

Queanbeyan – Palerang Regional Economic Development Strategy 2018 - 2022

Supporting Analysis



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Preamble

- The Regional Economic Development Strategy for the Queanbeyan-Palerang Region is presented in two documents, the Queanbeyan-Palerang Regional Economic Development Strategy 2018–2022 (the Strategy) which allows the reader to easily determine key content, and the Queanbeyan-Palerang Regional Economic Development Strategy 2018–2022: Supporting Analysis (Supporting Analysis), which details the methodology, evidence and the strategy development process.
- Both the Strategy and Supporting Analysis have been developed with the support of the NSW Government as part of the Regional Economic Development Strategies program to assist local councils and their communities in regional NSW.
- For further information about the Regional Economic Development Strategies program please contact the CERD on 02 6391 3025 or CERD@dpc.nsw.gov.au.



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Appendix A –

The Queanbeyan-Palerang Economy

Resident Profile

Since 1970 the median age in NSW has been increasing. In general, ageing is pronounced in regional areas. However Queanbeyan-Palerang is an exception, with a median age of 37.5, marginally lower the NSW average and markedly lower than Regional NSW (38 and 42.5).

Queanbeyan-Palerang has a significantly lower Age Dependency Ratio compared to NSW and Regional NSW. The Region's Youth Dependency Ratio (28.7 percent) is on par with NSW (28.4 percent) and also regional NSW (28.4 percent); highlighting Queanbeyan-Palerang's proportionally higher working population even by regional standards.

The NSW Intergenerational Report (2016) projects that regional aged dependency ratios are expected to increase over the next 15 years to as high as 42 per cent for the State.

	QPRC	NSW	Regional NSW
Age Dependency Ratio (>65 / 15-64)	17.8%	25%	34.8%
Youth Dependency Ratio (<15 / 15-64)	28.7%	28.4%	28.4%
Dependency Ratio (Sum of the two)	46.5%	53.4%	65.4%
Proportion of Young Persons (<15/all)	19.6%	18.5%	18.5%
Proportion of Old Persons (>65/all)	12.2%	16.3%	21.1%
Median Age 2016	37.5	38	42.5

Population Forecast

NSW Department of Planning and Environment estimates that by 2036, Queanbeyan-Palerang's population is forecast to be around 86,200 people.

The median age group is expected to increase from 35-39 to 40-44 by 2036.

This indicates Queanbeyan-Palerang's population would be dominated by older workers in the future.



Age Location Quotient

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

Location quotients below 1 show underrepresentation in the local cohort compared to the reference group. Quotients over 1 show overrepresentation locally compared to the reference group.

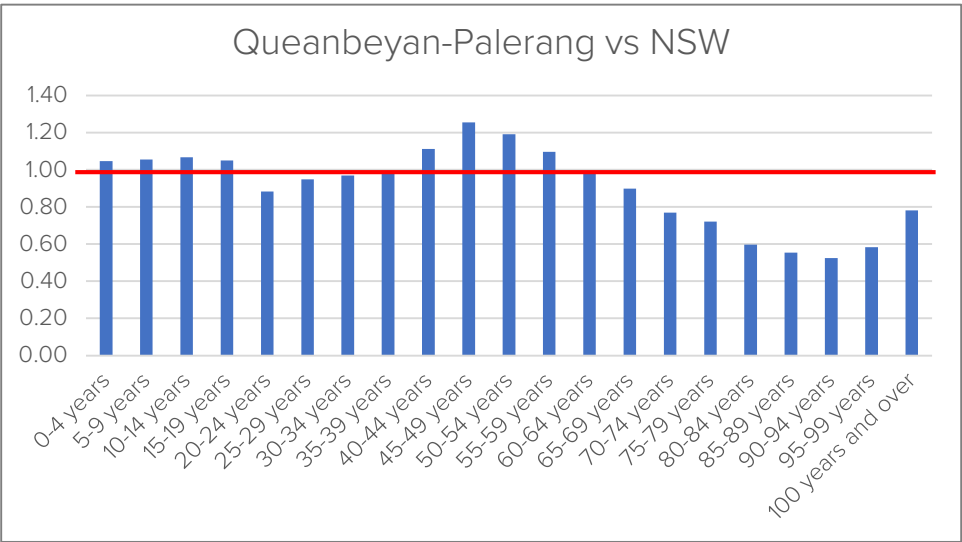
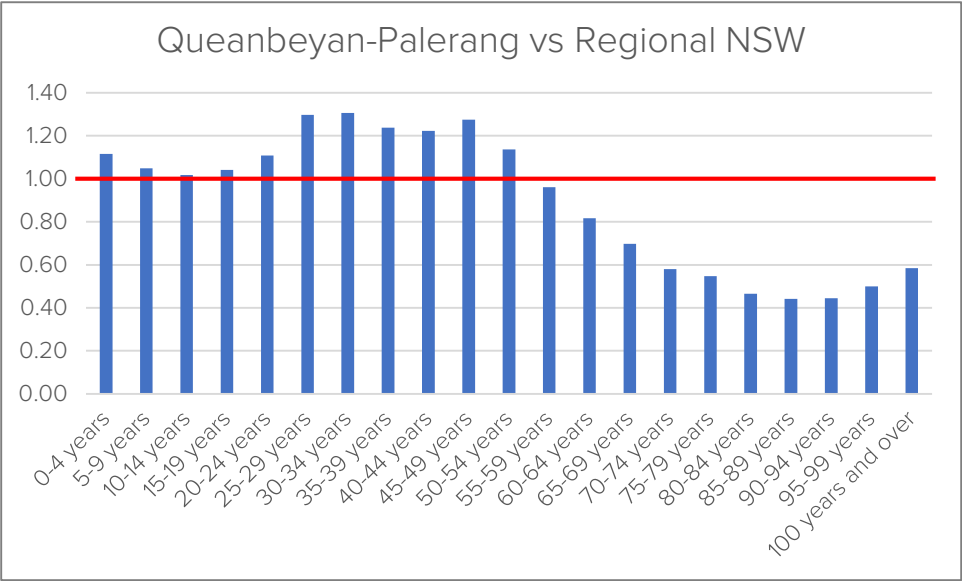
Compared to Regional NSW, Queanbeyan-Palerang is relatively overrepresented in its working age demographic.

This is due to Queanbeyan-Palerang's proximity to Canberra's labour markets, drawn to Queanbeyan-Palerang's relatively affordable housing compared to Canberra.

The sharp decline over the demographic cohorts concludes with underrepresentation of an older population, suggestive of migration to amenity regions after retirement.

In summary, Queanbeyan-Palerang is close to state-wide norms, excepting:

- a bulge of middle to late working ages
- a sharp decline beyond retirement age thresholds.



Housing Ownership & Affordability

Outright ownership of homes is lower in Queanbeyan-Palerang relative to prevailing rates for NSW overall. Unusually for regional NSW, mortgage payments in the Region are higher than the State average, reflective of high incomes. Rents nonetheless are below State averages.

Educational Attainment

Queanbeyan-Palerang is marginally underrepresented for people with a Bachelor or Postgraduate qualification (22.5 per cent) when compared to the NSW average (24.2 per cent).

However, the Region has a marginally higher proportion of its population qualified at Certificate Level (18.8 per cent to 16.6 per cent) representing a higher need/demand for more skills-based work.

Internet Connection in Dwellings

Queanbeyan-Palerang has a higher proportion of its population (84.4 per cent) connected to the internet compared to the prevailing rate for NSW (82.5 per cent). However, during the stakeholder consultation, issues were raised about quality of the speed and coverage of mobile connectivity.

Indigenous Population

Queanbeyan-Palerang's Aboriginal and/or Torres Strait Islander representation is close to State averages (3.1 per cent against 2.9 per cent).

Location	% of Dwellings Owned Outright	Monthly Mortgage Repayments	Median Weekly Rent
Queanbeyan-Palerang	27.6%	\$2,100	\$300
NSW	32.2%	\$1,986	\$380

	QPRC	NSW
Bachelor or Postgraduate Qualification	22.5%	24.2%
Advanced Diploma	14.2%	11.8%
Certificate Level	18.8%	16.6%

	QPRC	NSW
Internet not accessed from dwelling	13.1%	14.7%
Internet accessed from dwelling	84.4%	82.5%
Not stated	2.5%	2.8%

	QPRC	NSW
% of Population Aboriginal and/or Torres Strait Islander People	3.1%	2.9%

Occupation Profile and Labour Mobility

Professionals, Clerical and Administrative Workers and Managers are the leading occupational classifications in Queanbeyan-Palerang.

Each of these classifications make up around 15 to 20 per cent of the Region's labour force.

When compared to the overall composition of the State's labour force, the Region is:

- most strongly overrepresented for Clerical and Administrative Workers and Managers
- most strongly underrepresented for Machinery Operators & Drivers.

This profile is broadly consistent with the Region's economic emphasis on public service specialisations.

As covered elsewhere in the Strategy, relatively high rates of labour exchange across the border into the ACT underline the economic linkages between the two areas in a common market. Less than 6 per cent of the Region's working population is employed outside of Queanbeyan-Palerang or the ACT.

Occupational Profile for Queanbeyan-Palerang

Occupation	# Queanbeyan-Palerang	% of the Labour Force	Location Quotient
Managers	4,735	16.5%	1.20
Labourers	2,114	7.4%	0.82
Machinery Operators & Drivers	1,346	4.7%	0.75
Technicians and Trades Workers	3,924	13.7%	1.06
Clerical & Admin Workers	5,384	18.7%	1.33
Community & Personal Service Workers	3,026	10.5%	1.00
Professionals	5,883	20.5%	0.85
Sales Workers	2,308	8.0%	0.86
TOTAL	28,720	100.0%	1.00

Labour Mobility within Queanbeyan-Palerang

	Works in the Region	Works in a neighbouring Region
Queanbeyan-Palerang	94.1%	5.9%

Unemployment Trends

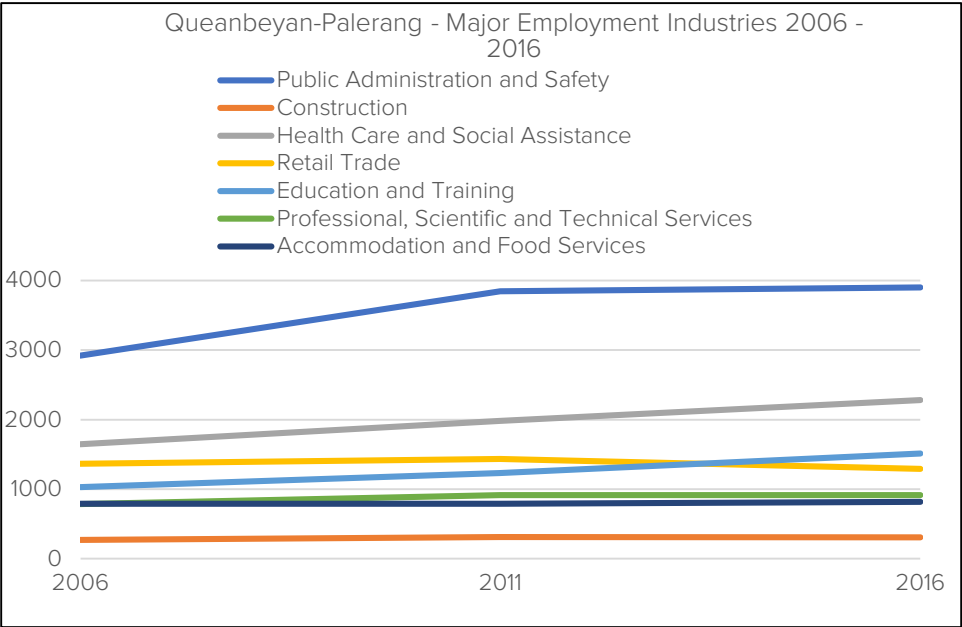
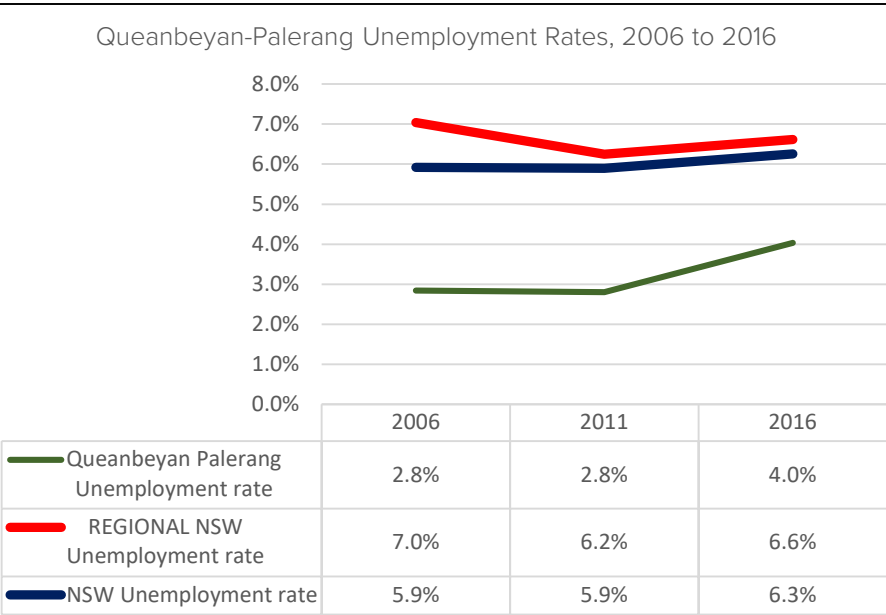
Unemployment rates across Queanbeyan-Palerang have been substantially below NSW and Regional NSW averages for an extended period of time.

Over time, the unemployment rate in the Queanbeyan-Palerang has been roughly between:

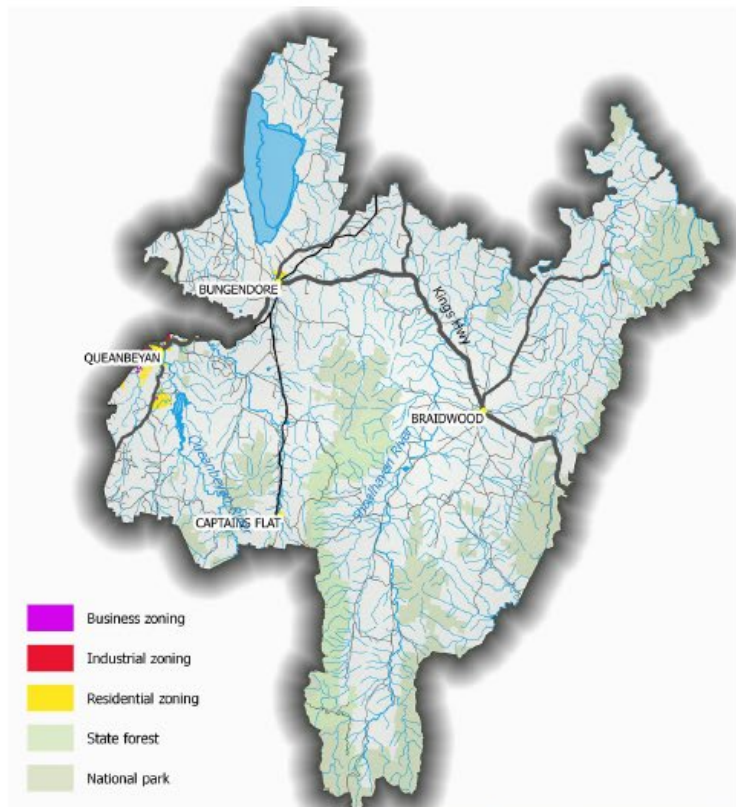
- two to three percentage points below the State average
- two and a half to four percentage points below the regional NSW average.

Together with its younger age demographic, these figures bear out that Queanbeyan-Palerang is a major ‘working region’ of the State.

Among Queanbeyan-Palerang’s largest employment industries, the strongest jobs growth in the decade to 2016 was seen in Public Administration and Safety. Health Care & Social Assistance and Education and Training also saw substantial increases in jobs over the period.



