



# ECONOMIC DEVELOPMENT STRATEGY

## 2020



# Economic Development Strategy

## Document Control

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# Executive Summary

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## Introduction

The Wollondilly Shire is in the midst of the greatest transformation that the area has seen since European settlement. The Shire has been (and will remain) one of the fastest growing local government areas in New South Wales, reaching almost 100,000 people by 2041.

In order to achieve the aspirations of the community, as expressed in the Wollondilly Community Strategic Plan, more local jobs are required. The creation of an aspirational 15,000 new local jobs across the Shire by 2041 would help to lower the rate at which resident workers have to leave the Shire. In order to generate this new employment, a proactive approach towards economic development is required.

## Growth Opportunities

Fortunately, the Wollondilly Shire has a variety of competitive advantages and unique industry growth opportunities.

Table E.1. Future Economic Growth Opportunities, Wollondilly Shire

Industry	Description	Competitive Advantages
<b>Agri-business</b>	<ul style="list-style-type: none"> <li>• Agricultural production (poultry, vegetables, fruit, etc.)</li> <li>• Value-added processing of local production</li> <li>• Nurseries (fresh cut flowers, tree nurseries)</li> <li>• Agri-tourism (farm-stay, farm tour, café/restaurant, retail outlet)</li> </ul>	<ul style="list-style-type: none"> <li>• Existing agricultural production</li> <li>• Proximity to Sydney region (large population/customer base)</li> <li>• Current trends in food consumption (interest in eating locally produced foods)</li> </ul>
<b>Tourism</b>	<ul style="list-style-type: none"> <li>• New accommodation development (hotel/motel, destination holiday park, eco-accommodation, other short-stay accommodation)</li> <li>• Events (festivals, weddings, business events)</li> <li>• Agri-tourism (farm-stay, farm tour, café/restaurant, retail outlet)</li> <li>• Nature-based tourism experiences (trails, trekking, walking, mountain biking)</li> </ul>	<ul style="list-style-type: none"> <li>• Proximity to Sydney region (large population/customer base)</li> <li>• Future population growth of Western Sydney</li> <li>• Increasing trends towards more frequent, shorter duration trips</li> <li>• Significant natural areas (national parks, reserves and water catchment areas)</li> <li>• Unique character of towns and villages</li> <li>• Future expected industry growth</li> </ul>

Industry	Description	Competitive Advantages
<b>Industrial</b>	<ul style="list-style-type: none"> <li>• Transport/logistics related</li> <li>• SME manufacturing, assembly and/or storage (advanced manufacturing)</li> <li>• Larger scale businesses with considerable outside storage needs</li> </ul>	<ul style="list-style-type: none"> <li>• Proximity to Western Sydney and Western Sydney Airport</li> <li>• Potential for more affordable industrial land</li> <li>• Access to Hume Highway and future M9</li> <li>• Future expected industry growth</li> <li>• Future growth of Western Sydney Aerotropolis</li> </ul>
<b>Professional Services</b>	<ul style="list-style-type: none"> <li>• Professional business services (accounting, legal, engineering, architecture, graphic design, property development, planning)</li> <li>• Small scale media and/or IT businesses</li> <li>• Small scale finance and insurance (financial advisory, financial planning, insurance brokerage)</li> </ul>	<ul style="list-style-type: none"> <li>• Increased opportunities to work from home or close to where one lives</li> <li>• Future expected industry growth</li> </ul>
<b>Healthcare</b>	<ul style="list-style-type: none"> <li>• Healthcare services (GPs)</li> <li>• Allied health services</li> <li>• Aged care/retirement living</li> </ul>	<ul style="list-style-type: none"> <li>• Large, growing and ageing local population</li> <li>• Natural environment and attractive landscapes</li> <li>• Proximity to major hospitals (Liverpool and Campbelltown)</li> <li>• Future expected industry growth</li> </ul>

Source: Lucid Economics

## Economic Development Strategy

The clear goal of the Economic Development Strategy is the creation of an aspirational 15,000 local jobs for local residents and to support specific industry growth opportunities.

The following diagram (Figure E.1) provides an overview of the Wollondilly Economic Development Strategy. The priority action areas have been defined through feedback from stakeholders regarding the most appropriate role of Council to support economic development as well as utilising the main levers that Council has that can influence the economy and support job creation.

The strategic initiatives provide further direction regarding the types of activities that will be undertaken to support economic growth and job creation.

