Snowy Monaro 2018 - 2022

Regional Economic Development Strategy

Supporting Analysis

SNOWY MONARO
REGIONAL COUNCIL

Preface

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

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

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

The power of the strategy is its ability to be used on an ongoing basis to identify additional high value projects over time. By complementing existing funding processes, these strategies present new opportunities to strengthen and increase investment in regional development across NSW.

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

This Strategy, prepared by Corview, on behalf of Snowy Monaro Regional Council, key stakeholders and the broader regional community, benefited from economic-analytical assistance from the NSW Government's Centre for Economic and Regional Development (CERD).

The Strategy is presented in two documents, the **Snowy Monaro Regional Economic Development Strategy 2022** which allows the reader to quickly and easily determine key content, while the accompanying **Snowy Monaro Regional Economic Development Strategy 2022 - Supporting Analysis** (this document) details the Strategy methodology, evidence and the strategy development process.

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

Appendices

Appendix A –

The Snowy Monaro Economy

Population Profile

The Snowy Monaro regional economy has a population of approximately 20,200. The overall population increased by 5.4 per cent across the Region from 2001 to 2016.

Resident Profile

Since 1970 the median age in NSW has been increasing. This ageing population is especially pronounced in regional areas.

Snowy Monaro is no exception, with an aged dependency ratio of 30.1 per cent above the State average of 25 per cent, but below the Regional NSW average of 34.8 per cent.

Snowy Monaro's dependency ratio, 57 per cent, is relatively close to the State's proportion, 53.4 per cent, which in turn places it into a stronger position than the norm for regional NSW at 65.4 per cent. However, Snowy Monaro's median age is higher than both NSW and regional NSW suggesting that a relatively higher proportion of its workforce is ageing.

The NSW Intergenerational Report (2016) projects that regional aged dependency ratios are expected to increase over the next 15 years to as high as 42 per cent for NSW, as the population ages, and this is likely to be accelerated in regional areas like Snowy Monaro.

Population % change relative to 2001
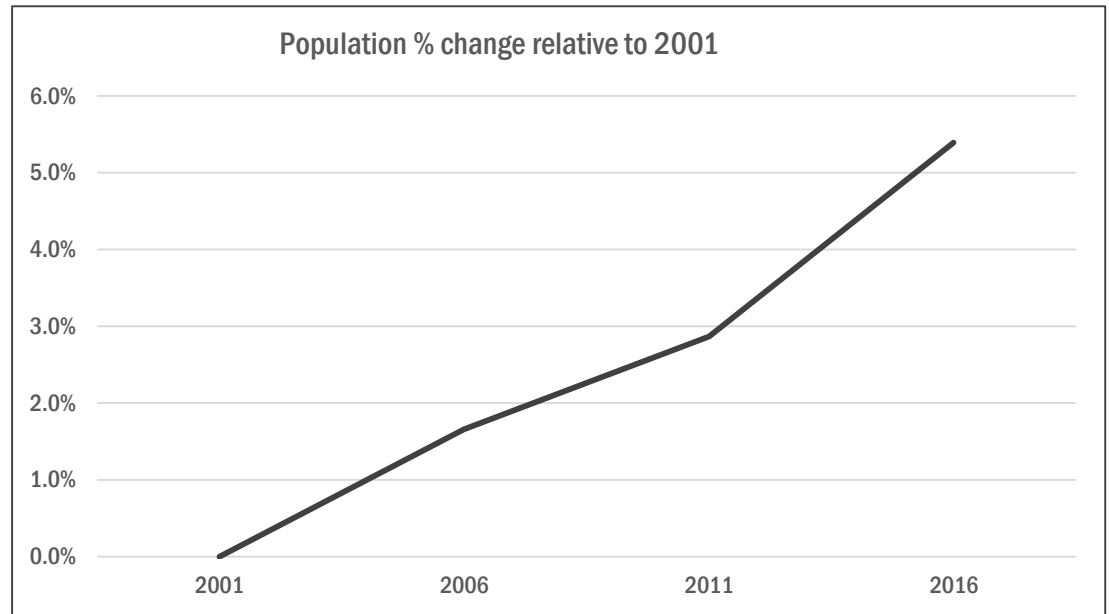
	Snowy Monaro	NSW	Regional NSW
Age Dependency Ratio (>65 / 15-64)	30.1%	25%	34.8%
Youth Dependency Ratio (<15 / 15-64)	26.9%	28.4%	28.4%
Dependency Ratio (Sum of the two)	57%	53.4%	63.2%
Proportion of Young Persons (<15/all)	17.1%	18.5%	18.5%
Proportion of Old Persons (>65/all)	19.2%	16.3%	21.1%
Median Age 2016	43	38	42.5

Population Forecast

NSW Department of Planning and Environment estimates that by 2036, Snowy Monaro population is forecast to be around 21,650.

This represents an increase of about 7.2 per cent on 2016 Census levels.

The Department's methodology does not directly account for either recent increases in tourism in Jindabyne or growth opportunities associated with the Snowy 2.0 proposal.

The median age group is expected to increase from 40-44 to 45-49 by 2026 and remain steady by 2036.

This indicates Snowy Monaro's population would be increasingly dominated by an older population in the future.
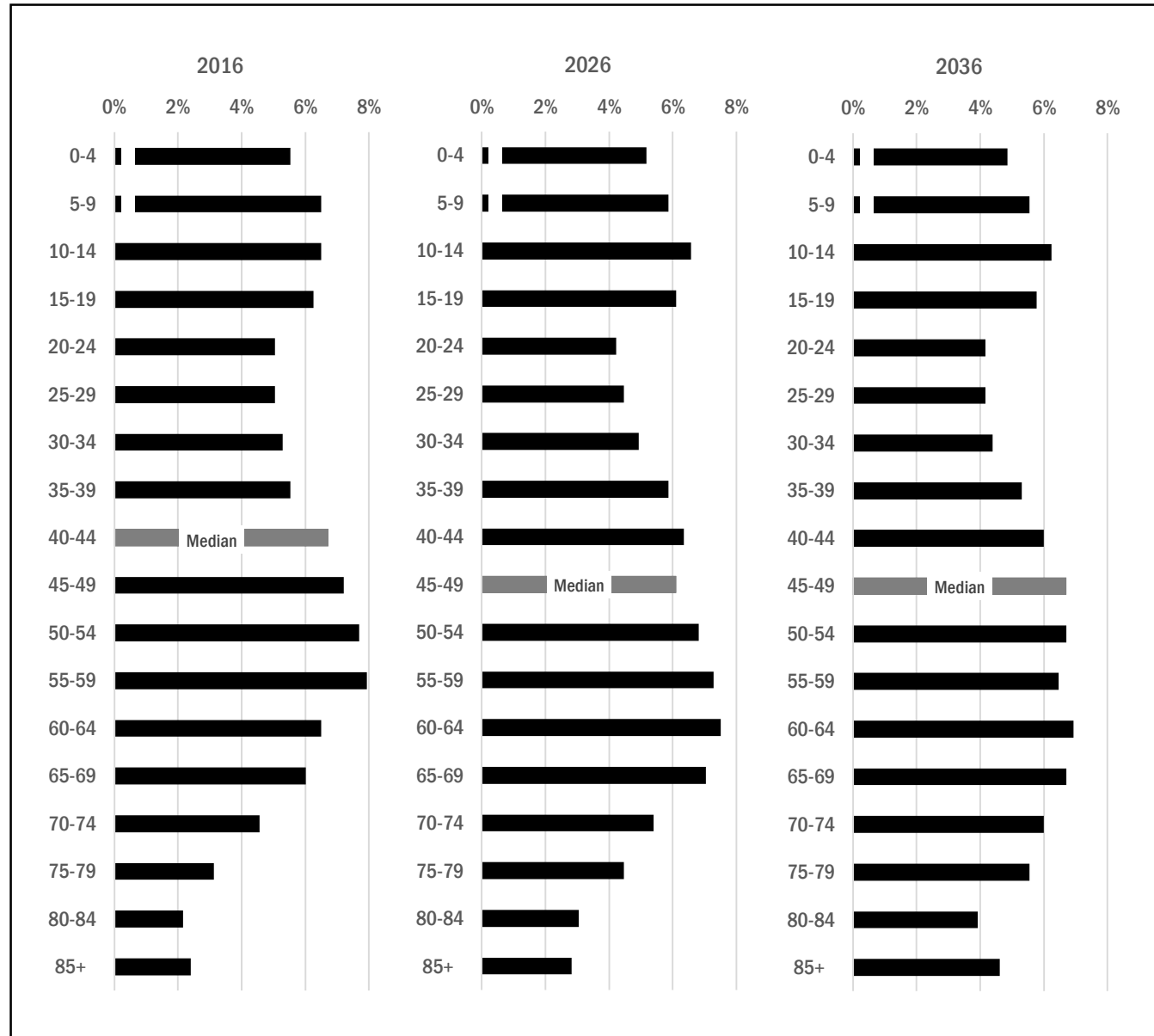
Age Location Quotient

The age location quotients show the relative under/over representation of an age group in the Snowy Monaro Region compared to either the NSW average or the regional NSW average.

Location quotients below one (1.00) show underrepresentation in the local cohort compared to the reference group. Quotients over one (1.00) show overrepresentation locally compared to the reference group.

Compared to NSW, Snowy Monaro has an underrepresentation for a significant part of its younger workforce from 15 to 39. This is most noticeably for 20 to 39 years with a proportionate underrepresentation of about 20 percent in each group. From 45+ Snowy Monaro generally has an overrepresentation of these age groups in its population than what would be expected for NSW.

When compared to Regional NSW these trends are stable and Snowy Monaro becomes more aligned to what would be expected for a regional area. However, Snowy Monaro still maintains a relative overrepresentation from 40 to 59. Relative to Regional NSW, Snowy Monaro has a notable underrepresentation of retired population. This suggests that retirees are moving away from the Region.

Snowy Monaro vs NSW

Snowy Monaro vs Regional NSW
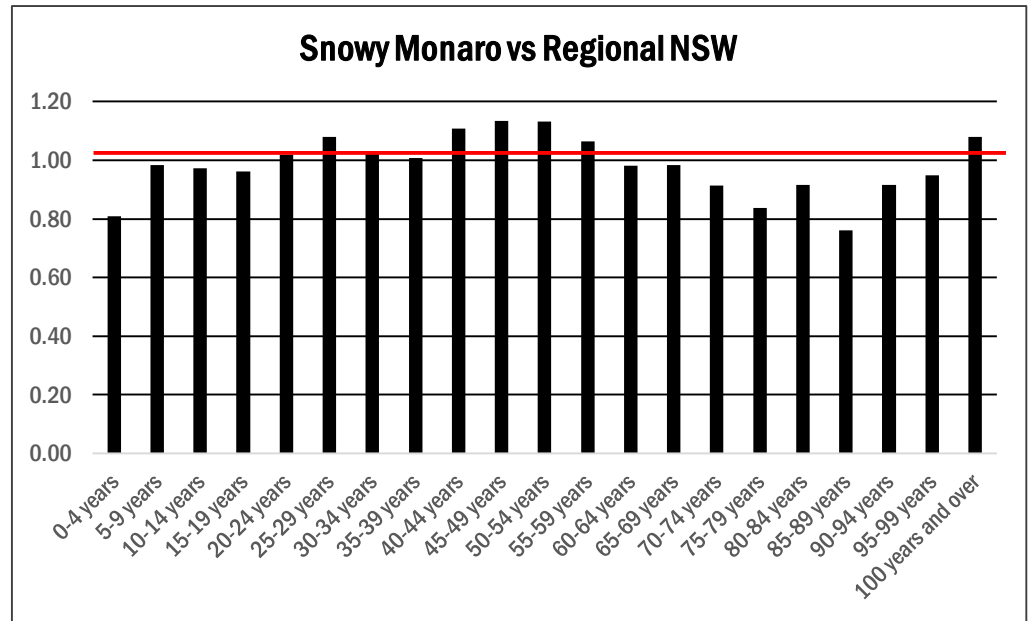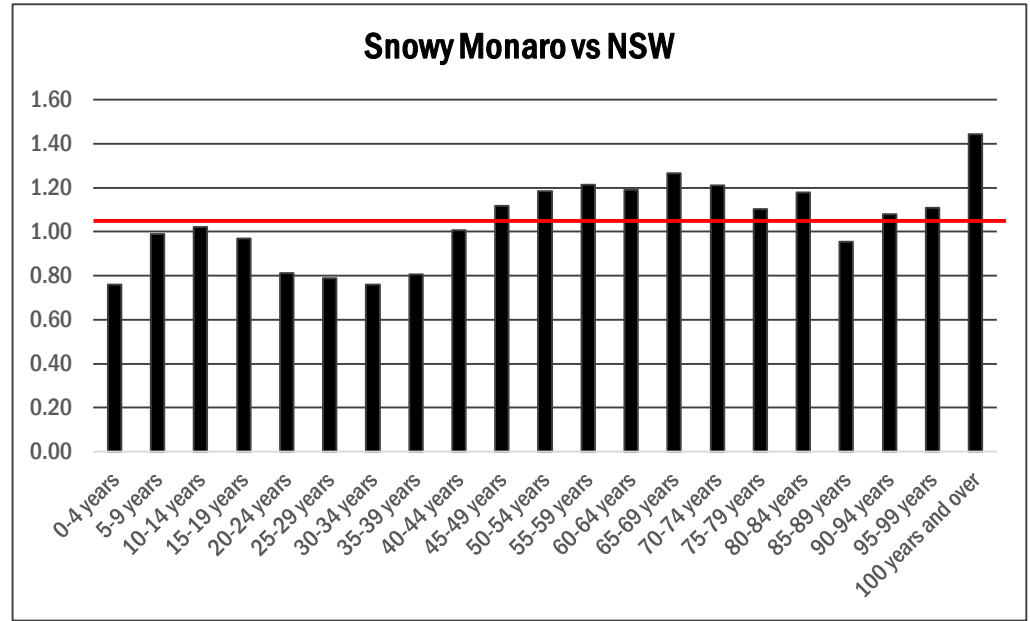
Housing Ownership & Affordability

Outright ownership of homes in Snowy Monaro is high relative to prevailing rates for NSW overall. Both mortgage payments and rents in Snowy Monaro are relatively low, at about two-thirds or less of the State averages. This indicates that the Region has high housing affordability.

Location	% of Dwellings Owned Outright	Monthly Mortgage Repayments	Median Weekly Rent
Snowy Monaro	38.9%	$1,300	$220
NSW	32.2%	$1,986	$380

Educational Attainment

Snowy Monaro's population is significantly unspecialised for people with a Bachelor or Postgraduate qualifications (15.6 per cent) when compared to the NSW average (24.2 per cent). This is about two-thirds the levels typical of the State as a whole. Consultation revealed that employers have trouble filling skilled job vacancies, and the low level of university level qualifications in the resident workforce reflects a "skills gap" in the workforce.

