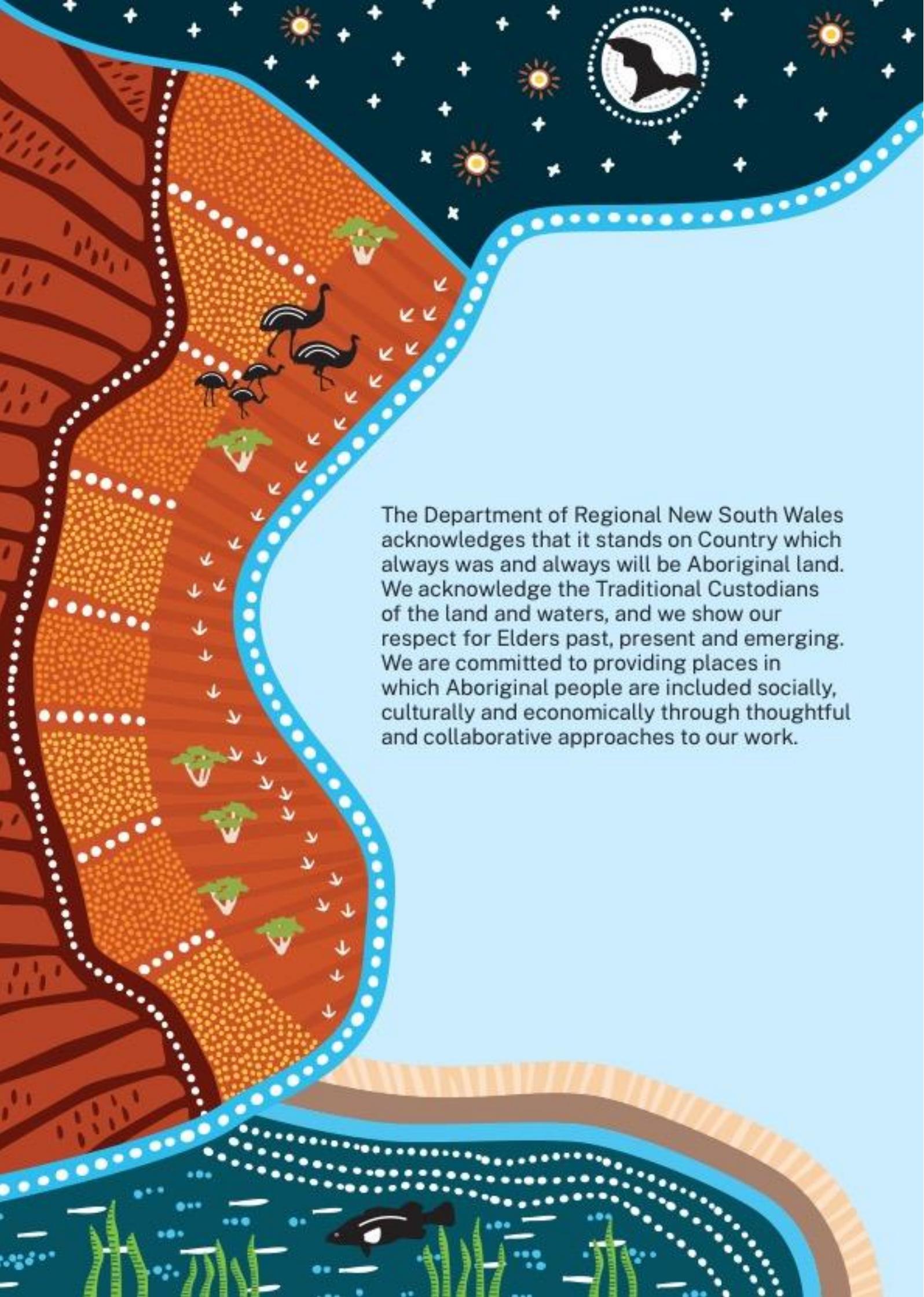


Southern Tablelands Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

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On Country – Artwork by Mumbulla Creative

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a river redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Cover image: Bungonia Gorge, Goulburn Mulwaree LGA. Photo credit: Lauren McLaughlin Photography

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1. Executive Summary

Changes in the Southern Tablelands region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

The Southern Tablelands region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



\$165 million committed to deliver the **Goulburn Hospital upgrade**.



\$20 million to deliver the Murrumbateman Public School.



Major upgrades to **Main Road 54 – Goulburn to Abercrombie**, totalling more than **\$3 million**.



Over **\$1.7 billion** invested into **renewable energy generation facilities** across the region including Bango, Biala, Collector, Crookwell II and Rye Park wind farms.

The Southern Tablelands has experienced solid population growth since 2018, which brings opportunities and challenges for the region



+ 3.5% population growth recorded in the region since 2018.



Housing **vacancy rates** sit **at 2%**, with median **house prices rising** by an average of **40%** across the region since 2018.



The proportion of the population **over 55 years old** has increased by **0.9%** since 2018.



Unemployment rates vary across the region, while the broader region has **seen sustained growth in job vacancies** since the start of the COVID-19 pandemic.

The region's key industries, in particular agriculture, tourism and health care continue to drive economic growth in the Southern Tablelands



Agriculture

+ 7.6% year-on-year (YoY) growth from 2011-2020

\$ 291 million gross value added (GVA) in 2020

2,156 jobs supported in 2021



Health care

+ 5.4% YoY growth from 2011-2020

\$ 261 million GVA in 2020

3,568 jobs supported in 2021



Tourism

+ 1.4% YoY growth from 2011-2020

\$ 204 million visitor spend in 2021

4,231 jobs supported in 2021



Energy generation (incl. Renewables)

+ 0.2% YoY growth from 2011-2020

\$ 91 million GVA in 2020

390 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Southern Tablelands region highlighted enhancing regional liveability and housing supply and maximising long-term benefits from major projects as key priorities for the region.

Enhancing liveability and connectivity



Stakeholders emphasised the importance of continuing to invest to enhance liveability and connectivity in the region, particularly through continuing to invest in infrastructure to enhance connections to Canberra and Sydney and key freight pathways to markets.

Housing availability and affordability



Current housing supply issues were highlighted as presenting a challenge for the community, in particular for low income and disadvantaged residents, as well as acting as a key constraint on further population and economic growth in the region.

Ensuring long-term benefits and enhanced resilience from major projects



Stakeholders highlighted the significant investment being made into renewable energy projects in the region and expressed a desire to ensure the region's communities derive long-term economic benefits from these projects.

Southern Tablelands REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Enhancing the liveability of the region and grow its visitor economy.</p>	<ul style="list-style-type: none"> • Support a diverse visitor economy by encouraging the development of new tourism experiences, including agritourism and events tourism. • Support improvements to community spaces, sports and recreation infrastructure, which improves amenity and diversifies the visitor economy offering.
<p>Maximise community benefits from the region’s emerging strength in renewable energy generation.</p>	<ul style="list-style-type: none"> • Facilitate community benefits from the growth of off-grid energy storage, generation and transmission capacity across the region while ensuring compatibility with surrounding land uses, such as agriculture.
<p>Improve connectivity, transport infrastructure and cross border arrangements to boost the region’s access to major hubs.</p>	<ul style="list-style-type: none"> • Work with the NSW and ACT Governments to enhance cross border arrangements, including infrastructure connectivity, mutual recognition of skills and improving regulatory coordination. • Investigate and implement future-proofing of transport infrastructure against climate-related shocks.
<p>Realise the economic opportunity in aged care, public administration and community services.</p>	<ul style="list-style-type: none"> • Improve alignment of local TAFE and VET training to meet industry needs and support local delivery in these skills. • Support the diversification of the region’s affordable housing options to increase housing supply.
<p>Sustain the region’s agriculture and processing advantage to maximise benefits for each local government area.</p>	<ul style="list-style-type: none"> • Investigate infrastructure needs, including water security and energy provision, to support the adoption of new technologies in agriculture and processing.

2. About the 2023 REDS Update

In 2018, the NSW Government and local councils developed a series of REDS for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW. The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent 'shocks' such as bushfires, droughts, floods, mice plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** identify strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: The old Bookham Church. Photo credit: Yass Valley Council.



Figure 2: Aerial view of Lerida Estate vineyard, near Collector. Photo credit: Destination NSW.

3. About the Southern Tablelands region

The Southern Tablelands FER is located to the north of the Australian Capital Territory, and around 3 hours South-West of Sydney. The region is comprised of the Yass Valley, Upper Lachlan Shire and Goulburn Mulwaree LGAs, as shown in Figure 3 below. Major population centres include Crookwell, Goulburn, Murrumbateman and Yass, alongside a large number of smaller towns and villages across the region including Binalong, Gundaroo, Marulan and Taralga.