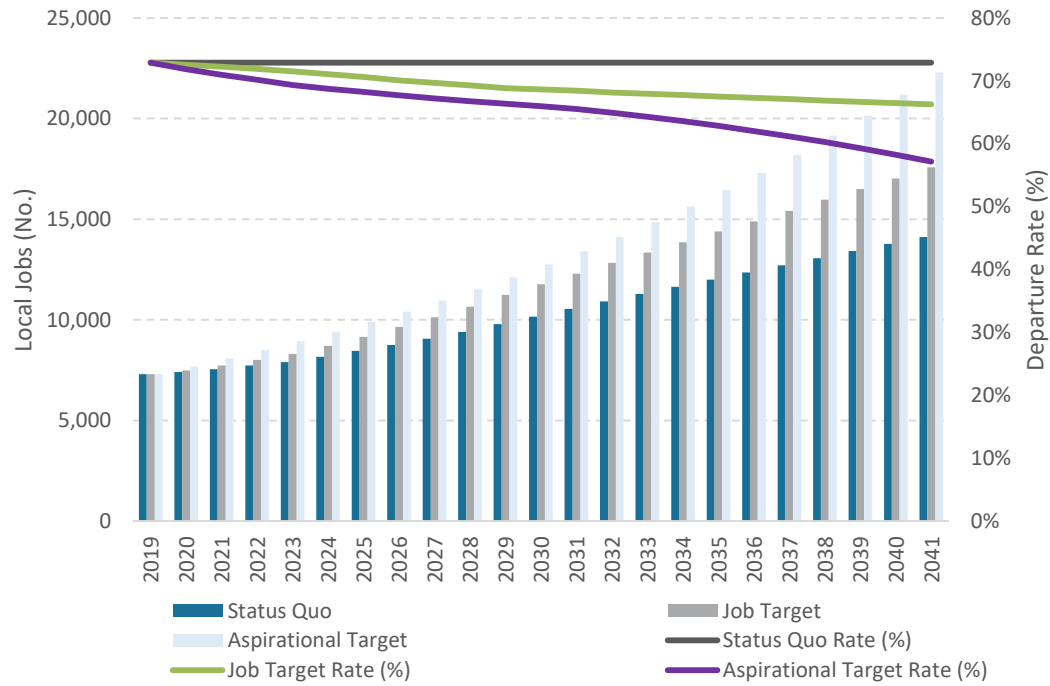
Figure E.1. Wollondilly Economic Development Strategy Overview



Source: Lucid Economics

The Strategy is supported through a detail annual implementation plan. The implementation plan will detail how the strategy will be implemented in the short, medium and longer term to deliver the aspirational target of 15,000 more local jobs for Wollondilly.

Figure E.2. Future Local Resident Employment and Worker Departure Rate, Wollondilly



Note: Departure rate represents the proportion of local resident workers who leave the Shire for work. Status quo assumes the rate of local resident workers leaving the Shire (i.e. 73%) is maintained.

Source: Lucid Economics

# Table of Contents

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<b>Executive Summary.....</b>	<b>ii</b>
<b>Table of Contents.....</b>	<b>vi</b>
<b>1. Introduction.....</b>	<b>1</b>
<b>2. Strategic and Planning Context .....</b>	<b>4</b>
<b>3. The Wollondilly Economy .....</b>	<b>5</b>
<b>4. A Tale of Two Futures for Wollondilly .....</b>	<b>8</b>
<b>5. Our Strengths and Challenges.....</b>	<b>10</b>
<b>6. Our Growth Opportunities.....</b>	<b>15</b>
6.1 Industry Growth Opportunities .....	15
6.2 Catalyst Infrastructure / Projects .....	17
6.3 Jobs Target.....	17
<b>7. Economic Development Strategy .....</b>	<b>19</b>
7.1 Vision and Goal.....	19
7.2 Strategy Overview .....	21
7.2.1 <i>Planning</i> .....	22
7.2.2 <i>Supporting Local Businesses</i> .....	23
7.2.3 <i>Marketing and Promotion</i> .....	24
7.2.4 <i>Investment Attraction</i> .....	25
<b>8. Measuring Progress.....</b>	<b>26</b>
<b>References.....</b>	<b>27</b>
<b>Appendix A: Strategic and Planning Context .....</b>	<b>28</b>

# 1. Introduction

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The Wollondilly Shire is located on the south-western fringe of Sydney at the foothills of the Southern Highlands. Much of the Shire features spectacular natural areas of protected national parks or water catchment area, alongside a patchwork of agriculture, rural landscapes, bushland and 34 towns and villages dotted throughout.

