

Business and Employment Development Committee

Meeting Date: Wednesday, 23 May, 2018

Location: Jervis Bay Rooms, City Administrative Centre, Bridge Road, Nowra

Minutes Attachments

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Roads & Maritime Services

SEATS Presentation

Albion Park Rail bypass

Road network benefits

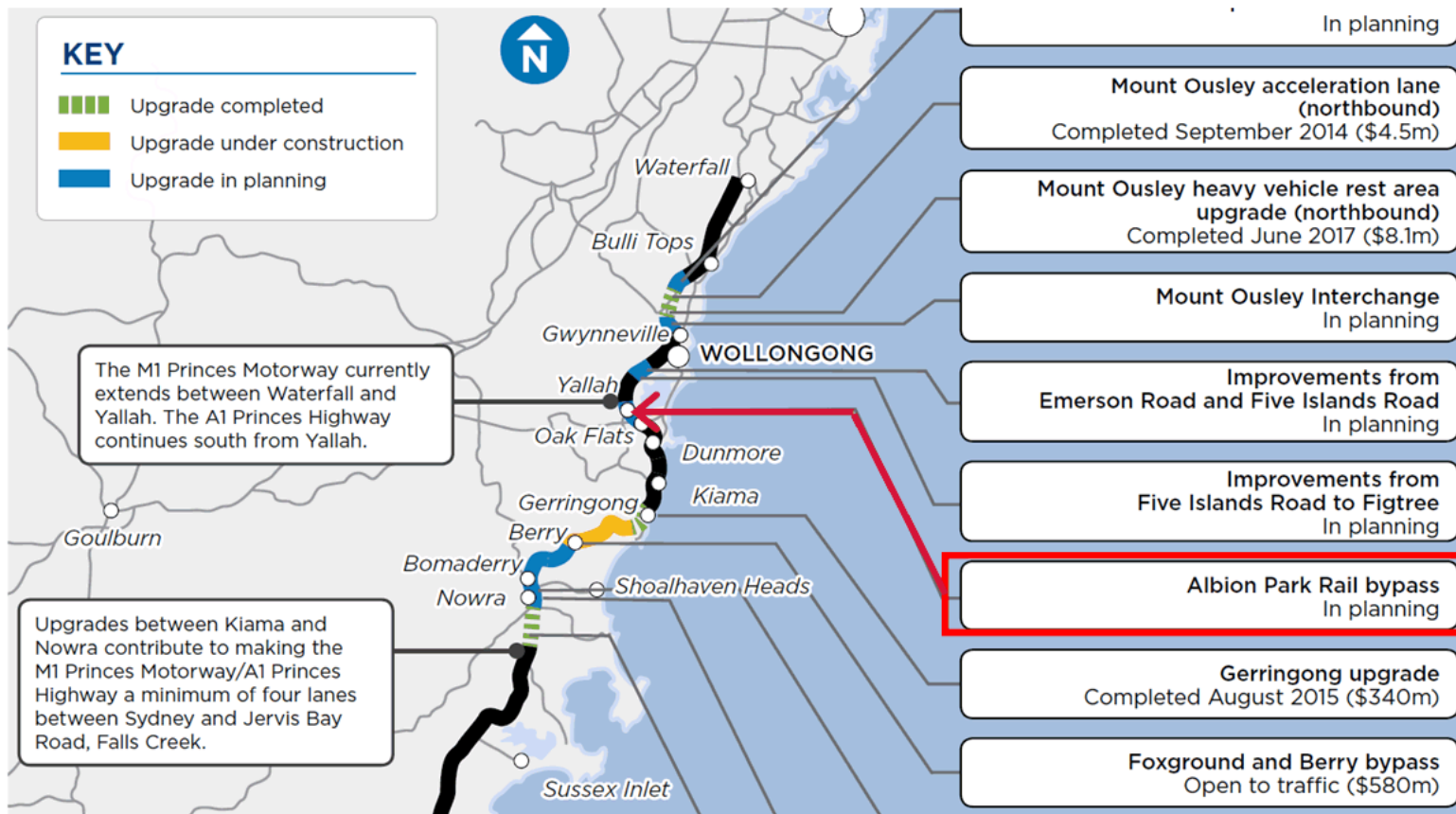


Agenda

- Project background
- Network benefits
 - Traffic
 - Road Safety
 - Flooding
 - Other
- Next steps
- Questions

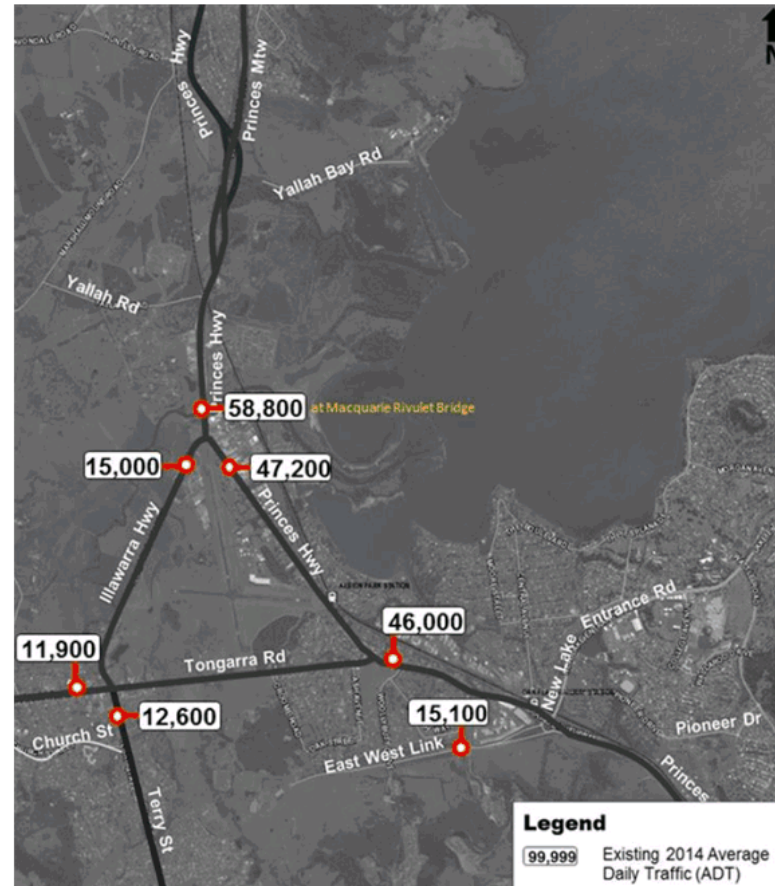


Project background



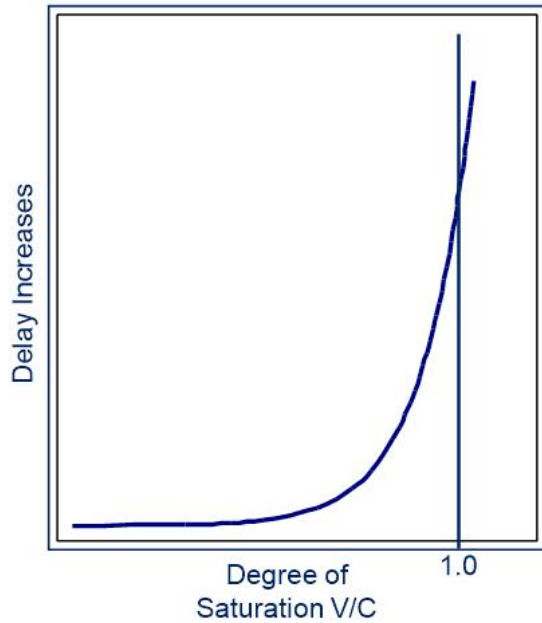
Project background

Existing traffic conditions:



Project background

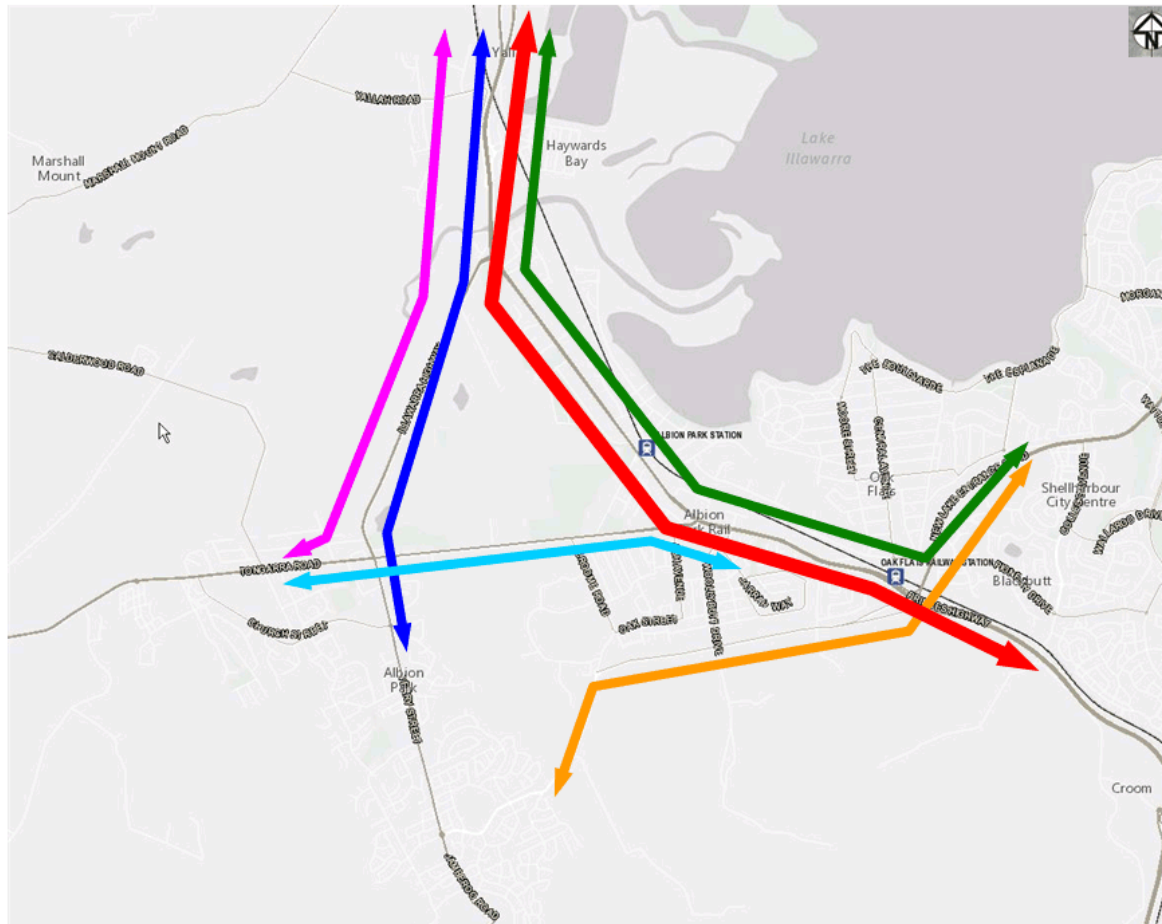
Existing traffic congestion



Future land use



Traffic movements



Flooding

Current flooding



Illawarra Highway -
seven times a year

Princes Highway -
three times a year

Flooding

Existing flooding – 100 year ARI



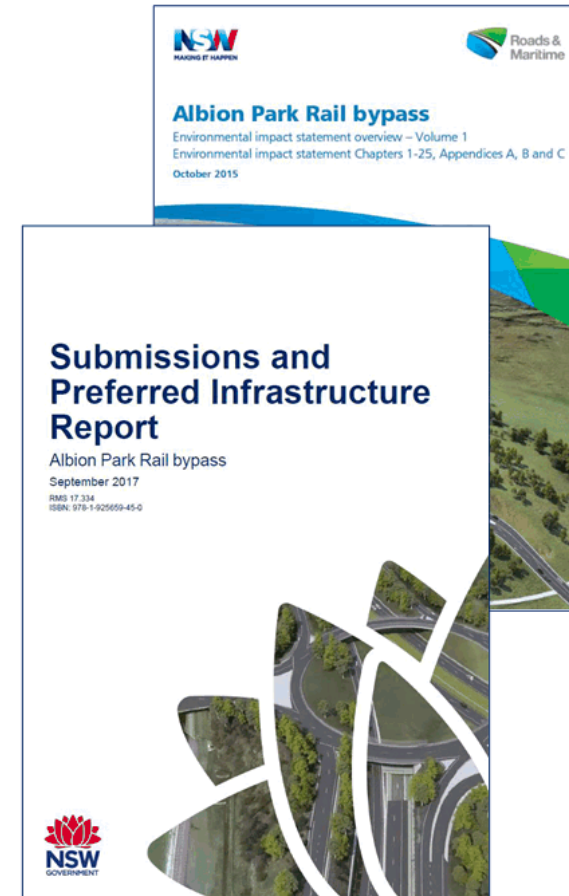
Concept design

What does the project look like?



Project background

- Environmental Impact Statement (October 2015)
- Submission and Preferred Infrastructure Report (September 2017)
- Project approval (January 2018)



Network benefits

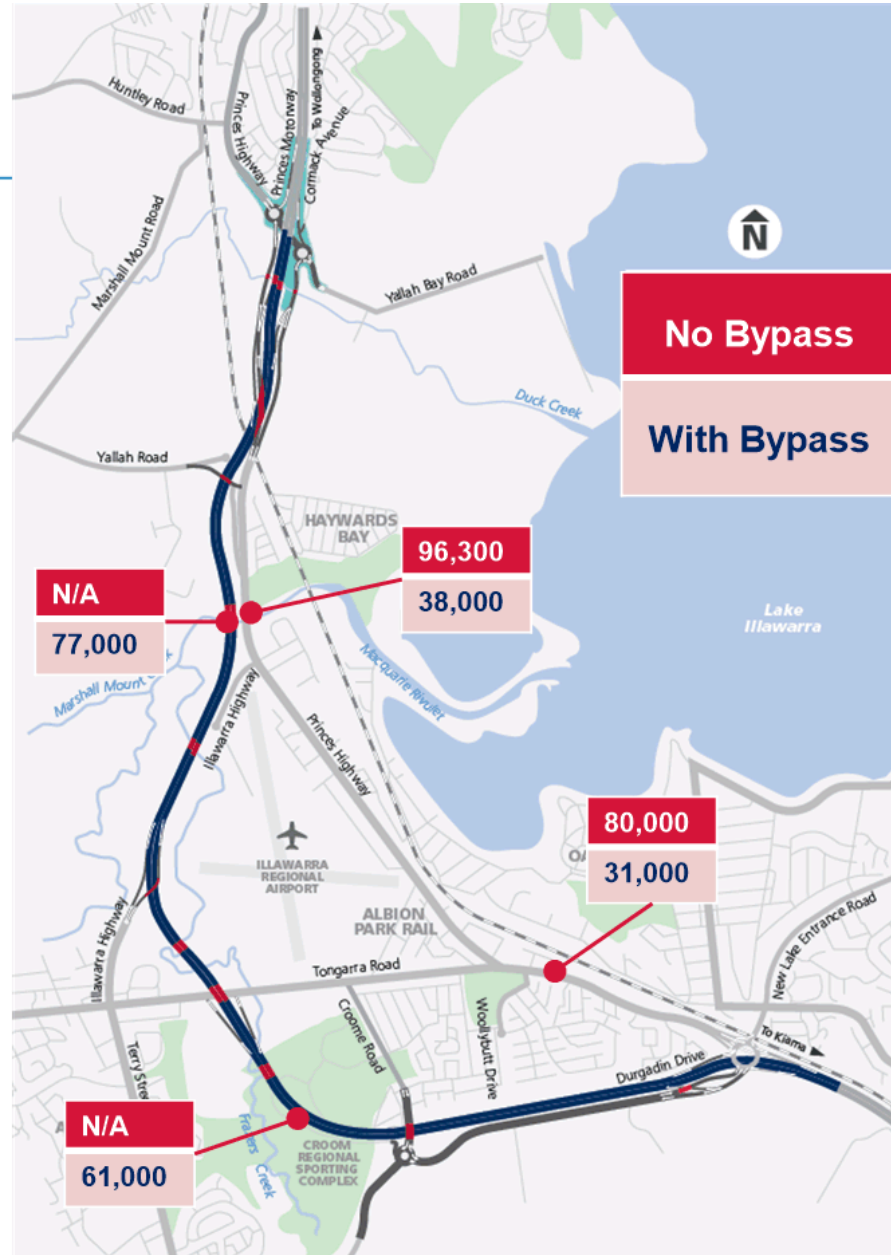
What drives road project benefits?