Total area covered (km ²)	14,321
Population (2021)	57,863
Goulburn Mulwaree	32,138
Upper Lachlan Shire	8,491
Yass Valley	17,234
Size of the economy (2020)	\$2.727 billion
Total employment (2021)	26,981

Source: ABS (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021)

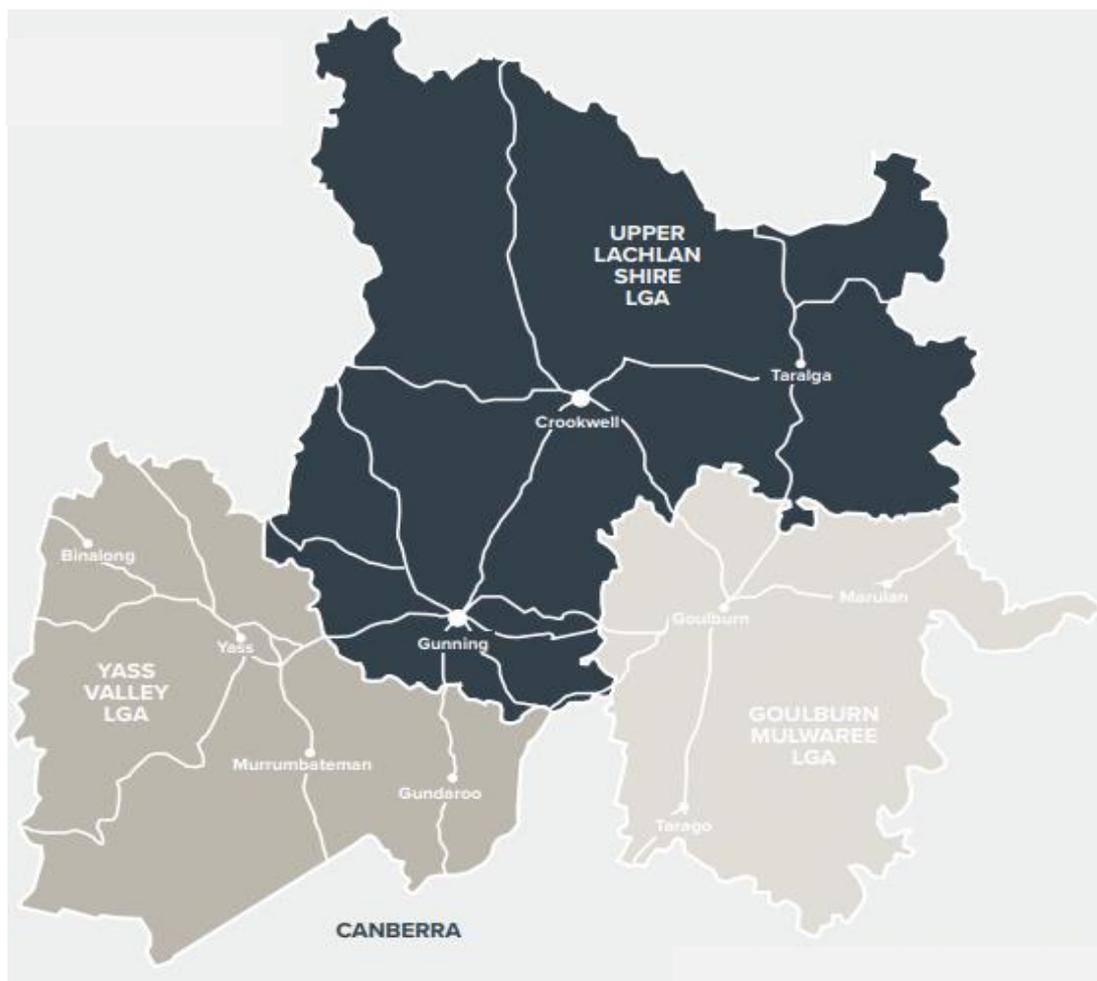


Figure 3: Map of the Southern Tablelands Functional Economic Region.

4. 2018 Southern Tablelands REDS and 2020 Bushfire Addendum

In the 2018 Southern Tablelands REDS, the region was actively pursuing growth in its industry specialisations, particularly tourism and agriculture. Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the overall approach to enabling economic development in the region. Following the 2019-2020 bushfires, the NSW Government developed the 2020 Southern Tablelands Bushfire Impact Addendum, which offered additional areas of strategic focus for the region.

2018 Southern Tablelands Strategies

	Sustain the region's agriculture and agricultural processing advantage, especially in livestock.
	Build on the region's core strength in energy generation and natural resource extraction.
	Realise the economic opportunity presented by public order, safety and aged care.
	Drive growth in the transport, access and logistics sector.
	Enhance the liveability of the region and grow its visitor economy.
	In addition to the core 2018 strategies, the 2020 Southern Tablelands Bushfire Impact Addendum set a series of additional short, medium, and long-term priorities focused on: Recovery - overcoming direct and indirect damage sustained by key industries. Resilience - pursuing growth and diversification opportunities to improve the region's economic and community resilience.

2018 Southern Tablelands specialisations

The industry specialisations below were identified as comparative advantages for the Southern Tablelands region in the 2018 REDS based on employment concentrations in industry sectors.

	Sheep, beef cattle and grain farming
	Non-metallic mineral mining and quarrying
	Construction
	Public order and safety services

	Meat and meat production manufacturing
	Accommodation and food services
	Residential care services
	Renewable energy (wind, solar)

2018 Southern Tablelands endowments

The Southern Tablelands is home to a wealth of physical, institutional, built and human endowments. These endowments play a key role in enabling success and growth across its industry specialisations.

Endowment	Relevant 2018 specialisation
Topography, water, climate, and soil	
Location, accessibility and lifestyle benefits	
Extractive and mineral resources	
Natural resources	
Public order and safety institutions	
Aboriginal heritage, historic heritage, and villages	
Hospitals	
Labour resources	
Local institutions and strong leadership	



Figure 4: Biala Wind Farm, located between Gunning and Crookwell. Photo credit: Matthew Smith.

5. The big picture: Shocks and trends impacting the Southern Tablelands region since 2018



Figure 5: A woman walks her dog in front of Goulburn Courthouse. Photo credit: Tahlia Aubusson.

Significant events impacting major industries

A sustained period of drought, followed by bushfires and flooding have had significant environmental and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses, particularly those servicing the visitor economy suffering from the impacts of movement and operating restrictions. During the period between 2018 and 2022, the region had 14 disaster declarations^[1] and received \$7.01m in disaster recovery grants.^[2] Recovering from these challenges and enhancing resilience against future shocks is an important priority for the region.

Drought

Like many parts of NSW, the Southern Tablelands endured a period of severe drought, particularly during 2018 and 2019. In late 2019, as conditions worsened across the region, all three LGA introduced moderate level water use restrictions as a mechanism for preserving supply and managing urban and residential demand as water levels decreased.^{[3][4][5]}

Water shortages had significant implications for the agricultural industry, the largest engine industry in the Southern Tablelands region. Increasing scarcity of feed forced farmers to truck in fodder, with rising feed prices forcing some to destock and reduce production levels, impacting on overall productivity and output in the sector.^[6]

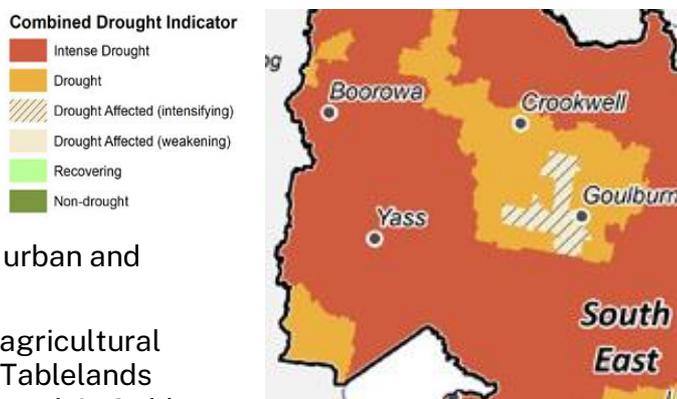


Figure 6: Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

Bushfires

The 2019-20 bushfire crisis across regional NSW also impacted the Southern Tablelands, with physical and economic impacts on the region.

While only 372 square kilometres was burnt in the region (about 2.6% of total land mass),^[7] the overall economic impact on the region was estimated to be more than \$18 million, with around 20 properties significantly damaged or destroyed.^[7] Key local economic impacts in the region included:

- significant damage to access roads and areas surrounding the Wombeyan Caves attraction,
- an estimated 1,331 tonnes of grapes significantly impacted by smoke taint across the Yass Valley region, with substantial implications for the viticulture,
- damage to fencing, sheds, machinery and a range of other agriculture infrastructure.^[7]



■ Bushfire impacted

Figure 7. Fire impacted areas in the Southern Tablelands region.

Floods

Ten out of the 14 natural disaster declarations to have occurred in the region between 2018 and 2022 related to storms and floods, with eight of those occurring since January 2020.^[1]

Sustained rain in early 2021 highlighted limitations in road drainage in some parts of the region, with a range of roads closed due to being cut by localised flooding in the Goulburn Mulwaree and Crookwell LGAs.^[8] During further heavy rain events in early 2022, over 60 call outs were recorded to households in the region impacted by water inundation.^[9] Businesses in Goulburn and Crookwell were also impacted by flooding, while runoff from rains negatively impacted wetlands around Rocky Hill in Goulburn.^[9]

The financial impact of the early 2022 flood events on businesses in the region was significant, with some local business owners estimating the value of direct damage alone to be over \$16,000.^[10] Additional indirect impacts, including transport infrastructure damage and supply chain disruptions also affected productivity and output in the economy.^[10]

Further flood events impacted the region later in 2022. A further disaster declaration was issued in relation to October 2022 flooding in low-lying parts of Goulburn,^[11] and a significant flash flooding event that inundated dwellings and businesses in the main streets of town after a severe storm hit Gunning.^[12]

COVID-19

The acute phase of the COVID-19 pandemic had a significant impact on business in the region with 53% of businesses reporting that COVID-19 negatively affected their business.^[13] International border closures restricted migration which contributed to a skills and workforce shortage. There was also a sustained increase in income support recipients observed after March 2020, with Jobseeker recipients increasing by 59% while Health Care Card recipients rose by 30% between March and June 2020.^[14]

Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate and migration have played a significant role in the Southern Tablelands region since 2018 and are likely to continue to have a strong influence on its future. With a growing population of remote workers, the impacts of successive natural disasters, and an important role in the shift towards net zero emissions, the region faces both opportunities and challenges associated with building resilience and leveraging competitive advantage to support future growth.