Despite its proximity to Sydney (about an hour's drive from the CBD), Wollondilly proudly retains its rural character and lifestyle that is highly valued by the Wollondilly community. Wollondilly was the birthplace of European agriculture in Australia, an important industry for the region to this day, which sits comfortably alongside the Shire's rich Aboriginal history, where the gorges, ranges and plains are interwoven with the dreamtime legends of the first Australians.

Wollondilly Shire Council (the Council) adopted its current Economic Development Strategy in 2015. Much has changed since that time, including:

- Development of the new Western Sydney Airport (WSA) has started
- The Western City and Aerotropolis Authority (WCAA) has been formed to oversee the planning and development of the Western Parkland City
- Planning for the Aerotropolis, its planned Agribusiness Precinct and associated infrastructure surrounding the Western Sydney Airport, has begun
- Outer Sydney Orbital corridor has been identified
- The Western City District Plan was published by the Greater Sydney Commission in March 2018
- The 20-Year Western Sydney City Deal (WSCD) agreement was signed in May 2018
- In March 2020, Council adopted its new 20 year land use vision in *Wollondilly 2040*

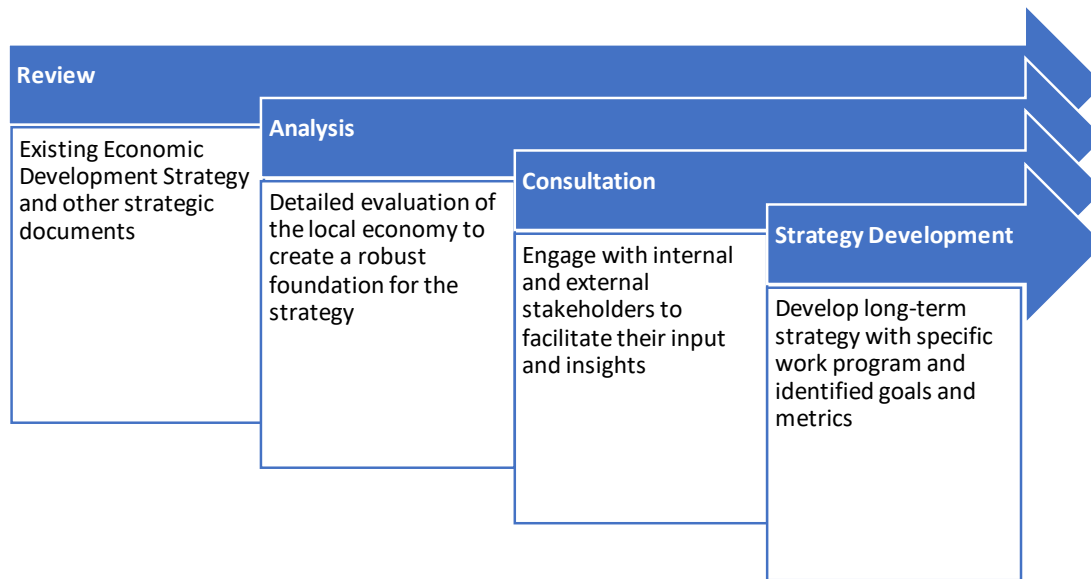
At the same time, the Shire has been one of the fastest growing local government areas (LGA) in New South Wales and is a major growth area for the Sydney Metropolitan region, posing both challenges and opportunities. Wollondilly is also adjacent to the Camden LGA, the fastest growing local government area in the country.

Based on the significant changes since 2015, an updated economic development strategy is required that can provide clear direction for a Council-wide economic development effort that can appreciate the area's unique competitive advantages, challenges and future growth opportunities.

This strategy was developed through a robust process of review, analysis and consultation, as highlighted in Figure 1.1.



Figure 1.1. Economic Development Strategy Review and Update Process



Source: Lucid Economics

This document has been informed by a detailed Background Report as well as consultation and engagement with a wide range of stakeholders, whose feedback has been captured in a Consultation Summary. This strategy should be read in the context of these other supporting documents.