However, the Region has a higher proportion of its population qualified at Certificate Level (24.8 percent to 16.6 percent) representing a higher need/demand for more skills-based work in the Region.

	Snowy Monaro	NSW
Bachelor or Postgraduate Qualification	15.6%	24.2%
Advanced Diploma	11.7%	11.8%
Certificate Level	24.8%	16.6%

Internet Connection in Dwellings

A relatively small share of Snowy Monaro's population is connected to the internet (76.5 per cent) compared to the prevailing rate for NSW (82.5 per cent) overall, highlighting a relative disparity in digital connectivity.

	Snowy Monaro	NSW
Internet not accessed from dwelling	19.4%	14.7%
Internet accessed from dwelling	76.5%	82.5%
Not stated	4%	2.8%

Indigenous Population

Snowy Monaro has a lower proportion (2.2 per cent) of Aboriginal / Torres Strait Islander in its population than NSW (2.9 per cent).

	Snowy Monaro	NSW
% of Population Aboriginal and/or Torres Strait Islander People	2.2%	2.9%

Occupation Profile and Labour Mobility

Managers, Technicians & Trades Workers and Professionals are the leading occupational classifications in Snowy Monaro.

Each of these classifications makes up between 14 and 19 per cent of the Region's labour force, such that all three classifications together represent just under half the labour force.

When compared to the overall composition of the State's labour force, Snowy Monaro is:
- significantly specialised for Managers, Labourers and Community & Personal Service Workers
- Significantly unspecialised for professionals, at less than 60 per cent below the relative composition of the State's labour pool.

This profile is broadly consistent with the Region's economic emphasis on tourism-related personal services and Agriculture.

It is noted that Professionals and Mangers make up about one-third of the workforce, and these occupations are generally associated with university level qualifications, yet only 15 per cent of the resident workforce possess Bachelor or Postgraduate qualifications. This highlights a workforce demand for more highly trained and educated workers.

Review of labour flows reflects a relatively high rate of self containment in Snowy Monaro. More than 4 out 5 of the Region's workers are employed within its bounds.

Occupational Profile for Snowy Monaro

Occupation	# Snowy Monaro	% of the Labour Force	Location Quotient
Managers	1,867	19.3%	1.40
Labourers	1,166	12.0%	1.34
Machinery Operators & Drivers	636	6.6%	1.05
Technicians and Trades Workers	1,393	14.4%	1.11
Clerical & Admin Workers	1,137	11.7%	0.83
Community & Personal Service Workers	1,202	12.4%	1.18
Professionals	1,355	14.0%	0.58
Sales Workers	931	9.6%	1.02
TOTAL	9,687	100.0%	1.00

Labour Mobility within Snowy Monaro

	Works elsewhere in the Region	Works in a neighbouring Region
Snowy Monaro	81.9%	18.1%

Labor Mobility and Income

Labour Mobility

Review of labour flows reflects a relatively high rate of self-containment in Snowy Monaro. More than 4 out 5 of the Region's workers are employed within its bounds.

According to the 2016 Census there are 9,373 jobs in the Region, with 9,649 workers living in the Region. This means slightly more people are travelling outside the Region to work than are travelling into the Region to work. It also indicates that residents have access to labour markets beyond the bounds of the Region.

The most popular place for residents to travel outside the Region for work are the ACT (739 workers), Queanbeyan-Palerang (99 workers) and Bega Valley (31 workers).

Non-residents travelling into the Region are coming from Bega Valley (142 workers), ACT (114 workers) and Queanbeyan-Palerang (32 workers).

Income

The Region has a lower medium annual income than Regional NSW and NSW overall. This is reflective of the education attainment of the Region with lower levels of education associated with lower income levels. It does have a higher medium weekly household income than regional NSW, which could be due to lower levels of government pensions and unemployment rates. The population profile suggests that people are moving away for retirement, and the Region benefits from low unemployment rates.

Labour Mobility within Snowy Monaro

TOTAL JOBS in the Region	9,373
Total LOCAL Workers (working anywhere)	9,649
Residents Working in the Region	8,075
% of Residents Working within the Region	84%
Non-residents Working in the LGA	1,298

Income

	Snowy Monaro	Regional NSW	NSW
Median annual income *	$41,182	$42,445	$46,879
Median weekly household income	$1,200	$1,168	$1,468

* (excl. Government pensions and allowance)

Unemployment Trends

Unemployment rates across Snowy Monaro have been well below NSW and Regional NSW averages for an extended period of time.

Over time, the unemployment rate in Snowy Monaro has been roughly between:
- 2 to 3 percentage points below the State average
- about 3 percentage points below the regional NSW average.

The Region has experienced sustained jobs growth across all of the largest employing industries in the Region since 2006.
Among the Region's largest industries, the strongest jobs growth over the decade to 2016 has been in Accommodation and Food Services, Health Care & Social Assistance and Education & Training.

ABS Census Data: 2006, 2011, 2016

Snowy Monaro Unemployment Rates, 2006 to 2016

	2006	2011	2016
Snowy Monaro Unemployment rate	3.9%	3.5%	3.3%
REGIONAL NSW Unemployment rate	7.0%	6.2%	6.6%
NSW Unemployment rate	5.9%	5.9%	6.3%

Snowy Monaro - Major Employment Industries 2006 - 2016

Accommodation and Food Services
Agriculture, Forestry and Fishing
Retail Trade
Public Administration and Safety
Health Care and Social Assistance
Education and Training
Construction
Arts and Recreation Services

Employment by Industry Data from 2001-2016

Industry Sector	Number employed				Change in Number Employed	Industry Size %	Employment Change % 2001-2016		
	2001	**2006**	**2011**	**2016**	**2011-16**	**2016**	**2001-06**	**2006-11**	**2011-16**
Accommodation and Food Services	2,312	1,471	1,482	1,939	457	19.9%	-36.4%	0.7%	30.8%
Agriculture, Forestry and Fishing	697	617	624	933	309	9.6%	-11.5%	1.1%	49.5%
Retail Trade	542	524	443	882	439	9.0%	-3.3%	-15.5%	99.1%
Arts and Recreation Services	139	567	692	814	122	8.3%	307.9%	22.0%	17.6%
Education and Training	389	352	409	762	353	7.8%	-9.5%	16.2%	86.3%
Health Care and Social Assistance	282	304	316	698	382	7.1%	7.8%	3.9%	120.9%
Public Administration and Safety	238	338	320	612	292	6.3%	42.0%	-5.3%	91.3%
Construction	219	294	245	448	203	4.6%	34.2%	-16.7%	82.9%
Manufacturing	239	171	205	331	126	3.4%	-28.5%	19.9%	61.5%
Electricity, Gas, Water and Waste Services	103	101	115	316	201	3.2%	-1.9%	13.9%	174.8%
Transport, Postal and Warehousing	137	166	167	307	140	3.1%	21.2%	0.6%	83.8%
Professional, Scientific and Technical Services	171	152	166	306	140	3.1%	-11.1%	9.2%	84.3%
Administrative and Support Services	147	131	149	282	133	2.9%	-10.9%	13.7%	89.3%
Other Services	154	124	131	270	139	2.8%	-19.5%	5.6%	106.1%
Rental, Hiring and Real Estate Services	177	137	147	231	84	2.4%	-22.6%	7.3%	57.1%
Wholesale Trade	131	76	80	152	72	1.6%	-42.0%	5.3%	90.0%
Financial and Insurance Services	56	48	36	75	39	0.8%	-14.3%	-25.0%	108.3%
Information Media and Telecommunications	41	25	24	59	35	0.6%	-39.0%	-4.0%	145.8%
Mining	4	16	12	26	14	0.3%	300.0%	-25.0%	116.7%

Note: there is only 19 sectors in ANZSIC Level 1

Bombala
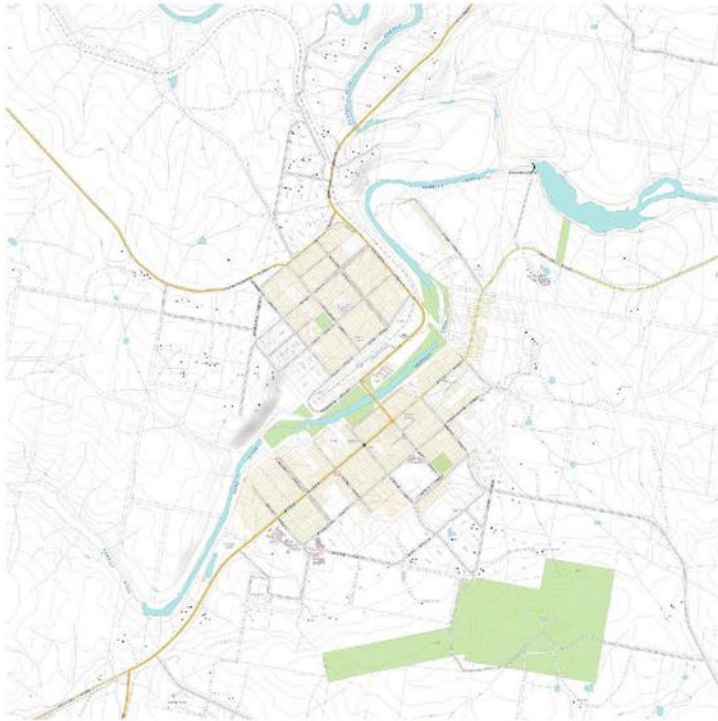
Employment by Industry Top 3

Agriculture, Forestry and Fishing	19.3%
Manufacturing	12.9%
Retail Trade	9.2%

90.4% are employed in Bombala

unemployment **3.1%**

18.3% of population are younger than than 15

Bombala was proposed in 1903 as the site of the parliamentary seat of Australia. It was considered as a location because it was half way between Sydney and Melbourne.

Located in South East corner of New South Wales, Bombala is known as 'platypus country'.

The town lies on the banks of the Bombala River and principal industries of the area include agriculture, forestry and timber. The local rivers are also recognised as some of the State's best trout fishing destinations.

44.5 Median Age

Population **1,383**

23.1% of population are older than 65 (2016)

Source: Australian Bureau of Statistics

Cooma

Home to the Ngarigo Aboriginal tribe and the Snowy Mountains Scheme, Cooma is the largest centre in the Snowy Monaro Region.

Cooma's first settlers brought cattle for grazing as early as 1827 and Cooma was surveyed in 1849. Discovery of gold in Kiandra in the 1860's brought about a permanent increase in Cooma's population.

Today, Cooma is known as the ' Gateway to the Snowy Mountains' serving as a main rest stop for many travellers heading to the snow fields.

Employment by Industry Top 3

Retail Trade	13.4%
Health Care and Social Assistance	11.9%
Public Administration and Safety	10.3%

89.5% are employed in Cooma

unemployment **4.7%**

15.7% of population are younger than than 15

44.5 Median Age

Population **6,683**

22.9% of population are older than 65 (2016)

Source: Australian Bureau of Statistics

Jindabyne

Jindabyne is one of the highest settlements of its size in Australia. The town's name is derived from an aboriginal word meaning "valley".

The original township was transferred to its present location in the 1960s due to the construction of Jindabyne Dam, as part of the Snowy Mountains Scheme.

Today, Jindabyne is a popular holiday destination due to its proximity to several ski resorts throughout the Kosciuszko National Park, including Thredbo and Perisher.

Employment by Industry Top 3

Accommodation and Food Services	23.8%
Arts and Recreation Services	14.6%
Education and Training	8.2%

93.3% are employed in Jindabyne

unemployment **2.1%**

17.0% of population are younger than than 15

35.5 Median Age

Population **3,326**

10.3% of population are older than 65 (2016)

Business Composition Profile

Analysis of business profiles compared to representative industry structures for the State as a whole reveals a number of features.

In considering the business profile, overall Snowy Monaro is specialised for firms in agriculture, utilities and tourism. Excepting utilities, these sectors are also among those with the largest numbers of businesses in them, along with construction, professional services and retail.

At the industry level, the Region's profile reflects a number of significant features, including:

- overrepresentation of businesses with relatively small levels of employment and revenue
- overrepresentation of agricultural businesses with smaller scale employment and revenues
- overrepresentation of retail businesses with larger scale employment and mid-sized revenues
- significant overrepresentation of professional services businesses with revenues of more than $10M (which may be aligned to the services demands of Snowy Hydro and/or tourism industry operators).

Business Staffing Location Quotients in Snowy Monaro, Select Industries

Industry	Non employing	1-19 staff	20-199 staff
Agriculture, Forestry and Fishing	0.78	1.58	1.11
Construction	1.10	0.94	0.00
Professional, Scientific and Technical Services	1.00	1.05	0.00
Retail Trade	0.94	1.02	1.23
All industries	0.93	1.13	0.72

Business Revenue Location Quotients in Snowy Monaro, Select Industries

Industry	0 - $2M	$2M - $10M	+$10M
Agriculture, Forestry and Fishing	1.03	1.02	0.00
Construction	1.05	0.95	0.00
Professional, Scientific and Technical Services	1.03	0.80	1.54
Retail Trade	1.01	1.22	0.62
All industries	1.04	0.99	0.28

Shift-Share Analysis

Shift-share Analysis is a widely used technique to analyse regional economies where there is a specific interest in the growth or decline in a particularly macroeconomic variable; most often employment. The interest in shift share analysis arises from its ability to partition employment change in a given region into three distinct components.

1. Changes in regional employment resulting from changes in the State economy. That is, employment will increase or decrease as a result of broader economic conditions. This component is called the **State Shift**.
2. Changes in regional employment that are a result of boarder industry specific trends. This component is called the **Industry Mix Shift**.
3. Finally, changes in employment which results from unique regional factors that are not related to broader economic and industry factors. This component is called the **Regional Shift**.

The total employment change in the region is called the **Total Shift**. Shift Share Analysis is concerned with the 'share' that each of these 'shifts' hold in the total change in employment (the Total Shift). This relationship is also described by the following expression.

Total Shift = State Shift + Industry Mix Shift + Regional Shift

The Regional Shift component is the residual change for the Region, after accounting for State Shift and Industry Mix Shift. It helps identify industries where a region has a comparative advantage over the broader economy that is attributed to local competitiveness or characteristics unique to the region.

The table shows the shift in employment growth for all ANZSIC level 1 industries, each employing more than 5 per cent of the Region's workforce.

Regional Shift between 2011-2016 for Snowy Monaro's Largest Industries

Industry	Total growth in employed persons (to 2016)	Employed persons (2011)	State shift	Industry Mix Shift	Regional Shift
Accommodation & Food Services	457	1,482	159	75	223
Arts & Recreation Services	122	692	74	16	32
Agriculture, Forestry & Fishing	309	624	67	-29	271
Retail Trade	439	443	47	-39	430
Education & Training	353	409	44	15	295
Public Administration & Safety	292	320	34	-11	269
Health Care & Social Assistance	382	316	34	22	326

The regional shift component was positive for all industries employing over 5 per cent of the Region's workforce. This indicates the Region has a general advantage in its larger industries after controlling for state and industry trends.

