

# Snowy Monaro

## Regional Economic Development Strategy 2018 - 2022

### *Vision*

*Connecting its communities and growing its strengths in tourism, energy generation, farming, forestry and manufacturing.*



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# 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](mailto:CERD@dpc.nsw.gov.au)



# Introduction

The **Snowy Monaro Regional Economic Development Strategy 2018 - 2022** (the Strategy) has been developed to facilitate economic growth opportunities across the Snowy Monaro Regional Council (the Region).

The Region is home to more than 20,000 people, concentrated in the centres of Cooma, Jindabyne and Bombala. People who work in the Region typically live in the Region: 84 per cent of its jobs are held by local residents.

*Economic development for the Snowy Monaro means bringing the Region's communities together to grow the skilled workforce, and strengthen an already diverse economic base, to contribute to a prosperous and thriving region.*

Economic principles suggest unique strengths provide regions with sustainable economic advantages, and so they should be points of focus for regional development policy.

Snowy Monaro's unique strengths were determined through review of several factors:

- the Region today – considering the Region as a whole and the localities within it for their particular demographics, infrastructure, institutions and economic opportunities
- endowments - key features of the natural environment, built environment, geography and society specific to the Region or location

- specialisations – activities in which the Region has a demonstrable advantage
- stakeholder consultation – ‘on the ground’ feedback on local economic conditions and forward-looking assessments of opportunities, issues, gaps and risks and initiatives to help shape the future.

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

The Region's Vision as a year-round tourism destination and exporter of power, produce and products. This can see the Region realise its potential as a connected and prosperous community set amidst a highly liveable natural environment.

Snowy Monaro's key endowments lie in its pairings of natural features and complementary infrastructure. For example, its mountainous terrain is paired with its ski fields and accommodation; waterways with the Snowy Mountains Scheme; and commercial forests with Dongwha Mill.

Snowy Monaro's diversified economy includes a range of specialisations, spanning:

- Engines of Growth like tourism, agriculture, forestry, power generation and manufacturing
- Enabling Industries like utilities, property services, administration, transport and professional services

- Population Serving Industries like education, retail, public administration and healthcare.

These strengths provide strategic imperatives to:

1. develop the Region's year-round tourism offering and accessibility from major markets
2. cultivate the Region's 'Engines of Growth' specialisations in agriculture, forestry and wood products
3. promote skills acquisition and industrial land development to strengthen the Region's employment base
4. grow the population to deepen the Region's internal markets for goods, services and labour.

This Strategy began with its guiding vision for the Region's future.

Next we establish the composition and defining economic characteristics and strengths of the Region today.

Finally, the strategic imperatives suggested by the analysis and stakeholder feedback are established, supported by detailed strategies and actions against the implementation themes.

This Strategy is the culmination of collaboration between the Snowy Monaro Regional Council, its community and the NSW Government's CERD.

Strategy implementation will be overseen by the General Manager of Snowy Monaro Regional Council, drawing on staff and broader stakeholders as appropriate.

# Background

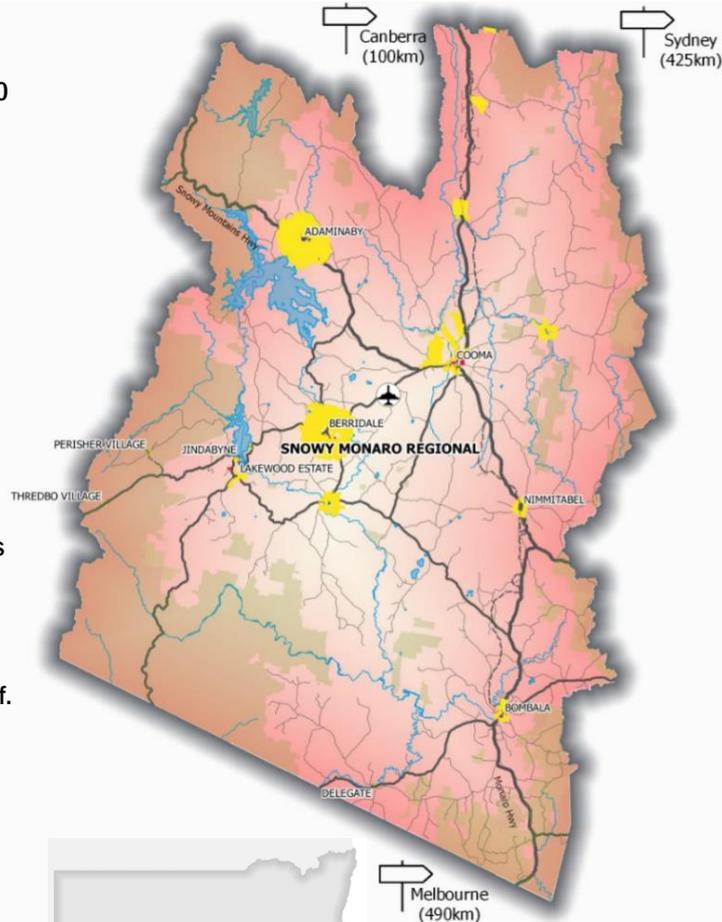
The Snowy Monaro Regional Council is located in south-eastern New South Wales, about 100 kilometres south of the Canberra CBD, and about 400 kilometres south-west of the Sydney CBD.

The Council was formed on 12 May 2016 through a merger of the Bombala, Cooma-Monaro and Snowy River Shires.

The Region covers 15,163 square kilometres, surrounded by rolling plains country and mountain ranges. About a third of the Region consists of National Parks and reserves.

The three major centres are relatively distinctive, economically and demographically. Jindabyne is the fastest growing centre and is heavily oriented towards tourism. Cooma has grown modestly over time and heavily features retail and agriculture in its economic base. Bombala has experienced population decline, despite being ideally located between the ski and surf. It has a strong agricultural base with growing forestry plantations and the expanding Dongwha Timber Mill. It will be a mid-way point on the proposed Bundian Way Walking Track.

The Region benefits from industry diversification beyond agriculture to include tourism, power generation and a potentially emerging manufacturing sector. This means the local economy is buffered from cyclical downturns in Agriculture. It offers diversity in job opportunities and therefore has a low unemployment rate.