**Coronavirus Pandemic (COVID-19)**

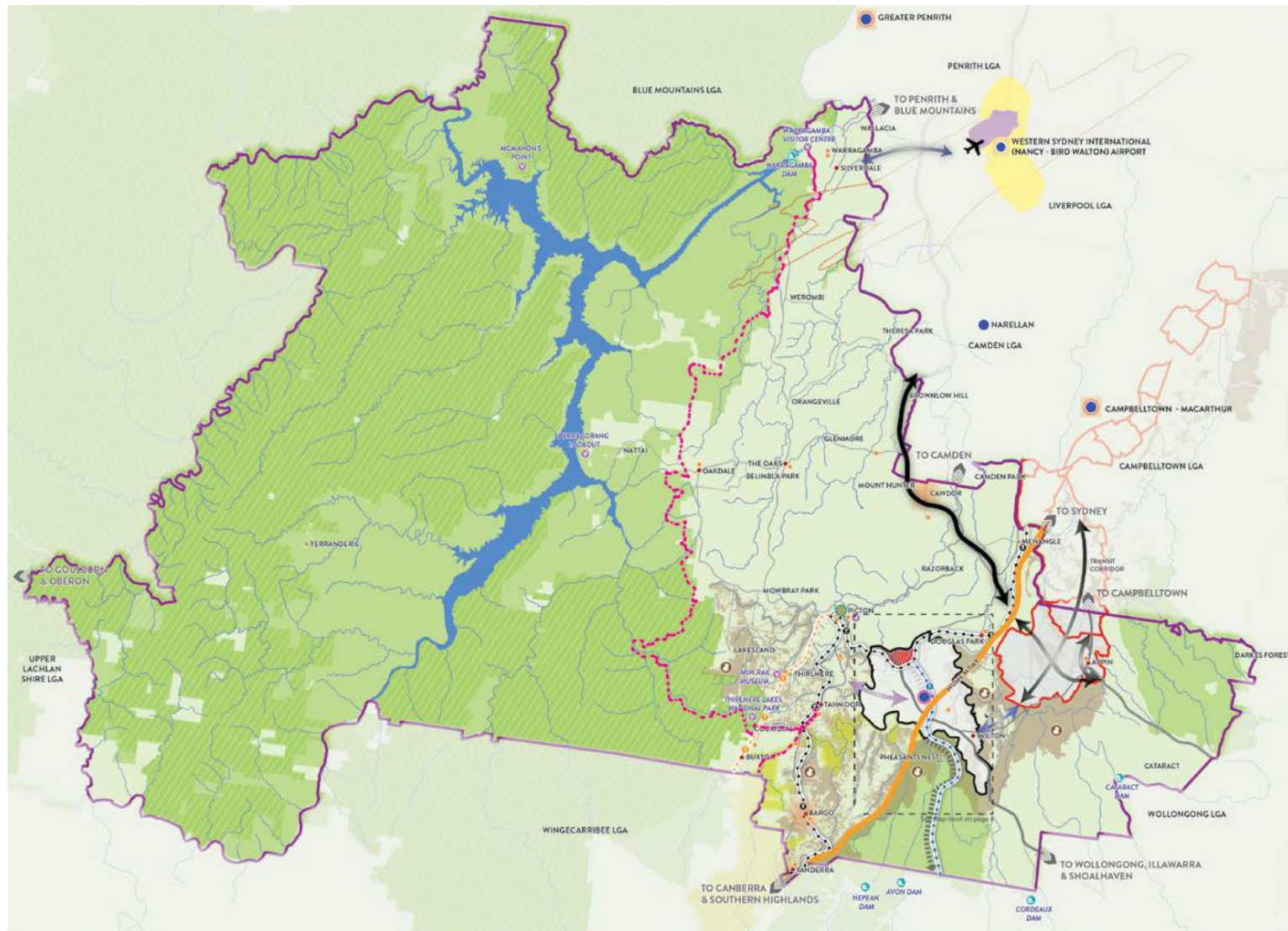
The coronavirus pandemic (COVID-19) emerged during the development of this strategy. On 31 December 2019, the World Health Organisation (WHO) was alerted to a pneumonia of unknown causes detected in Wuhan, China. The outbreak spread quickly and was declared a Public Health Emergency of International Concern on 30 January 2020 and a Pandemic on 11 March 2020. The WHO names the new disease COVID-19.

As of the 18 April 2020, there were more than 2.2 million confirmed cases of COVID-19 and more than 150,000 deaths. In Australia, there are 6,533 confirmed cases and 67 people have lost their life.