Trend	Opportunities and risks	
 <p>Digital Transformation</p>	<p>The COVID-19 pandemic has bolstered remote working opportunities and workers have been taking advantage of the regional lifestyle offering while maintaining metro-based employment. This is evident in the population shift in 2020-21, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200.^[15] Local stakeholder feedback supported the view that there has been an increase in the rate of migration to the region throughout the pandemic.</p> <p>Investment in improved telecommunications infrastructure since 2018 through the Connecting Country Communities program, including more than \$3.3 million to support the rollout of 11 new mobile phone towers to address connectivity issues, has been an important enabler of the digital transformation underway.^[2] However, additional investment will be required to continue to address parts of the region experiencing poor digital connectivity and mobile phone coverage.</p>	<p>Accelerated digital transformation opens online opportunities for businesses to scale up e-commerce capability and reach new markets.</p> <p>The surge in demand for data will place increased pressure on key telecommunications infrastructure, potentially creating reliability and service quality issues and impacting on the ability of businesses to take advantage of the digital shift underway.</p>
 <p>Changing Migration Patterns</p>	<p>Increased COVID-19 pandemic related migration to the region has been a contributing factor in increasing demand for enabling infrastructure, especially housing. The competitive nature of COVID-19 pandemic has meant that worker population growth no longer guarantees an increase in the available workforce to meet local demand, given residents can easily live and work in higher paying jobs not based in the region.</p> <p>Retaining young workers, especially in hospitality and other in-demand population serving roles typically requires high-quality placemaking and amenity,^[16] as well as a need to ensure employment opportunities which can compete with remote working offerings based elsewhere.</p>	<p>A boost in population can increase local economic activity and attract new businesses and industries to the region.</p> <p>Population growth can increase pressure on infrastructure and services, in particular housing supply and key population serving sectors, such as health and education.</p>
 <p>Towards Net Zero</p>	<p>As the state shifts towards net zero, the Southern Tablelands region is playing an important role given its local specialisation in renewable electricity generation. The region continues to see strong investment in renewable energy generation, with recent major projects including the Bargo, Biala, Crookwell II and Collector Wind Farms.</p> <p>The Tablelands Regional Community Strategic Plan (2016-2036) developed collectively by the</p>	<p>There is an opportunity for the region to leverage shared objectives of the councils in the region to plan strategically for the growth of renewables and work together towards net zero targets.</p>

Trend	Opportunities and risks	
	<p>three councils outlined a clear intention to continue to support the development of additional renewable energy facilities in the region.^[17]</p> <p>Significant opportunities exist for local councils to become leaders in the shift towards net zero at the local government level – an example of this is Upper Lachlan Shire Council’s stated target of reaching net zero carbon emissions by 2025.^[18]</p>	<p>A challenge is how to ensure the region derives long-term local benefit from new renewable energy generation projects, especially post the investment intensive construction phase.</p>
 <p>Rising Uncertainty</p>	<p>The region has experienced a succession of extreme climate events since 2018, including drought, bushfires and floods. With the frequency and intensity of these events projected to increase in coming decades there is a need to enhance climate and economic resilience in the region.^[19]</p> <p>A focus will be needed on not only enhancing resilience of infrastructure and industry, but also supporting increased resilience within the broader community.</p>	<p>Rising uncertainty presents an opportunity to invest to improve supply chain resilience in core sectors such as agriculture and energy.</p> <p>Rising uncertainty places upward pressure on inflation, driving up input costs for key industries.</p>



Figure 8: Micalong Creek Reserve, Wee Jasper. Photo credit: Yass Valley Council.

6. Responding to change: Initiatives and investments since 2018

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against key REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
The draft Southeast and Tablelands Regional Plan 2041 sets out strategic land use planning objectives for the region. Focus areas include supporting investment and growth in key industries such as the visitor economy, renewable energy generation, sustainable agriculture and advanced manufacturing.	
The three councils' Local Strategic Planning Statements set out the strategic planning objectives for each LGA. They provide growth principles and planning priorities, including securing additional water supply, developing priority growth areas, protecting the natural environment and preserving the heritage.	
The Yass Valley Towards 2042 - Community Strategic Plan (CSP) , Goulburn Mulwaree CSP 2042 and the Upper Lachlan CSP set out the community's key priorities and aspirations in each LGA and establishes a clear plan for how each Councils will seek to prioritise actions to deliver on agreed priorities.	
The Upper Lachlan Shire Council Infrastructure Plan 2022-2031 provides a 10-year asset management strategy of how the council plans to maximise the utility of its transport, water, waste, building, land and open space assets.	
The Goulburn Mulwaree Council Urban and Fringe Housing Strategy 2020 investigated and identified potential areas suitable for the provision of additional housing across there, with a focus on both urban locations in Goulburn and Marulan, as well as future potential greenfield development sites.	
The Yass Valley Settlement Strategy 2036 provides a clear framework to guide long-term growth and development across the LGA, including accounting for increasing pressure for development in the NSW-ACT border region.	
The Destination Southern NSW Destination Management Plan 2022-2030 creates a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the visitor economy.	
The Southern Tablelands Destination Development Plan 2020 – 2025 was developed to guide the collaborative work of local, regional and state tourism stakeholders to grow, develop and promote the Southern Tablelands region and its towns and villages as a distinct and appealing tourism destination in NSW.	
The Canberra Regional Economic Development Strategy (CREDS) sets out actions to develop an economically prosperous region that provides a high quality of life and is resilient, accessible and environmentally sustainable.	
The Blueprint for a Resilient South East NSW is being developed by the Canberra Region Joint Organisation to plan for enhanced resilience through	

<p>effect linkages and actions to prevent, prepare, respond and recover from future disasters and challenges.</p>	
<p>The draft South East and Tablelands Regional Transport Plan outlines how Transport for NSW will respond to the broader region’s transport needs and how it will plan for future challenges. Key objectives include improving public and active transport options and supporting emissions reduction initiatives.</p>	
<p>The draft Murrumbidgee Regional Water Strategy (Yass Valley), draft Lachlan Regional Water Strategy (Upper Lachlan) and Greater Sydney Regional Water Strategy (Goulburn-Mulwaree) will help guide actions designed to support the achievement of long-term water security of the region.</p>	

Significant investments since 2018

As shown in Figure 9, the region has seen significant public and private investment across a range of projects since 2018. These investments are at varying stages of progress, with some delivered, some underway and some still in the planning stage. Public investment has focused on key facilities such as hospitals and schools, a range of road network upgrades, and a range of community and sporting infrastructure that supports increased amenity. Grant funding has played a role in many projects.

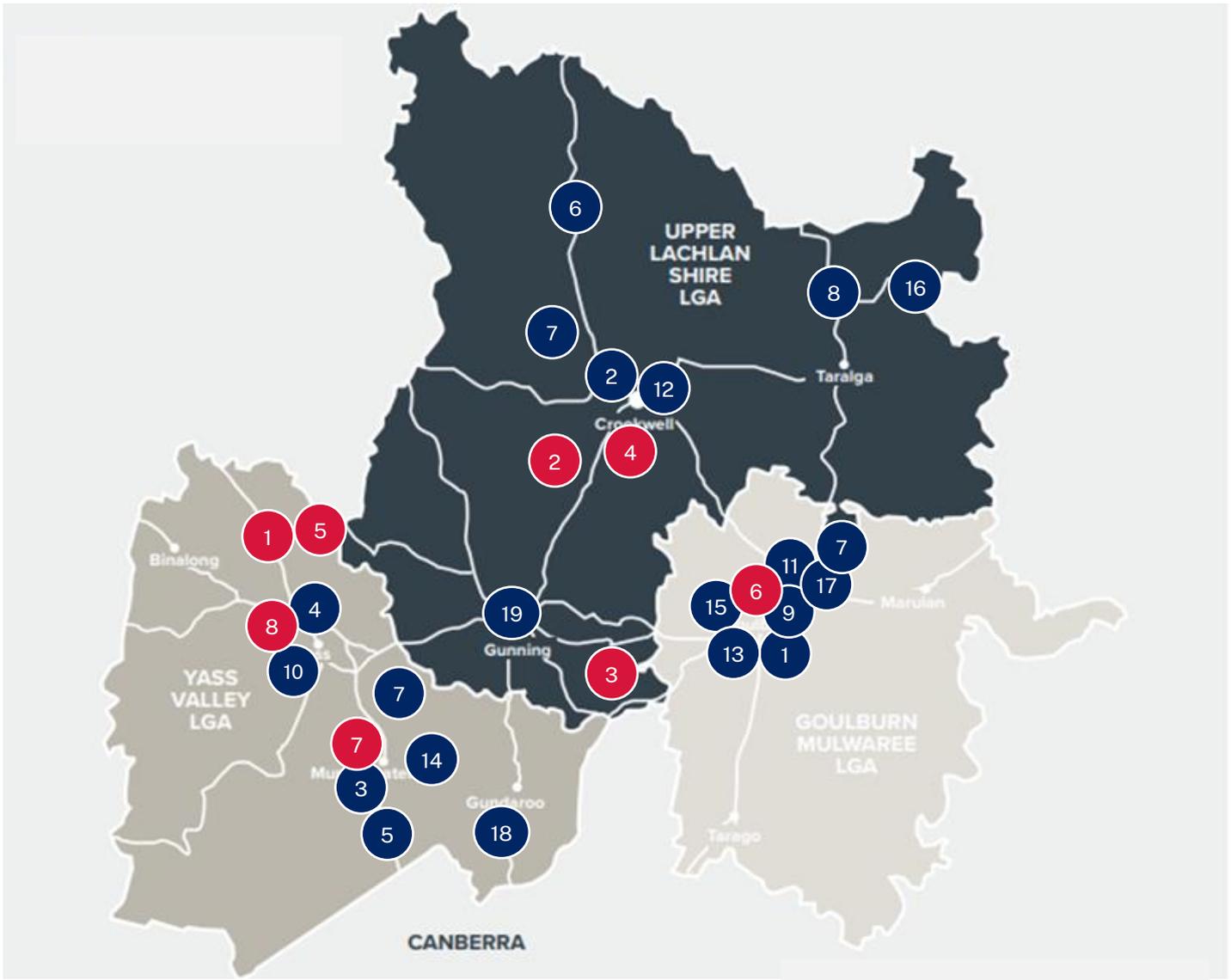


Figure 9: Major investments since 2018 in the Southern Tablelands region, as set out on pages 18 and 19.

Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Bango wind farm	\$500 million	
2 Biala wind farm	\$200 million	
3 Collector wind farm ¹	\$360 million	
4 Crookwell II wind farm	~\$150 million	
5 Rye Park wind farm	~\$700 million	
6 Hidrive Group expansion	\$1.6 million ²	
7 Murrumbateman hotel and accommodation	Not available	
8 South Eastern Livestock Exchange	\$15 million	

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Goulburn Hospital upgrade	\$165 million	
2 Crookwell Hospital emergency department upgrade	\$2.5 million	
3 Murrumbateman Public School	\$20 million	
4 Yass High School multipurpose hall	\$6 million	
5 Barton Highway Stage 1 and 2 Upgrades	\$200 million	
6 Main Road 54 upgrade	\$3 million	
7 Timber bridge upgrades - all LGAs	> \$15 million	

¹ Project also supported by funding through the Clean Energy Finance Corporation.

² Project also supported by a grant under the NSW Government Regional Job Creation Fund.

8	Tablelands Way and Wombeyan Caves Road upgrades	\$9 million	 
9	Goulburn Waste Centre upgrade	\$8.4 million	
10	Crago Mill Precinct proposal	\$29 million	
11	Goulburn Aquatic Centre	\$29.9 million	
12	Crookwell Multipurpose Aquatic Centre	\$5 million	
13	Goulburn Performing Arts Centre	\$18.9 million	
14	Murrumbateman Winery Trail	\$2.3 million	 
15	Goulburn Regional Hockey Centre	\$7 million	
16	Wombeyan Caves upgrades	\$9.6 million	
17	Wollondilly River walking track extension	\$2 million	
18	Yass Valley LGA facilities upgrades	\$1.65 million	
19	Gunning Showground Upgrade	\$0.8 million	 

Regional grant programs

The region has received \$60 million in grants since 2018. The Stronger Communities Country Fund has been a key program during that time in the region, with \$17.18 million invested across a range of community and sporting project.

Grant category	Approved funding
Community	\$24.78 million
Economic	\$28.21 million
Disaster recovery	\$7.01 million

Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.

7. Southern Tablelands 2023 economic snapshot

The Southern Tablelands has continued to experience strong population growth, but an ageing population demographic remains a key challenge for the region

The region has seen consistently strong population growth since 2016, with almost 2,000 additional residents between 2018 and 2021. However, an overall demographic profile with a higher proportion of residents in the older age cohort highlights the need to focus on developing social infrastructure, which can support attraction and retention of people in their prime working age.

Population growth

The Southern Tablelands has experienced strong population growth over the past decade, with growth rates consistently above 1% per annum (see Figure 10).

Between 2018 and 2021, the region experienced an average annual growth rate of 1.2%, with total population growth of 3.5% over that period. This equates to a net increase of 1,959 residents between 2018 and 2021, with the population growing from 55,904 to 57,863.

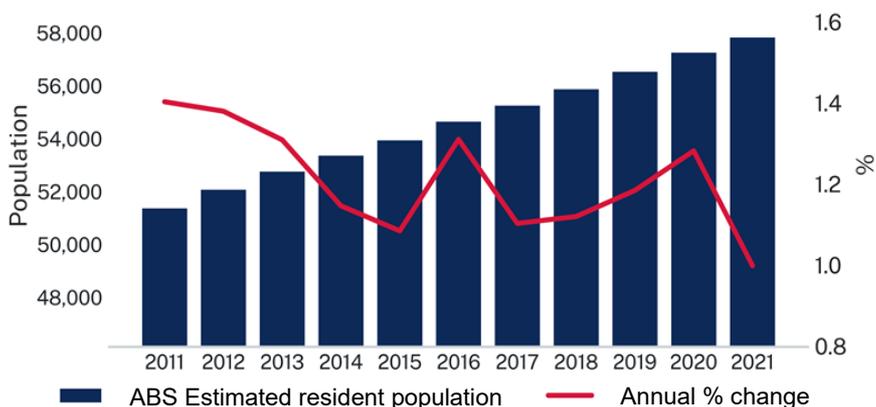


Figure 10: Southern Tablelands FER population growth, 2011-2021 (ABS ERP, July 2022).

Demographic profile

The Southern Tablelands demographic profile shows 34.8% of the population is over the age of 55, a proportion significantly higher than the whole of NSW share in this age group (see Figure 11). Combined with a lower proportion of the population in the primary working age cohort, this demonstrates a structural ageing challenge for the region, which is likely to increase pressure on population serving industries such as healthcare and social assistance. The ability to successfully attract, train and retain skilled workers in the region will be critical to meeting the needs of the region's population in the future, as well as supporting the delivery of major projects in the region.

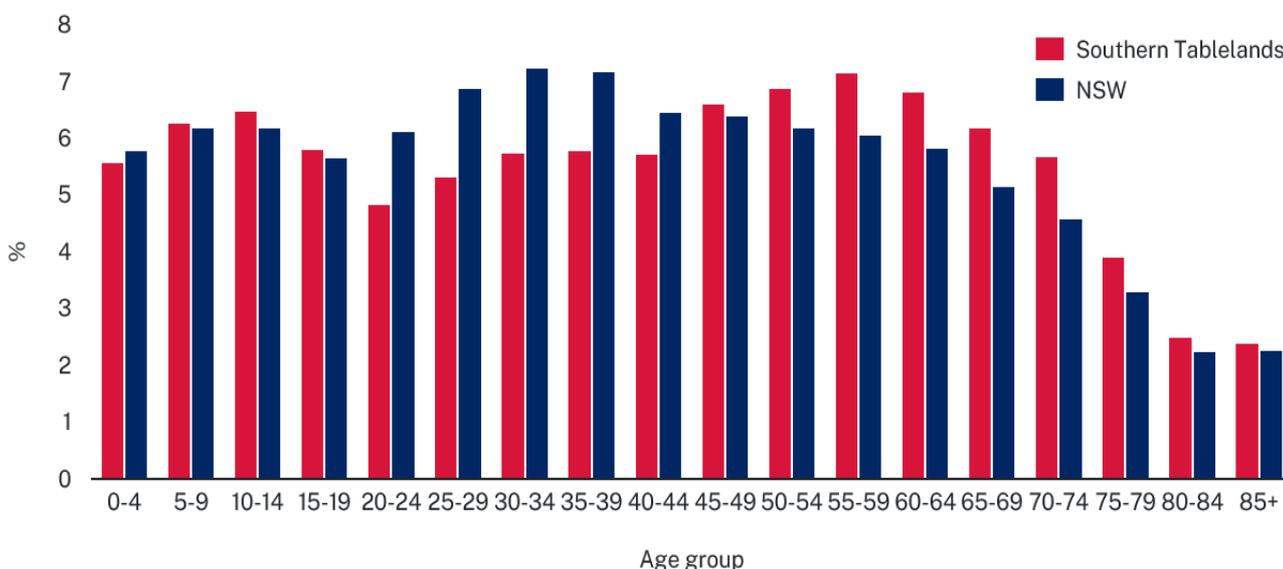


Figure 11: Southern Tablelands FER population by age, 2021 (ABS ERP, July 2022).

Sustained population growth in the Southern Tablelands is increasing pressure on housing availability and affordability

The region has experienced a decline in housing availability and affordability since 2018. Ongoing population growth in the region, and an increase in demand for worker housing and tourist accommodation brought about by a tight labour market are contributing to the challenges being faced in the housing market.

Housing availability

Residential vacancy rates in the region have dropped from 3.5% in March 2020 to 2.1% in August 2022 (see Figure 12 below). Increased internal migration due to increased capacity of remote working during the pandemic represents a factor that is driving tighter housing availability alongside the sustained period of strong population growth in the Southern Tablelands region since 2011.

Meanwhile, residential building approvals rose significantly during 2021, recovering from low levels recorded in 2019. While there is always a degree of lag between supply and demand for housing, there remains a need to ensure that state and local planning systems (and other land development enablers such as infrastructure provision) are appropriately calibrated to keep pace with projected ongoing strong demand for housing.

Housing affordability

As with much of regional NSW, heightened demand for housing has fuelled significant growth in house prices in the Southern Tablelands. Between June 2018 and June 2022, median house prices in Goulburn Mulwaree grew by 37% to \$608,000, by 67% in Yass Valley \$843,000 and by 17% in Upper Lachlan to \$485,000.^[20]

Despite recent price growth, in 2021 the estimated price-to-income ratio in the region was 6.41, below the NSW average of 8.12.^[21] While the region may currently still enjoy a relative cost of living advantage, sustained increases in house prices may constrain the ability of the region to attract and retain skilled workers due, with flow on implications for major project delivery, meeting labor demand in population serving sectors and overall economic growth.