- Travel time
- Operating costs
- Road safety

Traffic volume 2041

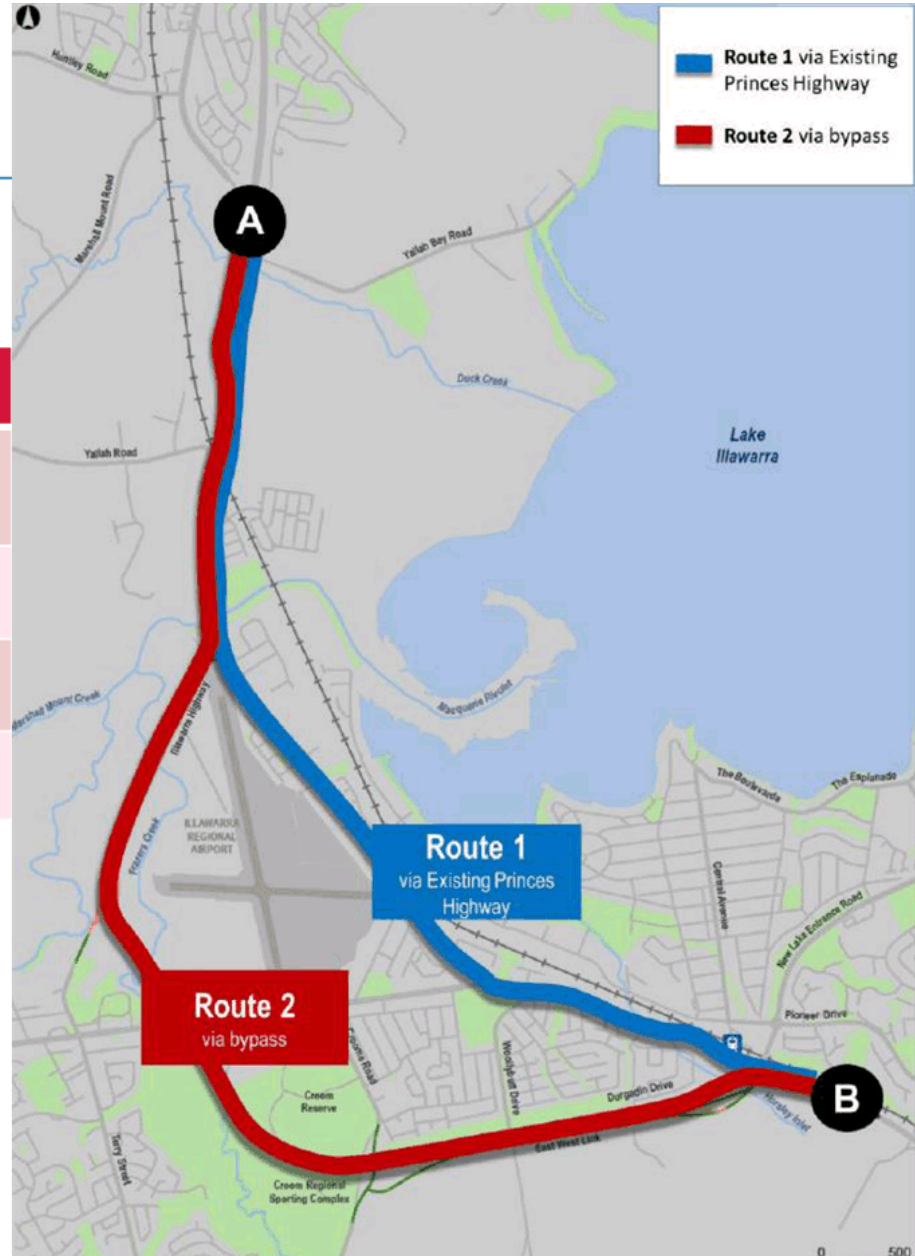
Substantial reduction in traffic volumes for the local network

Through traffic transfers to bypass



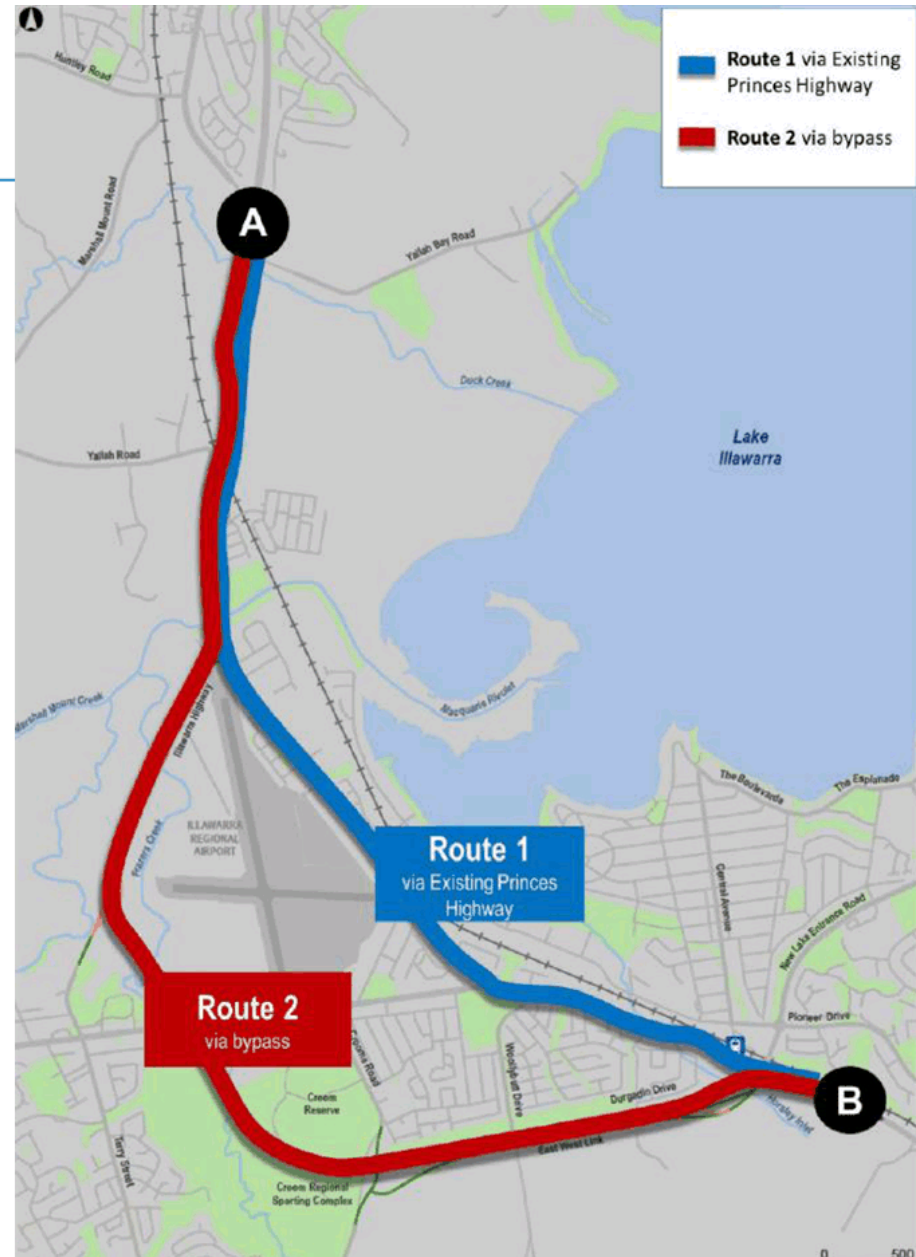
Travel time 2041

Travel Time	AM	PM
Princes Highway	18 Min 24 sec	17 min 18 sec
Bypass	6 min 42 sec	6 min 42 sec
Saving	11 min 42 sec	10 min 36 sec
Saving	64%	61%