Restrictions brought in by the Commonwealth and State Governments have changed the way that people live and work. The current crisis will have a lasting effect on the lives of the people who are living through it. It will likely become a defining element of the current generation, similar to the Great Depression or World War II for earlier generations.

This strategy also responds to this economic crisis and outlines actions that will play a key role in supporting local economic recovery.

Figure 1.2. Wollondilly Location Map



Source: Wollondilly Shire (2020)

## 2. Strategic and Planning Context

There are a wide variety of various strategies and plans that are important for the future economic development of the Shire. All of these strategies and plans will have an impact (directly or indirectly) on the Wollondilly Economic Development Strategy. The following strategies and plans influence or link to the Wollondilly Economic Development Strategy:

- Local
  - Community Strategic Plan 2033
  - Local Strategic Planning Statement
  - Destination Management Plan
  - Smart Shire Strategy
- State and Commonwealth
  - Western City District Plan
  - Western Sydney City Deal
  - Western Sydney Aerotropolis Plan
  - Future Transport Strategy 2056

The Economic Development Strategy seeks to leverage these plans and will build on them to identify specific economic growth opportunities locally as well as how the Shire can play an important role in and influence the development of the broader region and other future Council plans.

The Community Strategic Plan 2033 is the over-arching, long-term plan for the community. The theme of the current Plan is *Create Wollondilly*, which is meant to maintain the value of Rural Living while at the same time creating new opportunities for growth and change. This theme provides important guidance for the Economic Development Strategy.

Figure 2.1. Influencing and Relevant Strategies and Plans



Source: Lucid Economics

### 3. The Wollondilly Economy

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The Wollondilly economy is about contrast.

Located on the fringe of the Sydney Metropolitan Region, it bridges the urban and 'city' parts of Sydney with the 'country' and other parts of regional NSW. There has been (and will be) considerable population growth in the Shire, but many in the community wish to retain the rural lifestyle. 90% of the land is preserved as national parks, water catchment and rural lands, but Wollondilly is one of the fastest growing local governments in New South Wales. Much of the recent and future population growth will be housed in Wilton New Town, but the Shire is made up of a collection of small towns and villages, each with its own unique character.

While seen often as predominantly a rural area, 30% of the local economy comes from three coal mines in the Shire. Manufacturing is the third largest sector in the economy and 1.5 times the size of the local agriculture sector. Roughly 70% of manufacturing is represented by four local businesses (i.e. Boral, Allied Mills, Inghams and Meatworx). While large mining and manufacturing companies exist in the local economy 99% of local businesses are small businesses (employing less than 20 people) and roughly half of these small businesses are owner/operators.

Wollondilly is just an hour outside of the Sydney CBD, but many in the Sydney Metropolitan Region consider the area 'out there'. The Shire's proximity to Sydney makes it an ideal day trip and weekend destination, but there is very little overnight accommodation. Agriculture has been the traditional industry of the region and still makes an important contribution to the local economy. However, most farms are relatively small (~100 acres), which is often too small to make farming very profitable. Half of the local agricultural production (based on value) is made up of poultry production.

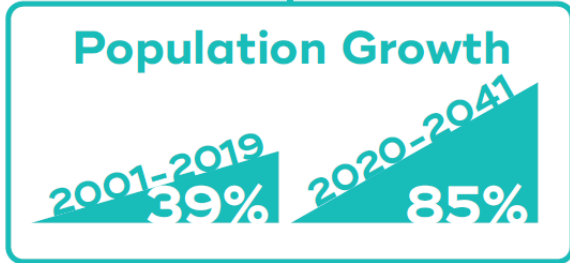
Almost three quarters of resident workers leave the Shire for work every day, but most of these people travel to adjoining local government areas (i.e. Camden, Campbelltown and Wollongong). Very few local residents (~3%) travel into the Sydney CBD for work. Currently, commuting patterns align to the aspirations of the Greater Sydney Commission (i.e. a 30 minute lifestyle). However, current drive times will change significantly over time as the local population continues to swell.

In the future, the local population will continue to grow, and grow rapidly. Some parts of the economy that directly service the local population are also likely to grow, such as local retail, food services, healthcare and education. The Department of Education, Skills and Employment projects that healthcare, construction, retail, professional services, education as well as accommodation and food services will be the sectors that create the most jobs across the broader region.

The contrast that is seen throughout the Wollondilly economy demonstrates the significant transition that is currently underway. The Wollondilly economy will continue to transition and evolve, accepting more and more residents of the Sydney Metropolitan Region and potentially playing a greater role in the broader economy.