Queanbeyan-Palerang



GRP
\$1,611 M



5,319 km²
area

Employment by Industry
Top 3

	Public Administration and Safety	25.5%
	Construction	10.1%
	Health Care and Social Assistance	9.6%

\$933

Weekly Median Income



96.0%

are employed



unemployment

4.0%



19.6%

of population are younger than 15



38

Median Age



Population

56,027

12.2%

of population are older than 65 (2016)



Source: Australian Bureau of Statistics; 2016 Census

Queanbeyan



Employment by Industry Top 3

	Public Administration and Safety	23.4%
	Health Care and Social Assistance	11.3%
	Retail Trade	10.3%



89.6%

are employed



unemployment

5.0%



*5.4% away from work during census

16.6%

of population
are younger
than
than 15



Prior to European settlers proclaiming township in 1838, the Region was home to the Ngambri Aboriginal people. Queanbeyan comes from the aboriginal word *Quinbean*, meaning “*clear waters*”. Queanbeyan was granted city status in 1972.

Located on the Queanbeyan River and directly bordering Canberra, Queanbeyan has become a centre for exploring both its own and the surrounding region’s cultural history and range of activities.

34.5

Median Age



Population

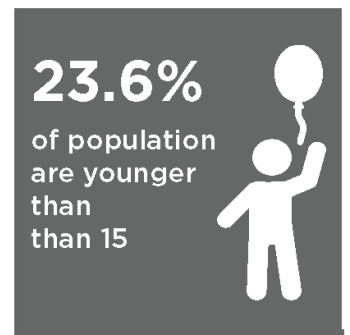
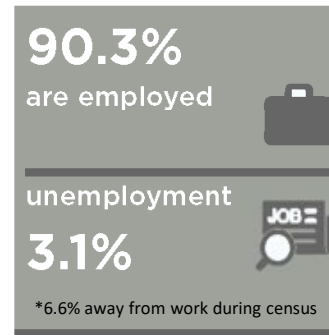
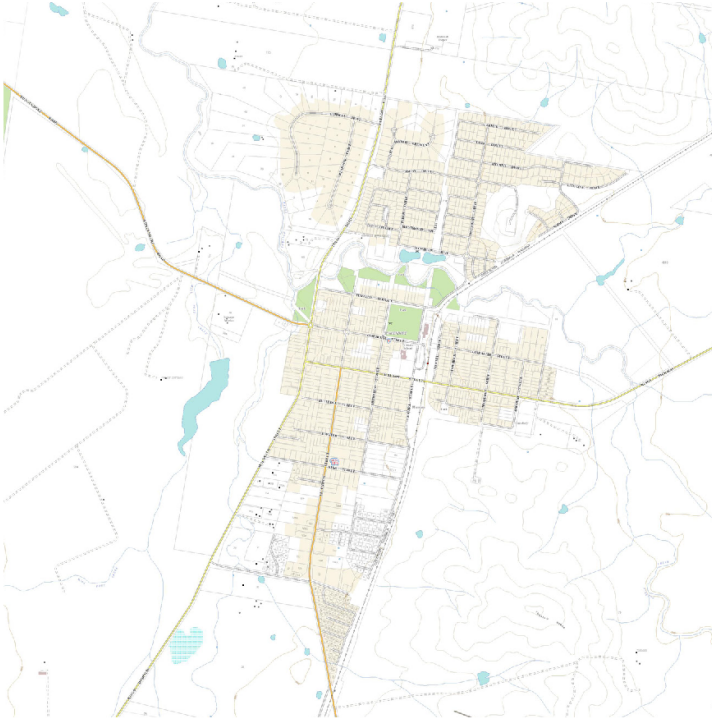
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12.6%

of population
are
older
than 65
(2016)

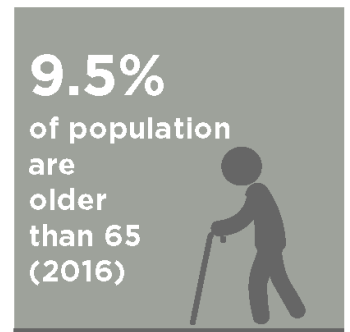
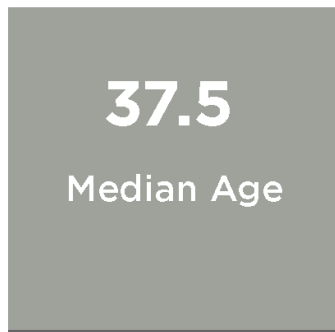


Bungendore

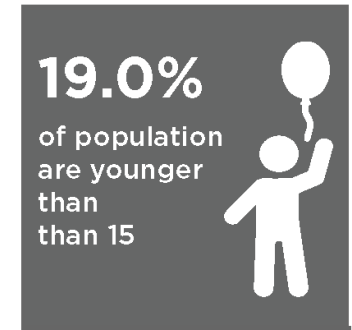
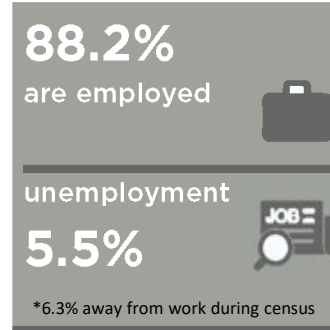
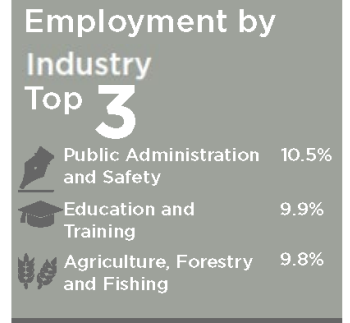
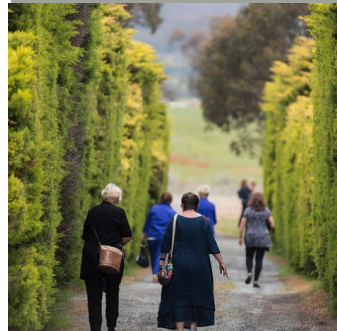
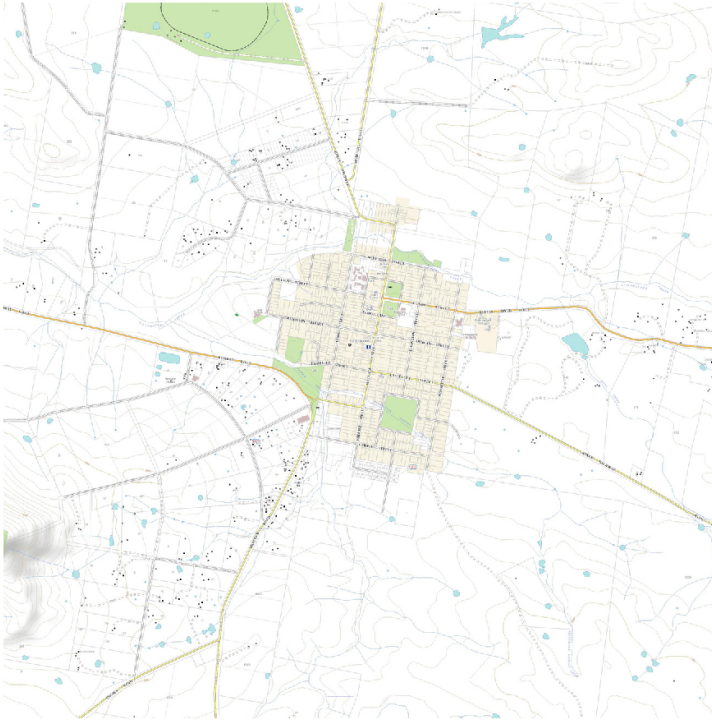


Bungendore was proclaimed a township in 1837 and acted as a service town for the surrounding farmlands separate to Queanbeyan. It has since been transformed into a local hub for boutique and specialised shopping in a historical 19th century setting.

Located in the Capital Wine Region on the Kings Highway, Bungendore has become a popular stopover point, hosting an array of food and wine experiences and historical walks through its town centre.

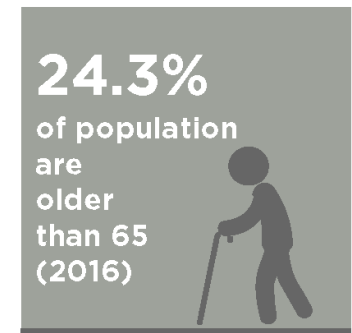
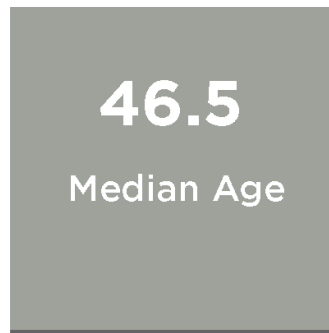


Braidwood



The National Trust-classified town of Braidwood is a heritage and tourism treasure. Its cafes, galleries and craft and antique shops help preserve its history and sustain its character. They are magnets attracting visitors through events and providing amenities for travellers moving along the Highway between the Capital and the coast.

Braidwood has become an artistic hub of the Region. The Festival of Braidwood sees the town covered with hundreds of quilts created by local artists.



Business Composition Profile

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

Location Quotients (LQ) values less than 1.0 indicate underrepresentation in the Region compared to NSW, and values greater than 1.0 indicate overrepresentation. For example, an LQ of 1.5 means there are 1.5 times as many workers in that business type in the region compared to NSW as a whole.

In considering the business profile, overall Queanbeyan-Palerang is overrepresented for firms in Agriculture, Construction, Manufacturing, Transport and Electricity, Gas, Water and Waste Services. These sectors are also among those with the largest numbers of businesses, along with Professional Services, Retail Trade, Health Care and Social Assistance and Tourism.

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

- significant overrepresentation in larger scale employing construction businesses
- representation typical of the State as a whole for smaller and mid-sized businesses
- a ‘bulge’ in manufacturing businesses with mid-sized revenues.

Business Staffing Location Quotients in Queanbeyan-Palerang, Select Industries

Industry	Non employing	1-19 staff	20-199 staff
Agriculture, Forestry and Fishing	1.06	0.96	0.99
Construction	0.98	1.02	1.61
Manufacturing	0.93	1.05	1.07
Transport, Postal and Warehousing	1.07	0.93	0.72
Electricity, Gas, Water and Waste Services	1.13	0.78	0.00
All industries	1.01	1.00	0.90

Business Revenue Location Quotients in Queanbeyan-Palerang, Select Industries

Industry	0 - \$2M	\$2M - \$10M	+\$10M
Agriculture, Forestry and Fishing	1.02	0.71	1.27
Construction	1.00	1.57	0.60
Manufacturing	0.98	1.62	1.08
Transport, Postal and Warehousing	1.02	1.24	0.90
Electricity, Gas, Water and Waste Services	0.70	0.97	0.00
All industries	1.01	0.96	0.63

Shift-Share Analysis

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

Changes in regional employment resulting from changes in the State economy. That is, employment will increase or decrease as a result of broader economic conditions. This component is called the **State Shift**.

Changes in regional employment that are a result of boarder industry specific trends. This component is called the **Industry Mix Shift**.

Finally, changes in employment which results from unique regional factors that are not related to broader economic and industry factors. This component is called the **Regional Shift**.

The total employment change in the Region is called the **Total Shift**.

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

$$\text{Total Shift} = \text{State Shift} + \text{Industry Mix Shift} + \text{Regional Shift}$$

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

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

Regional Shift between 2011-2016 in Queanbeyan-Palerang for Largest Industries

Industry	Total change in Jobs (2011-16)	State Shift	Industry Mix Shift	Regional Shift
Public Administration and Safety	-402	7,944	-2,631	-5,716
Professional, Scientific and Technical Services	297	2,359	339	-2,402
Health Care and Social Assistance	4,236	2,205	1,460	571
Education and Training	3,041	2,071	691	279
Retail Trade	-127	1,875	-1,524	-477
Construction	670	1,533	2,273	-3,136
Accommodation and Food Services	2,599	1,343	637	619

For Health Care & Social Assistance, Education & Training and Accommodation & Food Services, the regional shift component was positive during the period. After controlling for the growth in total employment and employment at the state level, the Region has a general advantage in these larger industries after controlling for state and industry trends.

For the four other major industries, the Regional Shift component was negative during the period. This indicates that, after controlling for the growth in total employment and employment in these industries at the state level, employment in these industries grew slower in the Region than in NSW, suggestive of constraining local factors.

It should be noted however, that since this analysis is based on comparison of the Queanbeyan-Palerang FER (which includes ACT) versus New South Wales, the Regional Shift may not be accurately captured.

Gross Value Add Analysis

The Centre for Economic and Regional Development (CERD) has produced an Input Output table for the Queanbeyan-Palerang regional economy based on the ABS Input Output (IO) Tables for New South Wales.

The CERD analysis shows the Region is a net importer, with exports out of the Region estimated at \$333 million and imports into the Region estimated at \$1,242 million.

Queanbeyan-Palerang's leading export industries are: Manufacturing; Agriculture, Forestry & Fishing; Transport, Postal and Warehousing; and Professional, Scientific & Technical Services. Manufacturing and Construction are the leading industry sources of demand for imports for production processes.

Final Demand also represents a large share of Regional Imports, consistent with the high incomes and considerable purchasing power of the households of the Region.

	Gross Value Add (GVA) \$m	% of Total Industry Exports	% of Total Region Exports	% of Total Industry Imports	% of Total Region Imports
Own Dwellings	463.8	1.0%	0.9%	7.3%	3.1%
Public Administration and Safety	269.3	0.4%	0.3%	6.0%	2.5%
Construction	216.9	3.9%	3.4%	16.0%	6.7%
Manufacturing	163.6	29.4%	25.7%	22.2%	9.3%
Health Care and Social Assistance	121.3	0.1%	0.1%	3.2%	1.3%
Retail Trade	109.4	1.3%	1.2%	3.0%	1.2%
Electricity, Gas, Water and Waste Services	106.7	0.3%	0.3%	5.3%	2.2%
Professional, Scientific and Technical Services	101.2	8.7%	7.6%	5.7%	2.4%
Transport, Postal and Warehousing	89.1	10.2%	8.9%	5.8%	2.4%
Education and Training	85.0	0.7%	0.6%	1.6%	0.7%
Rental, Hiring and Real Estate Services	74.4	1.4%	1.2%	2.8%	1.2%
Accommodation and Food Services	63.4	4.4%	3.8%	4.0%	1.7%
Financial and Insurance Services	61.2	1.4%	1.2%	1.4%	0.6%
Agriculture, Forestry and Fishing	56.5	27.9%	24.3%	4.5%	1.9%
Wholesale Trade	56.2	5.5%	4.8%	2.9%	1.2%
Other Services	47.0	0.1%	0.1%	3.8%	1.6%
Administrative and Support Services	25.0	1.0%	0.9%	1.5%	0.6%
Information Media and Telecommunications	19.7	0.7%	0.7%	1.0%	0.4%
Arts and Recreation Services	17.4	0.3%	0.2%	1.3%	0.6%
Mining	12.0	1.4%	1.2%	0.6%	0.3%
Total Industry GVA	2159.1	100.0%	87.3%	100.0%	42.0%
Final Demand	305.5				58.0%
Primary inputs			12.7%		
Total	2464.6		100.0%		100.0%
Total value (\$m)	2464.6	290.9	333.2	521.7	1,242.4

Tourism

Tourism Research Australia 2016 LGA profiles show that Queanbeyan-Palerang has 466 tourism business that employ people, and attracts around 206,000 overnight visitors per year that spend \$97m in the Region.

While nonetheless significant, Queanbeyan-Palerang enjoys relatively low levels of visitation and visitor expenditure compared to neighbouring locations.

For comparison, visitor expenditure is about 5 per cent of the levels in Canberra and just under 20 per cent of Snowy Monaro's levels.

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

Source: Tourism Research Australia Local Government Area Profiles 2016

Tourism

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

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

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

- Accommodation and Food Services
- Retail Trade
- Arts and Recreational Services
- Rental, Hiring and Real Estate Services
- Administrative & Support Services.

CERD's analysis concludes that the total impact of tourism expenditure on the Queanbeyan-Palerang economy can be summarised as:

- 4.5 per cent of total wages
- 5.8 per cent of total employment
- 4.2 per cent of total output.