Travel distance 2041

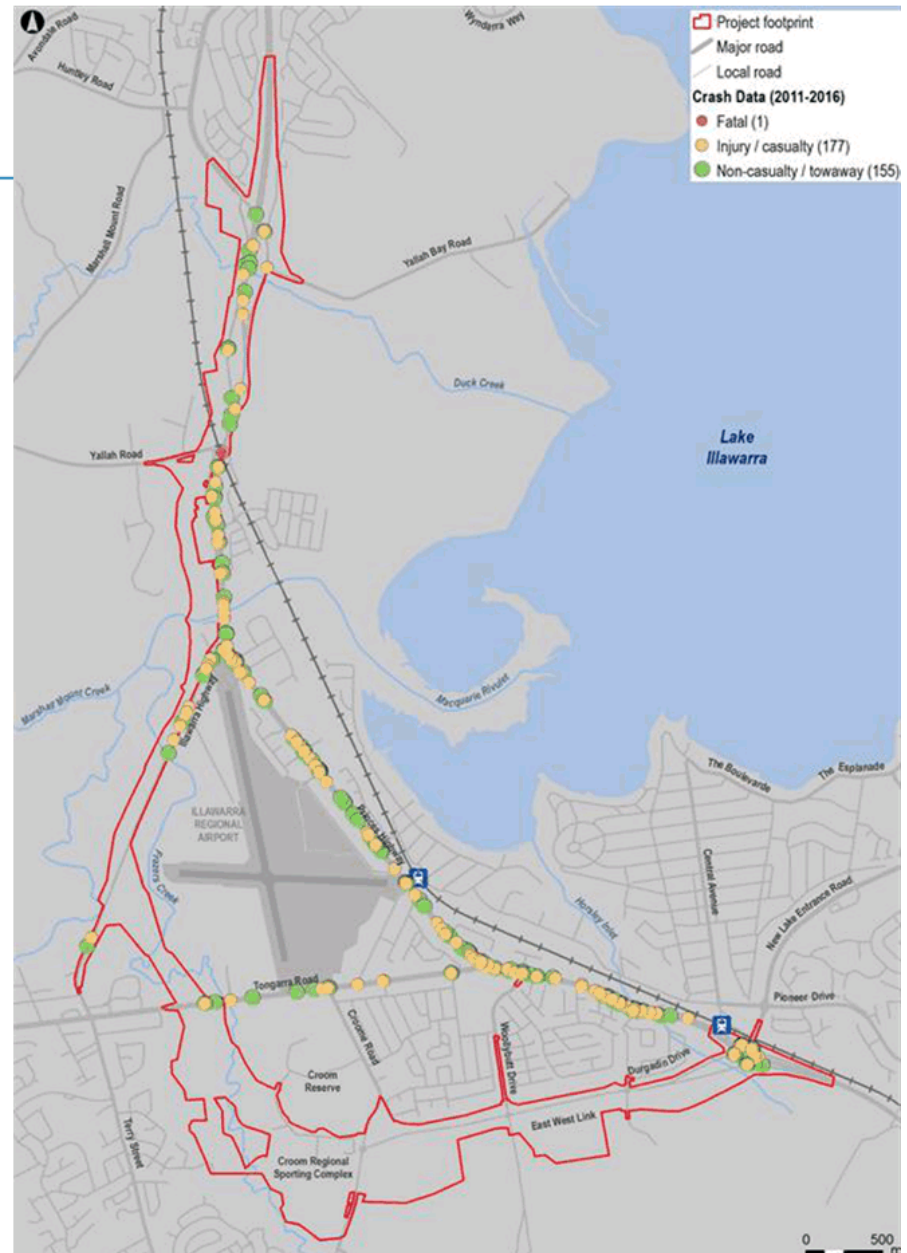
- Bypass 2.2kms longer
- Reduced vehicle operating costs
- Urban to rural



Road Safety

Princes Highway

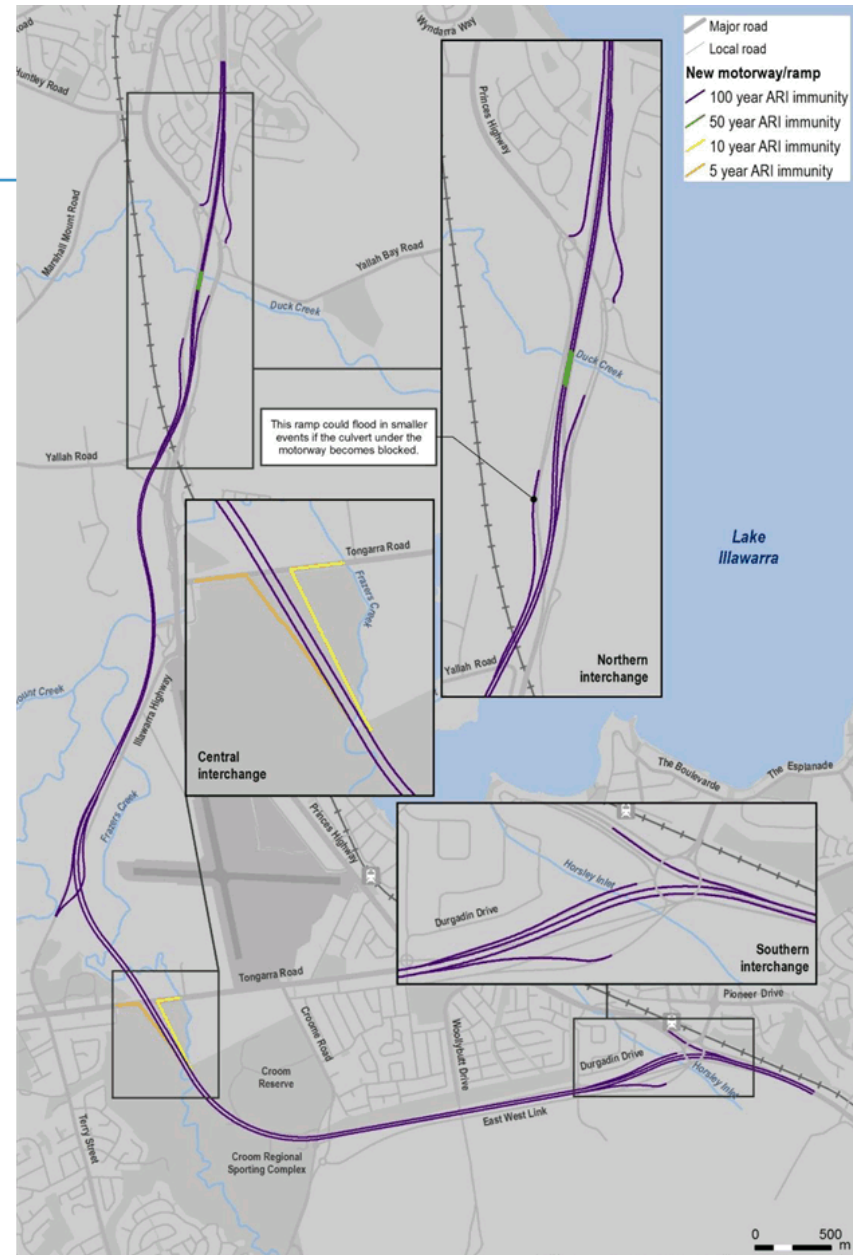
- ~280 crashes / one every 6 days
- Reliability for through traffic
- Expected 60% reduction in future crashes