# Population

Source: ABS (2020), Economy ID (2020)



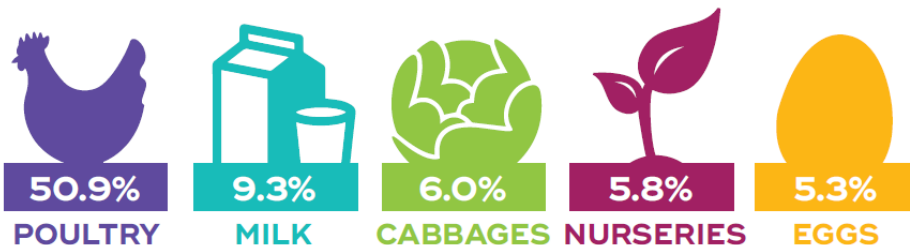
# Median Household Weekly Income



Sources: ABS (2017), ABS (2012), ABS (2007).

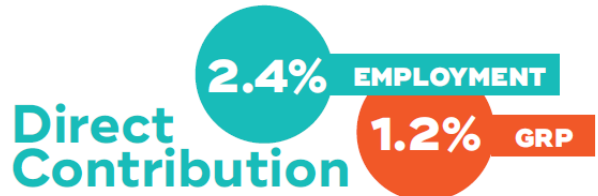
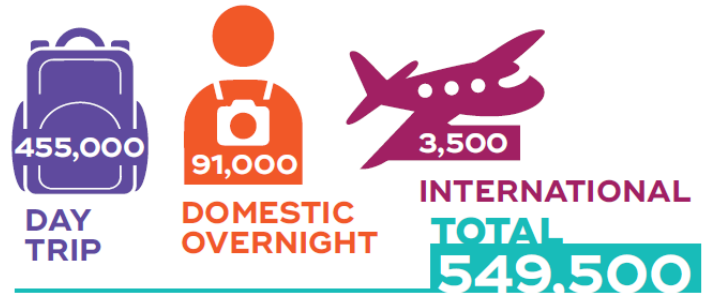
# % Of Total Agriculture Production

Source: ABS (2017)



# Tourism (YE Sept 2019)

Source: TRA (2020), Lucid Economics (2020)



# Wilton New Town

Source: NSW Dept. of Planning and Environment (2017)





# Gross Regional Product 2018-19

## \$2.1 billion.

Source: Economy ID (2020)



\$m

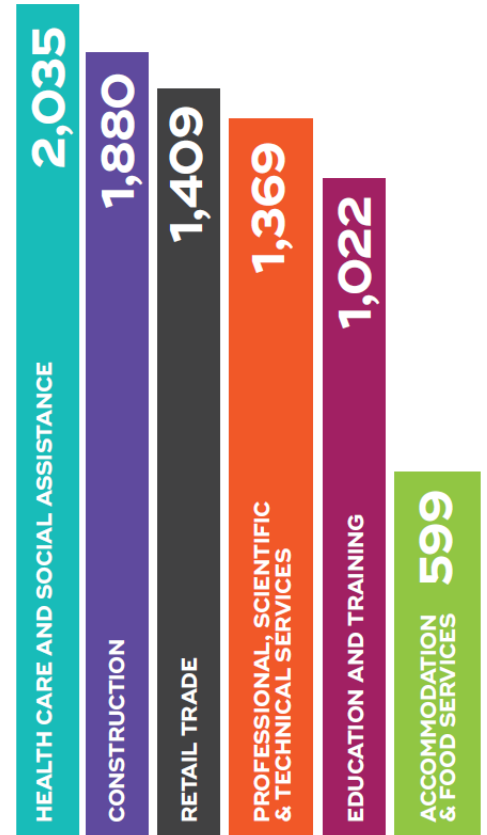


% Of Total Industry



# Future Regional Job Growth 2019-24

REGION INCLUDES THE LGAS OF CAMPBELLTOWN, CAMDEN AND WOLLONDILLY.



Source: DESE (2020).

## Jobs

Source: Economy ID (2020)

Jobs (201819) % Of Total



## Small Businesses

(< THAN 20 EMPLOYEES)

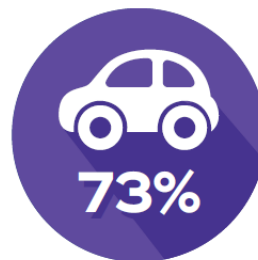
Source: ABS (2017)



98.8%

of all businesses in Wollondilly.