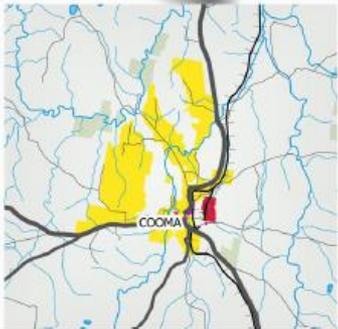
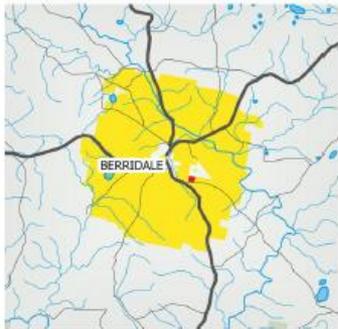
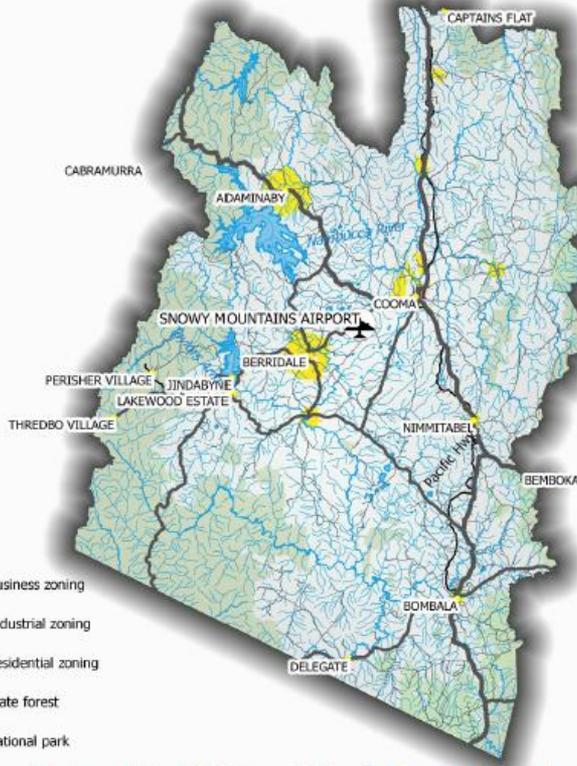
Snowy Monaro sits at the top of both the Snowy and Murrumbidgee River catchments offering significant environmental values, as well as a source of fresh water for urban, recreational, irrigation and energy uses. Snowy Monaro is home to the iconic Mount Kosciuszko, Australia's highest mountain and the historic Snowy Mountains Hydro Electric Scheme.

Snowy Monaro also serves as a gateway to the NSW South Coast, Southern Tablelands of NSW and North Eastern Victoria. The Region's major road links include:

- Monaro Highway
- Snowy Mountain Highway
- Delegate Road, Kosciuszko Road and Barry Way

The Region is connected by air via Snowy Mountains Airport, located 16 kilometres south-west of Cooma. Snowy Mountains Airport provides daily return services from the Snowy Mountains to Sydney. The Region also benefits from being in close proximity to Canberra International Airport, which is about 110km from Cooma.

# Snowy Monaro



**GRP**  
**\$991M**

**15,163 km<sup>2</sup>**  
**area**

**Employment by Industry**  
**Top 3**

Accommodation and Food Services	13.6%
Agriculture, Forestry and Fishing	9.9%
Retail Trade	9.3%

**\$675**  
**Weekly Median Income**

**96.7%**  
are employed in Snowy Monaro

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**3.3%**  
unemployment

**17.1%**  
of population are younger than 15

**43**  
**Median Age**

**Population**  
**20,218**

**19.2%**  
of population are older than 65 (2016)

Source: Australian Bureau of Statistics, 2016 Snowy Monaro Regional (A) (Local Government Areas)

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



# 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.

NSW Department of Planning and Environment estimates that by 2036, Snowy Monaro population will be around 21,650. However, these estimates do not directly account for recent increases in tourism in Jindabyne or growth opportunities associated with the Snowy 2.0 proposal.

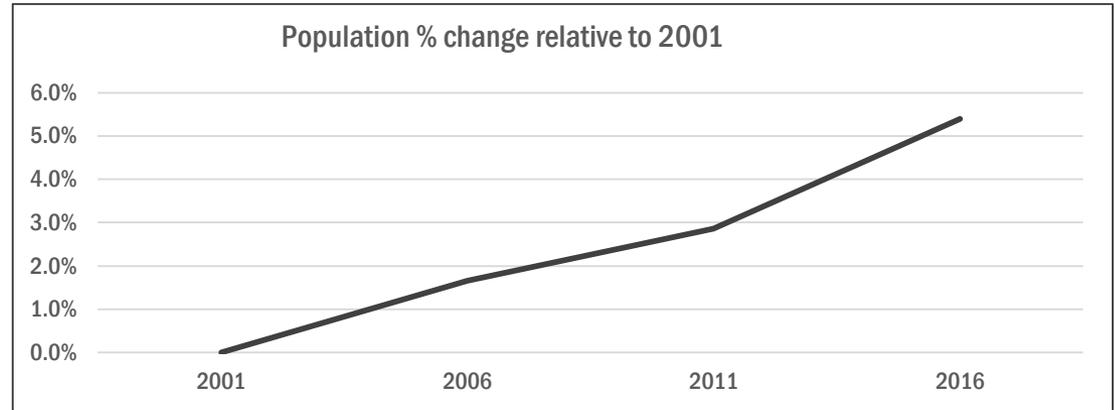
In reviewing the Region’s population, it is important to account for differences in the composition of growth and demography across the Region’s centres.

As a generalisation, Bombala has experienced ongoing contractions in population, such that it is now about 7.5 per cent below 2001 levels. This is despite Dongwha Timber Mill expanding production and looking for workers to staff a proposed MDF factory. Cooma and its surrounding area are about 4 per cent above 2001 levels, with Jindabyne about 12 per cent above 2001 levels.

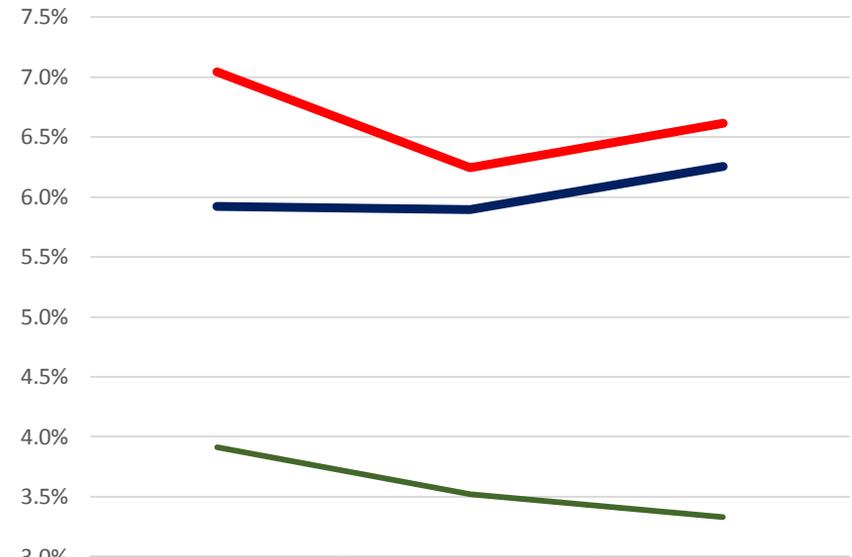
Differences in population growth are more pronounced over longer periods of time. Jindabyne-Berridale is about 50 per cent above its 1991 levels, while Bombala’s population has contracted by about a quarter over that same period.

Taken as a whole, the demographic profile of the Region is close to representative of averages for regional NSW. However, one key point of distinction for the Region is its relatively low unemployment rate.

On 2016 Census data, Snowy Monaro’s unemployment rate is half that for Regional NSW and three percentage points below the NSW average. Reported unemployment rates were lowest in Jindabyne (2.1 per cent) and highest in Cooma (4.7 per cent).