Flooding

Design achieves

- Majority 100 year ARI



Economic benefits

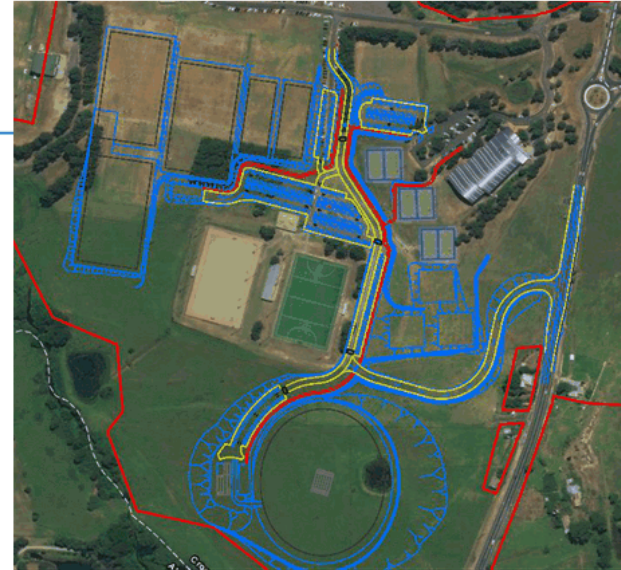
Benefits	% of Total
Travel Time	62.3%
VOC	14.9%
Safety	4.8%
Externalities	14.3%
Flood Access	1.8%
Residual Value*	1.8%
TOTAL	100.0%

*Residual value based on P50 cost estimate

Benefit Cost Ratio – 2.6

Other project benefits

- Community cohesion
- Reconfiguration of sporting facilities
- Amenity benefits
- Business opportunity



Next steps

- Award design & construct Contract – Mid 2018
- Start construction – Early 2019
- Open to traffic – 2022

Questions





Qube wants support for BBMT

Qube took over managing and operating Barry's Beach Marine Terminal (BBMT) in October 2017 under a long term contract with Esso Australia. BBMT is within the Gippsland Port of Corner Inlet.

Qube wants to develop BBMT into a world class, multi-user port to serve the Gippsland region and beyond. However Qube's Michael Knowles and Leatrice Grundy told February's SEATS meeting this vision faces considerable challenges, especially the need to gain the support of Government at all levels as well as the community. Currently BBMT has no significant road or rail access.



Barry's Beach Marine Terminal, managed and operated by Qube. Photo courtesy Qube.

So what is Qube

Qube is a major national player in the import and export supply chain with ports, energy, logistics and strategic divisions. It is the largest stevedoring company in Australia, and handles a large market share of fertiliser imports. It has rail services, intermodal parks, road transport, warehousing and distribution, container parks, global forwarding and specialised project services. It is a publicly listed company.

Qube's vision

Mr Knowles said Qube's vision is not for BBMT to become a large export port for coal, for example. 'Rather we're looking to more realistic value-added trades, such as importing/ exporting smaller volume high value bulk materials (such as fertiliser, mineral sand etc), servicing Esso offshore platforms, third party oil and gas projects, the manufacturing and fabrication for offshore windfarm projects, and small shipping services with other coastal ports in Australia, especially with Tasmania.

Qube wants to set up a supply chain in the Gippsland region linking Qube's existing road, rail and coastal shipping networks. He said this in

Continued bottom p.2

Princes campaign gains traction

Since February's meeting, SEATS' campaign to have the Princes Highway from Sale to Wollongong included in the National Highway Network has started to gain momentum. SEATS wants urgent and ongoing funding to fix the Highway and for it to be recognised as a major freight and tourist route.

SEATS chair Patricia White has called for a commitment of 80/20 funding (80% Federal Government 20% State Governments) for all improvements to the Princes Highway.

SEATS executive is working with State Parliamentarians. NSW Premier Gladys Berejiklian is lobbying the Federal Government for Princes Highway funding, NSW Transport and Infrastructure Minister Andrew Constance wants the Princes Highway duplicated to the Victorian border, and Fairfax newspapers have taken up the call with their 'Fix It Now' campaign.

Feds fund Princes' Corridor Strategy

The Australian Government has allocated \$5m for a Princes Highway Corridor Strategy from Sydney to Port Augusta. Transport for Victoria's Harvey Dinelli, a SEATS stalwart, has been invited to be part of the project team.

The Strategy will prioritise short, medium and long term projects along the corridor to help the three states and the Australian Government identify funding priorities.

The Traralgon Bypass progresses

VicRoads received 'overwhelming' community feedback on the proposed Traralgon Bypass as part of a recent planning study. This was one of the projects VicRoads Eastern Regional Director Scott Lawrence outlined to SEATS delegates.

The long proposed Traralgon Bypass will reduce the number of trucks and passing traffic through Traralgon's town centre, so ensuring a safer and more efficient traffic link for Gippsland's growing population, trucks and visitors.

Significant work was done by VicRoads in 2000s, including a preliminary road design for the bypass route, as various assessments. The route was formalised in 2009. In August last year, the Victorian Government announced a \$1.4m study by VicRoads to progress the proposed Traralgon Bypass and connecting road infrastructure. This involved working with the wider community, businesses and industry to gain a better understanding of the associated transport challenges.

VicRoads is now reviewing the feedback. A business case will then be developed and submitted to the Victorian Government for assessment for funding against other road projects.

Continued from p. 1

turn would benefit local industries and create many jobs in the area.

The constraints

Qube faces considerable challenges for this vision (see p. 3). These include:

- the size of vessels accessing the Port, particularly BBMT, is limited by water depth
- development necessitates dredging at the entrance to Corner Inlet, in the channel to BBMT and creating a swing basin
- environmental constraints (see p. 3)
- gaining Local, State and Federal Governments support; Corner Inlet is not listed for future development in any current strategic planning document
- gaining local community support with more commercial vessels and truck movements.

Subsequent discussion led to a suggestion that SEATS could possibly develop a maritime transport strategy. The meeting decided a task-force should first investigate the current situation and report back to the May SEATS meeting.

SEATS March 2018 Newsletter page 2

SEATS Chairman speaks...



A dinner highlight at the February SEATS meeting was the presentation of Inspirational Leadership Awards to Warren Sharpe OAM (left), Ralf Kastan (centre), Greg Pullen (right) and Cr Graeme Middlemiss (not in photo). They are seen here with SEATS Deputy Chair Cr Mari- anne Pelz, left, and SEATS Chair Cr Patricia White.

Our February meeting was hosted jointly by South Gippsland and Bass Coast Shire Councils at Inverloch. I thank them for hosting such a fascinating and informative program; it was greatly appreciated by delegates.

In welcoming us, Bass Coast Mayor Cr Pam Rothfield also highlighted the area's significant growth, its beautiful environment, the importance of tourism and industry, and some of its transport challenges.

What is increasingly apparent from our regular meetings is SEATS' considerable value in providing a perspective on clarifying and trying to resolve transport issues to ensure we have effective and integrated transport networks throughout the South East Region of Australia.

The changes, management and serious challenges facing the Princes Highway and interconnecting road networks in NSW and Victoria need a regional perspective into the future. It is fundamental that local councils via SEATS are serious players in providing the much needed data and information from a local level for the Federal Government Strategy programme and any funding proposals for the upgrade of the Princes Highway in our region.

SEATS is now working with councils to develop a tactical approach to both State and Federal Governments, as well as working on material to distribute to prospective candidates in the Victorian (18 November) and NSW (19 March) elections and the Federal election when announced. This will promote targeted projects across the Region that meet SEATS and council objectives, especially for the Princes Highway.

A highlight of the February dinner was the presentation of Inspirational Leadership Awards to Greg Pullen, Warren Sharpe OAM, Ralf Kastan and Cr Graeme Middlemiss recognising their significant contributions as members of SEATS (see photo above). All well deserved.

A warm invitation is extended to all Councils in our region to our next meeting in May, hosted by Shellharbour City Council.

*Cr Patricia White
Chairman*

Gippsland ports' growth opportunities



Oil and gas industry support vessels at Barry Beach Marine Terminal, the Port of Corner Inlet, Victoria.
Photo courtesy Gippsland Ports.