Tourism Contributions to Wages, Employment and Output by Industry in Queanbeyan-Palerang

Industry	Wages	FTE	Value Added
Agriculture, Forestry and Fishing	0.9%	0.8%	0.9%
Mining	1.2%	1.2%	1.2%
Manufacturing	1.5%	1.6%	1.7%
Electricity, Gas, Water and Waste Services	2.6%	2.6%	2.6%
Construction	1.4%	1.6%	1.3%
Wholesale Trade	1.9%	1.9%	1.9%
Retail Trade	15.3%	15.3%	15.3%
Accommodation and Food Services	49.5%	46.7%	51.6%
Transport, Postal and Warehousing	4.6%	4.2%	4.7%
Information Media and Telecommunications	2.4%	2.4%	2.5%
Financial and Insurance Services	2.4%	2.3%	2.1%
Rental, Hiring and Real Estate Services	6.2%	6.7%	6.8%
Professional, Scientific and Technical Services	2.3%	2.3%	2.3%
Administrative and Support Services	4.3%	6.6%	4.4%
Public Administration and Safety	0.1%	0.1%	0.1%
Education and Training	1.1%	1.1%	1.1%
Health Care and Social Assistance	1.1%	1.1%	1.1%
Arts and Recreation Services	12.3%	11.6%	11.8%
Other Services	3.4%	3.9%	3.4%
Ownership of Dwellings	NA	NA	2.2%

Source: Centre for Economic and Regional Development



Appendix B –

Regional Endowments & Specialisations

Endowments

Endowments are key features of the natural environment, geography and society in a region or location.

Economic principles suggest that endowments are a region's key source of sustainable economic advantage, and so should be points of emphasis for regional development policy.

Sources of endowment potentially include:

- Geography
- The built environment and physical capital
- Human capital
- Institutional and organisational linkages (social capital).

Physical endowments include agricultural land, climate, mineral and water resources, aesthetic appeal and location relative to major trade routes.

Built and institutional endowments include hospitals and educational facilities, which may be the result of government decisions. Human endowments include abundant labour, specialist skills and entrepreneurship.



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.

Economic development policy should therefore focus on factors that enable the growth of endowment-based industries, as well as building local leadership and institutional capacity and capabilities to better enable businesses and public agencies to capitalise on the opportunities 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

Proximity to Canberra – easy access to Canberra, an economy offering high quality jobs and a large market with the highest disposable incomes per head in the country, helps sustain Queanbeyan-Palerang's attractiveness.

Proximity to Sydney – Queanbeyan-Palerang is also situated about three hours from Australia's largest economy. While not as proximate as its access to Canberra, the Region is very well positioned relative to most of the remainder of regional NSW.

Gateway to the Snowy Mountains and South Coast – Queanbeyan-Palerang is also relatively close to the Snowy Mountains and South Coast. This offers a diversity of lifestyles and activities few regions can rival. This also offers opportunity to develop freight connections from the seaport at Eden to Queanbeyan and Canberra International Airport

Arable land, State Forest and National Parks – whether for traditional agriculture, forestry or emerging agricultural activities, the arable tracts of Queanbeyan-Palerang provide substantial yields for its communities.

Queanbeyan River – the river frontage in Queanbeyan provides considerable amenity, utilised through casual recreational activities, as well as for civic events

Queanbeyan Regional Hospital – the hospital offers a standard of service and availability that differentiates it from many other regional locations, including acute care, heart, general surgery and maternity services.

Canberra Airport – Canberra International Airport provides access for both inbound and outbound movements of goods and people. Situated only 10km from the Global Gateway of Canberra Airport, exploring opportunities to leverage freight, logistics and tourism will be important to enable associated sectors such as agriculture and precinct development.

Braidwood's preserved heritage – the well-preserved town of Braidwood has been heritage listed as a whole, forming a tourist attraction frequented by many visitors. More broadly, the Region offers insights into its modern origins as a centre for agriculture, the gold rush and arrival of nationhood.

Rail Network – the NSW Government Future Transport Strategy 2056 identifies Queanbeyan-Palerang is a part of a 'Global Gateway City' via its operating rail corridor connection from Canberra to Sydney. The potential of a Fast Train between Sydney and Canberra could provide significant economic stimulus for the Region, and potential for utilisation of rail for developing freight networks could be important given Queanbeyan's close position to the Canberra Airport and major road freight corridors.

Kings Highway – the Highway's east-west alignment serves important functions in both connecting the centres of Queanbeyan-Palerang and facilitating broader movements of people and goods between the ACT and the South Coast.

Canberra Avenue and Piallago Avenue Corridor – Canberra Avenue extends the access provided by the Kings Highway into the heart of economic activity in Canberra and Piallago Avenue provides easy access to Canberra Airport.

Monaro Highway – provides easy access to different parts of Canberra, as well as the Snowy Monaro region.

Endowments

Queanbeyan-Palerang has exceptionally good economic prospects by virtue of its highly educated workers, proximity to the large Canberra market and access to highly influential institutions and excellent employment opportunities in the nation's capital. These factors sustain the ongoing attractiveness of the Region, as reflected in its high historical and projected rates of population growth. Each of these factors is also intrinsically related to Queanbeyan-Palerang's integration with the larger, neighbouring ACT economy.

The greatest risks presented by the Region's endowments relate to potentially avoidable obstacles to greater integration with the Canberra market, including differential rates and charges across the border and the availability of appropriately priced and scoped industrial land. If addressed, greater integration will see more economic opportunities located within Queanbeyan-Palerang itself, meaning more jobs closer to home and a stronger rate base for Council to fund community infrastructure and services. Similarly, the Region can become a more effective, productive place if the path of freight movements through the Region's three major town centres on the Kings Highway can be harmonised with their roles as 'places for people'.

Institutional endowments

Queanbeyan-Palerang Regional Council – the Council is a very able advocate for the Region's economy, proven to be proactive in engaging with its community in pursuit of development.

Balance of Lifestyle, Social and Economic Opportunities – the geographic positioning of Queanbeyan-Palerang offers a broad mix of lifestyle and economic opportunities. This variety of choice allows visitors or residents to combine a generally high quality of regional services with appealing places to live, work and play in coastal, riverine or hinterland settings.

The Federal Government – provide much of the immediate economic opportunity for Queanbeyan workers. The Federal Government also provides many cultural and educational institutions in Canberra that complement the attractions of Queanbeyan-Palerang itself.

State Government Agencies –play a number of key roles in the Region: as employers; as providers of key services; as owners of land that may merit re-purposing; and as regulators of private sectors activities.

Collaboration between community members – the communities of the Region demonstrate a good degree of cohesion in supporting key development needs, even where formal organisations are not in place or are inactive.

Aboriginal heritage – the Region is home to the Ngambri/Ngunnawal, who it is believed first arrived in Queanbeyan around 20,000 years ago.

Local culture and food specialities – Braidwood and Bungendore have high concentrations of arts and recreational services. Along with its natural environment, the Region also has emerging food manufacturing that could lend itself to tourism.

Canberra Region Joint Organisation (CRJO) –provides a leading forum for councils, State agencies and other stakeholders to work together at a regional level to identify shared priorities. The CRJO membership is made up of eight Local Government Areas in the Canberra region, advocating for all parts of the region in partnership to create vibrant communities.

Human endowments

Diverse specialised skill sets – the sub-industry data suggests the workers of Queanbeyan-Palerang offer a diverse range of regional specialisations, including:

- Engines of Growth like:
 - Air Transport
 - Printing
 - Furniture and Other Wood Products
 - Computer and Electronics Manufacturing
- Enabling Industries like:
 - Computer System Design
 - Scientific Research
 - Management Consulting
 - Telecommunications
- Population Serving Industries like:
 - Central Government Administration
 - Defence
 - Public Order and Safety
 - State Government Administration
 - Construction.

Regional Specialisations

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

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

- the longer time period means it is less influenced by short-term effects such as drought, high Australian dollar, or fluctuations in the economic cycle
- the comparison against regional NSW removes distortions associated with large metropolitan cities, such as low agricultural concentrations and high concentrations of Financial and Insurance services

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

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

In reviewing data, readers should keep in mind:

- by definition, not all industries in a region can have ratios of greater than one. A high concentration in one sector must come at the cost of lower concentrations in other sectors, bearing out the relative composition and advantages of the Region's employment base.
- the charts reflect changes in concentration between 2001 to 2016. Changes in ratios reflect shifts in relative concentration, potentially attributable to either Queanbeyan-Palerang (numerator), or change in regional NSW (denominator), or both.
- the data suggests sources of advantage and specialisation for the Region as a whole, with differential impacts across the localities in it.

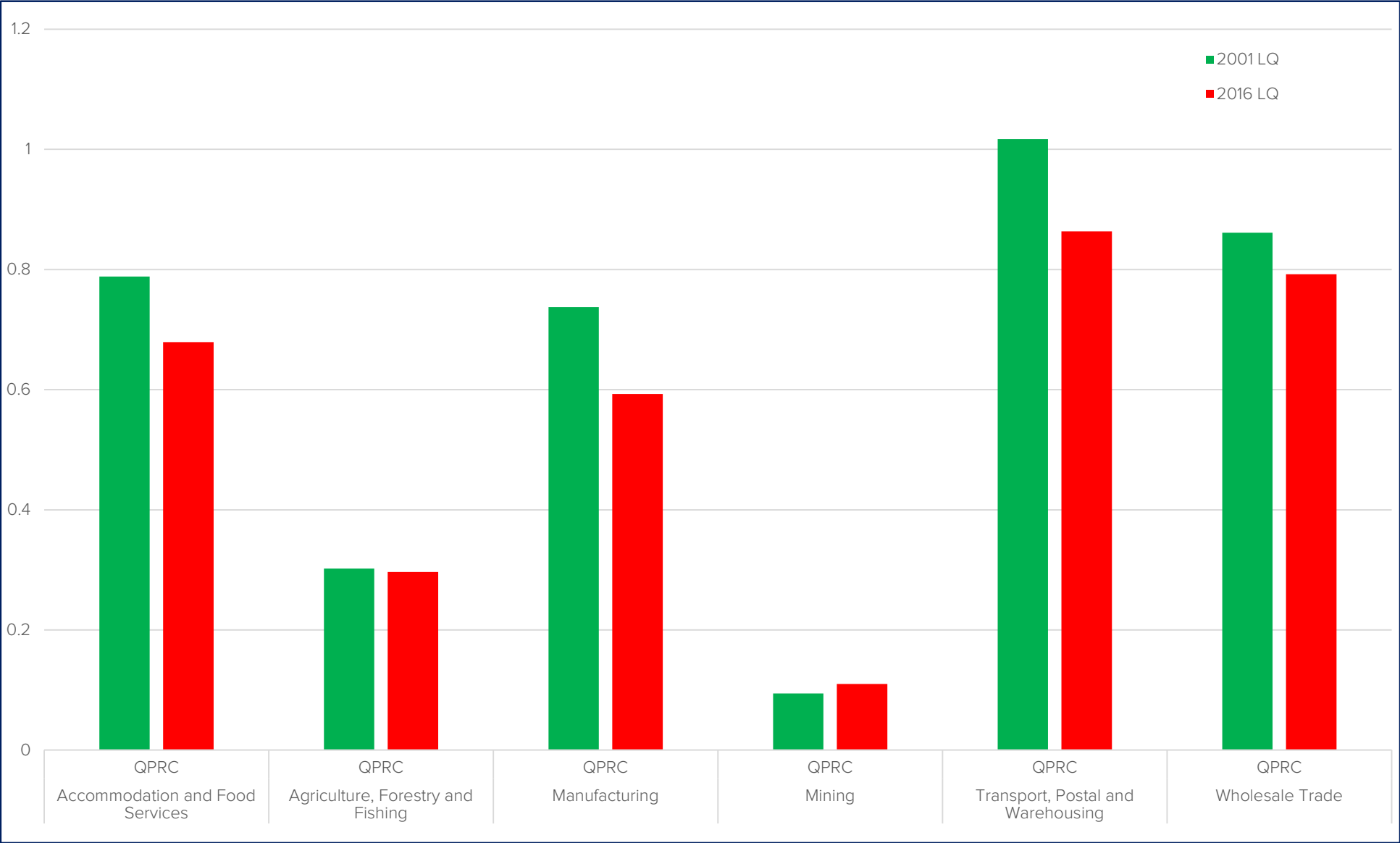
Industries have also been grouped together to allow comparison among and between those most closely linked to external markets and opportunities (Engines of Growth), those typically providing key support services to business (Enabling Industries) and those focused on providing services to the people,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

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

The concept of endowments is covered in the above section. Endowments are the key features of the Queanbeyan-Palerang's natural environment, geography and community that offer its key sources of sustainable economic advantage. Economic principles suggest these endowments should be points of emphasis for regional development policy.

Taken together, the strengths and endowments are the principal guide to the foundations for review in considering priority needs, gaps, opportunities and risks.

‘Engines of Growth’ Industries - Location Quotients 2001 - 2016



‘Engines of Growth’ Industries – Regional Specialisations Analysis

Engines of Growth are key drivers typically reflecting regions’ original reasons for being. They often offer the best prospects for growth, as they reflect both distinctive capabilities already in place, linked to external markets and opportunities.

At the industry level, none of the engines of growth have location quotients indicative of a regional specialisation.

Some of the industries most commonly found to be specialisations in other parts of regional NSW are decidedly underrepresented in Queanbeyan-Palerang. This includes:

- Accommodation and Food Services workers at two thirds of typical shares
- Agriculture, Forestry and Fishing workers at 30 per cent of typical shares
- Manufacturing workers at 60 per cent of typical shares.
- The Transport, Postal and Warehousing and Wholesale Trade industries have seen declines in their ratios over time to about 0.8.

Key sub-industry strengths

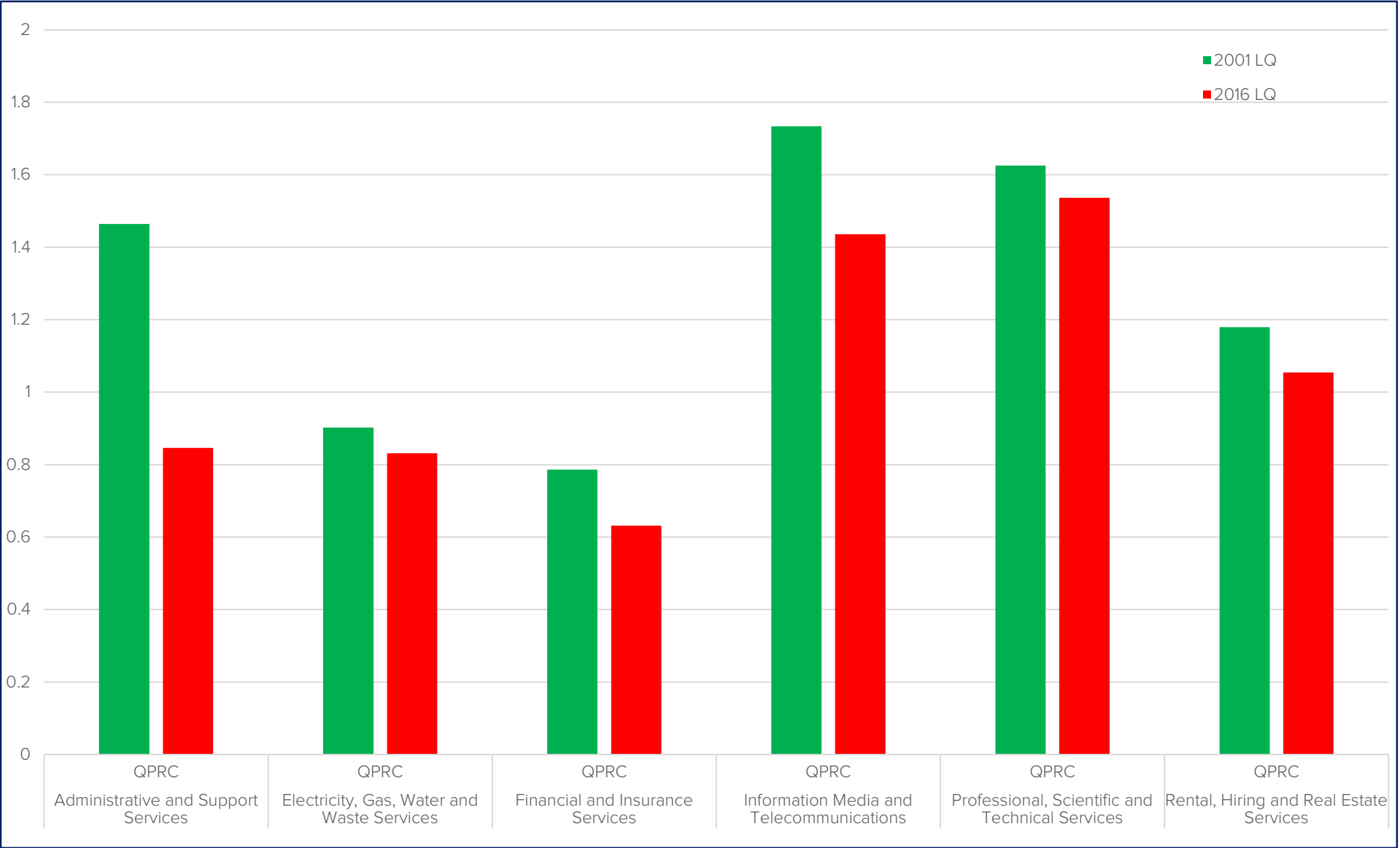
At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

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

1. Postal and Courier Pick Up and Delivery Services (ratio 1.1, 200 workers)
2. Air and Space Transport (ratio 1.9, 100 workers) and Airport Operations and Other Air Transport Support Services (ratio 6.0, 90 workers)
3. Other Wood Product Manufacturing (ratio 1.2, 105 workers) and Furniture Manufacturing (ratio 1.5, 70 workers)
4. Other Machinery and Equipment Wholesaling (ratio 1.2, 100 workers)
5. Computer and Electronic Equipment Manufacturing (ratio 4.9, 70 workers)
6. Printing and Printing Support Services (ratio 1.4, 60 workers).