Shift-share analysis highlights that industries need to be aware of and respond to shifts in employment at all three levels of employment change. For example the Region has experienced the strongest regional shift in Retail Trade and has been able to out-perform a declining trend in employment at the industry level.

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Gross Value Add Analysis

The Centre for Economic and Regional Development (CERD) has also produced an Input Output table for the Snowy Monaro economy based on the ABS Input Output (IO) Tables for New South Wales.

The CERD analysis shows Snowy Monaro has a Gross Regional Product of $991 million and is a net importer, with exports out of the Region estimated at $274 million and imports into the Region estimated at $462 million.

Exports

Snowy Monaro's leading export industries are Tourism (Accommodation & Food Services) and Agriculture, Forestry & Fishing. Together, these two industries account for more than 70 per cent of the Region's exports.

Imports

Tourism (Accommodation & Food Services), Utilities and Agriculture, Forestry & Fishing are the leading industry sources of demand for imports for production processes.

	Gross Value Add (GVA) $m	GVA as % of total regional economy	% of Total Region Exports	Total Region Exports ($m)	% of Total Region Imports	Total Region Imports ($m)
Accommodation and Food Services	130.8	13.2%	36.6%	100.3	11.4%	52.6
Arts and Recreation Services	75.9	7.7%	2.5%	6.8	4.5%	20.9
Public Administration and Safety	67.9	6.8%	0.1%	0.3	2.9%	13.6
Electricity, Gas, Water and Waste Services	64.3	6.5%	0.5%	1.4	10.5%	48.6
Agriculture, Forestry and Fishing	57.4	5.8%	31.8%	87.1	9.6%	44.4
Retail Trade	54.3	5.5%	2.0%	5.5	2.5%	11.3
Health Care and Social Assistance	53.8	5.4%	0.2%	0.5	1.8%	8.5
Education and Training	51.5	5.2%	1.9%	5.1	1.4%	6.7
Rental, Hiring and Real Estate Services	47.6	4.8%	1.5%	4.0	3.7%	17.2
Professional, Scientific and Technical Services	35.1	3.5%	2.0%	5.6	2.8%	12.7
Financial and Insurance Services	33.1	3.3%	0.8%	2.2	1.4%	6.5
Construction	32.4	3.3%	0.1%	0.3	6.5%	29.9
Administrative and Support Services	22.9	2.3%	0.6%	1.8	1.5%	6.7
Transport, Postal and Warehousing	21.8	2.2%	4.7%	13.0	2.4%	10.9
Wholesale Trade	19.7	2.0%	2.6%	7.1	1.8%	8.2
Manufacturing	19.1	1.9%	7.2%	19.6	2.4%	11.1
Other Services	16.6	1.7%	0.1%	0.3	2.1%	9.9
Information Media and Telecommunications	6.7	0.7%	0.5%	1.2	0.6%	2.8
Mining	2.5	0.3%	0.0%	0.1	0.1%	0.6
Ownership of Dwellings	118.7	12.0%	1.0%	2.8	2.9%	13.2
Total Industry GVA	932.2	94.1%	96.8%		72.8%	
Final Demand	58.6	5.9%			27.2%	125.8
Primary inputs			3.2%	8.8		
Total	990.7	100.0%	100.0%		100.0%	
Total value ($m)	990.7	990.7		**273.9**		**462.1**
Total GRP ($m)	**990.7**					

Gross Regional Product (GRP) = Total GRP ($m) It is the sum of value added across all industries for the economy plus that derived from Ownership of Dwellings and Final Demand.

Gross Value Add (GVA): Measures the value of goods and services produced in a region. It is a combination of wages (CoE) and Operating Surplus (Cos).

Final demand contribution to imports is related to imports purchased to satisfy Household & Government Final Consumption Expenditure and Gross Fixed Capital Formation

Primary inputs contribution to exports relates to the proportion of imports re-exported.

Ownership of Dwellings: is not an ANZSIC industry classification. It relates to the imputation of rent to owner-occupiers and their associated expenses and does not have any associated direct employment or household income.

Reference: Centre for Economic and Regional Development (CERD) 2015-16 Input Output table, generated using the GRIT method and IO9 software.

Tourism

Tourism Research Australia 2016 LGA profiles show that Snowy Monaro has 394 tourism businesses that employ people, and attracts around 634,000 overnight visitors per year that spend $521m in the Region.

Compared to surrounding regions, Snowy Monaro enjoys relatively high levels of visitation and visitor expenditure.

While Canberra enjoys substantially more visitors than Snowy Monaro does, Snowy sees:
- more than five times the visitor expenditure of Queanbeyan Palerang
- about 50 per cent more visitor expenditure than Eurobodalla.

	Overnight ('000)	Tourism businesses	Spend ($m)
Canberra	2,214,000	3,421	1,876
Queanbeyan-Palerang	206,000	466	97
Snowy Monaro	634,000	394	521
Eurobodalla	699,000	541	350

Tourism

The NSW Government's Centre for Economic and Regional Development (CERD) has undertaken analysis to shed light on how tourism activity impacts the sectors of the Region's economy.

CERD's analysis accounts for both the direct and flow-on (or multiplier) impacts associated with the expenditure of visitors. CERD's estimates are based entirely on secondary data used to construct the IO table and estimate visitor expenditure.

The CERD analysis suggests that the sectors most closely associated with tourism activity are:

- Accommodation and Food Services

- Retail Trade

- Arts and Recreational Services

- Rental, Hiring and Real Estate Services

- Administrative & Support Services.

CERD's analysis concludes that the total impact of tourism expenditure on the Snowy Monaro economy can be summarised as:

- 40.1 per cent of total wages

- 43.6 per cent of total employment

- 44.0 per cent of total output.

Further contextual information on the sources and structure of Tourism in the Region can be found in Tourism Research Australia LGA data overleaf.

Tourism Contributions to Wages, Employment and Output by Industry in Snowy Monaro

Industry	Wages	FTE	Value Added
Agriculture, Forestry and Fishing	8.9%	9.3%	9.2%
Mining	1.2%	1.1%	1.1%
Manufacturing	22.3%	27.1%	22.7%
Electricity, Gas, Water and Waste Services	37.0%	38.0%	38.4%
Construction	6.3%	7.6%	6.1%
Wholesale Trade	20.8%	20.8%	20.8%
Retail Trade	97.2%	97.2%	97.2%
Accommodation and Food Services	95.4%	97.8%	93.0%
Transport, Postal and Warehousing	33.2%	32.7%	33.7%
Information Media and Telecommunications	28.0%	26.0%	28.2%
Financial and Insurance Services	37.7%	38.0%	38.8%
Rental, Hiring and Real Estate Services	37.6%	38.8%	39.4%
Professional, Scientific and Technical Services	23.5%	23.6%	23.5%
Administrative and Support Services	41.4%	46.9%	41.5%
Public Administration and Safety	4.5%	4.8%	4.4%
Education and Training	15.4%	17.9%	16.0%
Health Care and Social Assistance	12.3%	12.4%	12.4%
Arts and Recreation Services	39.2%	39.8%	39.4%
Other Services	36.3%	38.5%	36.2%
Ownership of Dwellings	NA	NA	69.8%

Source: Centre for Economic and Regional Development

Appendix B –

Regional Specialisations
Compared to Regional NSW 2001-2016

Regional Specialisations

The following charts are indicative of Snowy Monaro's regional and locational specialisations. The data underlying the charts reflects the relative concentrations of employment across different industries in Snowy Monaro from 2001-2016.

This analysis is in addition to the specialisations analysis presented in the Strategy. It takes a long-term view from 2001-2016 instead of 2011-2016, and it is relative to regional NSW, not NSW as a whole. The advantage of undertaking this additional analysis is that:

- the longer time period means it is less influenced by short-term effects such as drought, high Australian dollar, or fluctuations in the economic cycle

- the comparison against regional NSW removes distortions associated with large metropolitan cities, such as low agricultural concentrations and high concentrations of Financial and Insurance services

The concentrations are expressed as ratios (otherwise referred to as location quotients) relative to the proportionate industry employment concentrations for regional NSW as a whole.

A ratio greater than one means an industry is over represented in the Region in terms of the concentration of workers compared to the average proportions for regional NSW. Alternatively, a ratio of less than one means an industry is underrepresented for employment in that industry compared to the average concentration for regional NSW economies.

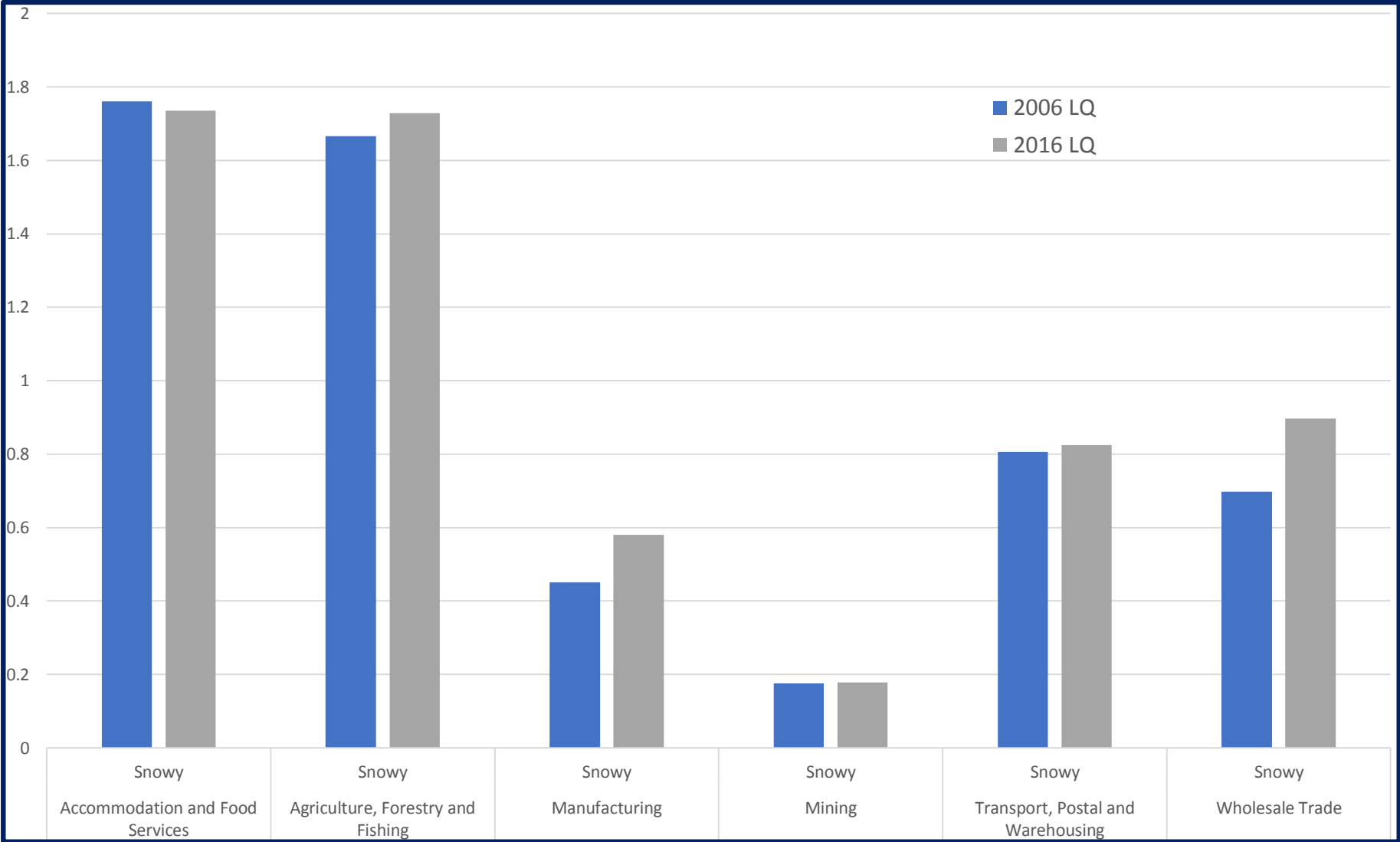In reviewing data, readers should keep in mind:

- by definition, not all industries in a region can have ratios of greater than one. A high concentration in one sector must come at the cost of lower concentrations in other sectors, bearing out the *relative* composition and advantages of the Region's employment base.

- the charts reflect changes in concentration between 2001 to 2016. Changes in ratios reflect shifts in *relative* concentration, potentially attributable to either Snowy Monaro (numerator), or change in regional NSW (denominator), or both.

- the data suggests sources of advantage and specialisation for the Region as a whole, with differential impacts across the localities in it.

Industries have also been grouped together to allow comparison among and between those generally linked to external markets and opportunities (Engines of Growth), those typically providing key support services to business (Enabling Industries), and those focused on providing services to the people, households and communities of Snowy Monaro (Population Serving Industries).

Review of data for these groupings can help identify common endowments and key linkages across the Region.

It is noted that for Snowy Monaro power generation is an Engine for Growth for the Region given it exports power outside the Region, and is a large employer in the Region. Alternatively, transport is more of an enabling industry for tourism and agriculture. These classifications can change at a regional level over-time, depending what industries are driving the regional economy and what are enabling or population serving industries.

'Engines of Growth' Industries - Location Quotients 2006 - 2016

Enabling Industries – Regional Specialisations Analysis

Enabling industries provide the Engines of Growth with key support services. Enabling industries tend to cluster in larger centres, bridging client firms and pools of skilled workers.

Utilities and **Rental, Hiring and Real Estate Services** are Snowy Monaro's key specialisations among enabling industries.

The relative concentration of Electricity, Gas, Water and Waste Services workers has remained relatively stable over time. Workers in this sector are about 150 per cent higher than the levels representative for a regional NSW economy, principally reflecting Snowy Hydro activities. Given the high levels of employment in power generation, Utilities was classified as an 'Engine of Growth' for the local regional economy in the Strategy.

Over the decade, (influence of being a tourist destination) the ratio for Rental, Hiring and Real Estate workers rose such that employment in this sector is now about 50 per cent above representative regional NSW concentrations, up from about 25 per cent above representative levels a decade earlier.

Ratios for other enabling industries are below one, including a marked decline in the Professional, Scientific and Technical Services ratio.

Key sub-industry Specialisations

At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

Taking the scale of employment into account, the most significant sub-industry specialisations include:

1. Building, Cleaning, Pest Control and Gardening Services (ratio 1.1, 200 workers)

2. Electricity Generation (ratio 11.3, 170 workers), Electricity Distribution (ratio 1.3, 50 workers) and Electricity Supply (ratio 4.8, 40 workers)

3. Legal and Accounting Services (ratio 0.9, 140 workers)

4. Architectural, Engineering and Technical Services (ratio 1.0, 100 workers)

5. Other Goods and Equipment Rental and Hiring (ratio 4.8, 100 workers) and Travel Agency and Tour Arrangement Services (ratio 2.0, 40 workers).