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%



# Endowments

Endowments are strengths that a regional economy possesses and can capitalise on. Economic principles suggest that endowments play a key role in the economic development of regions. The CERD in its Regional Economic Growth Enablers Report (2017) found that:

*the future of individual regional economies is inexorably linked to their natural endowments and attempts to retain or establish industries without an underpinning endowment are unlikely to succeed.*

A region seeking to encourage economic development should therefore concentrate on factors that enable the growth of endowment-based industries, as well as building local leadership and institutional capacity and capabilities, to facilitate businesses and public agencies and services to capitalise on the opportunities that a region's endowments present. Endowments can lead to opportunities from which commercial and industrial interests may leverage and develop specialisations.

## Physical or geographic endowments

**The Snowy Mountains** – the Snowy Mountains offer unique cool-climate environmental amenity and are also the basis for major economic activities like tourism and electricity generation. The Mountains are also the source of the distinctive climate of the Region and the water sources it supports.

**Lake Jindabyne and Lake Eucumbene** – both lakes offer incredible natural beauty. They are integral to the economic productivity of the Snowy Mountains Scheme and recreational fishing, and could play a larger role in tourism activity over time.

**Prime Agricultural Lands and Commercial Forests** – in addition to agricultural productivity, commercial timber grown around Bombala provides the base for forestry, timber products and logistics.

**Proximity to Canberra and major metropolitan markets** – Snowy Monaro's access and proximity to Canberra, home to the community with the highest household disposable incomes in the country. It is an attractive cool climate destination for Sydney and Brisbane residents, whose visitation could be leveraged with improved air services.

## Built endowments

**The Snowy Mountains Scheme** – the network of power stations, turbines, pumping stations, dams, pipelines and aquaducts provides 4100MW of electricity generation capacity.

**Dongwha Timbers** – Dongwha Mill plays a key role in transforming the Region's timber assets into wood products, including lumber and deck products, employing numerous people.

**Other private capital equipment** – large scale investments in private capital, including accommodation facilities, greatly enhance the productive potential of the Snowy Monaro Region.

**Monaro Highway** – the Monaro Highway is the Region's principal source of north-south access. Monaro Highway access facilitates tourism, which is largely road-based, as well as more general connectivity for people and goods back into the major population centres to the Region's north.

**The Alpine Way and Kosciuszko Road** – provides connectivity for visitors to the the Ski resorts of Thredbo, Charlotte Pass ski and the ski tube to Perisher .

**Snowy Mountains Highway** – the Snowy Mountains Highway provides significant east-west access through the Snowy Mountains region. This access is important to the Snowy Mountains Scheme, facilitates substantial timber volumes from the Region to Tumut for processing, and offers broader connectivity benefits to the communities of the Region.

**Snowy Mountains Airport** – located 16km southwest of Cooma on the Kosciuszko Road. Snowy Mountains Airport provides return services from the Snowy Mountains to Sydney.

**Ski fields** – the Region's ski fields are a magnet for tourists and supporting activities.



# Endowments

Snowy Monaro's endowments reflect combinations of natural and geographic advantages augmented by built infrastructure to make the most of the productive opportunities they present. For example, mountainous terrain has been complemented by ski fields and the Snowy Scheme to support specialisations in tourism and electricity generation. In Bombala, commercial forests are complemented by Dongwha Mill to expand production opportunities.

These endowments and the relatively small scale of the Region's population emphasise the need for more effective connections to external markets. For example, one of Jindabyne's key points of competition for winter sports tourism is Queenstown, which is served by regular direct air services from major markets on Australia's east coast. Similarly, the Region's agricultural producers do not have the quality of trade relationships and access to major metropolitan markets enjoyed by other agricultural regions like the Riverina, Northern Tablelands and Central West.

The Region also faces other key challenges in the years ahead. The newly established council faces a considerable challenge in representing and administering its relatively diverse communities and geographies with a modest population base. Similarly, the Region's population supports a remarkably diverse range of capabilities for its scale, but very low rates of unemployment are symptomatic of a scarcity of labour supply, which was confirmed by employers during consultation.

## Human endowments

**Diverse specialised skill sets** – the sub-industry data suggests Snowy Monaro workers present a diverse range of regional specialisations, spanning: tourism, agriculture, forestry, power generation, manufacturing, support services, education, retail and healthcare.

**Entrepreneurial talent** – for a small population the Region has strong entrepreneurial talent, like Birdsnest clothing, which has built a well-established online retail business.

**Community** – the Region's residents have a strong sense of community, with many active community and sporting groups who are very welcoming of new residents.

**Cultural heritage** – the Ngarigo people are the traditional custodians of most of the Region, with connection of other groups like the Walgalu, Ngunnawal and Bidjawal people. The Bundian Way is an Eden Local Aboriginal Land Council project that is developing the ancient walking track from the coast to Kosciuszko. The walking track is older than the Silk Road and was used by Aboriginal people for trading, ceremonies, family gatherings and caring for the country for thousands of years.

## Institutional endowments

**Snowy Hydro** – Snowy Hydro is a leading innovative player in the National Electricity Market and sizeable employer in the Snowy Monaro Region. Their decisions, including those in relation to the Snowy 2.0 investment proposal, will have substantial implications for the economic future of the Region.

**Tourism Snowy Mountains** – is an independent, not-for-profit membership-based organisation recognised as the official Regional Tourism Organisation for the Snowy Mountains. It provides administrative and organisational know how to the task of attracting tourists and activating the tourism potential of the Region.

**Chamber of Commerce** – the Region has a strong network of business chambers that come together for the annual business awards.

**Country Universities Centre** – Located in Cooma, the Country Universities Centre facilitates, delivers, promotes and provides access to university education in regional and rural areas. The Centre was opened on March 6, 2013 as a joint initiative of Snowy Hydro, and the then, Cooma Monaro Shire Council.

**TAFENSW Cooma** – has developed flexible delivery strategies to service a large area with a small population. It has Access Centres at Bombala and Jindabyne, and also offers customised training onsite.

**Snowy Monaro Council** – the newly established council provides the Region's economic and institutional leadership across a large and relatively diverse geographic area.

# Specialisations

A simple form of analysis that can be used to gain an understanding of a region's competitive advantages is the Location Quotient (LQ) which measures the employment concentration in industry sectors within a regional economy, compared with the same sectors across NSW. The higher the LQ, the more specialised a region is in that industry relative to the rest of NSW. For the purpose of this analysis, specialisations as defined by LQs, are in turn used as a proxy measure for those sectors and industries that represent a region's true competitive advantages.\*

Importantly, while LQs are used in this document for that purpose, they are only a partial measure of those competitive advantages. Hence, they have been considered alongside additional qualitative evaluations and data analysis, such as Input-Output analysis, to arrive at the findings for the Region's Specialisations and Strategies.