Enabling Industries - Location Quotients 2001 - 2016



Enabling Industries – Regional Specialisations Analysis

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

Information Media and Telecommunications and **Professional, Scientific and Technical Services** are Queanbeyan-Palerang's key enabling industries.

While ratios for both these industries have declined over time, they nonetheless remain well above representative regional NSW shares:

- Information Media & Telecommunications is 40 per cent above typical shares
- Professional, Scientific and Technical Services is 50 per cent above typical shares

Ratios for the other four enabling ratios also declined over the decade and a half to 2016. The Rental, Hiring and Real Estate Services ratio remains just above 1. Broadly speaking, concentrations of workers for other industries are between 20 per cent and 40 per cent lower than would be representative for regional NSW.

Key sub-industry strengths

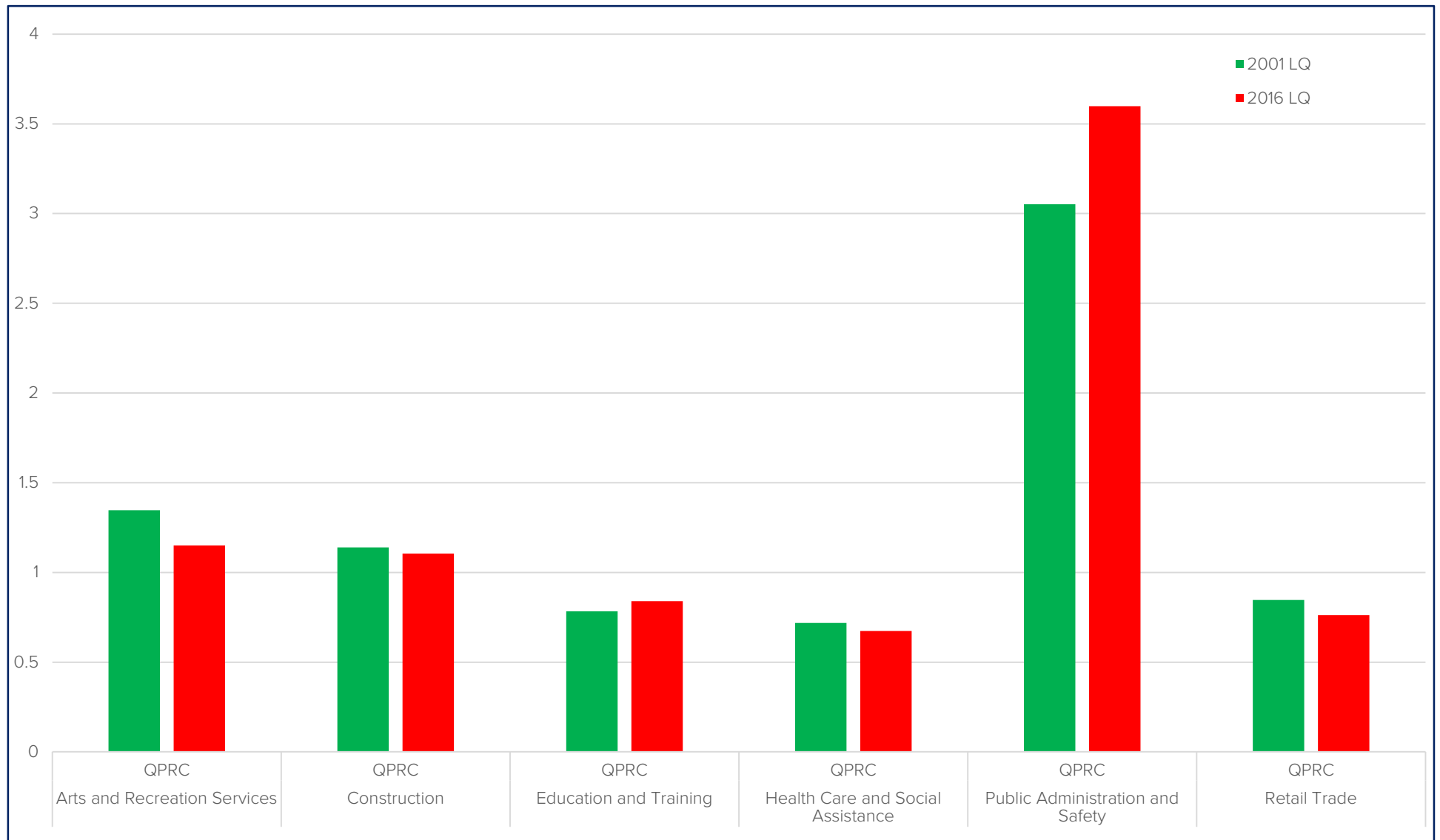
At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

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

1. Computer System Design and Related Services (ratio 3.3, 560 workers)
2. Building Cleaning, Pest Control and Gardening Services (ratio 1.0, 540 workers)
3. Legal and Accounting Services (ratio 1.1, 490 workers)
4. Architectural, Engineering and Technical Services (ratio 1.1, 330 workers)
5. Real Estate Services (ratio 1.0, 280 workers)
6. Management and Related Consulting Services (ratio 1.8, 220 workers)
7. Scientific Research Services (ratio 3.8, 160 workers)
8. Telecommunications Services (ratio 1.5, 160 workers)
9. Electricity Distribution (ratio 1.1, 130 workers).



Population Serving Industries - Location Quotients 2001 - 2016



Population Serving Industries – Regional Specialisations Analysis

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

Public administration and safety is the dominant population serving industry for the Queanbeyan-Palerang region.

The concentration of public administration and safety workers rose over time, from a ratio of about 3.1 to 3.6. This is broadly consistent with expanding public sector employment opportunities over the border in Canberra over the decade and a half.

Arts and Recreational Services (ratio 1.2) and Construction (ratio 1.1) also exhibit modest degrees of regional specialisation at the industry level.

Ratios for the remaining industries suggest they are underrepresented by share of total workers by between about a third and a fifth, compared to regional NSW as a whole.

Key sub-industry strengths

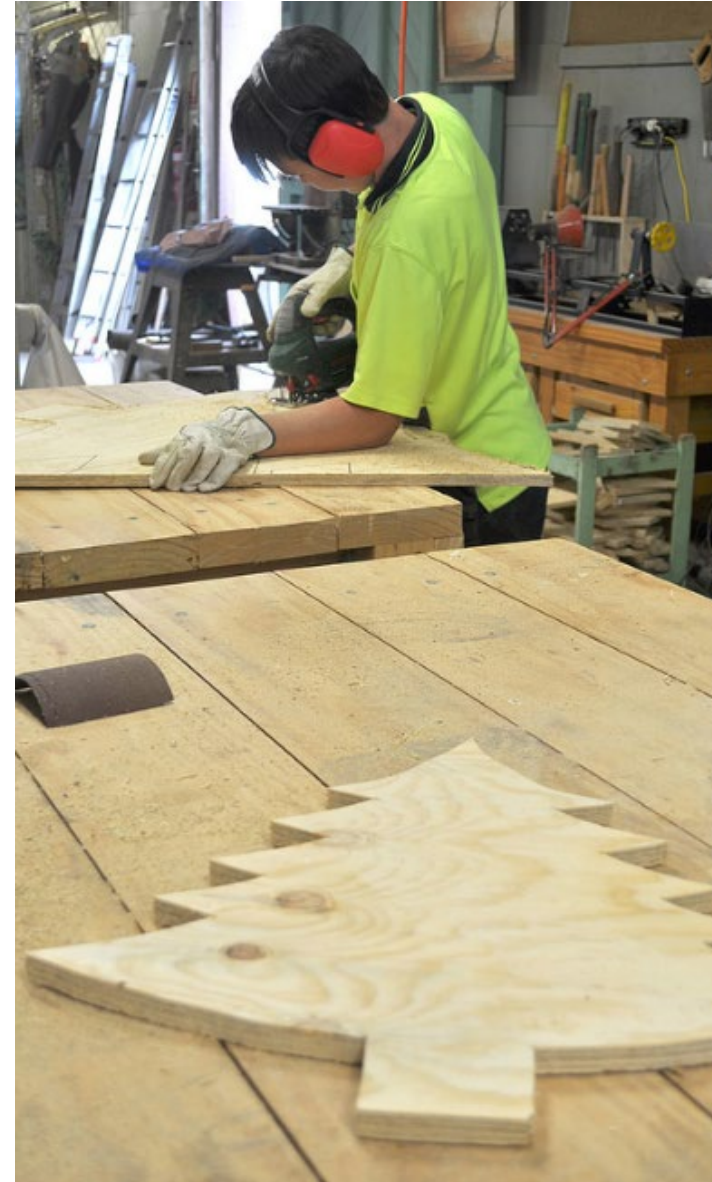
At the sub-industry level, many groupings reflect concentrations well above the typical regional NSW shares.

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

1. Central Government Administration (ratio 10.6, 3,290 workers)
2. Defence (ratio 7.7, 1,930 workers)
3. Public Order and Safety Services (ratio 1.7, 820 workers)
4. State Government Administration (ratio 2.1, 720 workers)
5. Building Installation Services (ratio 1.3, 640 workers), Building Completion Services (ratio 1.0, 450 workers), Residential Building Construction (ratio 1.1, 400 workers), Other Construction Services (ratio 1.1, 260 workers), Building Structure Services (ratio 1.1, 240 workers) and Non-residential Building Construction (ratio 1.8, 230 workers)
6. Tertiary Education (ratio 1.3, 560 workers)
7. Child Care Services (ratio 1.3, 400 workers).

For smaller quantities of employment, significant specialisations include:

- Creative Artists, Musicians, Writers and Performers
- Amusement and Other Recreational Activities
- Museum operation
- Arts education.



Employment by Industry: Strengths and Changes Analysis

Economic change since 2001 has seen both traditional strengths reinforced and the emergence of new opportunities for Queanbeyan-Palerang.

The bubble diagram integrates the regional strengths on the previous slides with the absolute scale and relative changes in the number of jobs supported in each industry. The size of each bubble reflects the scale of employment in each industry. The positioning on the diagram reflects the relative change in job numbers in the 15 years to 2016 and industry ratios. Implications of the diagram can be understood from various perspectives, but might most easily be seen by quadrant.

The upper left quadrant contains one (red bubble) specialised, reduced employment industry (Information Media and Telecommunications). While the decline in employment in this sector over the period has been substantial (about - 25 per cent), it accounts for less than 2 per cent of the Region's total employment.

The lower left quadrant reflects four (green bubble) unspecialised, declining employment industries specialisations at the industry level.

While the declines in these industries have been substantial, with declines of up to 40 per cent, collectively they account for only 10 per cent of the Region's employment.

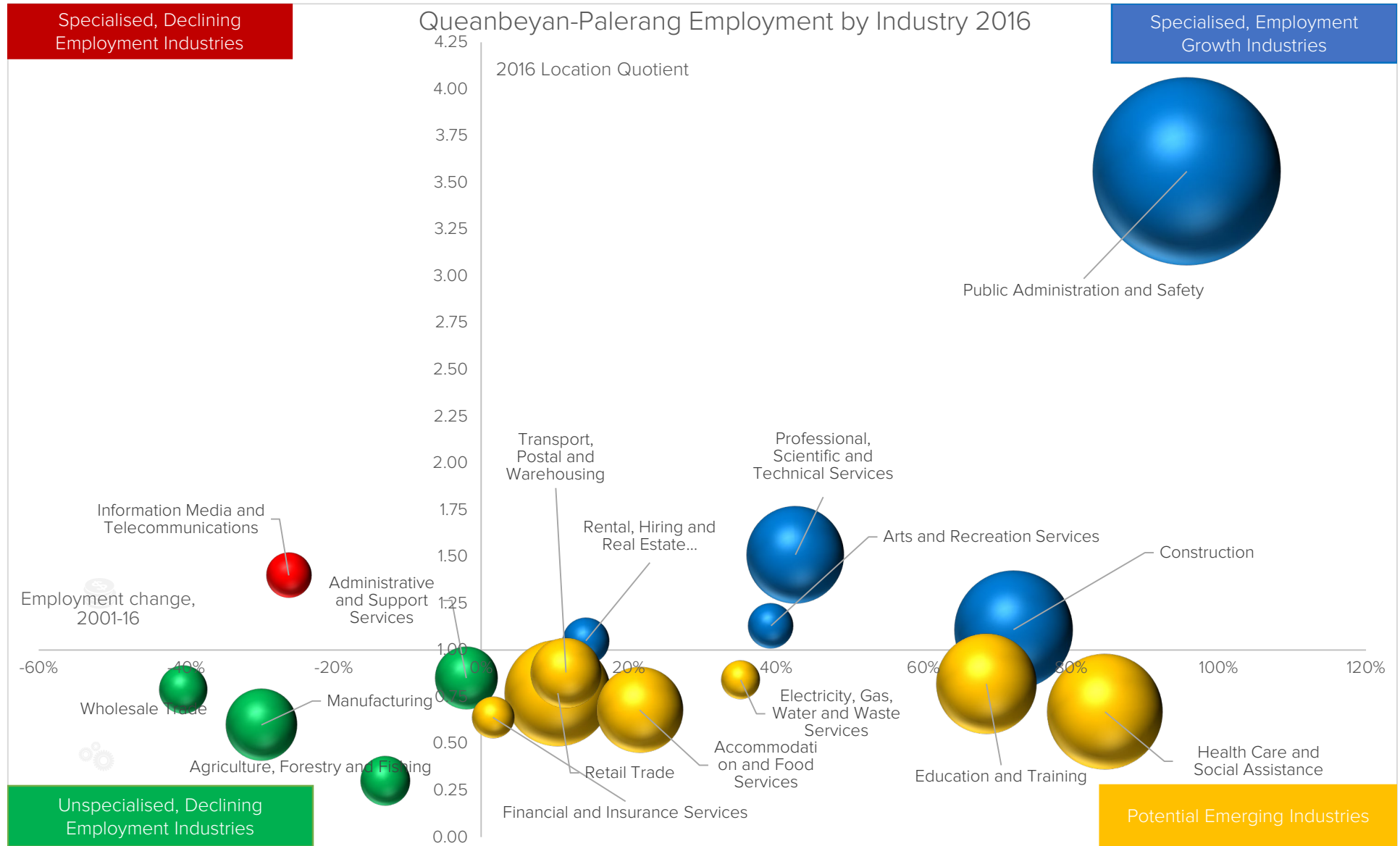
The lower right quadrant contains seven (yellow bubble) potential emerging industries with increases in jobs over the decade and a half to 2016. Increases in employment have been substantial in some cases, with growth of up to 85 per cent. In aggregate, these industries account for about 37 per cent of total employment.

The upper right quadrant contains five (blue bubble) specialised employment growth industries. In total, these industries account for about 47 per cent of employment.