Enabling Industries - Location Quotients 2006 - 2016

Enabling Industries – Regional Specialisations Analysis

Enabling industries provide the Engines of Growth with key support services. Enabling industries tend to cluster in larger centres, bridging client firms and pools of skilled workers.

Utilities and Rental, Hiring and Real Estate Services are Snowy Monaro's key specialisations among enabling industries.

The relative concentration of Electricity, Gas, Water and Waste Services workers has remained relatively stable over time. Workers in this sector are about 150 per cent higher than the levels representative for a regional NSW economy, principally reflecting Snowy Hydro activities. Given the high levels of employment in power generation, Utilities could alternatively have been classified as an 'Engine of Growth' for the local regional economy in the Strategy.

Over the decade, the ratio for Rental, Hiring and Real Estate workers rose such that, employment in this sector is now about 50 per cent above representative of regional NSW concentrations, up from about 25 per cent above representative levels a decade earlier.

Ratios for other enabling industries are below one, including a marked decline in the Professional, Scientific and Technical Services ratio.
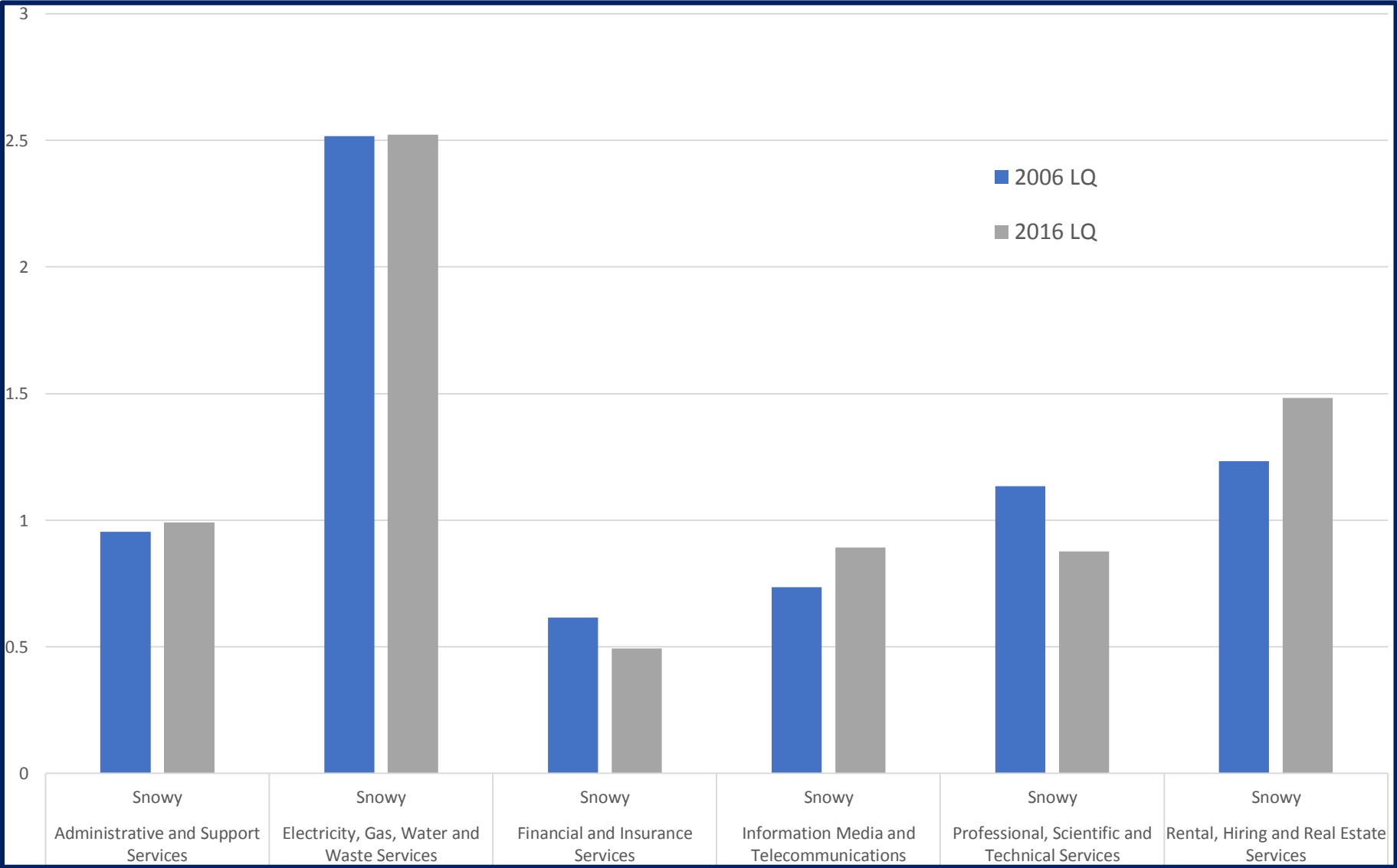
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Population Serving Industries - Location Quotients 2006 - 2016

Population Serving Industries – Regional Specialisations Analysis

Population Serving Industries tend to be focused on serving the people who live in a region more so than the businesses operating within it.

Arts and Recreation Services and **Public Administration and Safety** are the standout population serving specialisations of the Snowy Monaro Region.

Arts and Recreation Services was already a specialisation of the Region at the turn of the millennium. However, the degree of specialisation has intensified substantially over the decade to 2016, rising by about 0.7. At 2016 levels, workers in this industry are about 3 times overrepresented compared to prevailing regional NSW shares. Arts and Recreation Services is a proxy industry for tourism and has been classified as an Engine of Growth in the Strategy.

The relative concentration of Public Administration and Safety workers suggests workers in this sector are now about 25 per cent above typical regional NSW shares.

Ratios for other population serving industries are below one, often by substantial margins. Of particular note is the representation of the Health Care and Social Assistance workers, which is less than 60 per cent of what is representative for regional NSW economies.
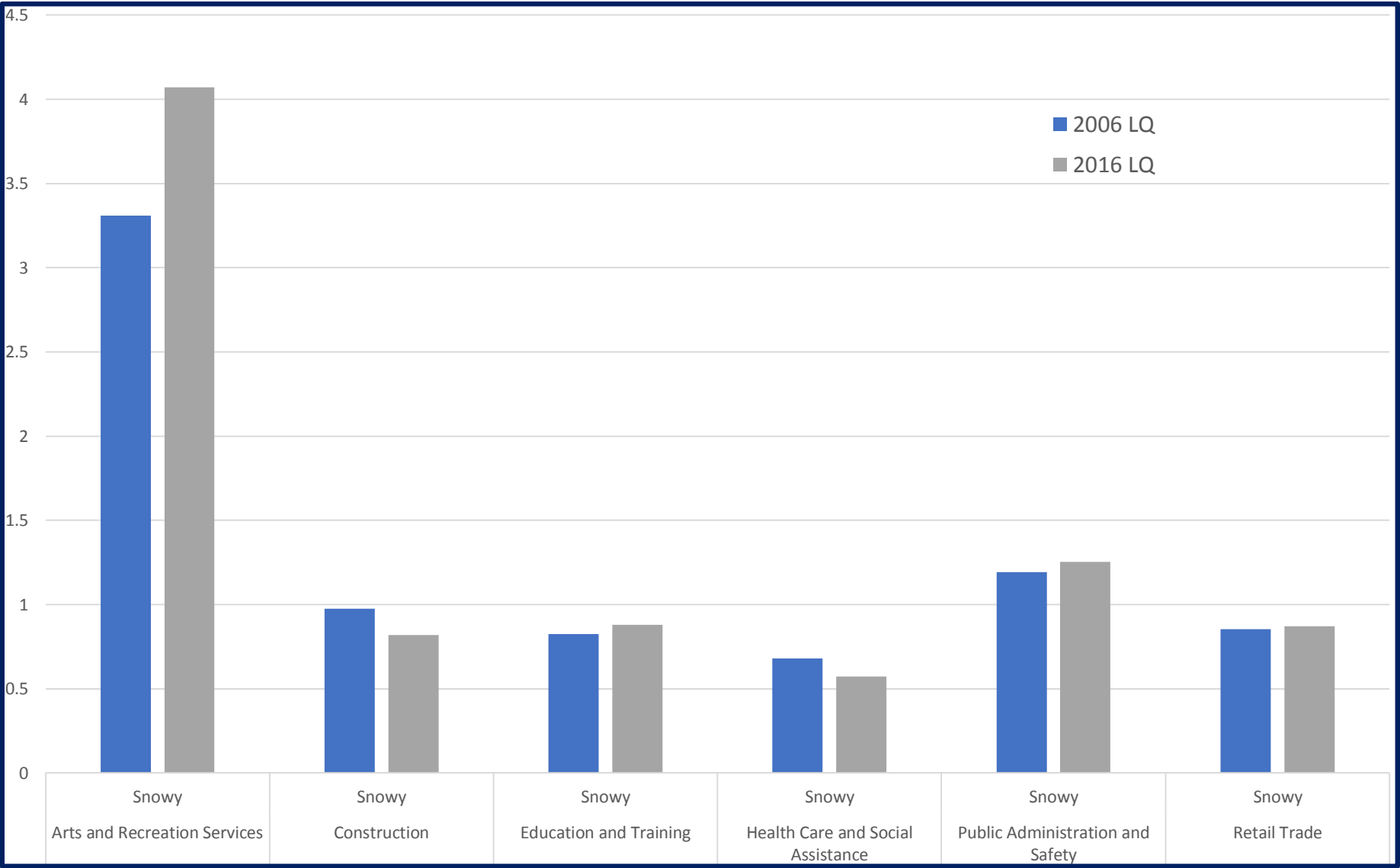
Key sub-industry Specialisations

At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

Taking the scale of employment into account, the most significant sub-industry specialisations include:

1. School Education (ratio 0.9, 490 workers) and Adult, Community and Other Education (ratio 1.5, 100 workers)

2. Sports and Physical Recreation Activities (ratio 6.0, 300 workers), Parks and Gardens Operations (ratio 4.7, 70 workers) and Amusement and Other Recreation Activities (ratio 8.3, 90 workers)

3. Local Government Administration (ratio 1.4, 290 workers), Public Order and Safety Services (ratio 1.0, 160 workers), Defence (ratio 1.6, 140 workers), Central Government Administration (ratio 1.2, 130 workers) and State Government Administration (ratio 1.1, 130 workers)

4. Clothing, Footwear and Personal Accessory Retailing (ratio 1.6, 170 workers) and Recreational Goods Retailing (ratio 1.8, 80 workers)

5. Supermarkets and Grocery Stores (ratio 0.9, 240 workers) and Fuel Retailing (ratio 1.7, 60 workers)

6. Building Installation Services (ratio 0.8, 140 workers), Building Completion Services (ratio 0.8, 120 workers), Residential Building Construction (ratio 0.9, 120 workers), Building Construction (ratio 1.2, 80 workers) and Land Development and Site Preparation Services (ratio 1.3, 70 workers)

7. Hospitals (ratio 0.6, 210 workers)

8. Residential Care Workers (ratio 0.5, 160 workers).

Employment by Industry: Snowy Monaro Compared to Regional NSW 2006-2016

Snowy Monaro Employment by Industry 2016

2016 Location Quotient

Specialised, Declining Employment Industries

Specialised, Employment Growth Industries

Unspecialised, Declining Employment Industries

Potential Emerging Industries

Employment change, 2006-16

Agriculture, Forestry and Fishing

Retail Trade

Wholesale Trade

Professional, Scientific and Technical…

Financial and Insurance Services

Manufacturing

Transport, Postal and Warehousing

Construction

Information Media and Telecommunications

Electricity, Gas, Water and Waste Services

Accommodation and Food Services

Rental, Hiring and Real Estate Services

Public Administration and Safety

Health Care and Social Assistance

Education and Training

Administrative and Support Services

Arts and Recreation Services

-25%   -15%   -5%   5%   15%   25%   35%   45%

Employment by Industry: Strengths and Changes Analysis

Economic change since 2006 has seen both traditional strengths reinforced and the emergence of new opportunities for Snowy Monaro.

The bubble diagram integrates the regional strengths on the previous slides with the absolute scale and relative changes in the number of jobs supported in each industry. The size of each bubble reflects the scale of employment in each industry. The positioning on the diagram reflects the relative change in job numbers in the decade to 2016 and industry ratios. Implications of the diagram can be understood from various perspectives, but might most easily be seen by quadrant.

The upper left quadrant contains one (**red bubble**) industry, Agriculture, Forestry and Fishing, which reflects a regional advantage by employment concentration. These primary activities provide the Region with its second largest source of employment, despite slower growth in employment levels compared to regional NSW since 2006.

The lower left quadrant reflects five (**green bubble**) enabling industries that are not regional specialisations at the industry level.

Each industries experienced slower employment growth compared to regional NSW, and together these industries account for more than 20 per cent of 2016 employment.

The lower right quadrant contains five (**yellow bubble**) unspecialised, potential emerging industries with increases in employment over the decade 2016. While the data does not support a conclusion these industries can be viewed as regional specialisations at the industry level, their rapid growth – of up to 25 per cent in some cases – since 2006 suggests they might emerge as specialisations over time. These industries account for around 23 per cent of 2016 employment.

The upper right quadrant contains six (**blue bubble**) specialised employment growth industries. In most cases, the extent of specialisation is strong – with four of six industries with ratios of 1.5 or more – the extent of growth in many cases is very substantial, with increases of more than 40 per cent in some cases.

In total, almost 40 per cent of all employment relates to this upper quadrant, including:
- Accommodation and Food Services, the largest source of employment for the Region
- Public Administration and Safety, the third largest source of employment for the Region.

Appendix C –

Institutional Audit

Institutional Audit

Institutions play a fundamental role in the economic development process. Before a regional economic development strategy can be formulated, the local institutional capacity must be evaluated. A successful Economic Development Strategy for Snowy Monaro regional economy would be the one that capitalises on the institutional strengths that exist in the Region. This section lists the key institutions in Snowy Monaro Region, as well their role in the economic future of Snowy Monaro.

The Region is fortunate to have a number of private institutions with significant capability and capacity to contribute towards the Region's development.

It is also important to recognise the Region is presently amidst the early stages of organisational change as a result of the council merger process. The new Council faces a considerable institutional challenge in representing and administering its relatively diverse communities and geographies, while supported by a modest population base.

Councils

Snowy Monaro Regional Council was formed in 2016 from a merger of the following councils:

- Bombala Council
- Snowy River Shire
- Cooma-Monaro Shire

Unity of the councils has led to more efficiencies, but the differences between the previous councils regulations has led to issues of the new consensus.

Tourism Snowy Mountains

An independent, not-for-profit organisation recognised by destination NSW as the official Regional Tourism Organisation for Snowy Mountains. Major stakeholders include:

- Snowy Monaro Regional Council
- Snowy Valleys Council
- National Parks and Wildlife Service
- Snowy Hydro Limited

National Parks and Wildlife Centre and Services

Home to Kosciuszko National Park, the largest national park in NSW offering year-round activities. They act as the council for the ski resorts located in the park, Thredbo, Perisher, Guthega etc.