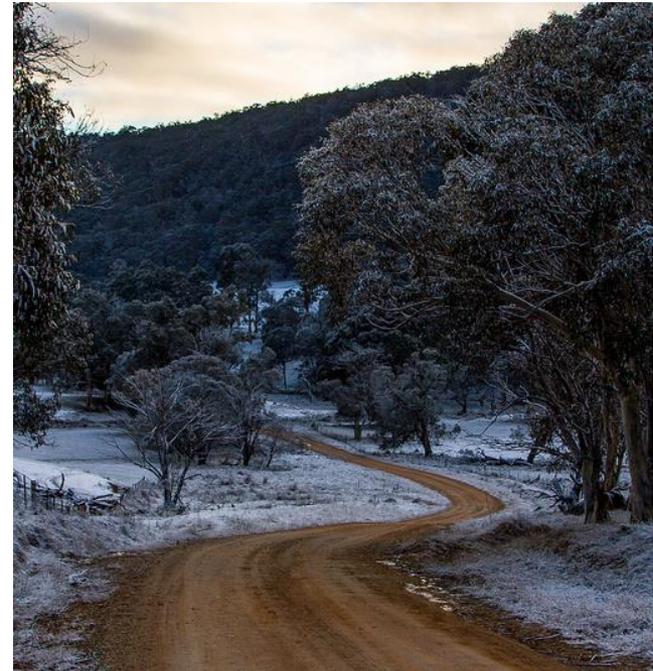
The 'bubble chart' (below) of selected industries in the regional economy in 2016, where:

- Industries with a larger 'bubble' employed more people
- Industries further above the horizontal line are more specialised when compared to NSW (LQ greater than 1.25), industries below the line are less specialised when compared to NSW
- Industries to the right of the vertical line grew faster between 2011 and 2016 than comparable industries across NSW; industries on the left grew more slowly. This value is calculated as the Region's industry growth rate less than the NSW growth rate for that industry, and is expressed in percentage points (ppts).

Overall the Snowy Monaro has achieved employment growth in all industries from 2011 to 2016. Compared to general trends for NSW, it achieved a much faster rate of growth in industries such as Manufacturing, Wholesale Trade, Utilities, Administration and Education. The growth in these industries points to potentially emerging specialisations.

Markets reflecting slower employment growth compared to NSW included Professional Services, Financial Services and Health Care. The Region's slower growth in these sectors may reflect the limited scale of its internal markets and its relatively modest rates of population growth for the Region as a whole.

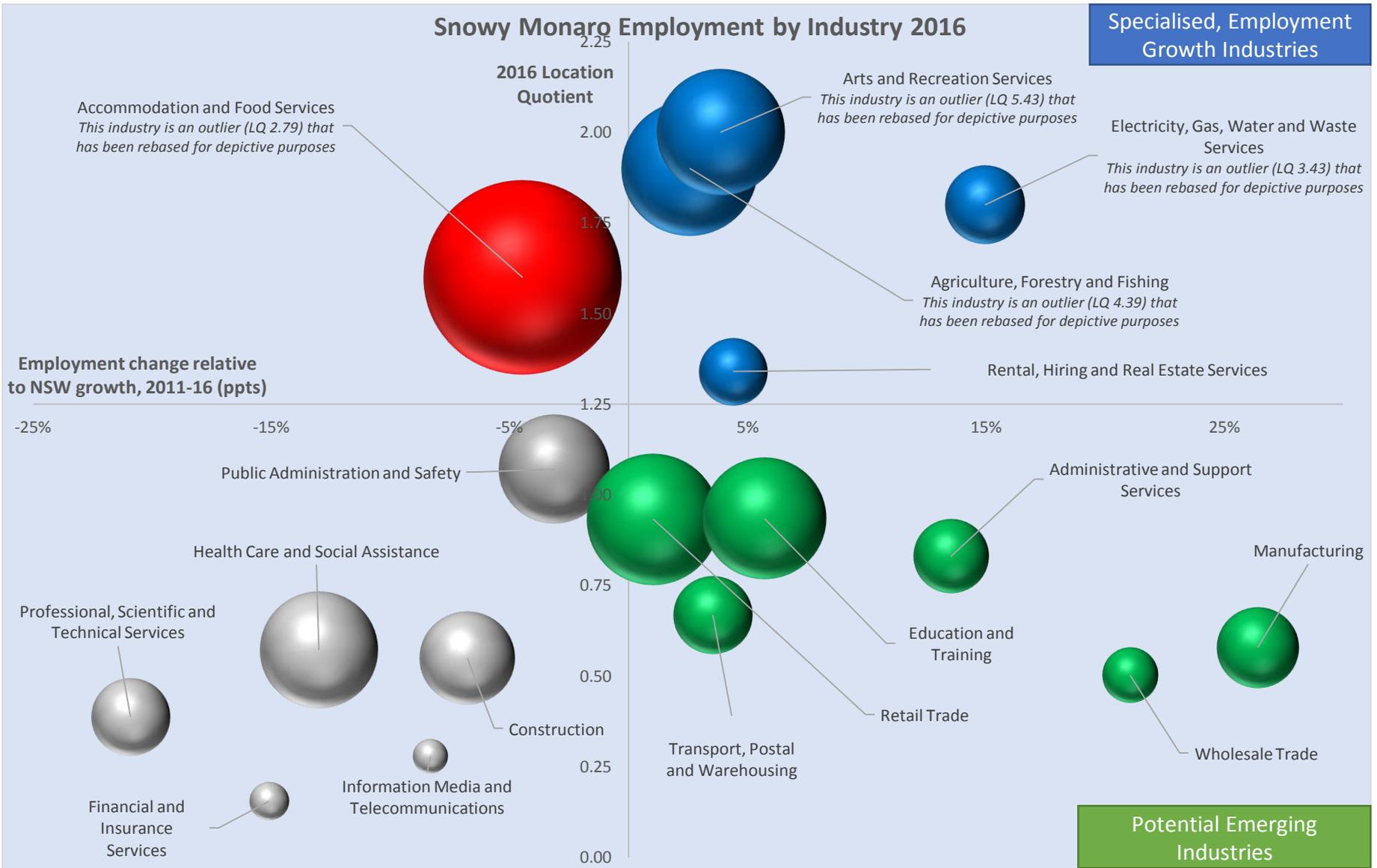
The Region has a high concentration of employment and a specialisation in Agriculture and Utilities. It also has a high employment concentration in Accommodation and Food Services, Arts and Recreation and Rental Hiring and Real Estate Services which are all closely linked to tourism. Together these industries account for about a third of the Region's employment, highlighting the Region's further specialisation in Tourism.



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



# Specialisations and Shifts in Employment - Snowy Monaro Compared to NSW 2011-2016





# Snapshot of Economy, Industry and Opportunity

## Production & Income by Sector

The figure on the next page is a key 'roadmap' to understanding economic opportunity in the Region. It reflects the income split between workers and businesses in each sector (blue and orange bars) and how much each industry contributes to regional production (the stacked height of the bars).

Business income is concentrated in Agriculture, Utilities and Accommodation & Food Services, which together account for 57 per cent of business income.

For wage and salary earners, opportunities are concentrated in four industries – Accommodation and Food Services, Public Administration and Safety, Education and Training, and Health Care and Social Assistance – accounting for 43 per cent of employee income.

