Development.

Other specialisations are Sheep, Beef Cattle and Grain Farming (predominantly beef cattle farming) and School Education (mainly secondary school education)⁹. These are important employing industries, but from 2011 and 2016 employment growth in the region was slightly less than the average growth for these industries in NSW.

Coal mining is a small sector in the economy (1% of employment) and the region did not show a specialisation in it at the time of the 2016 Census of Population and Housing. However, between 2011 and 2016 employment in this sector experienced a 105% growth relative to NSW. This likely reflects work associated the proposed Hume Coal Project.

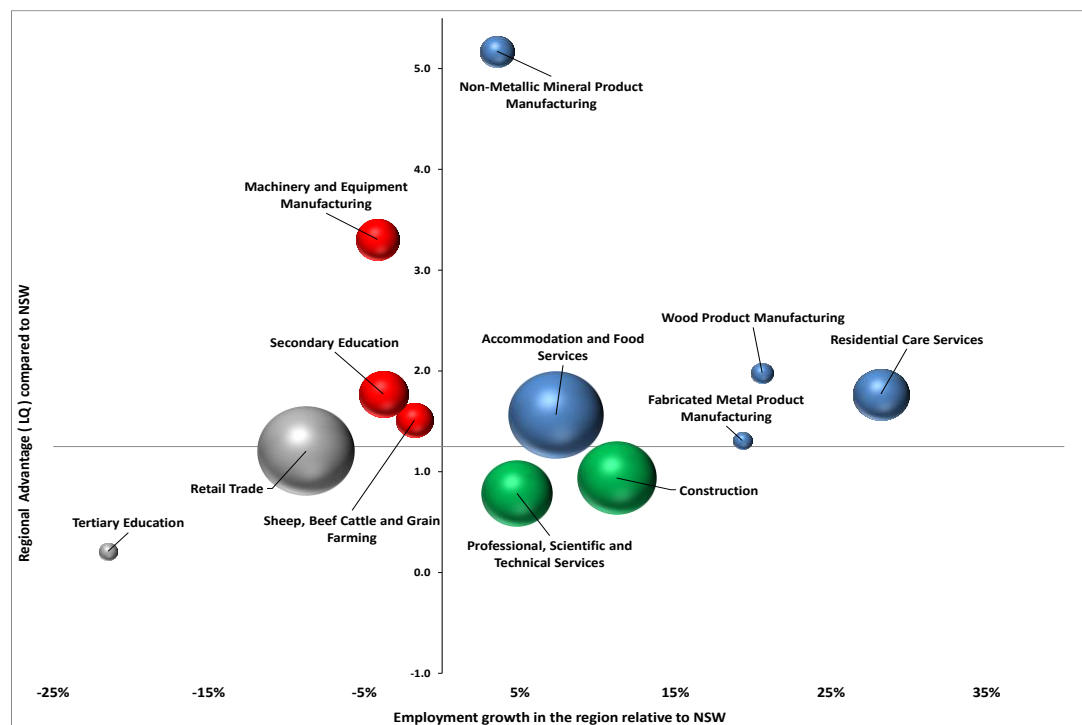


Figure 3: Location Quotients and Employment Growth for Industries in the Region¹⁰

⁹ While Tertiary Education is not a regional specialisation, it is a key export sector of the region with potential to become a specialisation.

¹⁰ Most sectors in the regional economy have grown in employment relative to NSW or contracted less quickly. Retail and Manufacturing sectors have contracted at a slower rate than NSW but have still contracted in absolute employment terms.

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.

Employment in industries to the right grew faster between 2011 and 2016 than the same industries across NSW, employment in industries on the left grew more slowly. Sectors with a specialisation are coloured blue and red.

The estimated Gross Regional Product was \$2,421 million in 2015-16 within the region. This represented around 0.4% of NSW Gross State Product and \$50,566 per capita. The highest value added industries in the Wingecarribee LGA in 2015-16 were retail trade (\$160M); Professional, Scientific and Technical Services (\$119 m), Finance (\$114 m), Primary and Secondary Education Services (including Pre-School and Special Schools) (\$110 m), and then Health Care Services (\$95 million).