Snowy Hydro Limited

Snowy Hydro is a major employer in the region and provider of the regions electricity. There are 16 power stations, generating 4500GWh on average per annum and have more than 5500MW of generating capacity across New South Wales, Victoria and South Australia.

Regional Development Australia – Southern Inland

Regional Development Australia (RDA) is a partnership between the Australian, state, territory and local governments to develop and strengthen the regional communities of Australia. RDA Committees will work with all three tiers of government, regional business and the wider community to boost the economic capability and performance of their region.

Office of Regional Development – Department of Premier and Cabinet

The Office leads the NSW Government's contribution to making regional NSW a productive place to invest and to produce goods and services, thereby creating jobs and opportunities for regional NSW. It also works to partnership with Ausindustry and NSW Department of Industry.

South East Arts

Snowy Monaro Council is part of the South East Arts which is the regional development organisation for arts and culture. They assist the ongoing development of, and participation in, arts and culture in the Region.

NSW Small Business Commissioner

Provides support services for smaller businesses in the Region. They act as mediation and dispute resolution between smaller businesses and larger ones as well as with the government.

Health

There are two public hospital in Snowy Monaro, Cooma Hospital and Health Service, and a regional hospital in Bombala.

There are no private hospitals in the Region.

Justice

There are multiple police stations located in the Region's towns.

There are local courts in both Cooma and Bombala.

Emergency Services

There are multiple Ambulance Services and SES's located in the Region.

Fire and Rescue NSW are located in Cooma, Jindabyne, Perisher, Thredbo and Bombala with Rural Fire Services in Monaro, Jindabyne Rocky Plains and Colinton Bushfire Brigade.

Higher Education

TAFE Cooma Campus

Cooma Universities Centre - facilitates, delivers, promotes and provides access to university education in regional and rural areas where services may not normally be available to students in a regional setting.

Core Competencies

Core competencies represent the ability of a region to organise and steward its resources to produce goods and services. They refer to the set of skills, technology, resource applications and management unique to that region.

The scores in the chart, right, reflect subjective judgements about the relative competencies of Snowy Monaro. These judgements have been informed by a ranking of the sub-components as either Strong, Average or Weak, considering the quantitative data, stakeholder feedback and insights and institutional evidence of the quality of stewardship.

The competency scores for Snowy Monaro reflect the fact that the Region could not be considered to have any significant deficiencies in organisation or stewardship given the population base and endowments of the region.

Relative to one another, the scores reflect that:
- the Region's greatest strengths lie in its degree of trade orientation and management, infrastructure and adoption of technology by businesses in key sectors. This is mainly associated with timber exports. However, trade orientation of other producers does not meet the levels of other inland agricultural regions.
- key Governance competency challenges relate to the business climate, rate base and regulatory encumbrances
- while acknowledging scope for improvement in transport infrastructure, the Region's extensive built infrastructure complements its natural and cultivated endowments.

Snowy Monaro Core Competencies
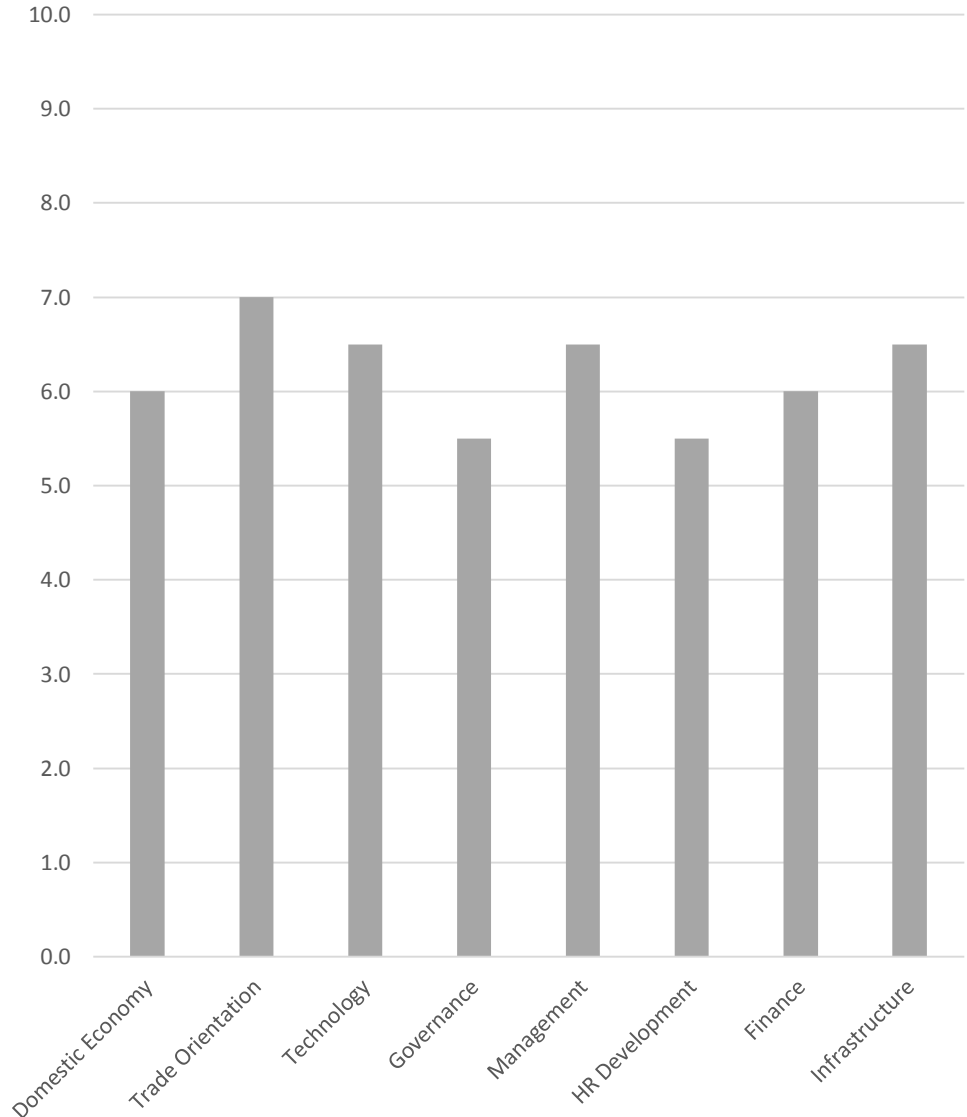
Appendix D –

Infrastructure Audit

Infrastructure Audit

Infrastructure is an important enabler of economic growth. Customers and businesses rely upon the physical and organisational structures and facilities that exist in a region, or that link regions to other parts of the country or globe.

Snowy Monaro Economic Development Strategy considered the opportunities and limitations presented by the infrastructure in the Region.

In many respects, the Region is fortunate to have built infrastructure that complements its natural endowments very well.

However, in some respects the transport and telecommunications infrastructure of the Region is impaired, with the implication that key 'Engines of Growth' industries are not as well connected to their customers as they could or should be.

Roads

The Region is the entrance to the Snowy Mountains via New South Wales, and major links connecting to the Region are:

- Monaro Highway

- Snowy Mountains Highway

Kosciuszko Road provides the major linking within the Region.

Rail

The Skitube – Alpine Railway is a small railway in the Kosciuszko National Park, it offers a seasonal service, primarily for skiers.

Waste facilities

There are five waste management facilities that accepts, recycle, green and general wastes.

Airport

Snowy Mountains Airport, based in Cooma serves as the Region's airport. It has seasonal fluctuations in its use but provides six days a week to and from Sydney.

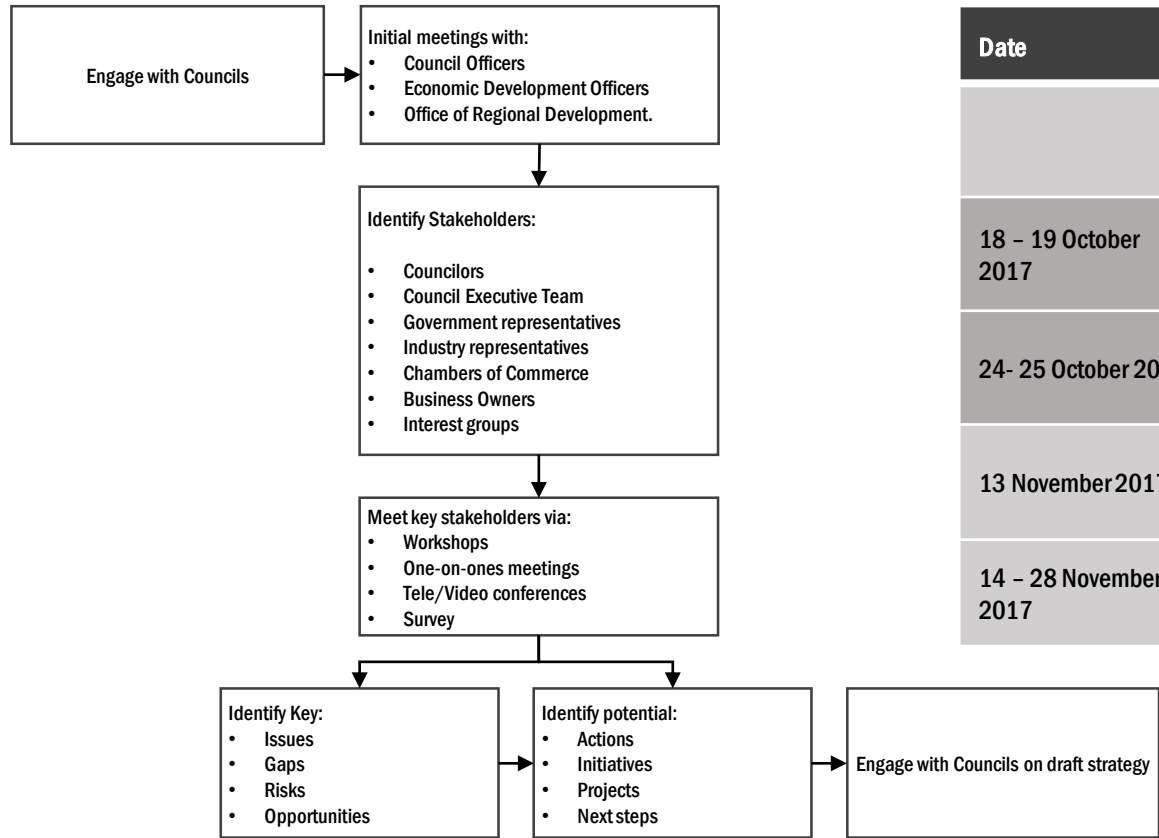There is also a small airport located in Jindabyne.

Energy

Snowy Hydro – Nine hydroelectric dams providing Eastern Australia with renewable energy. Snowy 2.0 is a feasibility study into enlarging water storage in the Scheme.

Cemeteries

Snowy Monaro Regional Council manages a total of 23 cemeteries in the Region.

Appendix E –

Consultation

Consultation Approach

```
┌─────────────────────┐      ┌──────────────────────────────────────┐
│                     │      │ Initial meetings with:               │
│ Engage with Councils│─────▶│  • Council Officers                  │
│                     │      │  • Economic Development Officers     │
│                     │      │  • Office of Regional Development.   │
└─────────────────────┘      └──────────────────────────────────────┘
                                              │
                                              ▼
                             ┌──────────────────────────────────────┐
                             │ Identify Stakeholders:               │
                             │                                      │
                             │  • Councilors                        │
                             │  • Council Executive Team            │
                             │  • Government representatives         │
                             │  • Industry representatives          │
                             │  • Chambers of Commerce              │
                             │  • Business Owners                    │
                             │  • Interest groups                   │
                             └──────────────────────────────────────┘
                                              │
                                              ▼
                             ┌──────────────────────────────────────┐
                             │ Meet key stakeholders via:           │
                             │  • Workshops                         │
                             │  • One-on-ones meetings              │
                             │  • Tele/Video conferences            │
                             │  • Survey                            │
                             └──────────────────────────────────────┘
```

Identify Key:	Identify potential:	
• Issues	• Actions	Engage with Councils on draft strategy
• Gaps	• Initiatives	
• Risks	• Projects	
• Opportunities	• Next steps	

Key Dates

Date	Stakeholder
	Individual inception meeting with Councillors / Council Executive Team
18 – 19 October 2017	Stakeholder engagements – 1:1 meetings, collective meetings and teleconferences
24- 25 October 2017	Stakeholder engagements – 1:1 meetings, collective meetings and teleconferences
13 November 2017	Further stakeholder engagements: - 1:1 meetings and teleconferences
14 – 28 November 2017	Economic Development Survey

Consultation Outcomes

Key Opportunities
- Improved national, state and regional road corridor productivity.

- Development of Snowy Hydro 2.0.

- Collaborate with Country Universities Centre and Cooma TAFE.

- Revise Mount Mount Kosciuszko Management Guidelines.

- Meeting emerging residential and industrial land use needs in a timely way.

- Timely processing of development applications to foster business growth.

- Accommodate an ageing population.

- Embracing and celebrating Snowy Monaro's environmental heritage.

- Expand the diversity of businesses locally to broaden employment opportunities.

Key issues, Gaps and Risks
- Lost opportunities from delays.

- Availability of skills, especially skilled trades.

- Availability of housing.

- Ability to retain workers who move here from outside the Region.

- Energy – costs and potential network planning issues (brownouts).

- Freight costs.

- 'Last mile' links for local roads and freight corridors.

- Improve road safety for local residences and visitors.

- Communications problems holding back farm productivity.

- Frequent public transport systems.

- Providing drinkable water and essential waste waterway and sewerage services.

- All year-round tourism opportunities.

Potential Actions
- Identify and cost key road network "last mile" constraints and options for local to arterial road connections.

- Affordable housing.

- Feasibility and Viability Study of Cooma and Jindabyne Airports, and Rail Connection.

- Needs and Preparation Study for Snowy Hydro 2.0.

- Investigate benefits of adventure sports tourism opportunities.

- Digital technology black spots.

- Collaborate with local industries and training providers in reviewing key training gaps in regional economy.

- Speed of approvals to provide investor confidence and reduced investment certainty.

- Relationships with State agencies.

- Reducing costs of regulation.

- Knowledge of / access to Government programs.

Consultation

Various stakeholder consultations were conducted to identify and understand key issues in Snowy Monaro. Addressing these issues assisted in defining the key priority actions and projects that will stimulate the economic development in Snowy Monaro. These issues include:

Better Connectivity

- Heavy vehicles are driving through residential and tourist areas due to lack of heavy vehicle route in Snowy Monaro Region. Allowing for heavy vehicle route will make Snowy Monaro's roads safer and provide cost efficient connections for freight movements.