Source: ABS (2020)



OF RESIDENTS LEAVE FOR WORK EVERYDAY

## Jobs Deficiency

2 RESIDENT WORKERS

FOR EVERY 1 JOB IN THE SHIRE



## 4. A Tale of Two Futures for Wollondilly

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The Wollondilly economy is in transition from a predominantly rural landscape of agriculture and a few large manufacturing facilities to a more suburban economy, underwritten by strong population growth.

The current theme of the Community Strategic Plan is 'to maintain the value of Rural Living while at the same time creating new opportunities for growth and change'. As the economy continues to evolve there are two probable future outcomes from this theme:

- A future that looks very similar to today ('the Old Future')
- A future that embraces the new opportunities for growth and change (the 'New Future')

Both of these outcomes are similar, but they have very important differences.

### **The Old Future**

For the Old Future, the community will continue to grow and the Shire remains one of the fastest growing in New South Wales. Wilton New Town will become a major residential expansion area for the Sydney Metropolitan Region and its centre becomes a large suburban economic hub, based solely on providing products and services to the local population, including a large retail offering, numerous restaurant and cafes, automobile dealerships, large offering of healthcare and allied healthcare offerings as well as a variety of other services including banking, real estate, hair salons, etc. Many national brands such as Bunnings, Harvey Norman, A-Mart, IKEA and many others will have a local presence. Despite this growth, the job target of 1 new job per dwelling is not met.

The majority of residents continue to work outside of the Shire. As the population has grown, the previous commuting time of 25 minutes to neighbouring LGAs has become well over 60 minutes in peak traffic. As more and more families have moved to the area, many workers are now spending more time commuting back and forth to work, which means spending more time away from home and the community. Additionally, these workers are spending increased levels of money outside of the local economy. The commuting requirement means that many of these workers have less time for volunteering in local sporting clubs or other community organisations.

The growth of Wilton New Town has captured a large share of local expenditure and the traditional towns start to fade. Empty shops begin to emerge across all of the traditional towns as they do not have an active role to play in the local economy.

Many of the agricultural producers have sold their family farms, choosing to use the funds to retire. The majority of these properties were purchased to be weekend homes and/or hobby farms, reducing the productive capacity of the local agricultural sector.

In this future, the economy has continued to grow. Construction continues to be a large part of the economy, bolstered by new home construction. As the economy has grown, it has taken on a more suburban structure, which means the dominant industries are those that service the local population (i.e. retail, food services, healthcare and education).

## **The New Future**

The most distinguishing feature of the New Future is the proactive attitude towards 'creating new opportunities for growth and change'.

Just as in the Old Future, the Shire remains one of the fastest growing in New South Wales and Wilton New Town becomes a major residential expansion area. Bunnings, Harvey Norman, A-Mart, IKEA and all the other retail offerings still come to Wilton New Town, as well as the education and healthcare services. However, other professional service and IT related businesses also have a presence here, creating the opportunity for multi-storey commercial office development. As such, Wilton New Town not only becomes an economic hub servicing the local population but also provides jobs in businesses serving the needs of the broader South-West and Macarthur regions. The target of adding 1 job per new household is generally met.

Wollondilly's strategic location on the fringe of the Sydney Metropolitan Region and its proximity to the Western Sydney Airport, Southern Highlands and Wollongong is truly leveraged, generating opportunities across a number of industries including tourism, agriculture, manufacturing/logistics and professional services.

New industrial land is taken up by small to medium sized enterprises (SMEs), many of whom have relocated to Wollondilly from Liverpool, Campbelltown and other parts of the Sydney Metropolitan Region. The local agri-business sector evolves to provide more premium products (often through more intensive uses) to the Sydney market and beyond. These businesses also offer numerous onsite services including cafes, accommodation, tours, weekend classes and/or children's activities.

Agri-tourism contributes to a growing tourism sector, which is bolstered by new accommodation development, more events and more activities and experiences geared towards visitors. As more tourists choose to visit (and stay) in the region on the weekend, the traditional towns become vibrant hubs of activity, each maintaining their own unique character. The towns are supported further by other small businesses that are attracted to the area by this unique character and the vibrancy created through tourism.

As many of the small family farms have evolved and transitioned in vibrant and profitable businesses, the underlying value of their land increases dramatically, making it unattractive for weekend homes or hobby farms. In this New Future, most of the region outside of Wilton New Town maintains its rural character and feel.