Wingecarribee is a net importer, with exports out of the region of \$614 million and imports into the region of \$987 million. Based on the Input-Output industry classifications, the largest exporting industries by value are, sheep, grain and beef (\$82.5 million), equipment manufacturing (\$71.4 million), accommodation and restaurants (\$51.8 million), indicating a contribution to more than just the local residents i.e. tourism, coal mining (\$45.2 million); and wholesale trade (\$39.0 million).

In addition, Wingecarribee is increasingly becoming a commuting location for Sydney and other areas, and hence the region is essentially exporting labour.

Conversely, the largest importing industries in the region are equipment manufacturing (\$61.9 million), accommodation and restaurants (\$37.1 million), professional/scientific/technical services (\$29.3 million), mineral manufacturing (\$28.3 million); and metal manufacturing (\$27.3 million).¹¹

Specialisation sectors or potentially emerging specialisations, that have a reliance on local endowments and are traded outside the region i.e. exported, or are servicing more than just the local population, are the focus of the Strategy.

¹¹ Although the household sector is the largest importer in the economy, it is not an industry sector as such.



Strategy

The four Strategy elements for the Wingecarribee region are derived through the process employed link directly to the opportunities presented by its endowments, economic core competencies and specialisations. Strategies also address some key regional risks.

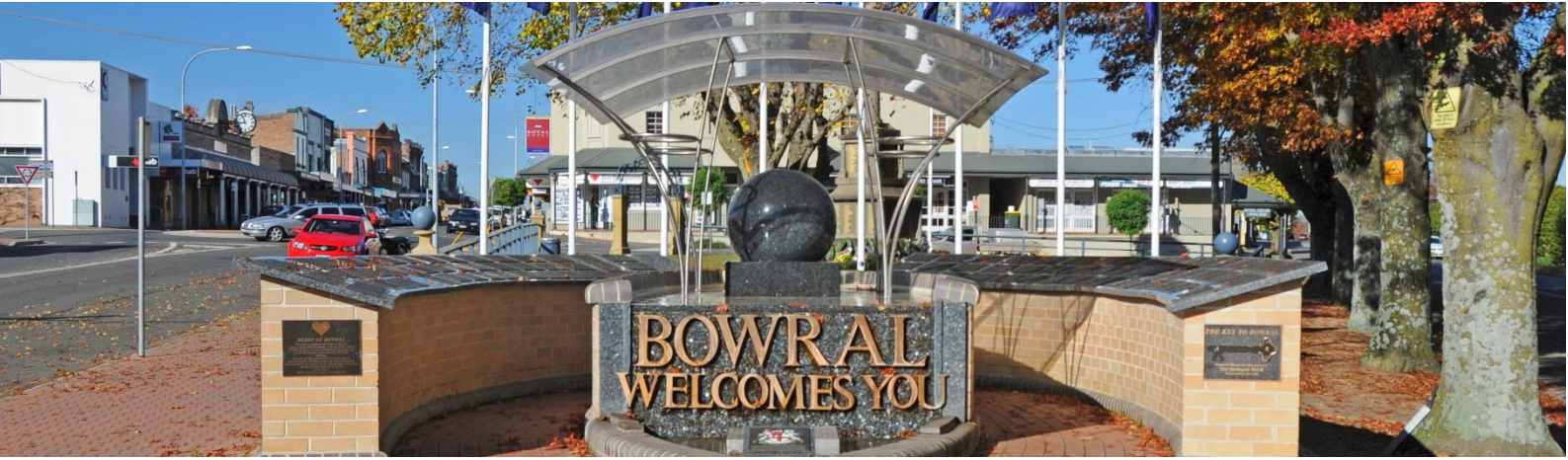
Strategy elements¹² were derived from an analysis of the endowments that underpin the region's strengths, followed by examination of current industry specialisations and emerging specialisations, identified in consultation with the community and council.

Each Strategy 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 vision that are yet to be identified. Consequently, an action's alignment with the strategy is the primary strategic consideration, rather than its listing in this document, and all current and proposed actions will be subject to further qualitative and quantitative evaluative processes.

¹² 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.