- Need to duplicate and/or increase overtaking lanes on the Monaro Highway. This is the only major road connecting Snowy Monaro and Canberra. During peak season it creates traffic congestion with holiday makers and makes the highway unsafe during emergency situations such as bush fire.

- Improve alternative connection between Snowy Monaro and Canberra by asphalting the remaining unsealed section of the Bobeyan Road. This will shift traffic and reduce congestion on the Monaro Highway.

- Improve road safety for local residences and visitors by addressing "last mile" on local roads.

- Allowing for more frequent public transport systems. Connecting regional towns internally is a key issue for regional areas in NSW. Due to lack of suitable transport system, the transport costs are high. This discourages jobs seekers to pursue employment or training opportunities.

- Mobile blackspots and lack of internet reliable and fast coverage in Snowy Monaro. Linking the Region to global market would drive innovative start up businesses to develop and existing business to grow.

- Air service timetable needs improvement. Most drive to Canberra Airport for wider connection to other major cities in Australia.

Harnessing Inputs, Skills and Jobs

- Skill labour shortage - local employers are struggling to recruit to fill skilled positions.

- Training courses are not available close to home or workplace requiring staff or potential job seekers to travel outside the Region.
- Sourcing, training or developing local workers to fill key operational needs of the businesses in the Region.

- Attracting skilled professional is a key challenge. Enabling infrastructure and services are not readily accessible or available these include: affordable housing, education and health services, and social recreational facilities and services.

- Broadening and generating productive and meaningful employment opportunities for the people in the Region.

- Ensure economic opportunities are distributed across the Region.

- Ensuring the businesses of the Region have a sufficient and secure supply of land, water and energy to make the most of the opportunities.

Consultation

- Upgrading and developing new accommodation for visitors.

More Liveable Communities

- Brown drinking water is a deterrent to skilled workers moving to Bombala.

- Shortage of attractive housing is a barrier for attracting families and workers to Snowy Monaro Region and putting pressure on rental price for local residences.

- Shortage of winter season worker accommodation.

- Making more land available for residential development to ease housing supply pressure.

- Meeting community expectations for high quality health and education services.

- Servicing a growing, ageing population cost effectively without compromising quality or care.

- Providing drinkable water and essential waste waterway and sewerage services in Snowy Monaro.

- Ensuring that assets keep up with standards and support modern and future community.

- Improving cultural, sporting and other social amenities for the people in the Region

- Keeping local communities safe by limiting vehicle speed limit – Adaminaby currently has 80km/hr road speed limit rather than 50km/hr.

New Ideas

- Inconsistent and lengthy development consent process that create investment uncertainty.

- Complying with various regulatory requirements from various levels of government and government agencies.

- Lack of coordination and integrated services across different level of government.

- Finding a balance between environmental sustainability and development for economic growth.

- Need to review and update Mount Kosciuszko National Park Management Plan to expand and create environmentally friendly tourism opportunities. The Management Plan was last updated in 1990's.

- Offer all year-round tourism activities and support services.

- Leverage Snowy Hydro 2.0 to provide long term benefits to the Region

- Create all year-round tourism opportunities by:
  - reviewing Head Lease arrangement for Perisher with a more commercial focus approach to management.
  - optimising the use of Lake Jindabyne and Lake Eucumbene
  - improving commercial operation during summer
  - allowing for private investment to cultivate tourism products

- Warming climate reduces snow depth, cover and duration, putting future winter tourism at risk. The industry's ability to create artificial snow will also be challenged as it becomes less efficient as humidity rises.

- Governance arrangement of Perisher Ski Resort needs revision. There were no additional parking space or new accommodation built and infrastructure upgrade in past 30 years. As a result, Perisher is unable to support growing number of tourists and changing demand for different tourism products.

Regional Issues

Connectivity aim

- An integrated and connected Snowy Monaro through road, rail, air and digital infrastructure to achieve logistics efficiencies, maximise existing investments and facilitate new opportunities.

- Supporting businesses, employees and residents by providing:
  - better transport connection to a wider destination
  - safe and reliable roads
  - efficient road networks
  - fast and reliable telecommunication coverage and network

Efficient and reliable movements of goods and people are crucial as it support and promote liveability and employment opportunities for Snowy Monaro

Key regional issues

- Heavy vehicles are driving through residential and tourist areas due to lack of heavy vehicle route in Snowy Monaro Region. Allowing for heavy vehicle route will make Snowy Monaro's roads safer and provide cost efficient connections for freight movements.

- Improve road safety for local residences and visitors by addressing "last mile" on local roads.

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- Mobile blackspots and lack of internet reliable and fast coverage in Snowy Monaro. Linking the region to global market would drive innovative start up businesses to develop and existing business to grow.

- Air service timetable needs improvement. Most drive to Canberra Airport for wider connection to other major cities in Australia.

Case study – Heavy Vehicle Route Bombala

The main street of Bombala is frequently used by heavy freight vehicles carrying agricultural goods, logs, and defence materials for the Royal Australian Navy. Over 100 trucks drive along the main street per day to deliver logs and pick up goods from the local timber mill.

The volume of heavy vehicle movements through Bombala is expected to increase with the upgrade of Port of Eden. The major users of the port are the Royal Australian Navy, wood chippers, cargo ships for logs and cruise ships.

Recently, the main street of Bombala was temporarily closed and its roundabouts dismantled and modified to allow heavy vehicles carrying disassembled wind turbines to drive through Bombala from the Port of Eden.

While the Wind Turbine company paid for the dismantlement and replacement of the roundabouts, nevertheless, the local residents and businesses were inconvenienced for the duration of the movement.

Construction of an alternative heavy vehicle route bypassing the main street of Bombala will reduce heavy vehicle movements around the town centre.

The heavy vehicle route will:

- improve road safety for local residents

- open up the main street for better pedestrian usage

- improve the amenity of Bombala and allow the Council to proceed with the Bombala CBD beautification Project

- improve traffic flow for local road users.

The Snowy Monaro Regional Council has identified an alternative heavy vehicle route and has conducted preliminary engineering and costing studies.

Regional Issues

Inputs, Skills and Jobs aim

To Increase Snowy Monaro's job density, diversity and opportunity.

Support businesses and young workers by:

- improving depth and breadth of skilled labour pool and workers

- equipping young workers with qualifications and experiences they need to participate and support growing economic activity

- facilitating infrastructure needs to enable growth and investment opportunities

Key regional issues

- Skill labour shortage - local employers are struggling to recruit to fill skilled positions.

- Training courses are not available close to home or workplace requiring staff or potential job seekers to travel outside the Region.

- Sourcing, training or developing local workers to fill key operational needs of the businesses in the Region.

- Attracting skilled professional is a key challenge. Enabling infrastructure and services are not readily accessible or available these include: affordable housing, education and health services, and social recreational facilities and services.

- Broadening and generating productive and meaningful employment opportunities for the people in the Region.

- Ensure economic opportunities are distributed to across full diversity of people in the Region.

- Ensuring the businesses of the Region have a sufficient and secure supply of land, water and energy to make the most of the opportunities.

- Offering all year-round tourism activities and support services

- Upgrading and developing new accommodation for visitors.

Case study – Country Universities Centre

The Country Universities Centre was established in 2013 in Cooma.

The Centre provides regional students opportunity to participate in higher education in regional towns which otherwise lack suitable alternative local higher educational opportunities.

The Centre establishes partnerships with universities, local government, registered training organisations and local employers to provide enhanced support and a broader network of opportunities for students and communities.

The aims of the Centre are to:
- improve regional student participation in higher education
- reduce economic and intellectual migration of regional youth
- improve flow-on effects on economic output and productivity
- improve the number of skilled labour pool in regional NSW

.

Country Universities Centre is an opportunity for regional students and businesses to:
- collaborate together to bridge the skills shortage gaps in regional NSW
- align local skills need with local training courses
- provide a pathway for regional students to a meaningful employment
- incubate innovative set up businesses in regional NSW.

In its first four years of operation, the Cooma Universities Centre has over 175 registered students completing undergraduate and postgraduate degrees at 28 Australian universities.

The Centre has plans to establish a further eight Centres in regional NSW.

Regional Issues

Liveability aim

- Making Snowy Monaro a desirable place to live and work will enable economic growth.

- Communities across Snowy Monaro are connected, liveable and resilient.

- Supporting families and young workers to come and stay, by providing:
    - a range of housing options
    - access to essential infrastructure services
    - opportunities for economic prosperity
    - better quality of life
    - Access to affordable social activities and amenities

.

Key regional issues

- Shortage of attractive housing is a barrier for attracting families and workers to Snowy Monaro Region and putting pressure on rental price for local residences.

- Shortage of winter season worker accommodation.

- Making more land available for residential development to ease housing supply pressure.

- Meeting community expectations for high quality health and education services.

- Servicing a growing, ageing population cost effectively without compromising quality or care.

- Providing drinkable water and essential waste waterway and sewerage services in Snowy Monaro.

- Ensuring that assets keep up with standards and support modern and future community.

- Improving cultural, sporting and other social amenities for the people in the Region

- Keeping local communities safe by limiting vehicle speed limit – Adaminaby currently has 80km/hr road speed limit rather than 50km/hr.

Case study – Liveablility

Dongwha Timbers employs about 140 local full-time staff. The company has plans to further expand its operation to produce value-adding timber products. However, the company face a significant challenge of recruiting labour and skilled professionals.

A recent recruit resigned after six months due to lack of attractive housing, inadequate health and school services, and limited social activities for the family to enjoy. Over the last four year, over 20 workers resigned from the company sighting the above reasons.

To secure workers required for current and future operations, Dongwha purchased and leased over 12 properties to house it workers, provides sponsorship to local events like the Bombala Cup, provides funding for local playgrounds and provides timber products to improve and upgrade the Bombala Exhibition Ground.

Improving Snowy Monaro's liveability by leveraging its endowments and collaborating with companies like Dongwha will create an environment where families can live and work.

Regional Issues

New Ideas aim

- Governing authorities to create new and innovative partnerships and collaborations with the private and non-government sectors to reduce costs, share delivery risks, facilitate timely responses to market opportunities.

- Innovation will support businesses and residents by:
    - applying a balanced and common-sense approach to finding a win–win solution
    - sharing common desire for Snowy Monaro
    - achieving an efficient and effective delivery of investments

Key regional issues

- Inconsistent and lengthy development consent processes that create investment uncertainty.

- Complying with various regulatory requirements from various levels of government and government agencies.

- Lack of coordination and integrated services across different level of government.

- Finding a balance between environmental sustainability and development for economic growth.

- Heavy handed regulations without notice of cautionary advice or warning notices.

- Need to review and update Mount Kosciuszko National Park Management Plan to expand and create environmentally friendly tourism opportunities. The Management Plan was last updated in 1990's.

- Create all year-round tourism opportunities by:
    - reviewing Head Lease arrangement for Perisher with a more commercial focus approach to management.
    - optimising the use of Lake Jindabyne and Lake Eucumbene
    - improving commercial operation during summer
    - allowing for private investment to cultivate tourism products

- Warming climate reduces snow depth, cover and duration, putting future winter tourism at risk. The industry's ability to create artificial snow will also be challenged as it becomes less efficient as humidity rises.

- Governance arrangement of Perisher Ski Resort needs revision. There were no additional parking space or new accommodation built and infrastructure upgrade in past 30 years. As a result, Perisher is unable to support growing number of tourists and changing demand for different tourism products.

Appendix G –

Focus Opportunities

Focus Opportunity – Getting the most from Snowy 2.0

Snowy 2.0 will stimulate Snowy Monaro's economy.

One of Snowy Monaro's key endowments is the Snowy Hydro Scheme which began in 1949. The original Snowy Hydro Scheme saw the population of Cooma increase almost tenfold, roads were built to connect the Region, and service industries moved into the Region.

Snowy 2.0 is an expansion of the existing scheme to create a battery-like water storage that can be used to provide an affordable source of energy. Snowy 2.0 will increase energy generation capacity up to 2,000 megawatts. This translates to about 350,000 megawatt hours of energy storage, or enough electricity to power three million homes for a week.

The project involves underground excavation and tunnelling, surface works in several locations and a number of supporting works such as building or upgrading access tracks and roads and electricity connections to construction sites.

Temporary housing will be constructed to provide accommodation for construction workers close to the work sites. It is expected Snowy 2.0 will take six years to complete.

Snowy Hydro estimates that Snowy 2.0 will create up to 5,000 direct and indirect jobs across the Region over the construction period.

Snowy Hydro estimates that the scheme will generate at least 5,000 jobs in NSW, and it is expected that most of jobs will be in the Snowy Monaro Region. Around 350 people are employed for Snowy 2.0 preparatory work. It is likely there will be additional jobs in local service industries and demand for essential infrastructure to support eventual growth in population in the region.

Snowy Monaro's challenge is to ensure the long-term benefits of Snowy 2.0 are maximised and any impacts on the Region, its people and visitors are captured and appropriately managed.

There are a number challenges for Snowy Monaro:
- Ensuring that the long-term benefits of the Snowy 2.0 are maximised and avoid the "sugar hit" syndrome of the original Snowy Hydro Scheme, where lack of planning saw the region unable to retain most the workers and transit to a strong and sustainable region
- Minimising disturbances and impacts to local residents and tourists, due to the nature of the works being undertaken during construction and for safety reasons, public access will be restricted in some areas of Kosciuszko National Park while works are underway

Focus Opportunity – Getting the most from Snowy 2.0

- Enhancing road safety by re-routing trucks and equipment away from population centres. Road management would be most critical during school holidays and peak winter seasons, where winter tourism bring significant number of tourists to the Region causing traffic congestion

- Retaining skilled workers and families that have relocated to work on the Snowy 2.0

- Improving existing planning and development application process to meet the significant demand for temporary accommodation across various areas of Snowy Monaro

- Ensuring essential services provided by Snowy Monaro Regional Council are capable of serving the increased in number of people in Snowy Monaro. These include maintaining council owned assets, council waste management services, water supply and local road maintenance

- Ensuring education and health services are ready to support increase in demand

- Snowy Monaro Regional Council is adequately resourced to meet community expectations for high quality services.

The Snowy Monaro Regional Council will need to prepare itself for the arrival of workers and capital investment entering the Region.

To ensure Snowy Monaro makes the most of the Snowy 2.0 investment and prepare the Region, Snowy Monaro Regional Council will need to be involved in the project as a major stakeholder. This will ensure the Council is aware of potential issues and benefits and take appropriate actions resolve issues and realise those benefits.

These preparation for the Snowy Monaro Regional Council include:

- Needs and Preparation Study for Snowy 2.0

- Snowy 2.0 Economic Needs and Impact Study

- Snowy Monaro Regional Freight and Traffic Study

- Regional Roads Connections and Condition Study

- Industrial Land Use Study to encourage further investment in industrial land

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Focus Opportunity – Getting the most from Snowy 2.0

- Snowy Monaro Health Strategy

- Water and Sewerage Treatment System in Jindabyne and Sewerage connections in Adaminaby

- Investigate requirements for deemed consent development assessment processes

- Joint Snowy Monaro, Private and Not-for-Profit Sector Taskforce to deliver social infrastructure and services.