In analysing the Region's economic features, it can also be useful to group similar industries together to allow review and comparison of some of their common underpinning economic drivers. One useful classification of activities is:

- “Engines of Growth” – activities linked to external markets and opportunities beyond the bounds of the Region, like agriculture, manufacturing and tourism
- “Enabling Industries” – activities within the Region providing key support services to Engines of Growth businesses, like property services, administration, transport and professional services
- “Population Serving Industries” - activities serving the people and communities of the Region, including activities like education, retail, public administration and healthcare.

Relative to the structure of NSW's regional economy, Snowy Monaro is most clearly specialised in Tourism (Arts & Recreation Services and Accommodation & Food Services), Utilities and Agriculture. Employment growth in Manufacturing suggests this may be an emerging specialisation.

Overall, this means Snowy Monaro's representation of 'Engines of Growth' industries is in keeping with what is typical for regional NSW, with Population Serving Industries reflecting a relatively low share and Enabling Industries a high share.

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.

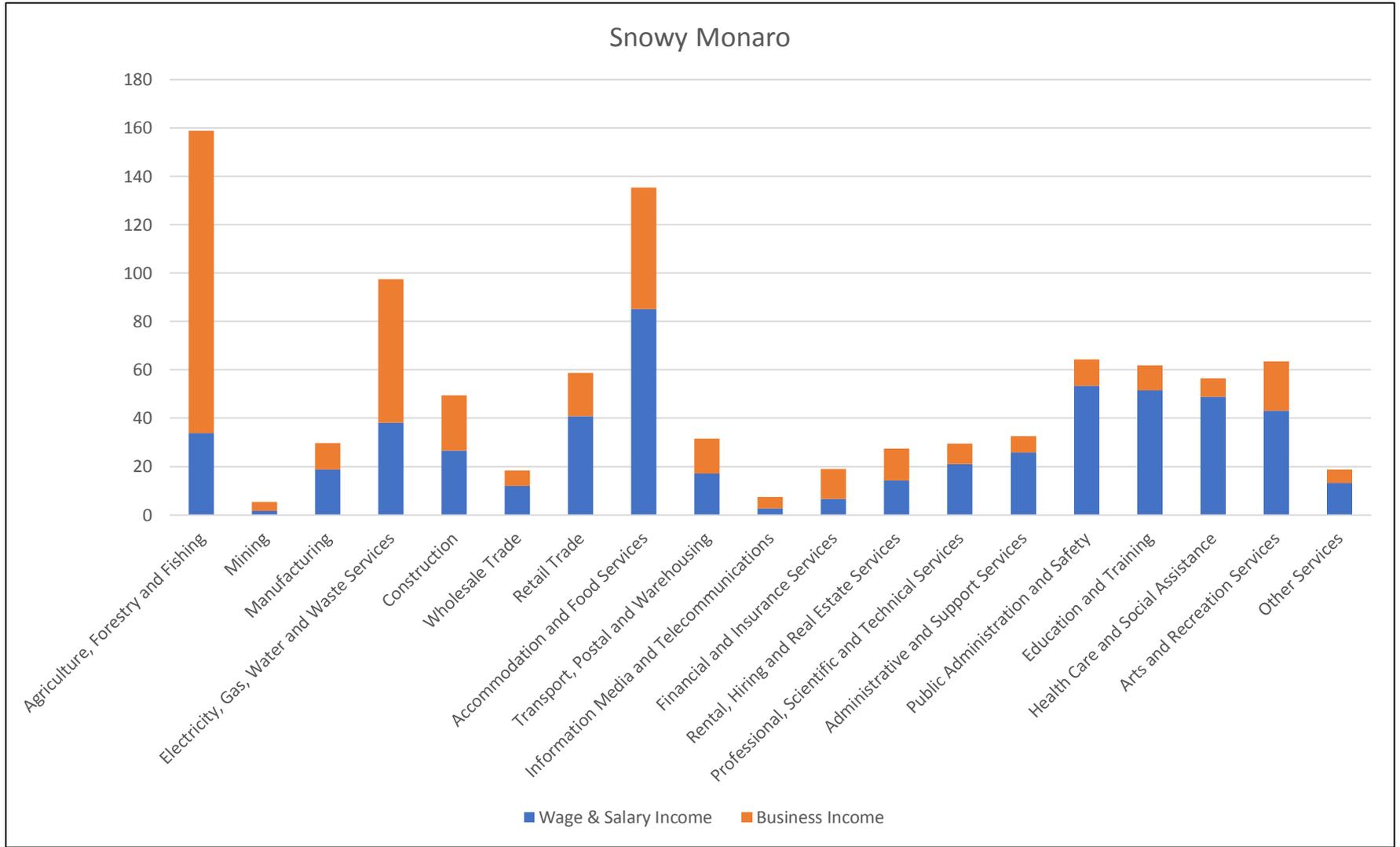
The CERD analysis shows Snowy Monaro is a net importer, with exports out of the Region estimated at \$274 million and imports into the Region estimated at \$462 million.

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.

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

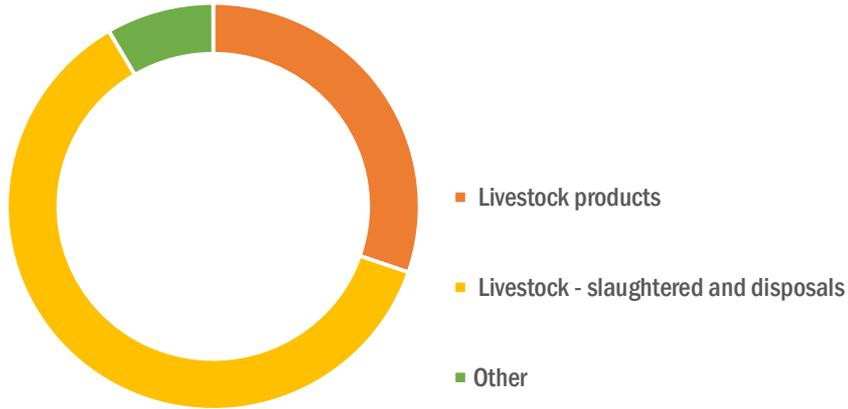
CERD have also undertaken an analysis of tourism linkages across the Snowy Monaro Region. CERD's analysis supports a conclusion that after both direct and flow-on contributions are considered, more than 40 per cent of wages, employment and output can be said to be supported by Tourism.

# Snapshot of Economy, Industry and Opportunity



# Agricultural Production

Value of Agricultural Production 2015-16



**Bombala and Cooma are the Region's agricultural hubs.**

Taken together, Bombala and Cooma's surrounds contributed more than 75 per cent of production.