THE FOUR STRATEGIES

1. Enhance the **liveability** of the Wingecarribee region
2. Facilitate the development of **agriculture** as a key strength and specialisation and **cultivate the visitor economy** based on food, wine and events
3. Grow the **education, health and aged care** sectors
4. Strengthen the region's **manufacturing** base and monitor opportunities in the **mineral resource** sector



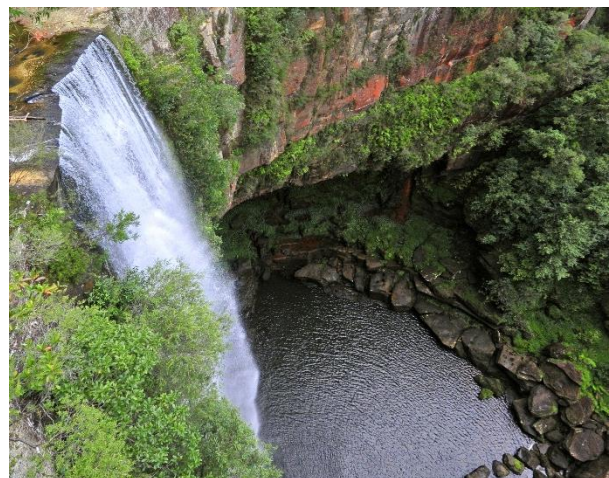
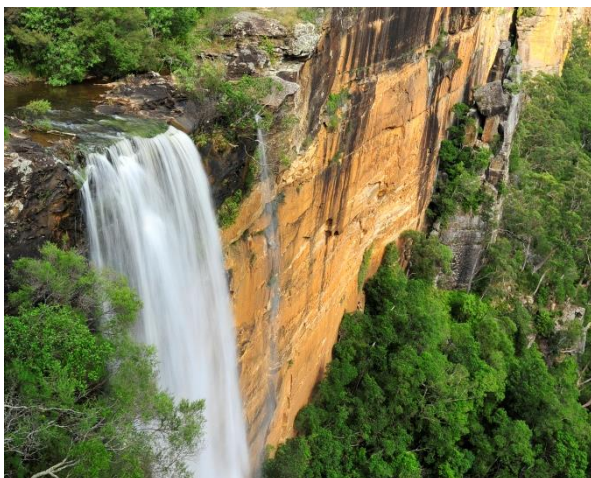
1. Enhance the liveability of the Wingecarribee region

This has been identified through the consultations with key regional stakeholders as an overarching strategy and outcome to meet the strong aspirations of the community to be maintained and enhanced for the Wingecarribee region.

While the Wingecarribee region is favourably located close to metropolitan centres and markets, it is also able to offer its residents an attractive lifestyle with a pleasant built environment, rural landscapes, national parks, waterfalls and waterways. To maintain these core advantages and retain its appeal for residents and visitors, and to attract in-migrants (including professionals and telecommuting and grow tourism, it must continue to invest in actions and infrastructure that enhances regional liveability.

A more liveable region provides a cornerstone from which all other strategies are delivered. A liveable region is one that also attracts visitors and builds the local tourist economy. A liveable region draws people to the area for education, health and aged care. A liveable region is one where manufacturers will choose to locate their businesses and add to the strength of the region's economy. Community priorities to enrich the liveability of the region include improvements in local traffic flow, rail infrastructure, utilities and energy, digital connectivity, sport, recreation and cultural facilities.

A liveability region is one that offers enhanced employment opportunities.