Snowy 2.0 is a highly significant opportunity for Snowy Monaro. With effective preparation, Snowy Monaro will be able to support local jobs creation and boost local economic activities.

Focus Opportunity – Securing Year-Round Tourism

Tourism plays a highly significant role in Snowy Monaro's economy.

Snowy Monaro's endowments of the Snowy Mountains, surrounding lakes, and specialisation of tourism operators underpin its tourism capability.

Long known as a snow holiday destination, tourism plays a highly significant role in Snowy Monaro's economy. In 2016, over one million people visit the Snowy region and spend $521 million in total*. Visitor expenditure is heavily concentrated in a few industries:
- $288 million on accommodation and food
- $101 million on transport
- $75 million on shopping.

Currently, 394 local businesses make up the backbone of Snowy Monaro's visitor economy.

Snowy Monaro has the opportunity to further develop itself as a year-round tourism destination through increased summer activities and events.

This emerging opportunity for the Region will potentially allow a new inflow of tourists to support and increase economic activity in the traditional off-season of the Region. There have been recent pushes for the Region to utilise its natural endowments and further develop itself as a year round destination.

A scenario modelling was conducted to demonstrate the significance of offering all year tourism products in Snowy Monaro Region.

Based on the scenario modelling, an increase in the number of visitors by 10,000 will add about $170 million to Snowy Monaro's economy over a 20 year period.

If Snowy Monaro could increase visitation by 10 per cent from 2016 level by offering summer related tourism, additional 100,000 visitors means $1.7 billion to Snowy Monaro's economy over 20 years.

Year-round tourism products require coordinated effort

To realise the above economic opportunity, a number of key challenges need addressing.

- Improving development consent process as to assist tourism investment opportunities. Delays and inconsistencies discourage private sector investment

- Developing and marketing all year round tourism products especially during summer

- Improving air and road transportation between Snowy Monaro Region. The Monaro Highway is the only major highway connecting the area with Sydney and Canberra and the Snowy Mountain Airport provides limited services to Sydney.

- Upgrading accommodation options including five star conference facilities to capture corporate businesses. There have been no new accommodation providers in Perisher Ski Resort in the past 30 years.

- Improving compliance with various regulatory requirements from various levels of government and government agencies. For example, the lakes around Jindabyne are managed by the Snowy Hydro Scheme and Mount Kosciuszko and its surroundings including roads within the national parks are managed by National Parks NSW. Each authority has different regulations limiting tourism development opportunities.

Source: Tourism Research Australia

Focus Opportunity – All Year-Round Tourism

There are potential strategies to address the challenges and realise the opportunity.

Recently, Snowy Monaro Region has been pursuing summer related adventure activates and tourism opportunities. These include opening a mountain bike trials, developing great walks in Jindabyne and seeking to introduce rail trail in the Region.

There are other strategies such as Destination Management Plan 2018-2020, the to support and enable all year round tourism opportunities.

Additional strategies were identified through stakeholder consultation includes:

- Introduce deemed consent development assessment processes

- Introducing Head Lease arrangement with Perisher Ski Resort will encourage private sector investment and development. Currently, only Thredbo has a head lease arrangement.

- Reviewing and updating Mount Kosciuszko National Park Management Plan to expand and create environmentally friendly tourism opportunities. The Management Plan was last updated in 1990's.

- Feasibility and Viability Study of Snowy Mountain Airport and Jindabyne Airstrip

- Engage with airline industry to identify key requirement to improve passenger air services

- Research to investigate how to support and realise the benefits of recreational fishing tourism

- Opportunity to promote historic/cultural related tourism by opening up historic parts of the national parks

- Developing a year-round Tourism Strategy:
    o Accommodation upgrade
    o Tourism events and activities creation and marketing
    o 5 Star Accommodation and Conference facility
    o Lake Eucumbene and Lake Jindabyne Tourism Premium tourism product development
    o Tourist rail trails on disused rail corridor

The above strategies will enable Snowy Monaro to realise the economic potential derived from developing year-round tourism opportunities.

Focus Opportunity - Ongoing Population Growth

Scenario modelling suggests ongoing population growth in the NSW and Victoria could increase Snowy Monaro output by more than $103 million over time.

To help provide an indicative illustration of the potential significance of population growth in an adjoining region, Corview commissioned Cadence Economics to undertake computable general equilibrium modelling of different population growth scenarios.

The scenario modelling assumed 1.5 per cent in population growth for New South Wales and Victoria. Under this scenario, Cadence Economics' modelling suggests, in aggregate, the additional activity in Snowy Monaro economy over time might total more than $103 million.

Wholesale Trade and Tourism industries are to benefit the most from New South Wales and Victoria's population increase.

The Wholesale Trade industries estimates to contribute additional $50.3 million to the economy. While the Tourism industries are expected to contribute $14.1 million to Snowy Monaro's economy.

Accumulated Projected Output ($M)
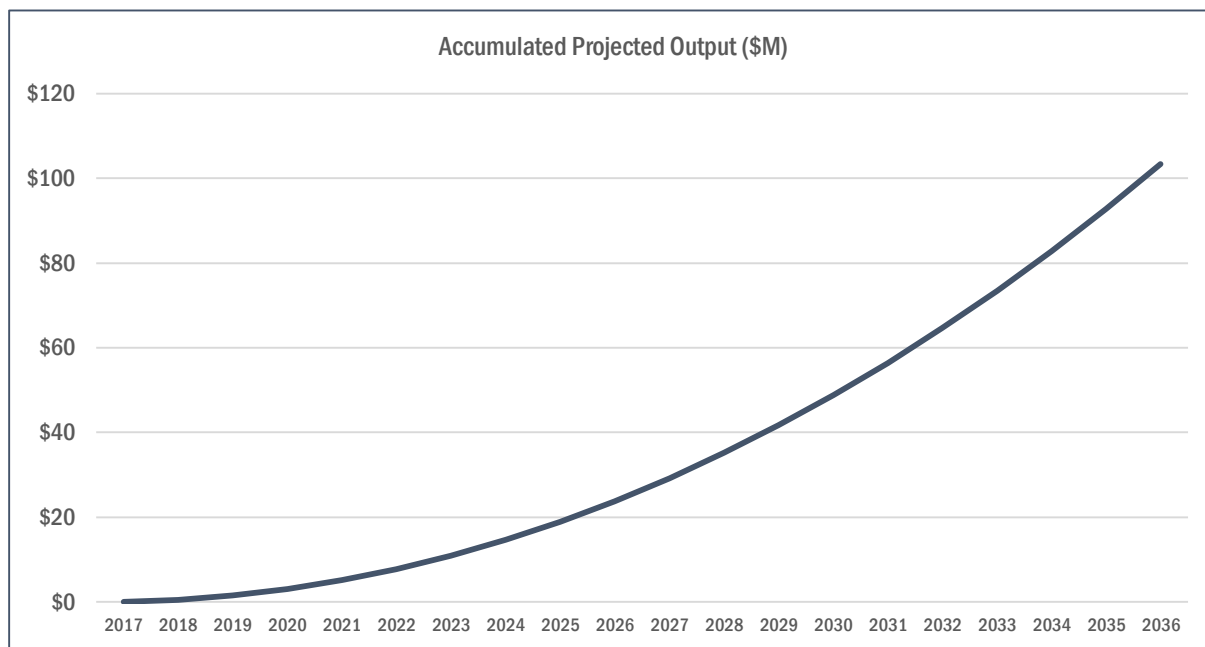
While this is only a single scenario, the modelled outcomes reinforce the potential of pursuing enabling strategies like:
- Improved national, state and regional road corridor productivity

- Realise better and safe integrated road network

- Improved regional, national and global connections for people and freight

- Expand the diversity of businesses locally to broaden employment opportunities

- Research to investigate how to support and realise the benefits of recreational fishing tourism

- Opportunity to promote historic/cultural related tourism by opening up historic parts of the national parks

- Investigate benefits of adventure sports tourism opportunities

Appendix H –

The Building Blocks of Economic Growth

The Building Blocks of Economic Growth

Promoting economic growth

The role of our regions

In an environment where cities continue to strengthen their position as economic engines, the question of what regions need to do to ensure that they continue to contribute to the nation's wealth and remains relevant.

Promoting regional economic development is at the heart of what this Strategy seeks to achieve. Regional economic development seeks to expand the value and capabilities of existing businesses, and facilitate the growth of new businesses. In turn, the additional activity generated by businesses should increase the number of jobs available as well as the earnings of employees.

There are uneven levels of growth across the regions in NSW. Some regions are growing strongly both in terms of population and economic opportunity. However, some regional communities face great challenges in terms of population decline, structural change, distance, and the impact this has on service delivery, infrastructure investment, and cultural and social development.

The Strategy outlines tailored strategies to address the specific priorities of the region to help industries to thrive, leading to strong employment growth and strong regional economy and future prosperity.

The "building blocks" of economic development

Many factors contribute to the economic potential of a region.

Some factors are inherent advantages and endowments, like geography or other features of the natural environment, that can be difficult to influence through policies and investments. But in many other cases, there is much governments can do to enhance their advantages and endowments and provide stronger enabling conditions for greater private investment and initiative.

A key step towards a coherent economic strategy is identifying what these 'building blocks' for growth are, as set out left. These enabling keystones are interrelated, and can be locked in together through a credible economic plan, consistent with the identified strengths, endowments and opportunities of a region.

Some of the key ingredients

At a most basic level, economic development can be achieved and enhanced through one of the following three 'P's:
- More People, which increases the size of the local market
- More Participation to increase the size of the labour pool
- Higher Productivity, to increase the value add each worker delivers.

Targeted planning and investment

Increasing the three 'P's is a challenge in regional areas. Often, all three drivers are moving in the wrong direction. Increasing these 'P's in an efficient and effective means of investments to be targeted into the right areas.

Research undertaken by the Department of Premier and Cabinet - Centre for Economic and Regional Development indicates the economic development primers work best where they promote existing strengths linked to local endowments.

Increasing global competition means industries without a comparative advantage from existing activities or existing resources are less likely to succeed.

This Strategy therefore places a high emphasis on focusing on areas that bolster existing strengths rather than targeting investments in speculative areas that are yet to be proven. Investment must consider improvements in the Region that are sustainable and equitable.
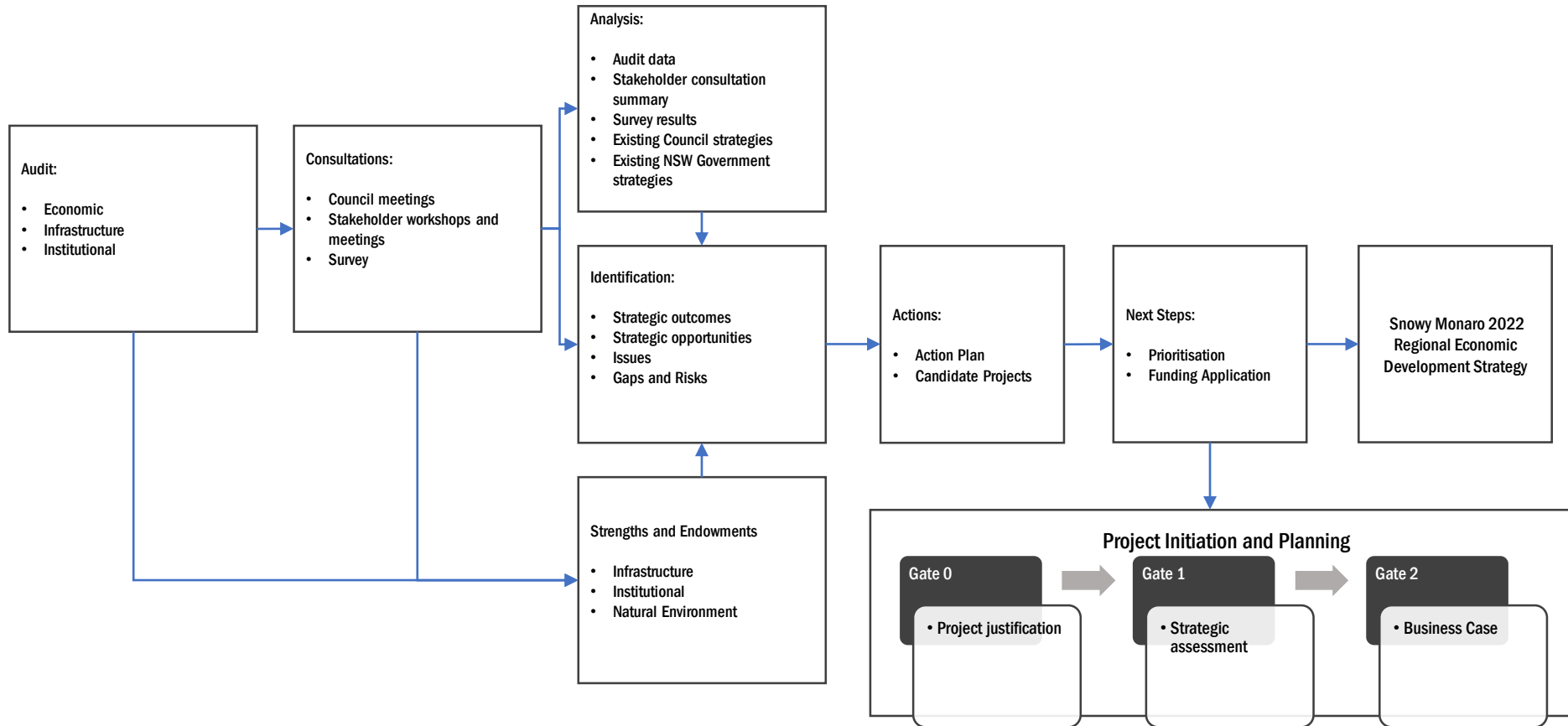
Improving standards of living across regional communities and ensuring that the region's economic base is resilient and adaptive to change are also important considerations. Therefore, this Strategy considers measures that deliver improvements in the four key strategic outcomes:

- Connectivity

- Inputs, Skills and Jobs

- Liveability

- New Ideas

Quality of Governance and Institutions

Competition

Private Initiative and Enterprise

Population

Market Size

Innovation and adoption of technology

Connections to outside markets and Ideas

Infrastructure and Natural Resources

Geography and Agglomeration

Regulatory and Investment Climate

Productivity

People, skills and social connections

Quality of Government Services

Participation

Specialisation

Appendix I –

Methodology

Snowy Monaro - Regional Economic Development Strategy Methodology

Audit:
- Economic
- Infrastructure
- Institutional

Consultations:
- Council meetings
- Stakeholder workshops and meetings
- Survey

Analysis:
- Audit data
- Stakeholder consultation summary
- Survey results
- Existing Council strategies
- Existing NSW Government strategies

Identification:
- Strategic outcomes
- Strategic opportunities
- Issues
- Gaps and Risks

Strengths and Endowments
- Infrastructure
- Institutional
- Natural Environment

Actions:
- Action Plan
- Candidate Projects

Next Steps:
- Prioritisation
- Funding Application

Snowy Monaro 2022 Regional Economic Development Strategy

Project Initiation and Planning

Gate 0
- Project justification

Gate 1
- Strategic assessment

Gate 2
- Business Case

KEY TASKS AND STEPS IN REGIONAL ECONOMIC DEVELOPMENT STRATEGY DEVELOPMENT
- Undertaking economic, infrastructure and institutional audits and integrating them into regional strengths and endowments
- Review existing strategies to account for current policy directions and shape strategic themes for this Strategy
- Consulting with stakeholders to identify current day and future strategic needs, issues, gaps, risks and opportunities
- Analyse and identify strengths and endowments when considering the strategic objectives and opportunities
- Identify strategies and actions that respond to the region's strategic economic development needs
- Actions and projects are assessed for Project Initiation and Planning

Appendix J –

Actions

1. Develop the Region's Year-Round Tourism Offering and Accessibility from Major Markets

Strategic Context

Snowy Monaro's combination of built and natural endowments in ski fields, mountainous terrain, waterways and accommodation support a signature specialisation in tourism. For a Region with a population of a little more than 20,000, tourism contributes a remarkable amount to activity, income and employment across the Region, especially in Jindabyne and its adjoining ski fields.