The economic growth of the Gippsland region could be boosted significantly by an expansion in marine transport. However Gippsland Ports CEO Nick Murray said that potential is severely limited by the lack of significant transport infrastructure connecting the Gippsland region with its two main ports of Western Port (Hastings) and Corner Inlet, and the neglect of Corner Inlet in any public strategic planning.

He told SEATS delegates that Melbourne is currently the hub of all principal road and rail networks for the Gippsland region. 'Doing business through Melbourne is expensive,' he said. 'The lack of road and rail connectivity to these Gippsland ports is losing trade and hindering their potential development.'

Gippsland Ports manages five of the 14 Victorian local ports between the South Australian and NSW borders – Corner Inlet and Port Albert, Anderson Inlet, Gippsland Lakes, Snowy River and Mallacoota.

The Port of Corner Inlet currently handles 230 commercial ships per year (excluding commercial fishing). Vessel size is limited by the depth of water. Maritime transport facilities within its waters include the Barry Beach Marine Terminal and Port Anthony Marine Terminal at Barry Point (Bass Strait oil and gas industry services, power industry components - see page 1), Port Welshpool (livestock and other small cargo between Tasmania, the Bass Strait islands and Gippsland, and commercial fishing), as well as the commercial fishing infrastructure at Port Albert and Port Franklin.

Mr Murray said opportunities for the expansion of trade through Corner Inlet included the construction and servicing of Offshore Energy's proposed \$8b wind farm, and Kalbar's mineral sand project.

'Yet numerous strategic planning documents at all levels of government completely overlook the development of commercial shipping

in Corner Inlet,' Mr Murray said. 'Government planning is not keeping pace with private capital and market opportunities.'

Mr Murray said constraints on the Port of Corner Inlet included vessels limited to 100m overall length (LOA) and 6m draught, difficult access to Barry's Beach, and it being a RAMSAR listed wetland and having several marine parks within its waters.

'What is needed to realise these opportunities is access for vessels 130-140m LOA, 8-9m draft and 12000t DWT,' he said. 'To do that would need a realignment of the channel, dredging and tug access but in a manner that did not compromise the important environmental values.'

The Port of Hastings within Western Port is one of four major commercial ports in Victoria and is managed by the Port of Hastings Development Authority. It has an existing deep water channel (up to 15m) and 3,500 ha of land zoned for future port services

'It currently handles about 100 commercial vessels carrying 1.7m tonne per year, yet has the capacity to handle up to 5m tonnes,' Mr Murray said. 'Again, this expansion is hampered by the lack of significant road and rail access to the port.' Another constraint is an embargo on international container cargo for the next 15 years, a condition of the sale of the Port of Melbourne.

His presentation is on SEATS' webpage.

Safe Freight Networks

John Ernst of Safe Freight Networks outlined the substantial improvements in transport safety that resulted from partnerships between Gippsland transport companies and government agencies. He has a three-year contract with the National Heavy Vehicle Regulator to establish 20 new Safe Freight Networks across Australia using a similar model as Gippsland's.

SEATS March 2018 Newsletter page 3

Burra Foods raises road freight concerns

Delegates at SEATS Lochinvar meeting had a virtual tour of Burra Foods' supply chain, courtesy of its General Manager Manufacturing and Supply Chain Stewart Carson.

Burra Foods is a South Gippsland-based dairy processor that adds value at its Korumburra plant to fresh Gippsland milk. It produces infant formula and nutritional powders, specialty milk powders, frozen creams and milk concentrates and fresh milk concentrates. The plant employs 200 people and operates 24 hours a day, seven days a week.

Most product is exported to more than 30 countries, the largest markets being Japan 37% and China 10% (and growing); about 28% is sold in Australia.

The company continues to grow. It now collects 350 million litres of milk per year from 220 dairy 'farmer supply partners'. It recently announced a \$24.5m infant formula blending and canning facility would be built on site; the focus is on meeting growing demand from China.

Burra Foods' freight task

All goods in and out of the Korumburra site are transported by road. Burra Foods partners with local carriers and milk collection contractors to do these tasks.

Key daily statistics are up to 60 milk tankers deliver to site, three tankers depart from site with fresh liquid products for delivery to customers, six milk powder shuttle trucks to and from Melbourne, eight refrigerated shuttle trucks to and from Melbourne, five incoming trucks per week day with materials and consumables, eight TEU shipping containers to the Port of Melbourne, and 200 containers collected from the Port of Melbourne each year.

Concerns with freight task:

1. **Challenges to Melbourne:** Roadworks on Monash Freeway and traffic congestion on M1



All goods in and out of Burra Foods Korumburra site are transported by road. Photo courtesy Burra Foods.

cause unpredictable trip times, resulting in missed time slots for unloading, delays and demurrage and drivers sitting around waiting. This places pressure on carriers in complying with Chain of Responsibility requirements; it has forced some novel solutions but extra costs, e.g. changing drivers between Korumburra and Melbourne.

2. **Milk tankers:** Access to farms over unsealed roads, lots of stops and starts at farms, gates, T-intersections create stresses on trucks. Milk tankers, being stainless steel are more rigid than most other trailers and need frequent stress testing. Internal cracks significantly impact on milk quality so must be addressed. Subsequently their maintenance costs are 12-15% of running costs compared to less than 8% for general freight.

3. **Stability of milk tankers** is lower than other freight creating instability when cornering. They require only a 5% tilt to roll over.

4. **The HV permit process** is onerous, a permit is needed for every farm by every transport provider, each permit costs \$75.

His transport wish list :

- Complete M1 road works, but concerned current upgrades will not meet requirements in 5-10 years.
- Fast track gazetting of permit approved roads and accelerate permit approval process
- Continue upgrading of roadway to minimise cost, increase productivity and improve safety.

What is SEATS?

South East Australian Transport Strategy (SEATS) aims to ensure that south east Australia has effective integrated transport networks that stimulate the region's economy and enhance the community. SEATS is a strong independent partnership of councils, industry, government authorities and other organisations from Wollongong to Dandenong.

Push for Hume-coast road

Goulburn-Mulwaree Council's Denzil Sturgiss told delegates the best freight route from the Hume to NSW's south coast is the shorter Goulburn-Nerriga-Nowra route, without accessing Canberra, rather than the route planned Yass-Canberra Airport-Braidwood-Nerriga-Nowra. Another plus is it has less steep grades.

Small companies dominate

Most freight in Australia is moved by smaller companies and owner operators with the big five freight companies moving only 2% of freight.

Older drivers and truck lights

The successful 'turn-on lights campaign' for trucks originated in the Gippsland region from finding that older drivers had difficulty judging the speed of approaching vehicles.

SEATS meetings

17-18 May: Hosted by Shellharbour City Council

16-17 August: Hosted by Baw Baw Shire

8-9 November: Hosted by RMS Southern in Wollongong

SEATS Executive

Chairman Cr Patricia White (Shoalhaven), **Deputy Chair** Cr Marianne Pelz (East Gippsland),

Secretary and Treasurer Cr Graeme Middlemiss (Latrobe)

Victorian representatives: Cr Keith Cook (Baw Baw) Cr Jeremy Rich (South Gippsland), Cr Clare Le Serve (Bass Coast).

NSW representatives: Greg Pullen (Shoalhaven), Cr Marianne Saliba (Shellharbour), Cr Denzil Sturgiss (Goulburn Mulwaree)

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FEBRUARY 20, 2018



SHOALHAVEN STRATEGIC REGIONAL PRIORITIES
WHITE PAPER - 2018

PRESENTED BY: THE POLICY COMMITTEE
SHOALHAVEN BUSINESS CHAMBER INC.
5/21 KINGHORNE STREET, NOWRA NEW SOUTH WALES 2541

BE18.15 - Attachment 1

February 2018

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EXECUTIVE SUMMARY

The Shoalhaven Business Chamber (SBC) is proud to be an integral part of the Shoalhaven region and contribute to its growth via the business community. The SBC is a membership organisation consisting of approximately 250 members from the business, government, education, and not-for-profit sectors. The SBC enjoys strong engagement with the local business community and seeks their input on issues of policy and regulation via its policy committee. The SBC also has strong relationships with other organisations in the region including the Shoalhaven Professional Business Association (SPBA) and the Shoalhaven City Council (SCC), and has collaborated with the SCC Economic Development Unit and the SPBA, in preparing this paper.