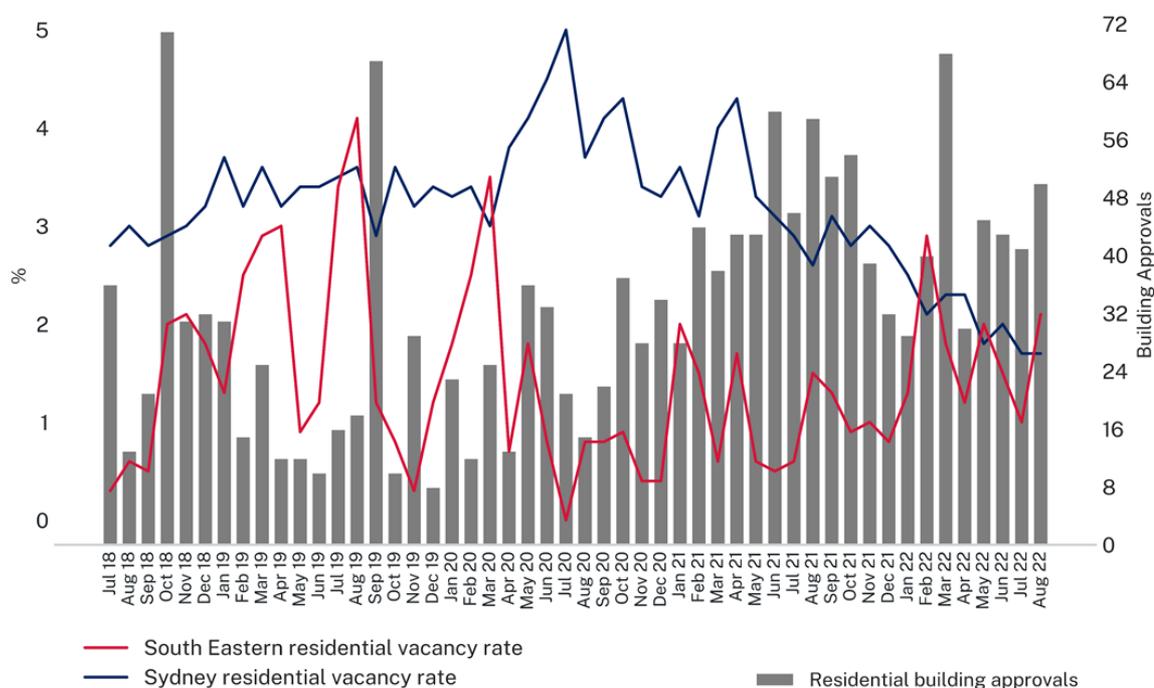


Figure 12: Southern Tablelands region FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region.

Employment outcomes since 2018 vary across the region, while demand for labour from key population serving industries continues to increase

Employment

As at June 2022, Goulburn Mulwaree, Upper Lachlan and Yass Valley had unemployment levels of 6.8%, 3.5% and 3.3% respectively (see Figure 13). This represents a divergent picture across the region, with the COVID-19 delta lockdowns in 2021 appearing to more acutely impact Goulburn Mulwaree compared with Upper Lachlan and Yass Valley.

Prior to the start of the COVID-19 pandemic, all three LGAs had experienced improvements in their unemployment rates across 2018 and 2019. While a gradual increase in unemployment was experienced from mid-2020 until early 2022, overall the level of unemployment across the region has remained resilient since 2018, reflecting strong ongoing economic performance of local industry specialisations despite key challenges and shocks during that period.

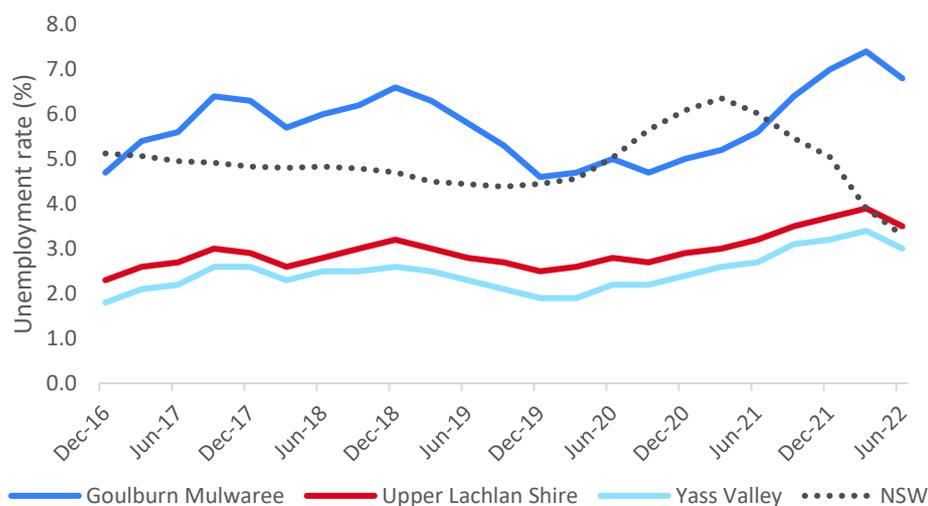


Figure 13: Southern Tablelands FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).

As the acute impacts of the Delta lockdown subsided in early 2022, the increased demand for workers reflected in the job vacancy data for the wider region is expected to flow through to improved labour market outcomes across the LGAs (see figure 14 below).

From mid-2020 onwards, there has been a sustained increase in job vacancies in the broader region, with top estimated job vacancies in the region as at August 2022 including carers and aides (83 vacancies), administrative staff (73 vacancies), medical practitioners and nurses (72 vacancies) and retail trades personnel (71 vacancies), highlighting some of the key population serving roles in demand in the region.

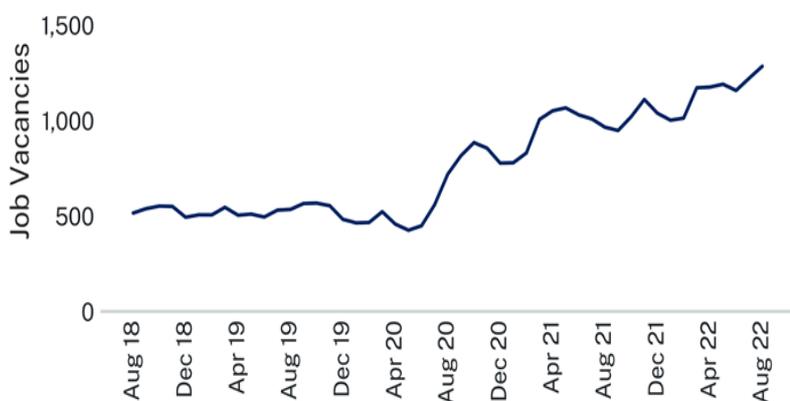


Figure 14: Job vacancies, Southern Highlands and Snowy region (2018-2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI - National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region.

Aboriginal employment

There has been a significant positive improvement recorded in economic participation and employment outcomes for members of the Aboriginal community in the Southern Tablelands across the past decade.

The Aboriginal unemployment rate for the region has dropped from 14.3% in 2011 to 8.8% in 2021. This rate is below the whole of NSW Aboriginal unemployment rate of 9.8% but remains above the whole of NSW unemployment rate of 4.9%. A focus on continued collaboration between all levels of government, business, industry and the Aboriginal community in the region can help ensure this positive trend continues in future years.

Aboriginal unemployment rate: Southern Tablelands	2011	14.3%
	2016	11.6%
	2021	8.8%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census, 2021.



Figure 15: Crookwell Wind Farm, the first grid connected wind farm in Australia. Photo credit: Destination NSW.

Southern Tablelands region 2023 engine and emerging industries

The Southern Tablelands region has a \$2.7 billion economy. Despite significant shocks since 2018 including bushfires, floods and the COVID-19 pandemic, the diverse economy of the region continues to be driven by sustained growth in key engine industries. The relative strength of each industry is measured using Location Quotient (LQ) analysis¹ as displayed in Figure 16, where industry size correlates with bubble size.

Engine industries

Agriculture remains an engine industry in the Southern Tablelands. Key specialisations include sheep, grains, beef and dairy cattle (LQ of 8.1) and poultry and other livestock (LQ of 5.1). The industry has experienced strong growth since 2011, increasing by an average of 7.6% per year, with the sector recording \$291m GVA in 2020.

Public administration and safety has grown into an engine industry, becoming the 4th largest industry in the region by 2020. This is driven in part by the region's public order and safety cluster centred around Goulburn (including the Goulburn Correctional Centre and Goulburn Police Academy), which recorded \$105 million GVA in 2020.

Construction has continued to grow strongly in the region, averaging 5.5% annual growth since 2011 and contributing \$252 million in GVA in 2020. Identified as a specialisation in the 2018 REDS, the specialisation is driven by construction services (LQ of 1.4) and heavy and civil engineering (LQ of 1.3).

Health care has continued to grow to become a key economic strength for the region, adding \$261m GVA in 2020. Strong average annual growth of 4.6% between 2011 and 2021 is expected to be sustained, especially given the significant health asset that will be created by the Goulburn Hospital upgrade.