Enhance the liveability of the Wingecarribee region - continued

Infrastructure Priorities	Actions
<ul style="list-style-type: none"> • Local roads: to enhance traffic flow and management while improving visual amenity for residents and providing a platform for economic growth. • Improved passenger rail services: to better connect the region to Sydney and Canberra and provide additional opportunities for residents to commute for employment. • Sewerage infrastructure: including planned Sewage Treatment Plan (STP) upgrades, effluent reuse and stormwater management to enhance the liveability of the region. • Digital connectivity: fast and reliable internet access (NBN rollout) as well as improved mobile reception in parts of the Wingecarribee region. • Sport and recreation: including upgrade of sporting fields, basketball facilities, and the creation of a multi-purpose equestrian space. • Culture and entertainment: a new arts precinct with conference and hotel facilities, a theatre space, a music auditorium, rehearsal facilities, regional art gallery, studios, workshops, exhibition space and capacity for large scale festivals and events. 	<ul style="list-style-type: none"> • Increase the supply of suitable hospitality sector labour. • Expand the range of commuting possibilities e.g. road upgrades, teleworking. • Address local traffic flow and management to improve visual amenity and economic growth. • Improve car parking in Mittagong, Bowral and Moss Vale to stop leakage of retail to other areas and enhance commuting opportunity. • Advocate for a better passenger rail service – electrification, efficiencies in the existing system and protection for a fast train corridor. • Enhance wastewater management with planned STP upgrades, effluent reuse and stormwater management. • Advocate for improved digital connectivity. • Develop and implement a renewable energy plan for Wingecarribee. • Upgrade sporting fields in Moss Vale and equip them with modern amenities. • Develop an indoor basketball facility for regional competitions and cultural events. • Provide planning support for a new arts and conference precinct with hotel facilities, theatre space, gallery space and room for large scale events and festivals. • Investigate the need for student housing and low-cost housing as the education, health and aged care sectors expand.





2. Facilitate the development of agriculture as a key strength and specialisation and cultivate the visitor economy based on food, wine and events

The Wingecarribee region’s agriculture sector is a regional strength and existing specialisation producing high quality fresh horticultural produce and beef cattle. There is a growing opportunity to service and value add this produce locally, grow the cool climate wine, distilling and brewing sectors and meet the needs of an expanded visitor economy. A productive and profitable agricultural sector will explore new local marketing opportunities. Two types of market growth are proposed through this strategy – further development of the niche produce sector including horticulture and specialty goods and improved livestock marketing through upgraded and fully compliant livestock saleyards. Ongoing investment in the saleyards is needed to meet future compliance requirements and to capitalise on the loss of infrastructure in other parts of southern NSW.

Infrastructure Priorities	Actions
<ul style="list-style-type: none"> • Agricultural: including ‘fit for purpose’ marketing and transport infrastructure. • Sport and recreation: including upgrade of sporting fields, basketball facilities, and the creation of a multi-purpose equestrian space. Improved sport and recreation infrastructure will attract visitor participants and spectators. • Culture and entertainment: a new arts precinct with conference and hotel facilities, a theatre space, a music auditorium, rehearsal facilities, regional art gallery studios, workshops, exhibition space and capacity for large scale festivals and events. • Local road: to enhance traffic flow and management in the main streets of Southern Highland towns, improve visual amenity for visitors and provide a platform for economic growth. 	<ul style="list-style-type: none"> • Prepare an up-to-date audit of agricultural producers and niche product suppliers with an interest in supplying the visitor economy. • Secure the future of relevant agricultural infrastructure such as the Moss Vale Saleyards. • Develop a strategy to attract more mid-week visitors to Wingecarribee. • Prepare and communicate pre-feasibility material on viability of a new larger scale hotel as part of proposed arts precinct. • Create a multi-purpose an equestrian facility in the Wingecarribee region. • Develop an indoor basketball facility for regional competitions and cultural events. Regional competitions and cultural events will bring visitors and economic activity to the region. • Provide planning support for a new arts and conference precinct with hotel facilities, theatre space, gallery space, and room for large scale events and festivals.



Facilitate the development of agriculture as a key strength and specialisation and cultivate the visitor economy based on food, wine and events - continued

The Wingecarribee Shire visitor economy is an important element of the region's economy and it has the potential for growth. It includes, but is not limited to, day trips, short stays, corporate conferences and private events such as weddings.

Growth in all these sectors is possible. Access to airports provides opportunity to attract international visitors. Prestige private boarding schools provide an introduction to the area for the parents of students and there is opportunity to lengthen their visits to the region. Partnerships between schools and food, wine and accommodation providers may be possible. Wingecarribee Shire is an attractive area for equestrian events. With appropriate infrastructure, the Wingecarribee Shire could be part of the equestrian circuit which would further strengthen the regional visitor economy. Underutilised assets such as rail stations have scope for redevelopment as tourism assets.



3. Grow the education, health and aged care sectors

Nationally, the services sector continues to grow and provide a range of skilled employment opportunities. The Wingecarribee region has specialisations within the service sector, including education, health and aged care services. This strategy targets growth in these industries.