In general, it is also true to say that the larger, more specialised 'blue bubble' industries have tended to see the fastest rates of growth. The largest and most specialised industry, Public Administration and Safety, saw the greatest rate of employment growth across the period, at 96 per cent.



Employment by Industry: Prevailing Strengths and Recent Changes





Appendix C – Institutional Audit

Institutional Audit

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

In general, the Region is very fortunate to have easy access to such a wealth of institutions.

The Region's only major deficiency is its lack of a standing and operating business chamber that is broadly representative of the Region's businesses. However, this has not prevented a number of productive informal arrangements within the business community and across different institutional sectors.

Councils

Queanbeyan-Palerang Council is the only local council in the Region, Queanbeyan Council and Palerang Council merged in 2017 to form the new council. It plays a pivotal regulatory, support and coordinational role in the economic future of the Region.

Australian Civil-Military Centre

An Australian Government initiative to improve Australia's effectiveness in civil-military-police collaboration for conflict and disaster management overseas. It engages with, and supports, government departments and agencies, non-government organisations and international partners, including the United Nations, on civil-military-police issues to achieve focused outcomes for the Region and globally

Southern Region Business Enterprise Centre

SRBEC is a not-for-profit dynamic regional organisation that delivers a range of business and educational services to 18 Local Government Areas (LGA's) in the southern region of NSW, Canberra and the ACT. Its main office is based in Queanbeyan.

Office of Regional Development – Department of Premier and Cabinet

The Office leads the NSW Government's contribution to making regional NSW a productive place to invest and to produce goods and services, thereby creating jobs and opportunities for regional NSW.

Queanbeyan Agency Network Group and Braidwood Agency Network Group

Provides a forum where community organisations and government services can meet to share information, strengthen community links and provide collaborative opportunities for services in the Region which assist in building and improving service delivery capacity within the Region.

Regional Development Australia – Southern Inland and Regional Development Australia – ACT

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

Canberra Region Joint Organisation (CRJO)

The CRJO provides a leading forum for councils, State agencies and other stakeholders to work together at a regional level to identify shared priorities. The CRJO membership is made up of eight Local Government Areas in the Canberra region, advocating for all parts of the region in partnership to create vibrant communities.

Australian Industry Defence Network (AIDN)

The AIDN is the peak industry association for small-to-medium enterprises (SMEs) wishing to do business in the defence and security sectors. Established in 1995, AIDN represents the interests of Australian SMEs in the defence and security industry sectors by advocacy, representation and member services. AIDN is made up of State and Territory Chapters with a combined membership of around 600 principally SME companies.

Canberra Innovation Network (CBRIN)

The CBRIN is a collaboration between the ACT Government and Canberra's world class education and research institutions to deliver lean innovation focused education programs for entrepreneurs and business sector.

Office of the NSW Cross Border Commissioner

Assists businesses, organisations and individuals who live, work and operate in cross-border areas of NSW

The ACT's array of government institutions

The Federal Government provides a wealth of social, educational and cultural institutions that enrich the lives of Queanbeyan-Palerang residents through easy access. Some Federal Government offices are also located in Queanbeyan.

Higher Education

Access to quality Tertiary Education institutions in the ACT including Australian National University, University of Canberra, Australian Catholic University and various annexes of universities offering specialist or postgraduate courses.

TAFE

TAFE NSW Queanbeyan campus offers a range of courses in outreach, business services, general education, community services, rural studies, information technology and trades and technology. It includes:

- Simulated hospital nursing environment
- Hair and beauty training facilities
- Simulated practical aged care training facility
- Bricklaying, concreting, tiling and construction workshop
- Automotive training workshop
- Health, Wellbeing and Community Services SkillsPoint
- 24 hours access to the Connected Learning Centre

Justice

There are multiple police stations in the Region. There is a local court house in Queanbeyan.

Axis Youth Centre

Axis Youth Centre is a safe, supervised, drug and alcohol free recreational space for young people aged 12-25. Axis Youth Centre is the city's hub of information, entertainment, advice, assistance and referral for young people in the Queanbeyan-Palerang area.

Health

Queanbeyan Regional Hospital is the primary service delivery hub in the Region. Queanbeyan Hospital and Health Service is a 29 bed facility with an eight chair Day Surgery and a Renal Unit. The hospital provides acute, maternity, renal, community health, dental, allied health service access and an emergency department operating 24 hours a day, 7 days a week, with close access to onsite X-ray and pathology.

Co-located on site are comprehensive community mental health services. Braidwood Multi Purpose Service is a 32 bed facility providing an integration of hospital and community health and aged care services.

Emergency Services

There are Ambulance and State Emergency Services in the Region.

There are NSW Fire Services based in Braidwood and Queanbeyan. There are RFS in: Braidwood, Captains Flat, Bungendore, Tarago, Mullon and Jerrabomberra Creek.

Core Competencies

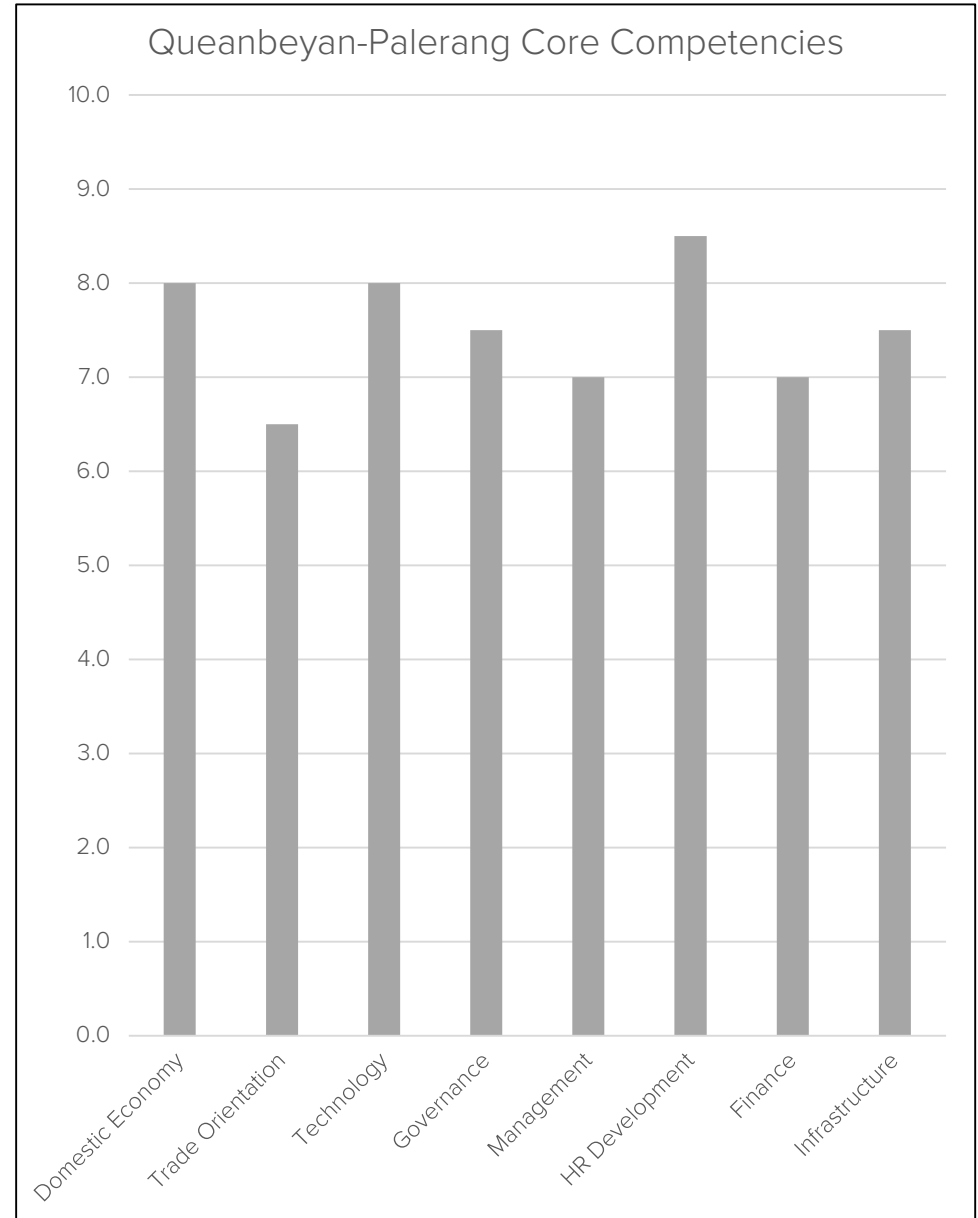
Core competencies represent the ability of a region to organise and steward its resources to produce goods and services. They refer to the set of skills, technology, resource applications and management unique to that region.

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

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

Overall, scores for Queanbeyan-Palerang a very high standard of competencies for a regional context. Relative to one another, the scores reflect that:

- Its greatest strengths lie in the productive quality and capacity of its people, receptiveness to technology and strength of domestic economy
- The Region should not be considered to be overly trade-oriented in relative terms, but has strengths in niche manufacturing, agriculture and tourism and access to an international airport
- the Region's quality of governance, management, and key enabling aspects of regional competency are robust
- while acknowledging scope for improvement in particular areas, in general, the infrastructure of the Region is very good.





Appendix D – Infrastructure Audit

Infrastructure Audit

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

The Strategy considered the opportunities and limitations presented by the infrastructure in the Region.

In general, the Region has a very high standard of infrastructure. The Region is ideally situated to take advantage of freight connections from the seaport at Eden utilising the Snowy Highway and Monaro Highways, MR92 connecting the east coast, the Hume Hwy connecting Sydney and Melbourne

The primary infrastructure challenges are:

- addressing conflicts between movement corridors and places for people
- Enabling industrial and residential land development.

Roads

The Region sits between the ACT and NSW, its major road corridors are:

- Kings Highway
- Federal Highway
- Monaro Highway

Rail

Main Southern Railway line – three trains each way from Canberra and Sydney. Two trains each way for Canberra and Melbourne.

Electricity Connections

Essential Energy provides local electricity supply to the Region.

Water Connections

Queanbeyan purchases its potable water from Icon Water Limited

Braidwood, Bungendore and Captains Flat have their own water treatment.

Googong has its own recycled water system to supply up to 18,000 residents.

‘The Q’ – Queanbeyan Performing Arts Centre

The Centre was completed in February 2008. With 346 seat capacity, it provides opportunity for live theatre productions, concerts, forums, conferences, conventions, movies, music or film festivals, award ceremonies, digital, video and audio recordings, television or radio broadcasts, HSC examinations and performing arts workshops.

The Q-One

The Q-One is a community portfolio of an aquatics, indoor sports, performing arts and community facilities centre.

Cemeteries

There are three major cemeteries:

- Braidwood Lawn Cemetery
- Bungendore Lawn Cemetery
- Queanbeyan Cemeteries

Waste facilities

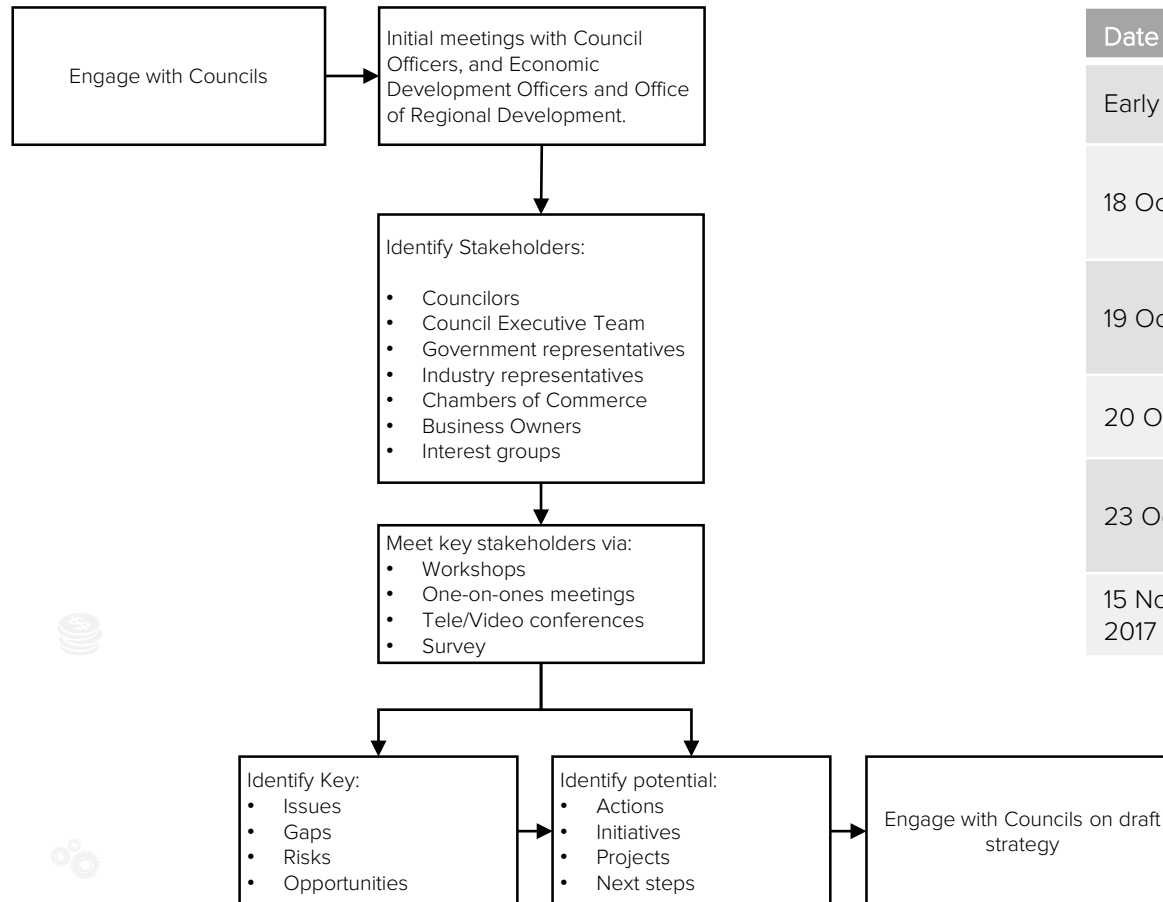
There are nine waste management facilities that accept and recycle green and general wastes.



Appendix E – Consultation

Consultation Approach and Summary

Key dates



Date	Stakeholder
Early October	Individual inception meeting Council Executive Team
18 October 2017	Queanbeyan/ Bungendore stakeholder engagements – 1:1 meetings, collective meetings and teleconferences
19 October 2017	Queanbeyan/ Bungendore stakeholder engagements – 1:1 meetings, collective meetings and teleconferences
20 October 2017	ACT Government stakeholder engagement
23 October 2017	Braidwood stakeholder engagements – 1:1 meetings, collective meetings and teleconferences
15 November 2017	Initial MP/Councillors consultation

Regional Issues

Connectivity aim

- An integrated and connected Queanbeyan – Palerang through road, rail, and digital infrastructure to achieve logistics efficiencies, maximise existing investments and facilitate new opportunities.
- Supporting businesses, employees and residents by providing:
 - better transport connection to a wider destination
 - safe and reliable roads
 - efficient road networks
 - fast and reliable telecommunication coverage and network

Efficient and reliable movements of goods and people are crucial as it supports and promotes liveability and employment opportunities for the Region.

Key regional issues

- The Region is well connected with major highway corridors. However, heavy vehicles are routed through main streets of Queanbeyan, Braidwood and Bungendore. This creates traffic congestion and puts local residents' safety at risk. A town-bypass would make local roads safer, reduce traffic congestion, create a place for people in local towns and revamp main street amenities for visitors and local residents.
- Allowing for more frequent and reliable public and community transport systems within the Region. Connecting the Region's centres internally is a key issue.
- Improving road and rail connection between Canberra and the Region to reduce traffic congestion. Providing alternative transport options such as public transport can reduce traffic congestion.
- Currently, buses cannot operate across the border of ACT and NSW. This creates inconvenience and lengthy travel times. Reforming public transport regulation and integrating Canberra and Queanbeyan services will provide an enhanced travelling experience for consumers and reduce traffic congestion.
- Access to Canberra Airport by NSW Taxis is highly regulated. NSW Taxis can take passengers to Canberra Airport, but are not allowed to pick up passengers.
- Mobile blackspots and lack of internet reliable coverage in the Region is an issue. Addressing this would mean the Region can connect its businesses and people to global markets, create innovative start ups and provide a safer community with connections to emergency services.