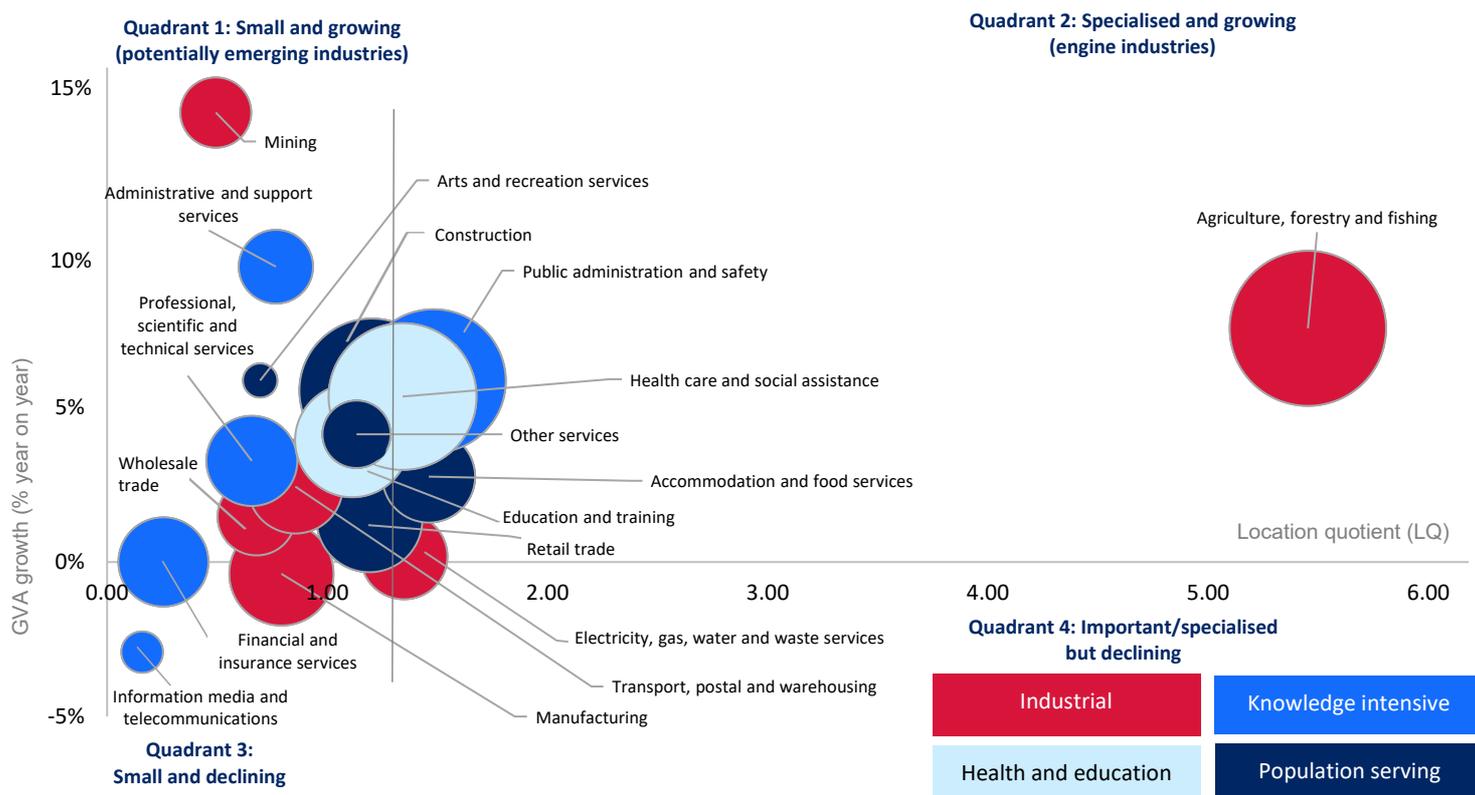


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used Gross Value-Add (GVA) data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

¹ LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.

Emerging industries

Given the significant investment into a number of renewable energy generation projects in the region, **energy generation** has significant capacity to continue to grow as a specialisation. With a number of major projects still in planning and construction, GVA to the region's economy will be partially reflected in the strong growth highlighted in the construction sector, but as more energy generation projects become operational the region's specialisation in energy generation (LQ of 1.7) is likely to grow.

While the **manufacturing** GVA contracted between 2011 and 2020 in the Southern Tablelands region by an average of -0.4% per year, this reflects a broader macro trend across the NSW economy (average of -0.7% per year). The region's range of specialisations in cement, lime and ready mixed concrete, chemical, and meat product manufacturing presents opportunities to support future growth, given a renewed focus on building local supply chain resilience after the impact of COVID-19 pandemic supply chain disruptions.

The **tourism** sector has also demonstrated sustained growth over the past decade, recording average annual growth of 2.8% between 2011 and 2020 despite of major shocks to the industry, including the COVID-19 pandemic. Total spending by visitors to the region was estimated to be \$204 million in 2021.^[22] The region's strength in accommodation and food services supports the potential for ongoing growth in the visitor economy.

Whilst the **mining** sector has shown significant growth, LQ analysis shows that, when compared to the rest of the state, it is neither a specialisation nor an emerging industry in the region.

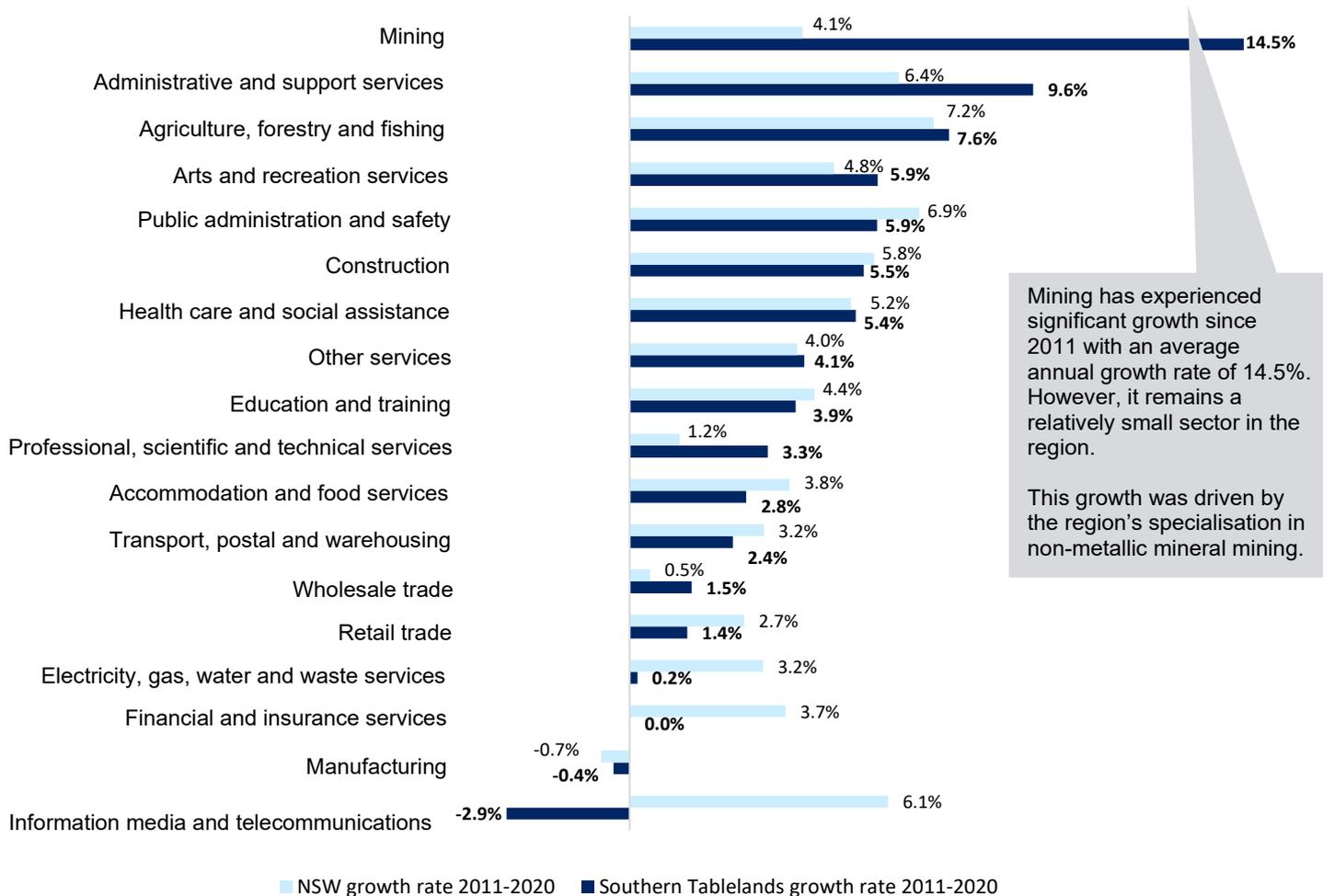


Figure 17: Change in GVA by industry (%YoY), 2011-2020 (REMPAN, 2020).

Southern Tablelands 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a range of endowments underpinning the Southern Tablelands economy and regional competitiveness (see page 11). Despite recent shocks impacting many endowments, consultation confirmed they remain valid, with endowments including:

- topography, water, climate, and soil and natural resources
- location, accessibility and lifestyle benefits
- extractive and mineral resources
- public order and safety institutions
- Aboriginal heritage, historic heritage and villages
- hospitals
- labour resources
- local institutions and strong leadership

New endowments

While not yet necessarily reflected in the employment and industry specialisation (LQ) analysis, recent investments and ongoing industry development have highlighted additional endowments that should be included in the 2023 endowments list that can underpin economic opportunities and future specialisations in the region.

+ Viticulture	The region's topography and suitable climatic conditions have facilitated significant ongoing growth in viticulture and related agritourism.
+ Availability of land for housing and industry development	There exists a strong supply of potential land for expansion of residential and industry development in the region.