In the education sector, the University of Wollongong's (UOW partnership with TAFE requires clarification and consultation reveals that there may be opportunities to explore degree based training at the UOW's Moss Vale campus. TAFE's vocational aged care training in the Wingecarribee Shire has been well received by both students and employers. Further, TAFE course offerings have been suggested around key trades. The present TAFE campus requires upgrade and expansion, as expressed during community consultation.

Stakeholders report strong growth in enrolments in primary schools, secondary schools and childcare. This has resulted in the emergence of issues with overcrowding and difficulty in securing childcare places. Wingecarribee Shire has an endowment in prestige boarding schools. There are opportunities to grow the regional economy through further linkages with these schools and the attraction of parents to the region.

Wingecarribee Shire has access to both a district hospital with a planned upgrade and a well-resourced private hospital. Aged care is a specialisation in the Wingecarribee region. Economic growth and community service can both be satisfied with additional medical services. The region needs a palliative care centre and additional dementia care capacity.



Infrastructure Priorities	Actions
<ul style="list-style-type: none"> • Education: Upgrade and expansion of the Moss Vale TAFE College to allow it to effectively deliver current course offerings as well as additional subjects consistent with regional capabilities. Childcare, primary school and secondary school infrastructure to address community concerns with overcrowding. • Health: including a new palliative care unit at the Bowral and District Hospital and additional dementia care capacity in the aged care sector. 	<ul style="list-style-type: none"> • Develop a collaboration plan for UOW and TAFE Illawarra. • Work with UOW on feasibility of local tourism and health/aged care degrees. • Work with TAFE to determine willingness to expand local trade training. • Provide evidence to the NSW Government to support additional primary and secondary school capacity. • Work with stakeholders to identify additional child care capacity. • Partner with prestige boarding schools to increase length of stay, tourism spend. • Provide evidence to the NSW Government to support investment in a local palliative care centre. • Work with stakeholders to deliver additional dementia care capacity. • Investigate the need for student housing and low-cost housing as the education, health and aged care sectors expand.





4. Strengthen the region's manufacturing base and monitor opportunities in the mineral resource sector

Relative to the rest of NSW, Wingecarribee Shire retains a specialisation in a number of manufacturing sub-sectors, including the manufacture of mining and construction equipment, lime and cement products. The region's proximity to Sydney presents opportunities for relocation of other manufacturing industries. However, in utilising its endowment (locational advantage), Wingecarribee will need to act on its pre-existing problems in its lack of serviced industrial land, rapidly rising electricity prices and improve connectivity-related infrastructure.

To support growth in manufacturing the shortage of low cost, fully serviced industrial land within the shire needs to be addressed. The cost of industrial land after taking account of Council Section 94 contributions is not competitive with other regions equally close to major population centres.

To keep manufacturing competitive in the region, ongoing improvement in the road network linking Wingecarribee Shire to input supplies and markets needs to be made. Improved access to the Hume Highway at Welby south of Mittagong has been suggested as a catalyst for further economic development in the region. Furthermore, the Illawarra Highway that connects Wollongong, Port Kembla and the Illawarra's industrial base to the Wingecarribee region requires upgrade. Accident 'black spots' between Albion Park and Moss Vale require urgent attention to support safe and cost effective freight movement.

Linked to the Wingecarribee region's specialisation in the manufacture of mining and construction equipment is the neighbouring Illawarra region's specialisation in coal mining. The Illawarra coal seam that feeds the neighbouring region's economy is also present as an economic deposit in the Wingecarribee region. Mining provides a substantial immediate and long term boost to a region's employment and economic prospects. However, it must be consistent with the Wingecarribee Shire's broader economic aspirations and at the moment it is not. For this reason, this strategy suggests Wingecarribee Shire Council monitor both opportunities in the mineral resource sector and community attitudes to mining and act if investment and community attitudes align.