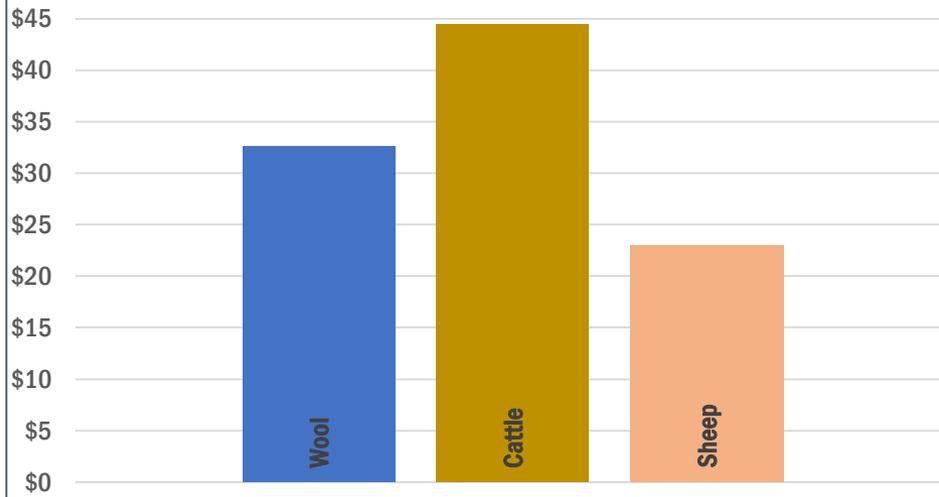
**Snowy Monaro's agricultural production topped \$110 million in 2015-16, with livestock and livestock products well ahead of cropping.**

Production in the Region is heavily oriented towards livestock and livestock products, which make up more than 90 per cent of production by value.

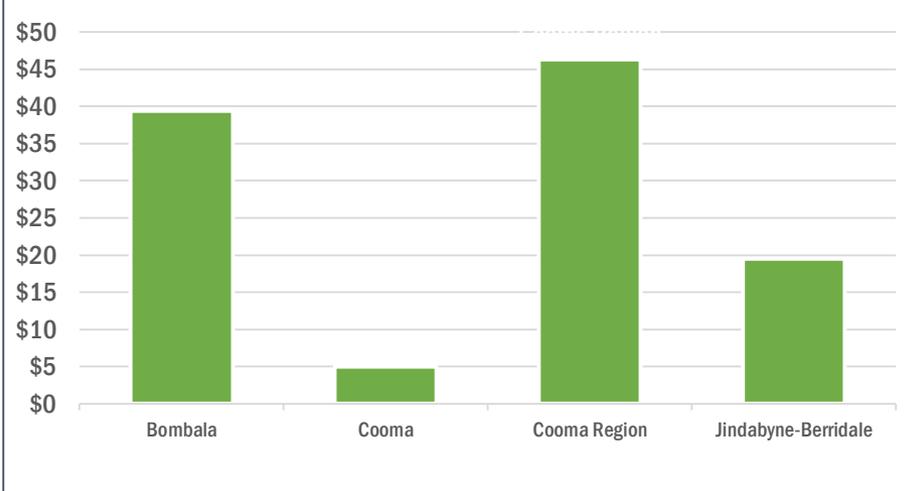
**Cattle and calves were the leading commodity of Snowy Monaro in 2015-16.**

Production of cattle, wool and sheep together accounted for about \$100 million of production in 2015-16.

2015-16 Major Commodities (\$M)



2015-16 Production by Location (\$M)



Data source: Australian Bureau of Statistics, Value of Agricultural Commodities Produced 2015-16 (7503.0) Note the available data does not precisely match LGA boundaries. The available SA2 boundaries have been used to match LGA boundaries to the extent possible.

The primary industry specialisations of the Region across the 'Engines of Growth', 'Enabling Industries' and 'Population Serving Industries' groupings are summarised below.

Among the '**Engines of Growth**', Snowy Monaro's key specialisations are tourism, agriculture, forestry, power generation and manufacturing.

**Key sub-industry specialisations include:**

1. Accommodation
2. Cafes, Restaurants and Takeaway Food Services
3. Sports and recreation Activities
4. Sheep, Beef Cattle and Grain Farming
5. Forestry and Logging, Log Sawmilling and Timber Dressing, and Timber and Hardware Goods Wholesaling
6. Electricity Generation, Electricity Distribution, and Electricity Supply
7. Wood and Food Product Manufacturing

Among the '**Enabling Industries**', Snowy Monaro's key specialisations are in industries supporting tourism like property services, rental and hiring services and travel and touring services. Other Enabling Industries supporting other 'Engines of Growth' industries include administration and professional services.

**Key sub-industry specialisations include:**

1. Real Estate Services
2. Rental and Hiring Services
3. Building, Cleaning, Pest Control and Gardening Services
4. Other Goods and Equipment Rental and Hiring and Travel Agency and Tour Arrangement Services.
5. Administrative Support Services
6. Road Freight Transport
7. Road Passenger Transport.
8. Legal and Accounting Services
9. Architectural, Engineering and Technical Services

Among the '**Population Serving Industries**', Snowy Monaro's key specialisations are in education, retail, public administration and healthcare.

**Key sub-industry specialisations include:**

1. Adult Community and Other Education
2. Preschool and School education
3. Food, Motor Vehicle and Fuel retailing
4. Clothing, Footwear and Personal Accessory Retailing, and Recreational Goods Retailing.
5. Local Government Administration, Public Order and Safety Services, Defence, Central Government Administration, and State Government Administration
6. Residential Care Services
7. Medical Services



# Risks

**Through consultation, the community contributed to the Strategy development process by identifying issues today that may be central to the economic future. This included a range of risks that may impede Snowy Monaro from achieving its economic potential.**

**Addressing these risks is essential to realising this Strategy's economic Vision for the Region.**

### Tourism risks:

- Heavy vehicles are driving through residential and tourist areas due to lack of dedicated heavy vehicle routes.
- 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 from holiday makers and can make the highway unsafe during emergency situations. |
- The Region's local air services timetables need improvement, as most commuters presently drive to Canberra Airport for wider connections to other major cities in Australia.
- Council needs to work closely with National Parks and Wildlife Service when reviewing the Kosciuszko National Park Plan of Management to continue to improve environmentally friendly tourism opportunities.
- New premium accommodation offerings are required to meet visitor expectations.
- Loss of indigenous cultural heritage in the Region.

- There have been limited infrastructure upgrades in the Perisher Ski Resort for the past 30 years, and it is unable to support growing numbers of tourists and changing demands for different tourism products. Despite a governance review and a world-wide expression of interest in 2017, there was no successful bid. Council will support NPWS in working with the NSW government to deliver improved governance approaches for Perisher.
- A warming climate reduces snow depth, cover and duration, putting winter tourism at risk. The industry's ability to create artificial snow will also be challenged as it becomes less efficient as humidity rises.

### Industry risks:

- The Region could miss out on the economic prosperity associated with the construction of Snowy Hydro 2.0 if they fail to effectively advocate and manage for these benefits.
- Mobile blackspots and a lack of reliable internet coverage in Snowy Monaro are inhibiting innovative start-up businesses and existing business to grow.
- Skilled labour shortages - local employers are struggling to recruit to fill skilled positions, jeopardising productivity.
- Inconsistent development consent processes are creating investment uncertainty.
- Lack of coordination and integrated services across different levels of government discourages development.
- Industry need to innovate and adapt to projected climate variability.

- Training courses are not available close to home, requiring staff or potential job seekers to travel outside the Region or miss out on skills acquisition.
- Shortage of rental accommodation and a limited stock of housing is a barrier to attracting families and workers to the Region and puts pressure on rents for local residents.