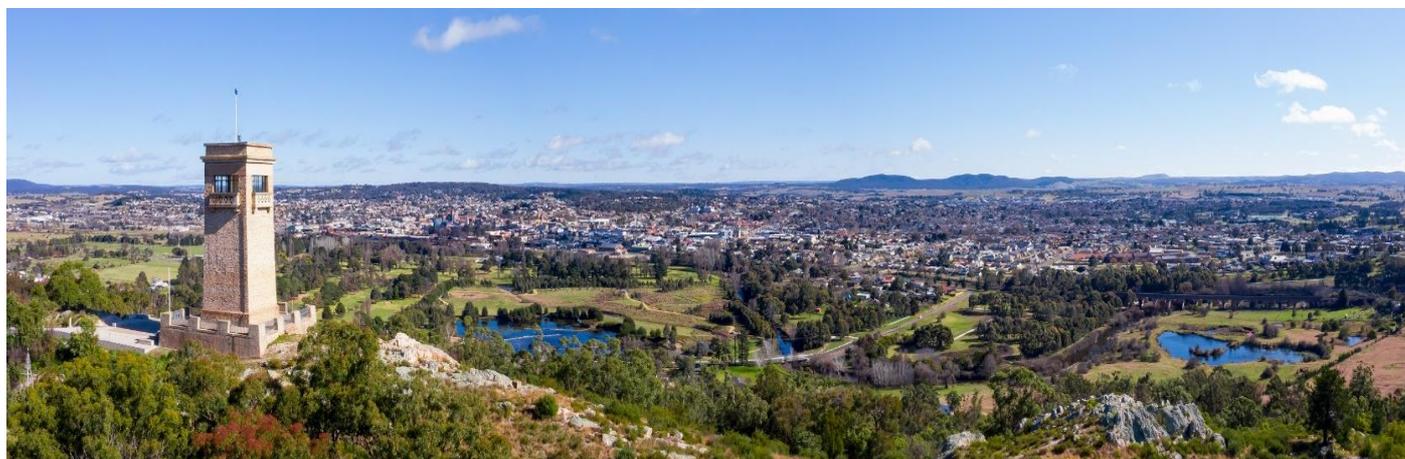


Figure 18: Views over the City of Goulburn from Rocky Hill. Photo credit: Goulburn Mulwaree Council.

8. Looking ahead: Strategic opportunities for growth, resilience and liveability

Opportunities and vulnerabilities in engine and emerging industries

Agriculture

The Southern Tablelands continues to leverage its natural endowments and specialised infrastructure to record strong growth in the agriculture sector. A key ongoing focus is needed on supporting the sector to enhance its resilience against the impacts of climate change and natural disasters.

GVA (2020, \$m)	291
Employment (2021)	2156
LQ score (2020)	5.45
LQ sheep, grains, beef & dairy cattle (2020)	8.1

Strengths

- The endowment of high-quality topography, water, climate and soil provides the region with access to high quality agricultural land and ideal growing conditions.
- Specialisations include sheep, grains, beef and dairy cattle, poultry and other livestock and viticulture, which all contribute to create a broad agriculture industry specialisation.
- Strong interlinkages in the supply chain with the meat and meat product manufacturing industry represents a key competitive advantage for the region.

Vulnerabilities

- Externalities have impacted the industry significant since 2018, evident in the multiple environmental shocks in the form of drought, bushfires and floods.
- There have been significant supply side impacts from major shocks, such as those experienced by viticulture which lost its 2020 vintage to smoke taint damage caused by bushfires.
- The impacts of increased climate variability and higher frequency of natural disasters due to climate change represents a challenge for the sector.
- Inflation has placed upward pressure on costs, such as production and freight transport costs (4.7% jump in service price in 2021-22).^[23] Freight costs represent a significant share of gross value of farm production, with grains (27.4%), fruit and vegetables (21%), and beef (6.4%) particularly high-cost sectors.^[24]

Opportunities

- Increased uptake of agtech and regenerative agriculture in farming processes can support increased productivity, output and improved resilience in the agriculture sector.
- Agritourism represents a growth opportunity in the Southern Tablelands region. Enhanced collaboration with regional producers and growers will be a key enabler to expanding offerings and the Australian Agricultural Centre in Crookwell can also support growth in this subsector.
- The South-Eastern Livestock Exchange is one of the largest livestock markets in NSW. This state-of-the-art facility is an enabler of growth, with daily capacity to sell 3,800 cattle and 30,000 sheep.^[25]

Healthcare

Although healthcare acts primarily as a population serving sector, the Southern Tablelands has a growing specialisation in healthcare and social assistance that is already making a significant economic contribution to the regional economy.

GVA (2020, \$m)	261
Employment (2021)	3568
LQ score (2020)	1.34
LQ Residential care and social assistance (2020)	1.6

Strengths

- The Southern Tablelands specialisation in health care and social assistance has grown strongly over the past decade, with 5.2% average annual growth between 2011 and 2020.
- The region is home to multiple healthcare assets including Goulburn Base Hospital, Crookwell District Hospital and Yass District Hospital, as well as a number of significant aged care facilities.
- The significant investment to upgrade Goulburn Base Hospital will further enhance the region's health sector endowments.

Vulnerabilities

- Attracting and retaining skilled professionals including medical practitioners, nurses, carers and aides represents a challenge for the region, in particular given the context of growing demand for healthcare and social assistance services associated with an ageing population.
- These occupations not only feature as some the most in demand roles in the region (see page 22), but they are also in high demand across much of regional NSW, meaning there is broad-based competition between regions for access to skilled health workers.
- Another challenge lies in improving integration and co-ordination of local health services across the different part of the region, given the large investments being made into primary care.

Opportunities

- The \$165m redevelopment of Goulburn Base Hospital presents an opportunity to act as a catalyst for improved healthcare service alignment going forward. This significant investment will support improvements in mental health service delivery, acute care, surgical procedures, palliative care and paediatric and maternal care.^[26]
- The upgraded Goulburn Hospital could support development of enhanced training and skills capability in the region. For example, increasing collaboration with the local TAFE network could allow for the expansion of training for care economy roles such as carers, aides and disability sector workers.

Tourism

With its unique natural endowments and close proximity to the major population centres of Sydney and Canberra, the region has significant opportunity to achieve sustained growth in the visitor economy.

Visitor spend (2021, \$m) ^[22]	204
Employment (2021) ^a	4,231
LQ score (2020) ^b	1.46
LQ food & beverage services (2020)	1.4

a Summation of ANZSIC 1 digit Retail trade, Accommodation and food services, Arts and recreation services.

b LQ score is for the Accommodation and food services industry.

Strengths

- Close proximity to markets in Canberra and Sydney provides a comparative advantage for the region, with it well known for its iconic produce and a range of natural attractions.
- The region has a range of high-quality wineries that support significant viticulture tourism and can showcase award winning cool climate wines produced in the region.
- The region has a range of natural attractions including state forests, national parks, the Wombeyan Caves and over 5,000km of waterways.
- There has been a range of recent investments into built infrastructure that support the visitor economy, including investments to deliver the Goulburn Performing Arts Centre, the Carr Confroy Sporting Fields and Goulburn Regional Hockey Facility upgrades, the Murrumbateman Winery Trail and the Upper Lachlan Civic and Community Centre.

Vulnerabilities

- The sector is vulnerable to the impact of external shocks, as evidenced over recent years where the visitor economy has been hard hit by bushfires, COVID-19 and floods.
- Domestic overnight travel and international visitor figures dropped on 2019 levels in 2020 and 2021 as a result of the border and COVID-19 pandemic restrictions.^[27]
- During consultation, stakeholders observed that broader challenges and competing priorities facing local councils may constrain the ability of local government to fund initiatives designed to grow the visitor economy.

Opportunities

- Agritourism represents a growth opportunity, which can help broaden the region's tourism offering through collaboration with local agricultural strengths, such as viticulture.
- Opportunities exist to increase visitor spend in the region by building enhanced links between different offerings, potentially through increased use of packaging between accommodation and other visitor economy products including events.
- Investment to diversify the visitor economy presents an opportunity to capitalise on the 20% average annual growth in expenditure associated with domestic overnight tourism.^[27]

Energy generation (including renewables)

Ongoing investment into major renewable energy projects is supporting substantial renewable generation capacity development in the region.

GVA (2020, \$m)	91
Employment (2021) ^a	390
LQ score (2020)	1.35
LQ electricity distribution (2020)	1.7

^a ANZSIC 1 digit Electricity, gas, water and waste services.

Strengths

- The Southern Tablelands has successfully leveraged its natural endowments to begin to build a specialisation in renewable energy, in particular wind powered energy generation.
- The region is home to a significant cluster of major wind farms primarily centred around the Upper Lachlan, with a number of additional wind farms currently in planning or under construction, and more than \$1.7 billion recently invested.

Vulnerabilities

- The labour-intensive construction phase of renewable energy projects can place significant additional pressure on the demand for housing given the need to accommodate a large number of workers.
- Energy infrastructure often requires a significant amount of land, which can compete with agricultural, commercial, industrial and residential demand.
- The uneven nature of renewable energy investment profiles and long approval timeframes for projects means the total benefits of these projects are not always reflected by significant GVA growth.
- Ensuring long-term, significant economic benefits flow to communities hosting renewable energy projects represents a key challenge in the region.

Opportunities

- Further expansion of the wind farm cluster in the region through development of projects currently in planning, and the energy network upgrades associated with Snowy 2.0 could support sustained growth of this sector in the region.^[28]
- A focus on ensuring local businesses and community members benefit from major projects, such as through supply of goods or services to workers and undertaking actions to match local skills training with employment opportunities can help maximise the flow of long-term economic benefits to the community.
- Significant opportunities exist for local councils to leverage shared values and become leaders in the shift towards net zero at a local level.
- The Hume Hydrogen Highway, currently under development by the NSW and Victorian Governments will see hydrogen powered linehaul trucks pass through this region. This will include development of refuelling stations and hydrogen production and distribution infrastructure, which could present opportunities to leverage the region's renewable energy generation capabilities.

Key themes in stakeholder consultation

Stakeholders noted that the Southern Tablelands continues to benefit from strong population growth and a diverse industry base that is connected to the Canberra economy. These strengths have assisted the region to withstand the significant economic shocks experienced in recent years.