Issues

Inputs, Skills and Jobs aim:

To Increase the Region's job density, diversity and opportunity.

Support businesses and young workers by:

- improving depth and breadth of skilled labour pool and workers
- equipping young workers with the qualification and experiences they need to participate and support growing economic activity
- facilitating infrastructure needs to enable growth and investment opportunities

Inputs, skills and jobs also supports and complements the strategic outcome themes of liveability and connectivity.

Key regional issues

- Large scale serviced industrial and employment land is in short supply in the Region. Land releases for residential areas is creeping closer to industrial sites. Existing businesses are unable to grow or expand their operations, with constraints on existing sites impacting on operations.
- Additional operational conditions are enforced on businesses to meet residential living standards - for example, businesses are unable to operate overtime shifts, face weekend curfews and must comply with more stringent noise level requirements.
- There is a shortage of multi-skilled labourers in Queanbeyan. Growing innovative and technological businesses require workers with both IT and trades skills.
- Disparity in regulations between ACT and NSW Governments is a barrier for attracting businesses to Queanbeyan.
- Small to medium enterprises face high start up and development costs in the Region.
- Most buildings in the Region are heritage listed, making it very difficult to reuse or adapt existing buildings for economic activities.
- Potential job creation in industries like:
 - Defence – leveraging of high number of defence personnel in the Region
 - Tourism – creating active, adventure, sports and boutique tourism experiences
 - Health and community service – leveraging the SkillsPoint in Queanbeyan
 - Smart City/Hub – leveraging the high number of people with Bachelor or Postgraduate qualifications
 - Small animal abattoir
- Training facilities offered in Canberra are not readily available for job seekers, as they can't access ACT Government course subsidies
- Empowering and encouraging women and indigenous populations to participate in employment and economic activities.

Issues

Liveability aim:

- Making the Region a desirable place to live and work will enable economic growth.
- Communities across the Region are liveable and resilient.
- Supporting families and young workers to come and stay, by providing:
 - a range of housing options
 - access to essential infrastructure services
 - opportunities for economic prosperity
 - better quality of life
- Access to affordable social activities and amenities
- Liveability also supports and complements strategic outcomes themes of connectivity and employment

Key regional issues

- A lack of water supply is limiting housing development.
- Meeting community expectations for high quality health and education services.
 - Demand for health services in the Region is forcing patients to seek treatment in Canberra. Local hospitals are currently at capacity and the old infrastructure is not capable of meeting population needs
 - Accommodate growing population demand for new school infrastructure services. Currently, public school students are educated in temporary demountable buildings
 - Servicing a growing, ageing population cost effectively without compromising quality or care.
- Braidwood and Bungendore needs Arts Centres to support their growing arts and craft industries
- Providing essential infrastructure for new residential development cost effectively, such as connection to sewerage services.
- Improving cultural, sporting and other social amenities for the people in the Region by co-locating sporting facilities or creating Sporting Hubs/ Precincts that could host State level championships.
- Ensuring that public assets keep up with standards and support modern and future communities.
- Keeping local communities safe and improve living standards by limiting heavy vehicle movements through main streets in the Region.

Issues

New Ideas aim:

- Governing authorities to create new and innovative partnerships and collaborations with private and non-government sector to reduce costs, share delivery risks and facilitate timely responses to market opportunities.
- Innovation will support businesses and residents by:
 - applying a balanced and common sense approach to finding a win-win solution
 - sharing common desire for the Region
 - achieving an efficient and effective delivery of investments
- New Ideas also supports and complements strategic outcomes themes of liveability, connectivity and Inputs, Skills and Jobs.

Key regional issues

- Balancing industrial and residential land use needs. Demand for residential land is crowding out industrial lands. Business owners view rezoning their land into residential development as a financially better option than business succession.
- The Region is competing with Canberra to retain and attract businesses to the Region. Payroll tax differential favours Canberra than Queanbeyan-Palerang.
- Businesses are approached by interstate governments to relocate by offering business friendly processes.
- Complying with various regulatory requirements from various levels of government and government agencies is an onerous task.
- Regulations are not scaled appropriately for small to medium enterprises; this results in relatively high compliance costs compared to large enterprises.
- Improving collaboration within the Region's business community is required, but the Chamber of Commerce is not active.
- Review of development control to create incentives for land and property owners to develop or adapt in favour of more productive uses.
- Greater clarity of regulations and definitions is required to reduce burdens on small to medium enterprises in the agricultural sector.
- Greater engagement and consultation with local businesses is required when designing or revising regulations to understand their implications and perspectives.

Appendix F –

Risks

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 Queanbeyan-Palerang from achieving its economic potential.

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

Achieving Better Connectivity

- Heavy vehicle routes along the main streets of Queanbeyan, Braidwood and Bungendore create traffic congestion, undermine their roles as 'places for people' and put the safety of residents at risk.
- Deficiencies in telecommunications coverage means that the human capital and innovative capacity of Queanbeyan-Palerang's labour pool is underutilised.
- More frequent and reliable public and community transport systems within Queanbeyan-Palerang and beyond to Canberra can change the way people live and work for the better.
- Access to Canberra Airport for NSW taxis is highly regulated. NSW taxis can take passengers to the airport, but regulations prevent them from picking up passengers.

- Slow rail links from Sydney to Canberra via Bungendore and Queanbeyan are a disincentive to use rail for commuter and visitor disbursement.
- The sole east /west commute and passenger road corridor along Canberra Avenue and Bungendore road provides inefficiencies and potential issues with the growing population in the Bungendore and Googong areas.

Leveraging Resources, Skills and Jobs

- CBD property owners are electing to keep properties vacant rather than reducing rents, reducing economic activity.
- Scarcity of "right sized" industrial and employment land in Queanbeyan-Palerang is constraining development.
- Land release for residential areas is encroaching on industrial sites. Existing businesses are unable to grow or expand, and it is impacting on the efficiency of their operations relative to the scale they can achieve in Canberra.
- Training offered in Canberra is not readily accessible for Queanbeyan-Palerang workers, as job seekers can't access subsidised places.
- A small animal abattoir would cater to local farmer needs and opportunities.

Enhancing Liveable Communities

- Better 'Places for People' in the centre of Queanbeyan, Bungendore and Braidwood requires delineating freight from pedestrian traffic.
- A lack of potable water services and flooding issues is holding back housing supply in Bungendore.
- Bungendore's main street needs to be better integrated with its showground.
- Affordable housing is in short supply.
- Braidwood needs traffic, drainage and sewerage solutions for its main street that are sensitive to its heritage values.
- Cultural, sporting and other social amenities and events should be enhanced. A sports precinct can attract people from the ACT every week to Queanbeyan, as well as providing capacity for elite sporting events and training.
- Essential infrastructure needs to be provided in sequence to best support new residential development.
- Cross Border Issues – unique to the area is the different regulatory environment on each side of the border. This complicates and disables the ability for effective public transport service delivery, leads to differential business cost establishment and flight corridor planning issues amongst other things.

Risks

New Ideas

- Queanbeyan is disadvantaged in key respects relative to Canberra for both cost and regulatory imposts on business and the thresholds at which they apply.
- Small to medium enterprises face high start-up and development costs in Queanbeyan-Palerang and lower thresholds for taxes like payroll tax.
- Potential businesses in Bungendore face substantive costs for car parking spaces for no substantive change in land use.
- Operational conditions enforced on businesses for noise, energy, fire and waste impede productivity and drive up costs excessively.
- Many buildings in Queanbeyan-Palerang are heritage listed, making it very difficult to reuse or adapt existing buildings for economic activities.
- Queanbeyan-Palerang's business communities lack a peak body and act informally.
- Small to medium enterprises in the Agricultural sector need better definitions from State regulation to reduce development costs.



Appendix G – Focus Opportunities

Focus Opportunity – Places for People

Queanbeyan-Palerang's success in growing its population demonstrates the appeal of the Region as a place to live and play.

Between 2006 and 2016, Queanbeyan-Palerang experienced population growth of 13.8 per cent. This suggests the Region is a great community to live in that growing numbers of people want to be a part of.

The appeal of the Region can be seen in its considerable endowments. These include its own internal features, such as the natural environment and sporting and cultural facilities, as well as those institutions located in Canberra and other adjoining regions.

The Kings Highway is a major constraint on the amenity and economy of the Region's centres

While liveability is already high in Queanbeyan-Palerang, opportunities remain to improve lifestyles and economic outcomes for locals.

A major issue in common for each of Queanbeyan, Bungendore and Braidwood is the co-location of the centre of each town with the Kings Highway corridor. Co-location is creating conflicts between transport purposes and the strategic purposes of centres, hampering both liveability and economic activity.

Symptoms of the conflicts caused by co-location include:

- poor pedestrian connectivity between precincts and facilities
- absence of attractive public space to entice pedestrians to gather in the CBD
- low levels of foot traffic in the CBD
- declining and undifferentiated retail offerings
- old and rundown buildings with substandard street appearances

The new *Future Transport Strategy 2056* includes a 'movement and place' framework to plan, design and operate the road network while appropriately accounting for different land purposes and uses. The guiding conceptual principles within the framework are:

- **local connectivity** – improving public transport, active transport and connections to transport gateways and other key land uses
- **creating places for people** – supporting centre development and placemaking



Focus Opportunity – Places for People

- **movement corridors** – designing and managing major roads to be sensitive to centres and their surrounding land uses, including through planning for future bypasses using the movement and place principles.

A key strategic direction from applying these principles is the separation of through movement (Movement Corridors) and reinforced place-based activity (Places for People). Applying this concept in Queanbeyan-Palerang's centres can enhance both liveability and the economy for residents.

The Ellerton Drive Extension plays a key role in transforming Queanbeyan's CBD and economy

The Ellerton Drive Extension is presently under construction. Once complete in 2020, heavy traffic will be diverted around the CBD rather than through it, supporting placemaking activities consistent with the 'places for people' concept from the 'movement and place' framework.

The Region has developed a CBD Transformation Strategy to complement the bypass and address the current low levels of utilisation in its centre and enhance activity for both businesses and residents.

Over time, the CBD could be supported by further transport initiatives consistent with 'movement and place' framework. This could include better public connections to Canberra, potentially through the existing heavy rail corridor or a new light rail alignment, or alternatively to Canberra Airport.

Bypasses can also enhance Bungendore and Braidwood as "Places for People"

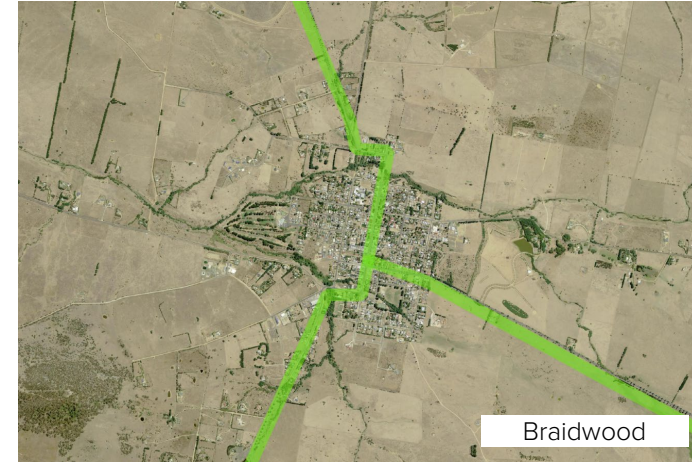
Braidwood and Bungendore are similarly hampered by the extensive traffic carried on the Kings Highway.

Potential bypasses of the centres would need to account for the existing alignments through each centre, reflected in green to the right of this page.

Reduced heavy vehicle movements will enhance the existing tourism, arts and heritage strengths of each centre. Complementary works could include enhanced parking and pedestrian corridors to allow ease of access to the centres.

Next steps for these initiatives should include:

- Preparing a CBD Transformation Program Business Case for Queanbeyan CBD
- Preparing bypass and complementary measures business cases for Bungendore and Braidwood.



Focus Opportunity – Levelling the Cross Border Playing Field

The scale of the ACT economy reflects the exceptional opportunities available to Queanbeyan-Palerang residents

ACT’s five most significant industries produce more than \$20 billion a year, with each significantly larger than Queanbeyan-Palerang Region’s \$1.6 billion economy.

The range of accessible large market employment and business opportunities, coupled with such a highly skilled labour force to employ, work with or learn from, is the core economic strength of Queanbeyan-Palerang. It follows that the most important economic strategies Queanbeyan-Palerang can pursue relate to increasing integration with such a large and lucrative market.

The degree of integration is already very high, with:

- almost two thirds of Queanbeyan-Palerang workers working in the ACT
- about one-third of the labour employed in Queanbeyan drawn from the ACT.

However, the scope for greater integration is significant. Defence represents one area for greater expansion, given the number of defence personnel living in the Region. A related opportunity of merit is a potential high-skill technology business park at Jerrabomberra.

Differences in ACT and NSW taxes, charges and regulation can distort economic activity within the ACT-QP market

Relative to the ACT, Queanbeyan-Palerang holds some key advantages, most notably the lower cost of land. This suggests that all other things being equal, Queanbeyan-Palerang should find success in attracting activities that are relatively land-intensive in their production processes.

While Queanbeyan-Palerang and the ACT forms a unified market, differences in taxation, charging and regulation by the ACT and NSW Governments can distort where economic activity takes place within the broader Capital region economy.

For example, NSW Treasury’s Interstate Comparison of Taxes illustrates that while NSW has a lower payroll tax rate compared to the ACT, the threshold is much higher in ACT, as reflected in the figure above.

The implication of the differential rates is that a small business in NSW faces paying taxes well before they reach the scale where an equivalent ACT business starts to pay tax:

- a Queanbeyan business with a \$2 million payroll pays \$68,125 in tax a year
- an ACT business with the same payroll would pay no payroll tax.

Payroll Tax	
NSW	ACT
5.45%	6.85%
\$750,000	\$2,000,000

Focus Opportunity – Levelling the Cross Border Playing Field

An implication of the difference in tax paid is some businesses may look to locate in, or relocate to, the ACT to reduce or avoid paying different taxes. If the decision is purely driven by differentials, economic decision making has been ‘distorted’.

The distorting impacts of taxes tend to be greatest at borders, where investors find it easiest to position to their advantage. Many of the Region’s stakeholders highlighted differences in taxes, charges and regulations as major impediments to economic growth, or encouragement to leave NSW.

In addition to taxes and charges, other notable differences in treatment include heavy vehicle regulations, taxi hire regulations and public transport services and ticketing. For example, Queanbeyan taxis are allowed to drop passengers at Canberra Airport, but are prohibited from picking up passengers.

Research into the extent of impacts can help Queanbeyan-Palerang advocate for adjustments that level the cross border playing field

There are a number of options for the Region to consider to level the playing field to retain and attract new businesses and extend its inherent advantages. These options include:

- develop policies to leverage the Region’s endowments and specialisations to promote key cost advantages over ACT
- develop taxation and financial incentives
- harmonise regulation and licensing
- develop a Special Economic Zone proposal to offset or eliminate differences at the border.
- investigating opportunities to activate industrial land for purposes integrating the high skill specialisations of the labour pool with cost advantages for land
- working with the NSW Government Cross Border Commissioner to advocate for policy changes offsetting or eliminating disadvantages to businesses, organisations and residents in border communities.

Prior to considering appropriate policy levers to address cross-border issues, the scale of cross-border impacts must be better understood. The initial strategic opportunities for action could include:

- undertaking a business cost and regulatory impositions comparative study

These actions can begin to position Queanbeyan-Palerang to level the playing field for new investment and make the most of its opportunities to build off its inherent advantages.



Focus Opportunity - Tourism

Tourism plays an important role in Queanbeyan-Palerang

Tourism plays a substantial role in the Region's economy, especially for its smaller centres like Bungendore and Braidwood.

On average, the Region has about 206,000 overnight visitors, contributing \$97 million to the local economy annually. Three main industries benefiting from tourism are:

- accommodation and food
- transport
- retail.

Tourism Research Australia accounts for about 470 local businesses that make up the backbone of tourism operations in Queanbeyan-Palerang.