### Liveability risks:

- Population decline in Bombala is creating a negative image for the town and making it hard to attract workers to the expanding Dongwha Mill.
- Skilled workers are deterred from moving to the region if their spouses are unable to find suitable employment, this is a key issue for Bombala.
- Poor public transport connections between the population centres is contributing to a disconnected region, and restricts access to government services.
- The cost of expanding water and sewer services to new subdivisions may discourage investment by developers, where this is not offset by land values.
- Shortages of zoned land exacerbates housing supply pressures and increases prices and costs.
- The community expects high quality health and education services, but servicing a growing, ageing population cost effectively without compromising quality or care is a rising challenge
- Servicing a small, dispersed population.
- Cultural, sporting and other social amenities for the people in the Region may be insufficient to attract new families that could help service older members of the community.



# Strategy

The four Strategy elements for the Region link directly to the opportunities presented by the Region's endowments and specialisations and also aim to address some key regional risks.

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

Each element is accompanied by a set of early actions, which should be interpreted simply as example actions derived from the preliminary application of the strategy framework. It is therefore expected that there will be other actions capable of contributing to the attainment of the Region's vision that are yet to be identified. Consequently, an action's alignment with the Strategy is the primary strategic consideration, rather than it being listed in this document, and all proposed actions will be subject to further qualitative and quantitative evaluative processes.

We previously saw that the Snowy Monaro's diversified economy incorporates a broad range of strengths, spanning:

- Engines of Growth like tourism, agriculture, forestry, power generation and manufacturing
- Enabling Industries like utilities, property services, administration, transport and professional services
- Population Serving Industries like education, retail, public administration and healthcare.

These strengths inform the strategic elements:

1. develop the Region's year-round tourism offering and accessibility from major markets
2. cultivate the Region's 'Engines of Growth' specialisations in agriculture, forestry and wood products
3. promote skills acquisition and industrial land development to strengthen the Region's employment base
4. Grow the Population to deepen the Region's internal markets for goods, services and labour.





# 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, Brisbane and Victoria, 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 and accommodation 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
<ul style="list-style-type: none"><li>• Make the most of Snowy Monaro's natural endowments for all year-round tourism opportunities.</li><li>• Facilitate private investment to cultivate tourism products.</li><li>• Review the efficiency of connections to capital city markets.</li></ul>	<ul style="list-style-type: none"><li>• Develop and implement a region wide Year-Round Tourism Strategy:<ul style="list-style-type: none"><li>• Mountain Bike and Iconic Walking Trails</li><li>• Lake Eucumbene and Lake Jindabyne mountain biking trails</li><li>• Rail trails on the disused rail corridor</li><li>• Heritage, cultural and agri-tourism.</li></ul></li><li>• Work with National Parks and Wildlife Service to investigate opportunities to sustainably utilise the national parks.</li><li>• Support revision of the ski resorts Head Lease arrangements to promote growth in year-round tourism.</li><li>• Investigate recreational fishing and adventure sports tourism opportunities.</li><li>• Further develop the Bundian Way walking track concept.</li><li>• Increase awareness and recognition of the Region's indigenous cultural heritage, and provide greater access to indigenous art, cultural and business opportunities.</li><li>• Investigate opportunities to grow the day-trip/short-stay market of Canberra and the South Coast.</li><li>• Engage with airlines to identify opportunities to improve passenger services at both Cooma and Jindabyne Airports.</li><li>• Undertake a feasibility study into re-establishing rail connections to capital city markets.</li></ul>	<ul style="list-style-type: none"><li>• Bundian Way Walking Track</li><li>• Mountain bike trails</li><li>• Upgrade of Jindabyne Airport</li></ul>



## 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 offers further expansion opportunities in coming years.

These specialised industries are relatively mature and require modest levels of government support. However, the further development of industry depends on the quality of connections to market and institutional linkages. 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 bypass route in Bombala

### Opportunities

#### Early Stage Actions

#### Candidate Projects

<ul style="list-style-type: none"> <li>Secure reliable, high capacity digital and mobile connections.</li> <li>Improve road corridor productivity for freight.</li> <li>Review the potential of rail freight connections.</li> <li>Improve Cooma's saleyards to facilitate livestock processing.</li> <li>Build close relationships with partners beyond the Region.</li> <li>Support innovation and collaboration within local industry</li> </ul>	<ul style="list-style-type: none"> <li>In collaboration with the private sector audit digital connectivity blackspots, and support the development of improved and new telecommunication facilities where this assist business expansion.</li> <li>Undertake a Regional Freight and Traffic Study.</li> <li>Develop project proposals for:               <ul style="list-style-type: none"> <li>Monaro Highway Improvements</li> <li>Kosciuszko Road Improvements</li> <li>Parsonage Creek Bridge Upgrade</li> <li>Delegate Road Improvements</li> <li>Polo Flat Road Upgrade</li> </ul> </li> <li>Review freight pinch points and develop a catalogue of investment priorities for local roads.</li> <li>Work with the NSW government to alleviate congestion issues between Jindabyne and the major ski resorts.</li> <li>Foster and sustain close relationships with Canberra Airport and the Port of Eden.</li> <li>Undertake a feasibility study to investigate the potential use of rail to connect producers to the Port of Eden and Canberra Airport.</li> <li>Develop a business case for upgrading Cooma's Saleyard.</li> <li>Work with Ausindustry and NSW Department of Industry to improve trade connectors for producers in the region.</li> <li>Investigate the potential impacts of climate variability on local industry.</li> </ul>	<ul style="list-style-type: none"> <li>Heavy Vehicle bypass in Bombala</li> <li>Heavy Vehicle Turning, Parking and Resting Bay at Delegate (South side of Bombala)</li> <li>Monaro Highway Improvements</li> <li>Kosciuszko Road Improvements</li> <li>Parsonage Creek Bridge Upgrade</li> <li>Delegate Road Improvements</li> <li>Polo Flat Road Upgrade</li> <li>Bobeyan Road</li> <li>Black Lake Road Bombala</li> <li>Imlay Road Upgrade</li> </ul>
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### 3. Promote Skills Acquisition and Industrial Land Development to Strengthen the Region's Employment Base

#### 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, sub-contractors 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

- Review the opportunities associated with Snowy 2.0 and how to make the most of them.
- Address "first mover" disadvantages in meeting enabling infrastructure costs.
- Secure reliable, high capacity digital and mobile connections.
- Collaborate with industry, high schools, Country Universities Centre and Cooma TAFE to match training courses to industry needs.

#### Early Stage Actions

- Develop an action plan to encourage as many Snowy 2.0 contractors, subcontractors and workers to locate in the Region where possible.
- Conduct a planning review into the regions industrial and employment lands to determine future demand, potential locations and any necessary changes to land use planning controls.
- Develop business cases for industrial precincts at Polo Flat and Bombala.
- Advocate for a Primary and Innovative Community Centre with the Country Universities Centre.
- Align youth skills development and ongoing training courses to local industry needs.
- Provide opportunities for industry to upskilling in climate variability adaptation techniques.
- Work with small business to take advantage of growing tourism and the opportunities presented by Snowy 2.0 to encourage growth and productivity.
- Continued support and promotion of Snowy Monaro Business Awards.