Compared to other regions focused on winter sports however, Snowy Monaro presently offers only a limited amount of activity outside of ski season. The first-order priority for the Region's tourism should be further developing off-peak offerings like mountain biking, bush walking and fishing, which if successful should also improve service availability and viability, and make it easier to retain staff permanently and avoid some present difficulties in sourcing staff. A secondary priority is improving connections to major markets like Sydney, Canberra and Brisbane, and increase the supply of worker accommodation. When planning for expansion in tourism the Region needs to ensure it does not negatively impact on its environmental and residential amenity, and its infrastructure can cater for seasonal demands.

Infrastructure Priorities

Active, adventure and nature-based tourism infrastructure and upgrade of Jindabyne Airport

Opportunities	Early Stage Actions	Candidate Projects

• Make the most of Snowy Monaro's natural endowments for all year-round tourism opportunities.	• Develop and implement a region wide Year-Round Tourism Strategy:
	  • Mountain Bike and Iconic Walking Trails
	  • Lake Eucumbene and Lake Jindabyne mountain biking trails
	  • Rail trails on the disused rail corridor
	  • Heritage, cultural and agri-tourism.
		• Bundian Way Walking Track
		
		• Mountain bike trails
		
		• Upgrade of Jindabyne Airport

• Facilitate private investment to cultivate tourism products.	• Work with the National Parks and Wildlife Service to investigate opportunities to open up historic parts of the national parks.	
• Review the efficiency of connections to capital city markets.	• Support revision of the ski resorts Head Lease arrangements to promote growth in year-round tourism.	
	• Investigate recreational fishing and adventure sports tourism opportunities.	
	• Further develop the Bundian Way walking track concept.	
	• Provide greater access to indigenous art, cultural and business opportunities.	
	• Investigate opportunities to grow the day-trip/short-stay market of Canberra and the South Coast.	
	• Engage with airlines to identify opportunities to improve passenger services at both Cooma and Jindabyne Airports.	
	• Undertake a feasibility study into re-establishing rail connections to capital city markets.	

Action Plan

Develop the Region's Year-Round Tourism Offering and Accessibility from Major Markets

Strategic Opportunities	Actions	Timeframe

• **Make the most of Snowy Monaro's natural endowments for all year-round tourism opportunities**
 	
• **Facilitate private investment to cultivate tourism products**
	• Develop and implement a region wide Year-Round Tourism Strategy:
	
	   • Mountain Bike and Iconic Walking Trails
	
	   • Lake Eucumbene and Lake Jindabyne mountain bike trails
	
	   • Rail trails on the disused rail corridor
	
	   • Heritage, cultural and agri-tourism.
	
	• Work with the National Parks and Wildlife Service to investigate opportunities to open up historic parts of the national parks.
	
	• Support revision of the ski resorts Head Lease arrangements to promote growth in year-round tourism.
	
	• Investigate recreational fishing and adventure sports tourism opportunities.
	
	• Further develop the Bundian Way walking track concept.
	
	• Provide greater access to indigenous art, cultural and business opportunities.
	
	• Investigate opportunities to grow the day-trip/short-stay market of Canberra and the South Coast.
		December 2019

• **Review the efficiency of connections to capital city markets**	• Engage with airlines to identify opportunities to improve passenger services at both Cooma and Jindabyne Airports. • Undertake a feasibility study into re-establishing rail connections to capital city markets.	December 2020

2. Cultivate the Region's 'Engines of Growth' Specialisations in Agriculture, Forestry and Wood Products

Strategic Context

The Snowy Monaro Region is marked by extensive tracts of land that contribute to the Region's economy through significant specialisations in agriculture and forestry. In Bombala, local wood supply has also supported extending the supply chain within the Region into wood products and potentially support expansion opportunities in coming years.

These specialised industries are relatively mature and require modest levels of government support. However, a focus area for assisting the further development of industry is in the quality of connections to market and institutional linkages that help see opportunities seized. For example, truck productivity is constrained by limitations of the road network, affecting wood supply locally and to mills in Tumut. The Region is also close to gateways to national and international markets in the form of the Port of Eden and Canberra Airport. The Region should also look to foster closer institutional relationships with both the Port and Airport to ensure emerging opportunities in external markets are identified and acted on rapidly.

Infrastructure Priorities

Heavy Vehicle Route in Bombala

Opportunities	Early Stage Actions	Candidate Projects
• Secure reliable, high capacity digital and mobile connections.	• In collaboration with the private sector, audit digital connectivity blackspots.	• Heavy Vehicle bypass in Bombala
	• Undertake a Regional Freight and Traffic Study.	• Heavy Vehicle Turning, Parking and Resting Bay at Delegate (South side of Bombala)
• Improve road corridor productivity for freight.	• Develop project proposals for:	
	• Monaro Highway Improvements	• Monaro Highway Improvements
• Review the potential of rail freight connections.	• Kosciuszko Road Improvements	
	• Parsonage Creek Bridge Upgrade	• Kosciuszko Road Improvements
	• Delegate Road Improvements	
• Improve Cooma's saleyards to facilitate livestock processing.	• Polo Flat Road Upgrade	• Parsonage Creek Bridge Upgrade
	• Bobeyan Road	
	• Black Lake Road Bombala	• Delegate Road Improvements
	• Imlay Road Upgrade	
• Build close relationships with partners beyond the Region.	• Review freight pinch points and develop a catalogue of investment priorities for local roads.	• Polo Flat Road Upgrade
	• Work with the NSW government to alleviate congestion issues between to Jindabyne and the major ski resorts.	• Bobeyan Road
	• Foster and sustain close relationships with Canberra Airport and the Port of Eden.	• Black Lake Road Bombala
	• Undertake a feasibility study to investigate the potential use of rail to connect producers to the Port of Eden and Canberra Airport.	
	• Develop a business case for upgrading Cooma's Saleyard.	• Imlay Road Upgrade
	• Work with Ausindustry and NSW Department of Industry to improve trade connections for producers.	

Action Plan

Cultivate the Region's 'Engines of Growth' Specialisations in Agriculture, Forestry and Wood Products

Strategic Opportunities	Actions	Timeframe
• **Secure reliable, high capacity digital and mobile connections**	• In collaboration with the private sector, audit digital connectivity blackspots.	June 2019

• **Improve road corridor productivity for freight**
 	
• **Review the potential of rail freight connections**
	• Undertake a Regional Freight and Traffic Study.
	• Develop project proposals for:
	   • Monaro Highway Improvements
	   • Kosciuszko Road Improvements
	   • Parsonage Creek Bridge Upgrade
	   • Delegate Road Improvements
	   • Polo Flat Road Upgrade
	   • Bobeyan Road
	   • Black Lake Road Bombala
	• Review freight pinch points and develop a catalogue of investment priorities for local roads.
	• Work with the NSW government to alleviate congestion issues between to Jindabyne and the major ski resorts.
	• Foster and sustain close relationships with Canberra Airport and the Port of Eden.
		December 2019

• **Improve Cooma's saleyards to facilitate livestock processing**	• Develop a business case for upgrading Cooma's Saleyard.	June 2019
• **Build close relationships with partners beyond the Region**	• Undertake a feasibility study to investigate the potential use of rail to connect producers to the Port of Eden and Canberra Airport. • Work with Ausindustry and NSW Department of Industry to improve trade connectors for producers in the Region.	December 2020

Strategic Context

Complementary natural and built endowments, including terrain, climate, waterways and the Snowy Mountains Scheme infrastructure, support the Region's distinctive specialisation in hydro electricity production. Forthcoming investment in Snowy 2.0 will increase activity during its construction phase and offer opportunities the Region must look to seize.

The extent of benefits to the local economy from Snowy 2.0's construction will depend on the degree to which contractors, subcontractors and workers are based locally, as opposed to operating on a 'Fly In, Fly Out' basis. Council should develop an action plan to position the Region to encourage activity locally to the extent economical. The rise in construction activity could be a catalyst for broader industrial development, so focus on key enablers like zoned and serviced industrial land, key utilities and skills and industry-focused skills development can position the Region to capture diversification opportunities as they arise.

Infrastructure Priorities

Polo Flat Industrial Precinct Improvements and Stormwater drainage upgrade

Opportunities	Early Stage Actions	Candidate Projects
• Review the opportunities associated with Snowy 2.0 and how to make the most of them.	• Develop an action plan to encourage as many Snowy 2.0 contractors, subcontractors and workers to locate in the Region as is possible.	• Polo Flat Industrial Precinct improvements and stormwater drainage upgrades.
• Address "first mover" disadvantages in meeting enabling infrastructure costs.	• Develop business cases for industrial precincts at Polo Flat and Bombala.	
• Secure reliable, high capacity digital and mobile connections.	• Align local training courses to local industry needs.	
• Collaborate with Country Universities Centre and Cooma TAFE to match training courses to industry needs.	• Advocate for a Primary and Innovative Community Centre with the Country Universities Centre.	

Action Plan

Promote Skills Acquisition and Industrial Land Development to Diversify the Region's Employment Base

Strategic Opportunities	Actions	Timeframe
• Review the opportunities associated with Snowy 2.0 and how to make the most of them	• Develop an action plan to encourage as many Snowy 2.0 contractors, subcontractors and workers to locate in the Region as is possible.	December 2018
• Address "first mover" disadvantages in meeting enabling infrastructure costs	• Develop business cases for industrial precincts at Polo Flat and Bombala.	December 2018
• Collaborate with Country Universities Centre and Cooma TAFE to match training courses to industry needs.	• Advocate for a Primary and Innovative Community Centre with Country Universities Centre . • Align local training courses to local industry needs.	December 2019

4. Grow the Population to Deepen the Region's Internal Markets for Goods, Services and Labour

Strategic Context

Despite its many endowments, the Snowy Monaro Region has a relatively small population. This restricts the depth and diversity of goods and services available to its communities and the extent of labour supply available to its producers. Growth in the Region's population can increase the Region's economic potential, diversity and increase its resilience to external shocks.

The foremost priority actions for Council should be completing its update of Regional land use planning. Secondary priorities should include an Activation Plan to help revitalise Bombala and identify enabling economic and social infrastructure and services that can help increase housing supply and further enhance the attractiveness of the Region.

Infrastructure Priorities

Bombala Activation Plan and housing supply enabling infrastructure, including water & sewerage.

Opportunities	Early Stage Actions	Candidate Projects
• Attract and retain families and workers by: ○ Offering a diverse and accessible supply of housing ○ Better aged care services ○ Providing cultural, sporting and recreational activities. • Identify and address gaps in key community services. • Better connect the Region's centres.	• Review and complete Snowy Monaro land use planning. • Undertake a review of housing supply opportunities and enablers study for each of the major centres, including necessary enabling infrastructure upgrades. • Undertake a scoping study of innovative solutions for the delivery of short-term worker accommodation for the winter season. • Review and assess water treatment and sewerage system capacity across Snowy Monaro. • Develop and implement a Bombala Activation Plan. • Collaborate with NSW Health to prepare a Road Map to address regional health care service delivery gaps. • Undertake a gap analysis of key community infrastructure and services in each of the three major centres. • Progress new bus and coach service improvements for the region to improve connectivity between centres. • Develop a cultural development strategy aimed at uniting the Region. • Increase awareness and recognition of the Region's indigenous cultural heritage.	• Bombala Activation Plan • Bombala Heavy Vehicle Route • Water and Sewerage Treatment System in Delegate and Jindabyne • Sewerage connections in Adaminaby • Michelago Essential Infrastructure

Action Plan

Grow the Population to Deepen the Region's Internal Markets for Goods, Services and Labour

Strategic Opportunities	Actions	Timeframe

• **Attract and retain families and workers by:**
   • **Offering a diverse and accessible supply of housing**
   • **Better aged care services**
   • **Providing cultural, sporting and recreational activities**
	• Review and complete Snowy Monaro land use planning.
	
	• Undertake a review of housing supply opportunities and enablers study for each of the major centres, including necessary enabling infrastructure upgrades.
	
	• Undertake a scoping study of innovative solutions for the delivery of short-term worker accommodation for the winter season.
	
	• Review and assess water treatment and sewerage system capacity across Snowy Monaro.
	
	• Develop and implement a Bombala Activation Plan.
		December 2019

• **Identify and address gaps in key community services**	• Collaborate with NSW Health to prepare a Road Map to address regional health care service delivery gaps. • Undertake a gap analysis of key community infrastructure and services in each of the three major centres of the Region.	June 2019
• **Better connect the Region's centres**	• Progress new bus and coach service improvements for the Region to improve connectivity between centres. • Develop a cultural development strategy aimed at uniting the Region. • Increase awareness and recognition of the Region's indigenous cultural heritage.	December 2019

Appendix L –

Strategic Alignment

Strategic Alignment and Directions Drawn from Other Plans

KEY SOURCES OF STRATEGIC ALIGNMENT INFORMING THIS STRATEGY:

- Key local plans are in BLUE

- Key State Plans in ORANGE

- Key Federal Plans in GREEN

Premier's Priorities

State Infrastructure Strategy

Future Transport Strategy

South East and Tablelands Regional Plan 2036

Destination Management Plan 2018-2020

Smart Cities Plan

Draft Snowy Monaro 2040 Community Strategic Plan

Local Economic Development Strategies

Local Tourism Strategies

Overview

Snowy Monaro Regional Economic Development Strategy 2022

Snowy Monaro 2022 Regional Economic Development Strategy

SNOWY MONARO REGIONAL COUNCIL