Many endowments lend the Region strength in tourism. Queanbeyan-Palerang is a central Gateway for access to Canberra and other adjoining regions. The standard of road access is generally very good, and its centres have a range of interesting features and events to attract visitors.

Constraints need to be addressed to see the Region's tourism offerings reach their potential

Stakeholders identified a number of constraints during stakeholder consultation. These included:

- improving collaboration among operators
- upgrading accommodation capacity
- increasing marketing and awareness
- developing and implementing signature experiences in the Region
- changing the Region's perception as "low-cost" option for Canberra stays
- reducing heavy vehicle movements on the Kings Highway near town centres (considered at length in a previous Focus Opportunity).

New strategic plans at the local and regional level can help realise the Region's tourism potential

Recently, the Region endorsed the QPRC Tourism Plan 2017-2025 which proposes:

- Developing outdoor adventure activities like high-quality cycling tracks and trails
- Revitalising Queanbeyan City CBD
- Attracting investment to develop a more diverse range of visitor accommodation
- Enhancing art, culture and food trails of QPRC



Focus Opportunity - Tourism

Additionally, the recently released Destination Southern NSW Regional Destination Management Plan encourages regional collaboration in driving its strategic directions.

Over time, tourism operators may be able to move up the value chain by offering novel experiences to high value customers

According to Tourism Research Australia, Canberra had over 2.2 million overnight visitors in 2014-15, spending more than over \$1.8 billion. In addition, ACT households have the highest disposable incomes in the country among States and Territories.

Taken together, these facts suggest opportunities may exist for the Region's tourism operators to move up the value chain over time.

Local strengths can support signature experiences unique to Queanbeyan-Palerang

A key to success is likely to be in promoting a distinctive set of local experiences. Among the population serving specialisations are a number of artistic and cultural pursuits, including:

- Creative Artists, Musicians, Writers and Performers and Art Education
- Amusement and Other Recreational Activities
- Museum operation.

These specialisations are consistent with the Region's boutique tourism experience offerings centred around local culture, heritage and artistic pursuits.

A model for the types of higher value experiences that could be offered is Daylesford, a notable tourist destination in Victoria famous for its natural spa.

Daylesford is located a comparable distance from Melbourne to what Braidwood is from Canberra. Daylesford created its tourism industries by leveraging off its endowment of natural hot springs and developed spas, restaurants, galleries, gardens and country-house-conversion bed and breakfasts.

Braidwood and Bungendore have high concentrations of arts and recreational services. Combined with deep heritage and picturesque surroundings, Braidwood and Bungendore could extend their strengths in arts and recreational services, including:

- an art trail with local artists
- a food and wine trail with the makers
- cultural and heritage tourism.



Focus Opportunity – Population Growth in Canberra

Scenario modelling suggests ongoing population growth in the ACT could increase Queanbeyan-Palerang output by more than \$225 million over time.

The Canberra economy is large, and swelling further over time.

Queanbeyan-Palerang and the ACT are in competition in some respects, as reflected in the Focus Opportunity on Levelling the Cross Border Playing Field. However, in general, growth in the Canberra economy will expand opportunities for Queanbeyan-Palerang as well, suggesting the general focus for policy should be on complementarity, rather than competition.

One of the key sources of the ACT’s growth is ongoing population increase. To help provide an indicative illustration of the potential significance of population growth in an adjoining region, Corview commissioned Cadence Economics to undertake computable general equilibrium modelling of different population growth scenarios.

The scenarios modelled include the current official forecast (1.27 per cent). Under this scenario, Cadence Economics’ modelling suggests In aggregate, the additional activity in the Queanbeyan-Palerang economy over time might total more than \$225 million.

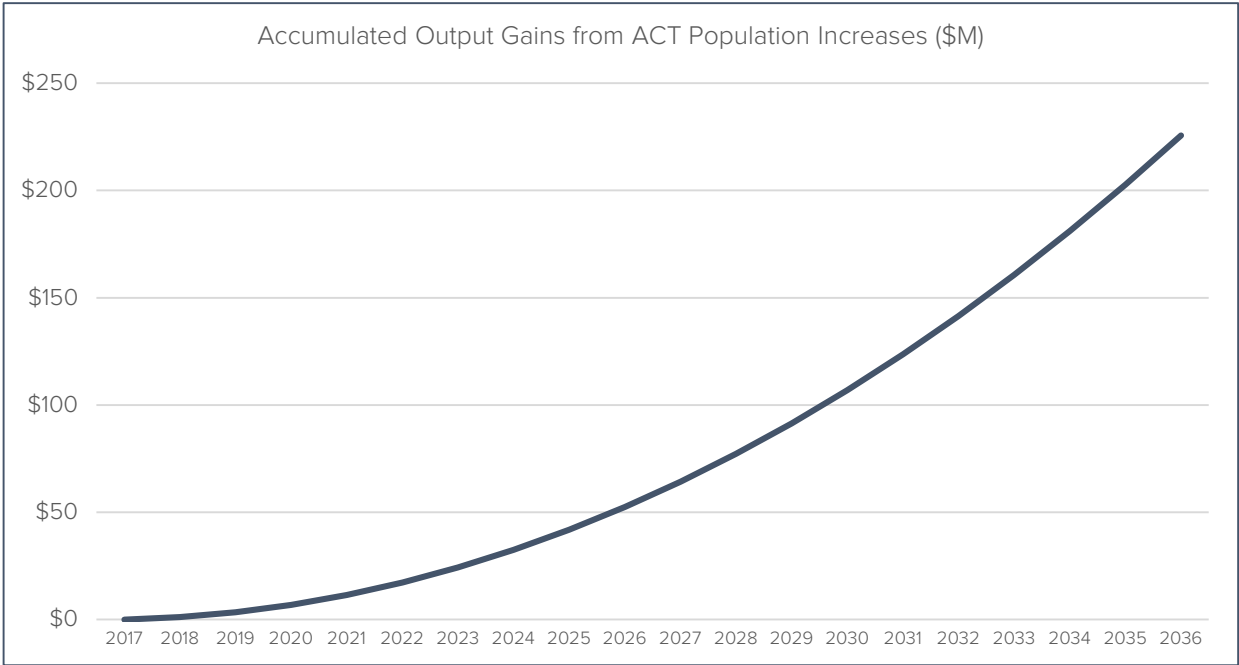
Business Services, Wholesale Trade and Transport are projected to benefit most among the Region’s industries from ongoing ACT’s population increases.

The local Business Services, Wholesale Trade and Transport sectors are projected to expand by an additional \$87 million, \$74 million and \$56 million respectively over time.

Other sectors reflecting substantial gains include food manufacturing, other manufacturing and recreational services.

While only a single scenario, the modelled outcomes reinforce the potential of pursuing enabling strategies like:

- leveraging the Region’s proximity to Canberra to promote the Region’s arts, food, drink and cultural heritage strengths for tourism
- investigating opportunities to better connect Queanbeyan-Palerang’s freight and passenger connections to Canberra and its gateways
- better connecting Queanbeyan and Canberra, potentially including heavy or light rail connections.



Appendix H –

The Building Blocks of Economic Growth

Promoting economic growth

The role of our regions

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

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

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

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

The “building blocks” of economic development

Many factors contribute to the economic potential of a region.

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

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

Some of the key ingredients

At a most basic level, economic development can be achieved and enhanced through one of the following three ‘P’s:

- More **People** which increases the size of the local market
- More **Participation** to increase the size of the labour pool
- Higher **Productivity** to increase the value add each worker delivers.

Targeted planning and investment

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

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

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

This Strategy therefore places a high priority on focusing on areas that emphasise existing strengths rather than targeting investments in speculative areas that are yet to be proven. Investment must consider improvements in the Region that are sustainable and equitable.

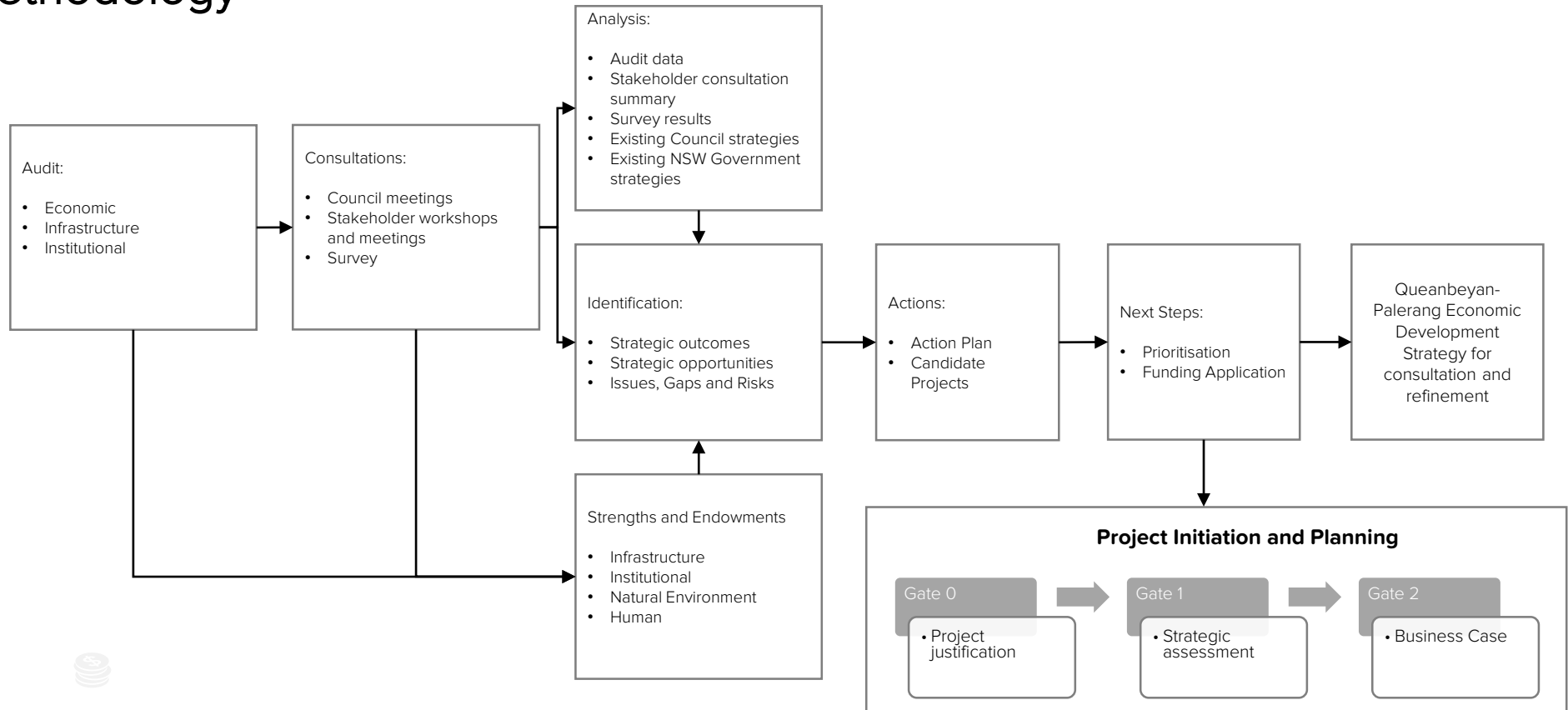
Improving standards of living across regional communities and ensuring that the Region's economic base is resilient and adaptive to change are also important considerations. Therefore, this Strategy considers measures that deliver improvements in the four key strategic outcomes:

- Connectivity
- Inputs, Skills and Jobs
- Liveability
- New Ideas



Appendix I – Methodology

Queanbeyan-Palerang - Regional Economic Development Strategy Methodology



KEY TASKS AND STEPS IN REGIONAL ECONOMIC DEVELOPMENT STRATEGY DEVELOPMENT

- Undertaking economic, infrastructure and institutional audits and integrating them into regional strengths and endowments
- Reviewing existing strategies to account for current policy directions and shape strategic themes for this Strategy
- Consulting with stakeholders to identify current day and future strategic needs, issues, gaps, risks and opportunities
- Analysing and identifying strengths and endowments when considering the strategic objectives and opportunities of each theme
- Identifying strategies and actions that respond to the Region's strategic economic development needs
- Actions and projects are assessed for Project Initiation and Planning



Appendix J – Actions

Action Plan

Each of the four strategies is supported by an Action Plan – allocating an “owner” or sponsor of each strategy and an expected timeframe in which to complete the actions.



1. Improve Digital Connectivity and Access to Harness the Innovative Capacity of the Workforce

Strategic Context

Queanbeyan-Palerang is fortunate to have access to a number of endowments that lend it productive potential well beyond levels typical for regional NSW. Foremost among these endowments are:

- its highly educated workforce
- advanced manufacturing firms
- proximity to Canberra, home to many of Australia's leading cultural, educational, scientific and social institutions.

Despite the complementary role Queanbeyan-Palerang plays with respect to Canberra in supporting land-intensive production activities like manufacturing, consultation revealed a scarcity of appropriately scoped industrial land, and tax and regulation differentials were constraining development in this sector.

To make the most of its endowments, Queanbeyan-Palerang should focus on facilitating cluster development for its high skill, high value add activities. An immediate opportunity relates to the proposed South Jerrabomberra Defence & Technology Precinct. A secondary priority should be improving regional digital and mobile connections, in order to improve the capacity of its workers to work flexibly and connect to markets much further afield.

Infrastructure Priorities

South Jerrabomberra Defence & Technology Precinct and digital connectivity infrastructure

Opportunities

- Position Queanbeyan-Palerang as a Smart City.
- Activate industrial land that utilises the Region's hi-tech workforce specialisations.
- Secure reliable, high capacity regional digital and mobile connections for the Region's creative and innovative workforce.
- Work on cross-border collaboration to address tax and regulations gaps.
- Enhance transport accessibility and connectivity between Queanbeyan-Palerang Region and Canberra to support cross border travel flow.

Early Stage Actions

- Develop a South Jerrabomberra Defence & Technology Precinct Business Case.
- Pursue a partnership with Canberra Institute of Technology, Australian National University and the University of Canberra to develop Queanbeyan-Palerang's entrepreneurial ecosystem.
- Implement the QPRC Digital Economy and Smart Community Strategy.
- Develop an Innovation Strategy.
- Advocate for an Australian Public Service Smart Work Hub in Queanbeyan.
- Develop a Business Innovation Hub in Queanbeyan.
- In collaboration with the private sector, audit digital connectivity blackspots and identify technical solutions.
- Investigate regional/remote Wi-Fi connectivity solution.
- Work with the ACT to develop a Public Transport Integration Strategy.
- Undertake a feasibility study for commuter rail options in the Bungendore to Canberra corridor.
- Continue to advocate for a Fast Train network from Sydney to Canberra.

Candidate Programs / Projects

- South Jerrabomberra Innovation Precinct
 - Defence and Technology Industrial Park
 - Enabling road works
 - Utilities corridor
 - Business park
 - Rail Freight Intermodal
- Queanbeyan-Palerang Business Innovation Hub.

Action Plan

Improve Digital Connectivity and Access to Harness the Innovative Capacity of the Workforce

Strategic Opportunities	Actions	Timeframe
<ul style="list-style-type: none"> Position Queanbeyan-Palerang as a Smart City . 	<ul style="list-style-type: none"> Pursue a partnership with CBRINT, ANU and UC to develop Queanbeyan–Palering’s entrepreneurial ecosystem. Implement the QPRC Digital Economy and Smart Community Strategy. Develop an Innovation Strategy. Advocate for an Australian Public Service Smart Work Hub in Queanbeyan. Develop a Business Innovation Hub in Queanbeyan. 	December 2020
<ul style="list-style-type: none"> Activate industrial land that utilises the Region’s hi-tech workforce specialisations. 	<ul style="list-style-type: none"> Develop a South Jerrabomberra Defence & Technology Precinct Business Case. 	December 2018
<ul style="list-style-type: none"> Secure reliable, high capacity regional digital and mobile connections for the Region’s creative and innovative workforce. 	<ul style="list-style-type: none"> In collaboration with the private sector, audit digital connectivity blackspots and identify technical solutions. Investigate regional/remote Wi-Fi connectivity solution. 	June 2019
<ul style="list-style-type: none"> Enhance transport accessibility and connectivity between Queanbeyan-Palerang Region and Canberra to support cross border travel flow. 	<ul style="list-style-type: none"> Work with the ACT to develop a Public Transport Integration Strategy. Undertake a feasibility study for commuter rail options in the Bungendore to Canberra corridor. Continue to advocate for a Fast Train network from Sydney to Canberra. 	Dec 2021

2. Re-establish the Town Centres as ‘Places for People’

Strategic Context

The Kings Highway corridor is highly significant from both an economic and social perspective, providing the primary point of access between the Region’s three major centres. Beyond Queanbeyan, the corridor becomes Canberra Avenue, the immediate access point to many of the economic opportunities residents find within the ACT’s borders.