#### Candidate Projects

- Polo Flat Industrial Precinct improvements and stormwater drainage upgrades.



## 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 potential and diversity and increase its resilience to external shocks.

The foremost priority actions for Council should be completing its first local environmental plan for the unified council area. Secondary priorities should include identify enabling economic and social infrastructure and services that can help increase housing supply and further enhance the attractiveness of the Region. A Bombala Activation Plan to improve liveability and attract working families should be developed in partnership with the community, employers, and three levels of government.

### Infrastructure Priorities

Housing supply enabling infrastructure, including water & sewerage.

### Opportunities

- 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.

### Early Stage Actions

- Review and complete Snowy Monaro land use planning strategies.
- 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 of the Region.
- 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.

### Candidate Projects

- Water and Sewerage Treatment System in Delegate and Jindabyne
- Sewerage connections in Adaminaby
- Michelago Essential Infrastructure
- Bombala Activation Plan.



# Implementation Plan

Strategy implementation will be overseen by the General Manager of Snowy Monaro Regional Council, drawing on staff and broader stakeholders as appropriate.

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

The completion of this document is intended to be the first stage of an ongoing process where new specific actions to further progress towards the Vision are identified through application of the framework.

The General Manager will meet regularly to track progress and liaise with the Regional Director, Southern NSW, NSW Department of Premier and Cabinet. These meetings could also be used to check the Strategy's progress and review against current grant opportunities.

After two years, a formal review of the Action Plan and associated governance processes will be initiated, producing a brief report card to be published as an addendum to the Economic Development Strategy.

This will also provide an opportunity to update the Action Plan for new or modified actions in view of key economic, social, environmental and policy changes.

After four years, an Advisory Committee will also begin the process of updating or refreshing the Strategy.



# Snowy Monaro Enablers Table

Strategies and Early Stage Actions				
Enablers	Develop a Year-Round Tourism Offering	Develop the Agriculture, Forestry & Wood Products Specialisations	Promote Skills Acquisition and Industrial Land Development	Grow the Population to Deepen the Region's Markets
People and Skills	<ul style="list-style-type: none"> <li>Increase awareness and recognition of the Region's indigenous cultural heritage, and provide greater access to indigenous art, cultural and business opportunities.</li> </ul>		<ul style="list-style-type: none"> <li>Develop an action plan to encourage as many Snowy 2.0 contractors, subcontractors and workers to locate in the Region as is possible.</li> <li>Align youth skills development and ongoing training courses to local industry needs.</li> <li>Provide opportunities for industry to upskilling in climate variability adaptation techniques.</li> </ul>	<ul style="list-style-type: none"> <li>Undertake a scoping study of innovative solutions for the delivery of short-term worker accommodation for the winter season.</li> <li>Develop a cultural development strategy aimed at uniting the region.</li> </ul>
Utilities		<ul style="list-style-type: none"> <li>In collaboration with the private sector audit digital connectivity blackspots, and support the development of improved and new telecommunication facilities where this assist business expansion.</li> </ul>		<ul style="list-style-type: none"> <li>Review and assess water treatment and sewerage system capacity across Snowy Monaro.</li> <li>Undertake a gap analysis of key community infrastructure and services in each of the three major centres of the Region.</li> </ul>

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Strategies and Early Stage Actions				
Enablers	Develop a Year-Round Tourism Offering	Develop the Agriculture, Forestry & Wood Products Specialisations	Promote Skills Acquisition and Industrial Land Development	Grow the Population to Deepen the Region's Markets
Government, regulation, services and information	<ul style="list-style-type: none"> <li>Develop and implement a region wide Year Round Tourism Strategy:               <ul style="list-style-type: none"> <li>Mountain Bike and Iconic Walking Trails</li> <li>Lake Eucumbene and Lake Jindabyne mountain bike trails</li> <li>Rail trails on the disused rail corridor</li> <li>Heritage, cultural and agri-tourism.</li> </ul> </li> <li>Work with National Parks and Wildlife Service to investigate opportunities to sustainably utilise the national parks.</li> <li>Support revision of the ski resorts Head Lease arrangements to promote growth in year-round tourism.</li> <li>Investigate recreational fishing and adventure sports tourism opportunities.</li> <li>Investigate opportunities to grow the day-trip/short-stay market of Canberra and the South Coast.</li> </ul>	<ul style="list-style-type: none"> <li>Foster and sustain close relationships with Canberra Airport and the Port of Eden.</li> <li>Work with Ausindustry and NSW Department of Industry to improve trade connectors for producers in the region.</li> <li>Undertake a Regional Freight and Traffic Study.</li> <li>Investigate the potential impacts of climate variability on local industry.</li> </ul>	<ul style="list-style-type: none"> <li>Advocate for a Primary and Innovative Community Centre with Country Universities Centre.</li> <li>Work with small business to take advantage of growing tourism and the opportunities presented by Snowy 2.0 to encourage growth and productivity.</li> <li>Continued support and promotion of Snowy Monaro Business Awards.</li> </ul>	<ul style="list-style-type: none"> <li>Review and complete Snowy Monaro land use planning.</li> <li>Develop and implement a Bombala Activation Plan.</li> <li>Collaborate with NSW Health to prepare a Road Map to address regional health care service delivery gaps.</li> <li>Undertake a gap analysis of key community infrastructure and services in each of the three major centres of the Region.</li> <li>Progress new bus and coach service improvements for the region to improve connectivity between centres.</li> </ul>

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Infrastructure	<ul style="list-style-type: none"> <li>• Further develop the Bundian Way walking track concept.</li> <li>• Engage with airlines to identify opportunities to improve passenger services at both Cooma and Jindabyne Airports.</li> <li>• Undertake a feasibility study into re-establishing rail connections to capital city markets.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop proposals for:               <ul style="list-style-type: none"> <li>○ Monaro Highway Improvements</li> <li>○ Kosciuszko Road Improvements</li> <li>○ Parsonage Creek Bridge Upgrade</li> <li>○ Delegate Road Improvements</li> <li>○ Polo Flat Road Upgrade</li> <li>○ Bobeyan Road</li> <li>○ Black Lake Road Bombala</li> <li>○ Imlay Road Upgrade</li> <li>○ Springfield Road Upgrade</li> </ul> </li> <li>• Review freight pinch points and develop a catalogue of investment priorities for local roads.</li> <li>• Work with the NSW government to alleviate congestion issues between Jindabyne and the major ski resorts.</li> <li>• Undertake a feasibility study to investigate the potential use of rail to connect producers to the Port of Eden and Canberra Airport.</li> <li>• Develop a business case for upgrading Cooma's Saleyard.</li> </ul>	<ul style="list-style-type: none"> <li>• Develop business cases for industrial precincts at Polo Flat and Bombala.</li> </ul>	<ul style="list-style-type: none"> <li>• Undertake a review of housing supply opportunities and enablers study for each of the major centres, including necessary enabling infrastructure upgrades.</li> </ul>