Infrastructure Priorities	Actions
<ul style="list-style-type: none"> • Hume Highway access: To facilitate the expansion of manufacturing in the Wingecarribee region. • Illawarra Highway upgrade: To more effectively link Wingecarribee to Wollongong, Port Kembla and the Illawarra’s industrial base. 	<ul style="list-style-type: none"> • Work with TAFE to determine willingness to expand local trade training. • Review the Wingecarribee Shire Local Environmental Plans (LEP) and identify opportunities to increase the supply of industrial land. • Improve access to the Hume Highway at Welby south of Mittagong. • Advocate for the upgrade of the Illawarra Highway between Albion Park and Moss Vale. • Monitor community acceptability of coal mining in the Wingecarribee region and make planning decisions that do not ‘sterilise’ future mining opportunities.



Strategies and Actions

Enablers	Enhance the liveability of the Wingecarribee region	Facilitate the development of agriculture as a key strength and specialisation and grow the visitor economy based on food, wine and events	Grow the education, health and aged care sectors	Strengthen the region's manufacturing base and monitor opportunities in the mineral resource sector
People and skills	<ul style="list-style-type: none"> Support existing initiatives and investigate new measures to increase the supply of suitable labour to the hospitality sector. 	<ul style="list-style-type: none"> Prepare an up-to-date audit of agricultural producers and niche producers with an interest in supplying the visitor economy. 	<ul style="list-style-type: none"> Work with the University of Wollongong (UOW) to assess the feasibility of local tourism and health/aged care degrees. Work with TAFE to determine willingness to expand local trade training. 	<ul style="list-style-type: none"> Work with TAFE to determine willingness to expand local trade training.
Government, regulation, services and information	<ul style="list-style-type: none"> Develop a renewable energy plan. Provide planning support for a new arts and conference precinct. 	<ul style="list-style-type: none"> Develop a strategy to attract more mid-week visitors to Wingecarribee. Prepare and communicate pre-feasibility material on viability of a new larger scale hotel as part of proposed arts precinct. Provide planning support for a new arts and conference precinct. 	<ul style="list-style-type: none"> Develop a collaboration plan for the UOW and TAFE Illawarra. Partner with prestige boarding schools to increase length of stay and tourism spend in the Wingecarribee economy. 	<ul style="list-style-type: none"> Review the Wingecarribee Shire LEP and identify opportunities to increase the supply of industrial land. Maintain a 'watching brief' on community acceptability of coal mining in the Wingecarribee region and ensure that planning decisions do not sterilise access to the resource.
Infrastructure	<ul style="list-style-type: none"> Upgrade commuting options – teleworking, road works, etc. Local roads for visual amenity and economic growth. Improve car parking in Mittagong, Bowral and Moss Vale to stop leakage of retail to other areas and enhance commuting opportunity. Advocate for better passenger rail. Upgrade sporting fields. Indoor basketball facility. Student housing and low cost housing. 	<ul style="list-style-type: none"> Secure the future of relevant agricultural infrastructure such as the Moss Vale Saleyards. Create a multi-purpose equestrian facility in the Wingecarribee region. Develop an indoor basketball facility for regional competitions and cultural events. 	<ul style="list-style-type: none"> Lobby the NSW Government for additional primary and secondary school capacity in the Wingecarribee region. Work with stakeholders to identify additional child care capacity. Lobby NSW Government for a local palliative care centre. Work with stakeholders to deliver additional dementia care capacity. 	<ul style="list-style-type: none"> Improve access to the Hume Highway at Welby south of Mittagong. Advocate for the upgrade of the Illawarra Highway between Albion Park and Moss Vale.
Utilities	<ul style="list-style-type: none"> Better wastewater management. Improved digital connectivity. 	<ul style="list-style-type: none"> Better wastewater management. 	<ul style="list-style-type: none"> Improve digital connectivity. 	<ul style="list-style-type: none"> Better wastewater management.



Implementation

This document sets out a vision for the Wingecarribee region as well as the strategies and actions that can enable the region to achieve this vision. This Strategy was formed in collaboration with the Wingecarribee Shire Council, the regional community, AgEconPlus and CERD. Further detail about the strategy, actions, economy and endowments of the region can be found in the *2018–2022 Wingecarribee Regional Economic Development Strategy Supporting Analysis*.

The completion of this document is intended to be the first stage of an ongoing process where new actions to further progress towards the vision are identified through application of the Strategy framework. It is therefore recommended that an Advisory Committee made up of representatives from Council, including the Economic Development Manager, and other groups such as business chambers be established to progress the actions listed in 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 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 Economic Development Strategy.

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