While the Kings Highway is highly valuable as a movement corridor, it nonetheless creates conflict with the intended economic land use outcomes for the three town centres disrupted by its current alignment. This reduces the amenity and productivity of these centres. In particular, Transport for NSW’s new ‘Movement and Place’ framework includes a core principle that freight corridors should be separated from “places for people” so both can function more efficiently.

The Ellerton Drive Extension, presently in delivery, will provide Queanbeyan’s CBD relief from freight traffic through a bypass from mid 2020. The immediate next step for the Region should be developing a program business case of initiatives to make the most of this opportunity. Thereafter, a business case for bypasses of Bungendore and Braidwood and similar complementary investment programs should be developed. Over the medium term, options to better integrate these centres with Canberra through better public transport services should be investigated.

Infrastructure Priorities

Queanbeyan CBD Transformation, consolidation of QPRC Offices & Town bypasses of Bungendore and Braidwood.

Opportunities	Early Stage Actions	Candidate Programs / Projects
<ul style="list-style-type: none"> Reinstate the main streets as a “Places for People”. Delineate freight corridors from “Places for People”. Improve connections between Canberra and Queanbeyan-Palerang with better integration of public transport services. 	<ul style="list-style-type: none"> Develop a program business case for revitalising the Queanbeyan CBD. Develop Town Bypass business cases for Braidwood and Bungendore. Review measures to encourage landlords to let and improve their properties, including rate incentives to do so. Work with the ACT to develop a Public Transport Integration Strategy. Undertake a feasibility study for commuter rail options in the Bungendore to Kingston corridor. Implement the Retail Growth Strategy and Queanbeyan CBD Spatial Business Plan to support the development of an authentic ‘main street’ retail experience as differentiator for the local economy. 	<ul style="list-style-type: none"> Queanbeyan CBD Transformation Consolidation of the QPRC Offices Kings Highway bypass study for Braidwood and Bungendore Light rail network extension to Queanbeyan Commuter Rail from Bungendore to Queanbeyan to Canberra.

Action Plan

Re-establish the Town Centres as ‘Places for People’

Strategic Opportunities	Actions	Timeframe
<ul style="list-style-type: none"> • Delineate freight corridors from “Places for People”. 	<ul style="list-style-type: none"> • Develop Town Bypass business cases for Braidwood and Bungendore. 	June 2019
<ul style="list-style-type: none"> • Reinstate the main streets as a “Places for People”. 	<ul style="list-style-type: none"> • Develop a program business case for revitalising the Queanbeyan CBD. • Review measures to encourage landlords to let and improve their properties, including rate incentives. • Develop main street investment programs for Bungendore and Braidwood. • Implement the Retail Growth Strategy and Queanbeyan CBD Spatial Business Plan to support the development of an authentic ‘main street’ retail experience as differentiator for the local economy. 	June 2019
<ul style="list-style-type: none"> • Improve connections between Canberra and Queanbeyan-Palerang with better integration of public transport services. 	<ul style="list-style-type: none"> • Work with the ACT to develop a Public Transport Integration Strategy. • Undertake a feasibility study for commuter rail options in the Bungendore to Kingston corridor. 	December 2021

3. Grow the Population and Internal Markets of the Region

Strategic Context

The combination of lifestyle and economic opportunity enjoyed in Queanbeyan-Palerang is a key factor contributing to the significant population growth enjoyed in the Region over the past decade. Many of the endowments supporting the Region's attractiveness are in the ACT rather than NSW, emphasising the significant 'satellite' relationship and relatively close integration between the Region and the nation's capital.

Nonetheless, there is more Queanbeyan-Palerang can do to further enhance its own attractiveness, grow its own markets and further increase its integration with Canberra. Priority measures should include developing a portfolio of enabling infrastructure projects to facilitate housing supply and new industrial land, a cross border comparison of charges and regulatory impositions and developing a business case for the proposed Jerrabomberra Sports Precinct.

Infrastructure Priorities

Utilities infrastructure supporting housing supply and new industrial land release

Opportunities

- Provide enabling infrastructure for new industrial and housing developments.
- Improve access to cultural, sporting and social facilities and services within Queanbeyan-Palerang.
- Level out the cross-border cost and regulatory differentials.
- Engage in transformative partnerships with local, state and federal governments.
- Accommodate an ageing population through integrating aged care and health services.
- Improve freight connectivity from the Kings Highway corridor.
- Explore the development of Freight Hub to support industry growth in the Region.

Early Stage Actions

- Develop a Queanbeyan-Palerang Water Security Program business case.
- Work with energy suppliers to identify infrastructure to support housing supply and industrial expansion, including renewable energy infrastructure.
- Develop a Jerrabomberra sports precinct business case.
- Leverage the Health, Wellbeing and Community Services SkillsPoint in Queanbeyan to work with Industry to identify and address gaps in social and community services.
- Undertake a study of cross-border business costs and regulatory impositions, and consider options including a Special Economic Zone.
- Advocate for a City Deal in collaboration with the ACT Government to address cross border issues.
- Advocate for harmonisation of Canberra Airport transport access regulations.
- Work with industry in investigating innovative solutions to energy and waste management constraints including renewable energy opportunities and solutions.
- Trial a Business Improvement District as an alternative to a Business Chamber in Queanbeyan.
- Undertake a feasibility study for freight network development (such as an intermodal) in Queanbeyan.

Candidate Programs / Projects

- Bungendore Water Supply System
- Queanbeyan Sewage Treatment Plant Upgrade
- Googong Recycled Water System
- Queanbeyan Regional Sports Facilities.
- Queanbeyan-Palerang Intermodal Freight Futures Study

Action Plan

Grow the Population and Internal Markets of the Region

Strategic Opportunities	Actions	Timeframe
<ul style="list-style-type: none"> • Provide enabling infrastructure for new housing and industrial developments. 	<ul style="list-style-type: none"> • Develop a Queanbeyan-Palerang Water Security Program business case. • Work with energy suppliers to identify infrastructure to support housing supply and industrial expansion, including renewable energy opportunities and solutions. • Work with industry in investigating innovative solutions to energy and waste management constraints, including renewable energy opportunities and solutions. 	June 2019
<ul style="list-style-type: none"> • Improve access to cultural, sporting and social facilities and services within Queanbeyan-Palerang. 	<ul style="list-style-type: none"> • Develop a Jerrabomberra sports precinct business case. 	December 2018
<ul style="list-style-type: none"> • Level out the cross-border cost and regulatory differentials. • Engage in transformative partnerships with local, state and federal governments. 	<ul style="list-style-type: none"> • Undertake a study of cross-border business costs and regulatory impositions and consider options, including a Special Economic Zone. • Advocate for a City Deal in collaboration with the ACT Government. • Advocate for harmonisation of Canberra Airport transport access regulations. • Trial a Business Improvement District as an alternative to a Business Chamber in Queanbeyan. 	December 2019
<ul style="list-style-type: none"> • Accommodate an ageing population through integrating aged care and health services. 	<ul style="list-style-type: none"> • Leverage the Health, Wellbeing and Community Services SkillsPoint in Queanbeyan to work with Industry to identify and address gaps in social and community services. 	June 2020
<ul style="list-style-type: none"> • Improve freight connectivity from the Kings Highway corridor. • Explore the development of Freight Hub to support industry growth in the Region. 	<ul style="list-style-type: none"> • Undertake a feasibility study for freight network development (such as an intermodal) in Queanbeyan. 	December 2020

4. Further Develop Specialised Agriculture and Food and Cultural Tourism

Strategic Context

The Region holds significant advantages in specialised agriculture and tourism that should be cultivated.

Consultations suggest Braidwood's well-established, highly productive beef cattle specialisation functions well, but smaller, developing niche agricultural activities demonstrating significant innovative capacities located around both Bungendore and Braidwood are impeded by a range of regulatory and infrastructure constraints. An immediate priority should be investigating the feasibility of the small animal abattoir concept proposed by stakeholders.

Similarly, the release of the new Destination Management Plan has provided a point of focus for further efforts to grow the Region's visitor economy. Specifically, the Region should seek to leverage existing tourism strengths, like its Aboriginal and European settlement history and Braidwood's well-preserved town, by developing new arts, food and cultural offerings.

Infrastructure Priorities

Small Animal Abattoir.

Opportunities

- Leverage Queanbeyan-Palerang's proximity to Canberra to promote its arts, food, drink and cultural strengths.
- Develop the Region's agricultural sector.
- Celebrate and embrace indigenous and multicultural heritage.
- Take advantage of expanding tourism, promotion and export opportunities of the Region given the available domestic and international connections that may be facilitated by the Canberra International Airport.
- Develop a tourism brand for the Region.

Early Stage Actions


- Work with the Small Business Commissioner to look at regulatory barriers to agri-business and agri-tourism.
- Review the LEP and planning policies to remove grey areas around the development of farm-gate agri-business and agri-tourism business.
- Investigate abattoir options for Bungendore and Braidwood.
- Explore opportunities that ag-tech advancements may offer the Region to boost capacity, efficiency and innovation in the sector.
- Provide greater access to and awareness of indigenous and multicultural heritage.
- Work with the Canberra Region Joint Organisation (CRJO) and Visit Canberra to develop or leverage joint marketing initiatives to promote the Region
- With the CRJO and Canberra Airport to (1) investigate the opportunity for Canberra Region produce and products placement in the Canberra airport to support the QPRC Tourism Plan objectives, (2) further ongoing development of export freight opportunities in agriculture and general industry.
- Conduct a consumer facing branding exercise for the QPRC LGA
- Leverage the Canberra Region brand where possible
- Further develop the Queanbeyan-Palerang Events Program.

Candidate Programs / Projects

- Small Animal Abattoir
- Queanbeyan-Palerang Regional Council Tourism Accommodation and Events Plan
- Tourism projects as per Queanbeyan-Palerang Regional Council Tourism Plan.

Action Plan

Further Develop Specialised Agriculture and Food and Cultural Tourism

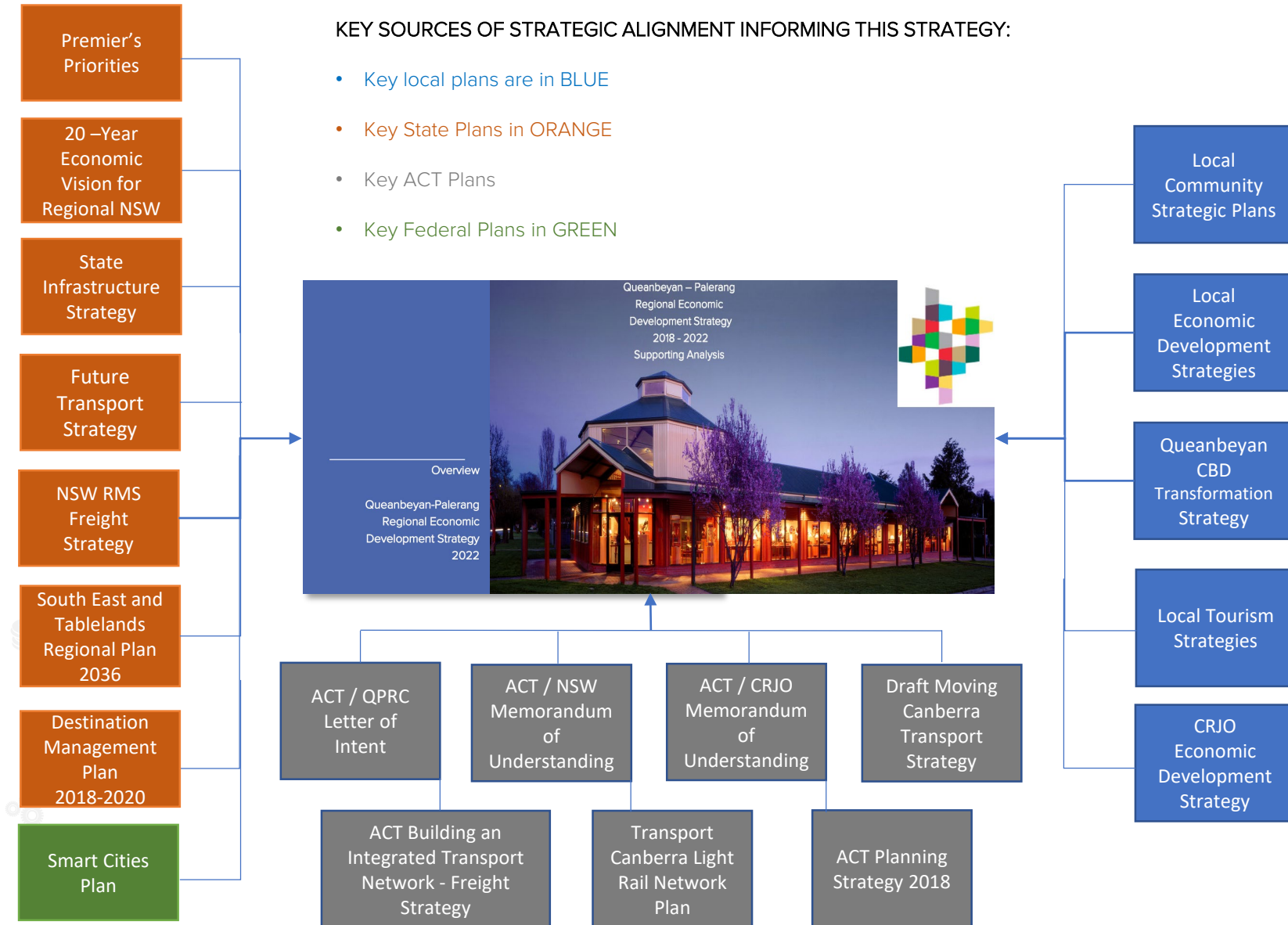
Strategic Opportunities	Actions	Timeframe
<ul style="list-style-type: none"> • Leverage Queanbeyan-Palerang's proximity to Canberra to promote its arts, food, drink and cultural strengths. • Develop the regions agricultural sector. 	<ul style="list-style-type: none"> • Work with the Small Business Commissioner to look at regulatory barriers to agri-business and agri-tourism. • Review the LEP and planning policies to remove grey areas around the development of farm-gate agri-business and agri-tourism business. • Investigate abattoir options for Bungendore and Braidwood. • Explore opportunities that ag-tech advancements may offer the region to boost capacity, efficiency and innovation in the sector. 	December 2019
<ul style="list-style-type: none"> • Celebrate and embrace indigenous and multicultural heritage. 	<ul style="list-style-type: none"> • Provide greater access to and awareness of indigenous and multicultural heritage. 	June 2020
<ul style="list-style-type: none"> • Take advantage of expanding tourism, promotion and export opportunities of the region given the available domestic and international connections and that may be facilitated by the Canberra International Airport 	<ul style="list-style-type: none"> • Work with the Canberra Region Joint Organisation (CRJO) and Visit Canberra to develop or leverage joint marketing initiatives to promote the region • With the CRJO and Canberra Airport: <ul style="list-style-type: none"> ◦ investigate the opportunity for Canberra Region produce and products placement in the Canberra airport to support the QPRC Tourism Plan objectives ◦ further ongoing development of export freight opportunities in agriculture and general industry. 	December 2020
 <ul style="list-style-type: none"> • Develop a tourism brand for the region. 	<ul style="list-style-type: none"> • Conduct a consumer facing branding exercise for the QPRC LGA. • Leverage the Canberra Region brand where possible. • Further develop the Queanbeyan-Palerang Events Program 	December 2020



Appendix K –

Strategic Alignment

Strategic Alignment and Directions Drawn from Other Plans





Developed with the support of the NSW Government as part of the Regional Economic Development Strategies program to assist local councils and their communities in regional NSW.