The SBC is affiliated with the Illawarra Business Chamber (IBC) and the NSW Business Chamber (NSWBC) via a Local Chamber of Commerce affiliation agreement which supports the SBC's economic objectives with regional input and support. The SBC holds a position on the IBC Regional Advisory Council (RAC) representing the Shoalhaven region and other smaller chambers within the Shoalhaven region.

The objective of this White Paper is to identify the 10-key strategic regional priorities for the Shoalhaven region and to contribute to the Illawarra Regions' overall strategic planning through our affiliation with the Illawarra Business Chamber (IBC) and its Regional Advisory Council (RAC).

February 2018

10 STRATEGIC REGIONAL PRIORITIES FOR THE SHOALHAVEN REGION IN 2018

1. Transport infrastructure	➤ Focus on the facilitation of High Mass Limit (HML) Transport across the region including upgrading road and rail corridors to Class 1 HML standards.
	➤ Support for the building of the South West Illawarra Rail Line (SWIRL) passenger/freight rail
	➤ Upgrade of Moss Vale Freight line in the short term to include passing loops exceeding 1000m
	➤ Develop Regular Passenger Transport (RPT) from Albion Park Regional Airport
2. Employment	➤ Decentralise Government Administrative Services - relocate offices to Illawarra/Shoalhaven regions
	➤ Identify & promote growth industries and promote advantages of local business investment and relocation.
	➤ Preservation of and increase availability of employment lands across the Illawarra/Shoalhaven region.
3. Education & Skills Development	➤ Identify local and regional career pathways and support long term skills development.
	➤ Access to Business Management training for entrepreneurs
4. Government	➤ Reduce Red Tape and Complexity of Compliance
	➤ Promote a business supportive culture in government which supports entrepreneurship & investment in regional businesses.
5. Health Services	➤ Supports the existing Master Plan for regional health services across the Illawarra/Shoalhaven
6. Aged care	➤ Support for the continued development of locally based aged care industry.
7. Tourism infrastructure & development	➤ Recognition of the opportunities created by the enhancement of the Princes Highway,
	➤ The development of MARINE based tourism including investment in the associated infrastructure to support it.
	➤ Support for investment in "Built Tourism Infrastructure" such as Jamberoo, Shoalhaven Motorsport Park and off-peak attractions such as corporate tourism (WEC).
8. Environment	➤ Supports the promotion and development of clean agriculture industries across the region for domestic and export markets
9. Defence and the Industries supporting it	➤ Acknowledges the economic contribution of HMAS Albatross and its enhancement of the Defence Support, Aviation and Advanced Manufacturing industries across the Illawarra/Shoalhaven region.
10. Energy Costs	➤ Supports a balanced energy policy which reflects the production of sustainable alternative fuels at commercially viable costs including alternate energy production from waste recycling and ethanol fuels.

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THE SHOALHAVEN REGION

The Shoalhaven is one of the closest strings of coastal villages to Sydney and contains the regional centres of Nowra and Ulladulla. The Shoalhaven Local Government Area (LGA) is the southernmost sub-region of the Illawarra. It's 4,660 square kilometre area stretches from the rural township of Berry in the north some 85 kilometres south to the harbourside township of Ulladulla.

The nominal Gross Regional Product was \$5.75 billion (Jun 2017) with manufacturing, construction, defence, tourism, health and agriculture representing the core income generating economic activities for the Shoalhaven LGA. The agricultural sector remains an important economic activity in the region. and includes such rural activities as dairy farming, nursery products, seeds and cut flowers.

The region's retail sector is mature, with major retail and supermarket chains operating in the area and considerable new investment taking place. According to REMPLAN, there were 6,649 businesses operating in the Shoalhaven LGA with a growth rate of 3% pa over 2016-17.

The Shoalhaven region's population is predicted to grow strongly over the next twenty years, but the rate of growth will plateau. Forecasts indicate that the population of the Shoalhaven will reach 113,500 by the year 2021, up from the current estimated population of 101,777.

A snapshot of the region indicates the diversity and strength of the various business sectors.

Shoalhaven Demographics		Value added:(Dec 2016)	
Population: (Mar 2017)	100,295	Property Services	\$758m
Labour Force: (Mar 2017)	39,004	Health/Social Assist	\$405m
Unemployment rate: (Mar 2017)	8.23%	Manufacturing	\$381m
Gross Regional Product: (Jun 2017)	\$5.75 billion	Defence	\$373m
Gross disposable wages & salaries: (Dec 2016)	\$2.2 billion	Retail	\$301m
Businesses operating	6,649	Accom/Food Services/Tourism	\$196m

Figures : REMPLAN

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1. TRANSPORT INFRASTRUCTURE

The Shoalhaven region is approximately 2 hours south from Sydney, connected by road and rail infrastructure, which has enjoyed recent upgrades. However, the requirements of industry are not being met for the transport of produce to major transportation hubs.

Focus on the facilitation of High Mass Limit (HML) transport across the region – Upgrade of road and rail corridors to Class 1 HML Standards.

- Upgrading of local Council roads to HML standards for the "last mile to destination".
- The upgrade of rail transport for industry permits local industry (eg, Manildra Ethanol) to reach export facilities at Port Kembla by rail and minimises the use of road tankers on Illawarra highways.
- Building of the new Nowra Bridge river crossing to meet peak demand and HML needs.

Support for the building of the South West Illawarra Rail Line (SWIRL) passenger/freight rail

- The investment in the SWIRL will permit greater commuter traffic along the South Coast Illawarra Line and a connection to the economic growth corridor surrounding the Badgerys Creek Airport precinct.

Upgrade of Moss Vale Freight line in the short term to include passing loops exceeding 1000m

- Creating a minimum 1000m rail passing loop will permit the line to double its current capacity. The current configuration does not permit 2 freight trains to sit on the same line at any one time causing capacity and timetable issues.

Develop Regular Passenger Transport (RPT) from Albion Park Regional Airport

- Closer connections to passenger air transport enhances business connectivity and growth.

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2. EMPLOYMENT

The Shoalhaven in 2017 had a 39,004-person strong labour force with an unemployment rate of around 8.9% - 9.1% in recent years. It is estimated that 35,751 people work in Shoalhaven representing 24.89 % of the 143,610-people working in the Illawarra. The most significant job-generating industries in the Shoalhaven are the Health Care & Social Assistance sector employing 5,848, Retail trade 4499, Construction 4009, Public Administration & Safety 3779 and Accommodation & Food Services 3663. It is noteworthy that with the closure of the Shoalhaven Paper Mill and others, Manufacturing has fallen out of the top 5 to 7th with 1927. The University of Wollongong and TAFE campuses add greatly to the Education & Training sectors employing 2912 people. (REMPPLAN)

Decentralise Government Administrative Services - relocate offices to Illawarra/Shoalhaven regions.

- Identify departments which integrate with UOW Research projects or which have opportunity to establish or expand their administrative and support services into the Shoalhaven region, such as Departments of Health, Social Services, Finance, Tax and State revenue.

Identify & promote growth industries and promote advantages of local business investment and relocation.

- Promote the opportunities for businesses to relocate into the Shoalhaven region from high cost areas such as Southern Sydney and South Western Sydney. Highlight the recent improvement of road connectivity, NBN, Defence & Innovative technology industries and associated workforce benefits. Create an 'Advantage Shoalhaven' promotion to complement the existing 'Advantage Wollongong' promotion by Wollongong Council.

Preservation of and increase availability of employment lands across the Illawarra/Shoalhaven region.

- Preservation of existing industrial precincts and protect from new formats (such as Bulky Goods retail which have impacted the South Nowra precinct). Ensure the supply of serviced employment lands is not restricted and remains affordable for new business entrants.