Stakeholders highlighted the need to prioritise actions that can help maximise the business and community benefits associated with major renewable energy projects, and to continue to focus on diversifying the visitor economy to assist its recovery from significant recent shocks.

Enhancing liveability and connectivity

Stakeholders emphasised the importance and need for further investment to support increased local amenity and liveability, both to benefit existing residents and to support the region to attract skilled workers to move to the region. The need to continue to invest in upgrades of transport infrastructure was also emphasised, in particular for freight pathways to markets in Canberra and Sydney.

Remote working is seeing workers spending more time working from home, with these workers more engaged in the local economy and community. Stakeholders highlighted this as a significant positive change arising from the impacts of the COVID-19 pandemic but noted the need for ongoing focus on enhancing digital connectivity in the region, including to remove many significant mobile phone coverage blackspots.

Housing availability and affordability

Consultation input revealed significant concerns about the current availability and affordability of housing across the region. Stakeholders highlighted that not only does this create significant challenges for workforce attraction and major project delivery, it also increases financial stress and pressure on low income and disadvantaged residents in the region.

Ensuring long-term benefits are delivered by major projects

Stakeholders noted the significant benefits to the regional economy associated with the investments made to deliver major renewable energy generation projects in the region. However, stakeholders highlighted the key challenge associated with ensuring communities that host renewable energy generation projects derive significant long-term economic benefits (full-time equivalent jobs, financial contributions to the community, access to the renewable energy supply) from these projects post the construction phase.

A need for stronger collaboration between all levels of government to ensure a viable framework and policies are in place to support local communities maximising benefits from these projects was highlighted as a priority, in particular given the goal of net zero by 2050 will likely incentivise continued significant investment into renewable energy generation projects more broadly.

Southern Tablelands REDS – 2023 Update strategies

The 2018 strategies remain broadly relevant to the Southern Tablelands region. However, a range of updates have been made as part of the 2023 REDS Update to ensure they reflect current priorities for supporting economic growth in the region. Changes made include:

- shifting the focus of the strategy associated with renewable energy generation to place priority on maximising the community benefits received from major investments,
- refocusing the transport and logistics sector strategy to highlight the need for action to improve transport connectivity and boost the region's access to major hubs,
- adding reference to community services, reflecting the economic opportunity associated with growth in this sector and to create an increased focus on this key service delivery arm of healthcare,
- expanding the strategy focused on sustaining the region's agriculture and processing advantage to include viticulture, given significant growth in the sector and increased food and wine tourism.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Southern Tablelands region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Existing	Enhance the liveability of the region and grow its visitor economy.
Amended	Maximise community benefits from the region's emerging strength in renewable energy generation.
Amended	Improve connectivity , transport infrastructure and cross border arrangements to boost the region's access to major hubs .
Amended	Realise the economic opportunity in aged care, public administration and community services .
Amended	Sustain the region's agriculture and processing advantage, especially in livestock and viticulture .

Key enablers of economic growth

A number of enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short- to medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New Enablers		Lead and support	Rationale
Enhancing the liveability of the region and grow its visitor economy.	Government and regulation	Support a diverse visitor economy by encouraging the development of new tourism experiences, including agritourism and events tourism.	Local councils, Department of Planning and Environment (DPE) - Planning, Destination NSW, Destination Southern NSW	Leveraging the region's specialisations, such as agriculture and cultural heritage, can help to support visitor economy growth following repeated shocks.
	Government and regulation	Support improvements to community spaces, sports and recreation infrastructure, which improves amenity and diversifies the visitor economy offering.	Local councils; DRNSW, DPE Planning	Improved community spaces enhances liveability for the region's residents and creates additional attractions for visitors to the region.

Strategy	New Enablers		Lead and support	Rationale
Maximise community benefits from the region's emerging strength in renewable energy generation.	Land use	Facilitate community benefits from the growth of off-grid energy storage, generation and transmission capacity across the region while ensuring compatibility with surrounding land uses such as agriculture.	Local councils , EnergyCo, Department of Regional NSW (DRNSW), DPE Planning	Ensure longer-term benefits accrue to the local economy through proactive planning.
Improve connectivity, transport infrastructure and cross border arrangements to boost the region's access to major hubs.	Government and regulation	Work with the NSW and ACT Governments to enhance cross border arrangements, including infrastructure connectivity, mutual recognition of skills and improving regulatory coordination.	DRNSW , TAFE NSW, NSW Cross Border Commissioner, local councils, ACT Government, Transport for NSW (TfNSW), Department of Premier and Cabinet	Remove barriers to labour mobility between the ACT and Southern Tablelands FER.
	Infrastructure	Investigate and implement future-proofing of transport infrastructure against climate-related shocks.	TfNSW , local councils, DPE Planning	Improve resilience of local transport infrastructure, including freight activity.
Realise the economic opportunity in aged care, public administration and community services.	Skills	Improve alignment of local TAFE and VET training to industry needs and support local delivery in these skills.	TAFE NSW , Training Services NSW, VET providers, local councils, registered training organisations	Ensure workforce capabilities can meet the demand of local industries.
	Infrastructure	Support the diversification of the region's affordable housing options to increase housing supply.	NSW DPE , local councils, DRNSW	Ensuring affordable and sufficient housing for all members of the community.

Strategy	New Enablers		Lead and support	Rationale
<p>Sustain the region's agriculture and processing advantage to maximise benefits for each local government area.</p>	<p>Infrastructure</p>	<p>Investigate infrastructure needs, including water security and energy provision, to support the adoption of new technologies in agriculture and processing.</p>	<p>Local councils, NSW Department of Primary Industries, DPE Planning</p>	<p>Generate new value-add opportunities for the agricultural sector, especially in sub-sectors of livestock and viticulture.</p>

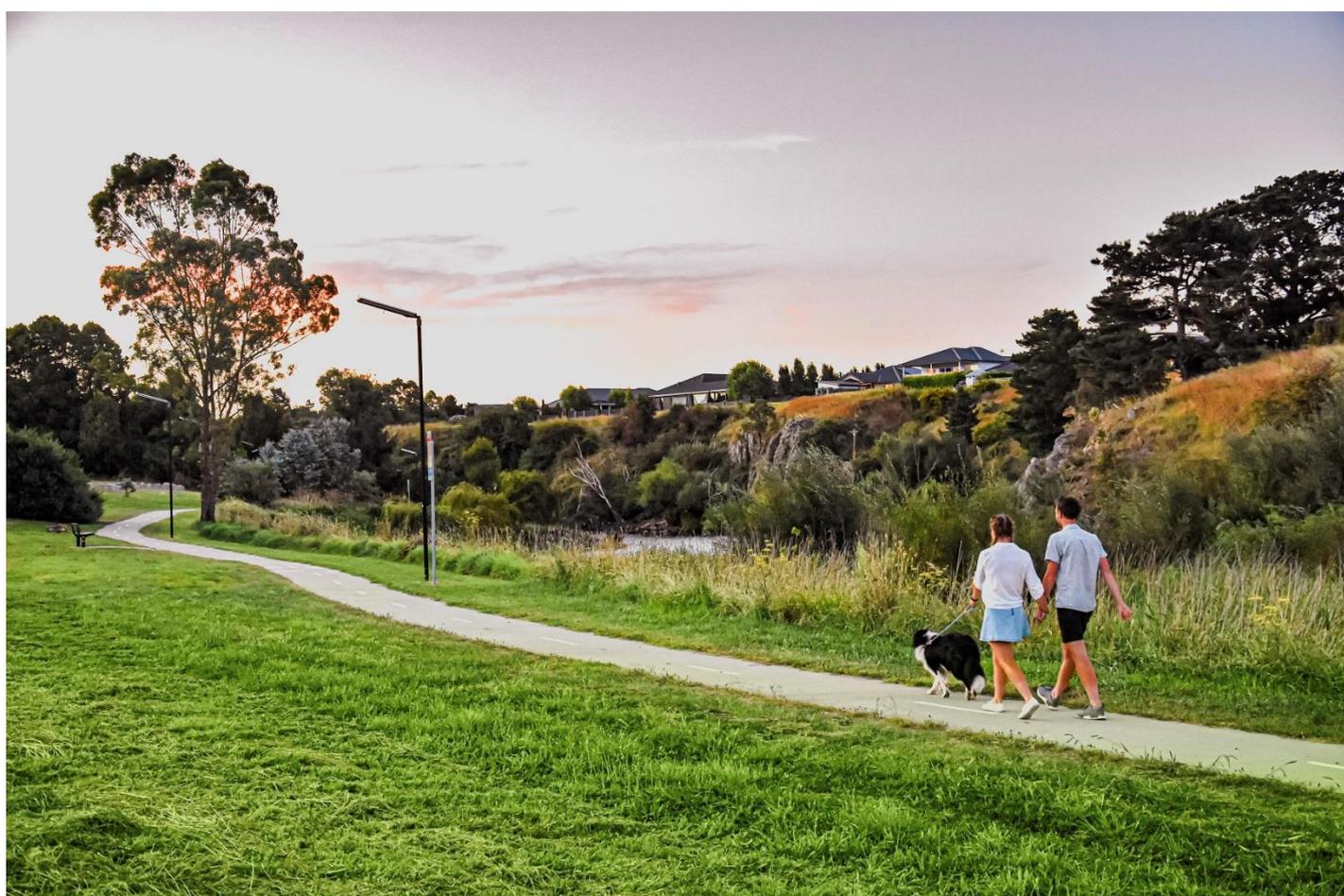


Figure 18: A romantic stroll on a summer evening in Goulburn Mulwaree LGA. Photo credit: Goulburn Mulwaree Council.

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Figure 19: Welcome to Sutton. Photo credit: Yass Valley Council.