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3. EDUCATION & SKILLS DEVELOPMENT

With over two thirds of the workplace (66.81%) being over the age of 35 years, and only 15.01% of the workforce under 25 years, there is a great need to educate and train the youth of the region to meet the skills required for the future. A third of all workers (33.4%) do not have any post school education, with another third (34.2%) having attained Certificate level only. Without career opportunities in the region, the youth leave for Wollongong, Sydney or further afield and are unlikely to return to the region, (figures from REMPLAN).

Identify local and regional career pathways and support long term skills development.

- The demand for some employment roles require trades skills and qualifications which are not supported by local youth training. Hence positions are often sought from outside the region owing to skills shortages. Without career pathways leading to skill development, the youth become trapped in a low skill/low income jobs or leave the region.
- For example, roles requiring Heavy Vehicle licences are abundant. However, opportunities to train unskilled youth under 25 years in mechanical/transport trades are limited. As such, qualification in Heavy Vehicle Driving is non-existent and must be filled by workers sought from outside the region. The identification of allied career pathways in the industrial/mechanical trades would permit career progression and skill development ie Mechanical apprentices, forklift licencing, Light and Medium Load licencing leading to Heavy Vehicle Licencing.

Access to Business Management training for entrepreneurs.

- Access to education for busy business people is frustrated by distance and cost of attendance. Local facilitation of professional development and management skills will enhance the calibre of entrepreneurship in the region.
- While 11.4% of the workforce have Diploma or Advanced Diploma qualifications and 18.8% with Bachelor's Degree or Postgraduate qualifications, it can be assumed that most are centred in the health and professional services sectors and not extended to entrepreneurs.

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4. GOVERNMENT

Public administration and Safety employs 3779 people (10.57% of the workforce) earning nearly twenty percent (19.66%) of salaries and wages. This contrasts with the overall Illawarra figure of 3138 people employed (7.44%) and 11.16% of wages and salaries earned. It is assumed that the Defence Force contributes to that differential significantly in the Shoalhaven.

REDUCE RED TAPE AND COMPLEXITY OF COMPLIANCE

- Support for the removal of regulation before new regulation can be introduced. Streamline the regulatory compliance regime such that complexity is minimised.
- There is a need for the reduction in the time taken to process Development Applications (DA's) across the region. The opportunities for investment and growth are stifled by the complexity and costs associated with submitting compliant applications. The process must be streamlined to reduce the complexity and cost associated with DA approvals.

Promote a business supportive culture in government which supports entrepreneurship & investment in regional businesses.

- Many regional businesses/start-ups are considered 'micro', small in scale or burdened by remoteness and access to government services. Governments should create 'regional exemption windows' which seek to reduce complexity of regulatory compliance by giving moratoriums, exemptions or extended terms which simplify compliance, reduce the cost/burden of compliance or remove barriers to starting a business enterprise in a regional area. In return this will encourage innovation, entrepreneurship, investment and jobs in regional areas.

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5. HEALTH SERVICES

The Health Care & Social Assistance sector is the largest employer in the region employing 5848 people (16.36% of the local workforce) in 2016 with a 29.9% growth over the previous 5 years. The sector represents 16.03% of all wages & salaries in the region.

Supports the existing Master Plan for regional health services across the Illawarra/Shoalhaven

- The current strategy of continued investment in the Shoalhaven and Southern Illawarra also supports the contribution of a recognised teaching hospital based in Nowra Health Campus, which the Chamber supports.

6. AGED CARE

Support for the continued development of locally based aged care industry.

- With growth in an aging population, and the close proximity to Sydney, the development of the Aged Care sector will require skilled staff and facilities to accommodate the influx. The region needs to embrace the opportunity and plan accordingly to take advantage of the growth in the sector.

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7. TOURISM INFRASTRUCTURE & DEVELOPMENT

The Accommodation & Food Services (Tourism) industry employs 3663 people (7.96%) across the regions' 475 businesses. However, it only contributes 4.65% of Wages & Salaries and 4.8% of total output for the region. This is reflected in the relatively low rates of tourism spend, with day travellers spending just \$122 each, with domestic overnighters (3.3 days on average) spending \$476 and International overnighters (5.1 days on average) spending \$743 in total. Shoalhaven City is the most visited, day trip and overnight, Local Government Area in NSW, outside of the Sydney region. The SCC Tourism Master Plan 2017 aims to achieve annual tourism revenue of \$1 billion by 2020

Recognition of the opportunities created by the enhancement of the Princes Highway.

- The recent Berry Bypass, the commencement of the Berry to Bomaderry upgrade and the approval and funding of the Albion Park bypass will create further tourism potential for the region, which the Chamber supports.

The development of MARINE based tourism including investment in the associated infrastructure to support it.

- The SCC Tourism Master Plan highlights the need to focus on "Coastal & Aquatic" tourism and to balance the winter months with "Food & Wine" tourism. This gives rise to greater opportunities for 'Nature/Adventure' travel, weddings & events, and niche markets. (SCC - Shoalhaven Tourism Marketing Strategy 2016/17)
- The development of leading infrastructure is needed to assist the organic growth of businesses in this sector including boat ramps, wharf facilities/piers and associated amenities.

Support for investment in "Built Tourism Infrastructure" such as Jamberoo, Shoalhaven Motorsport Park and off-peak attractions such as corporate tourism (WEC).

- Destination tourism needs to be encouraged and attracted to the region.

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8. ENVIRONMENT

The Shoalhaven region is bounded by the Illawarra Escarpment to the west and the Pacific Ocean to the east. Its topography combines mountainous terrain, flat coastal plain, bays, inlets, lakes and rivers. Its perception of a clean and pollution free environment make it an integral part of agricultural and tourism sectors.

Support the promotion and development of clean agriculture industries across the region for domestic and export markets

- The pristine areas of the Shoalhaven, including the Jervis Bay and surrounding marine parks need to be protected such that their economic benefit can be exploited by the tourism and agricultural sectors in a sustainable and low impact environment.

9. DEFENCE AND THE INDUSTRIES SUPPORTING IT.

The Shoalhaven has a long and proud history of providing innovative defence technology and services to the Australian and global defence industries. Renowned as Australia's Centre for Naval Aviation it has a strong industry base with extensive capabilities across air, land and sea and joint domains. Strategically located between Sydney and Canberra the Shoalhaven boasts a skilled stable workforce, competitive business costs, supportive business environment and an attractive affordable lifestyle.

Acknowledge the economic contribution of HMAS Albatross and its enhancement of the Defence Support, Aviation and Advanced Manufacturing industries across the Illawarra/Shoalhaven region.

- The acknowledgment of the Defence industry to the local manufacturing, defence support and allied industries is recognised, particularly as an attraction to new innovative technologies and entrepreneurship. This in turn amplifies the need for skills-based training to assist in the future needs of the defence industry including construction, transport and logistics.

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10. ENERGY COSTS

As a direct response to the current increases in electricity costs faced by businesses in the Shoalhaven, the Shoalhaven Business Chamber and Shoalhaven City Council are holding an Energy Crisis Forum.

The Forum on March 7th, 2018 will showcase the products, strategies and information available to help business owners directly reduce energy costs to their businesses.

Supports a balanced energy policy which reflects the production of sustainable alternative fuels at commercially viable costs including alternate energy production from waste recycling and ethanol fuels.

- Increasing costs of energy for regional businesses are affecting their commercial viability and their ability to employ local people. The threat to local jobs is serious and affirmative action is required to ensure that businesses are not forced to the wall by imbalanced energy policies.
- The Shoalhaven region has significant investment in alternative fuels such as ethanol production and waste recycling which need to be supported for their application across the country and internationally.

Supports the exploration of Gas reserves in NSW

- The restriction on the exploration of natural gas reserves in NSW has stifled investment in the exploration and supply of gas reserves/pipelines. There is an urgent need to support cost reduction in the energy market by bringing cheaper gas fuel energy into the NSW market.

Supports further use of hydro power generation in addition to the two existing facilities in the Shoalhaven.

- The two existing hydro power stations of the Shoalhaven Scheme, Kangaroo Valley and Bendeela are connected to the Sydney water catchment system and operate either as pumps or generate 240 megawatts of power.
- The expansion of this system could be used to store off-peak solar energy for peak-time demand.