While many residents still travel out of the Shire for work, there is a considerable boost in local employment through a variety of sectors. Commuting time to work increases from the current 25 minutes to 40 or 45 minutes. The proportion of residents leaving the Shire for work falls.

***The main difference between these two futures is the number of local jobs. This strategy is focussed on delivering the 'New Future', embracing new opportunities and delivering a better way of life for our residents.***



## 5. Our Strengths and Challenges

The Wollondilly Shire has many strengths and challenges that must be considered for the future economic development of the area. The key themes from an analysis and the consultation are highlighted in Table 5.1 below. These unique features will determine the future growth opportunities and required infrastructure to support local job growth into the future.

Table 5.1. Wollondilly Shire Strengths and Challenges

Strengths	Challenges
<ul style="list-style-type: none"> <li>• Strategic location:               <ul style="list-style-type: none"> <li>○ Proximity to Sydney, Wollongong and Southern Highlands</li> <li>○ Proximity to Western Sydney Airport and Aerotropolis</li> </ul> </li> <li>• Existing agricultural production (poultry and eggs, vegetables, dairy, nurseries and flowers)</li> <li>• Population growth, Wilton New Town</li> <li>• Natural environment and landscape are green, clean and attractive</li> <li>• Unique character of traditional towns and 'rural' feel</li> <li>• NSW Rail Museum and current events (for tourism)</li> <li>• Good access to the area (Hume Highway), centrally located between Port Kembla and the Aerotropolis</li> <li>• Extensive coal resources</li> <li>• Elizabeth Macarthur Agricultural Institute (Menangle)</li> <li>• Wollondilly is a gateway location to the Sydney Metropolitan region</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of local employment</li> <li>• Lack of zoned and developed industrial land</li> <li>• Lack of visitor accommodation</li> <li>• Lack of experiences and activities for visitors</li> <li>• 90% of the Shire is not accessible (national parks, reserves, water catchment and rural zoning)</li> <li>• Small scale nature of agriculture, making farming marginal</li> <li>• Managing population growth and 'sprawl'</li> <li>• Managing balance between growth and maintaining existing character</li> <li>• Large geographic area, lots of 'breaks' in terms of gorges / rivers</li> <li>• Access issues (lack of electric train services, getting around the region can be difficult)</li> <li>• Lack of good mobile and internet coverage in most parts of the LGA</li> <li>• Ambiguous position (part of Sydney region, but rural, no clear identity, no natural central town / CBD)</li> <li>• Lack of commercial office space</li> <li>• Lack of supporting infrastructure to support growth (e.g. sewerage infrastructure)</li> <li>• Potential competition with future agricultural uses at the Aerotropolis</li> <li>• Transport connectivity to the Aerotropolis</li> </ul>

**Impact of Coronavirus Pandemic (COVID-19)**

In reaction to the coronavirus pandemic, the Australian Government (as well as the New South Wales Government) have taken drastic action and implemented a series of restrictions that have severely changed the economic landscape, including:

- Forced social distancing and self-isolation rules
- Closure of all non-essential businesses (including tourist attractions)
- Cancellation of all events and limiting gatherings to two people
- People are required to stay at home (unless you have to leave for an essential purpose)

The ABS has conducted a survey of Australian businesses to identify the impacts of the coronavirus pandemic and found:

- 66% of businesses saw a reduction in turnover
- 64% of businesses experienced a reduction in demand
- 48% of businesses have reported an impact from Government restrictions
- 29% of businesses experienced a difficulty in sourcing new stock or raw materials

**Wilton New Town**

Wilton will change significantly over the next 30 years delivering new homes, infrastructure, schools, community facilities and open space across 6 precincts. While facilitating continued and sustained population growth for the Shire, the development will create considerable economic activity through construction and other flow-on benefits.

Key features include:

- Around 15,000 new homes in a variety of forms to meet the needs of people of different ages and income
- Around 60,000 sqm2 of retail and business road space to provide new shops, restaurants and services near to homes
- A target of 15,000 local jobs to create employment opportunities close to new homes
- Appropriate infrastructure to support new and changing communities
- New walking and cycling routes
- Conservation of important wildlife habitat and biodiversity corridors

Figure 5.1 Wilton New Town Land Use Plan



Source: NSW Planning and Environment (2017)

### **Western Sydney Aerotropolis**

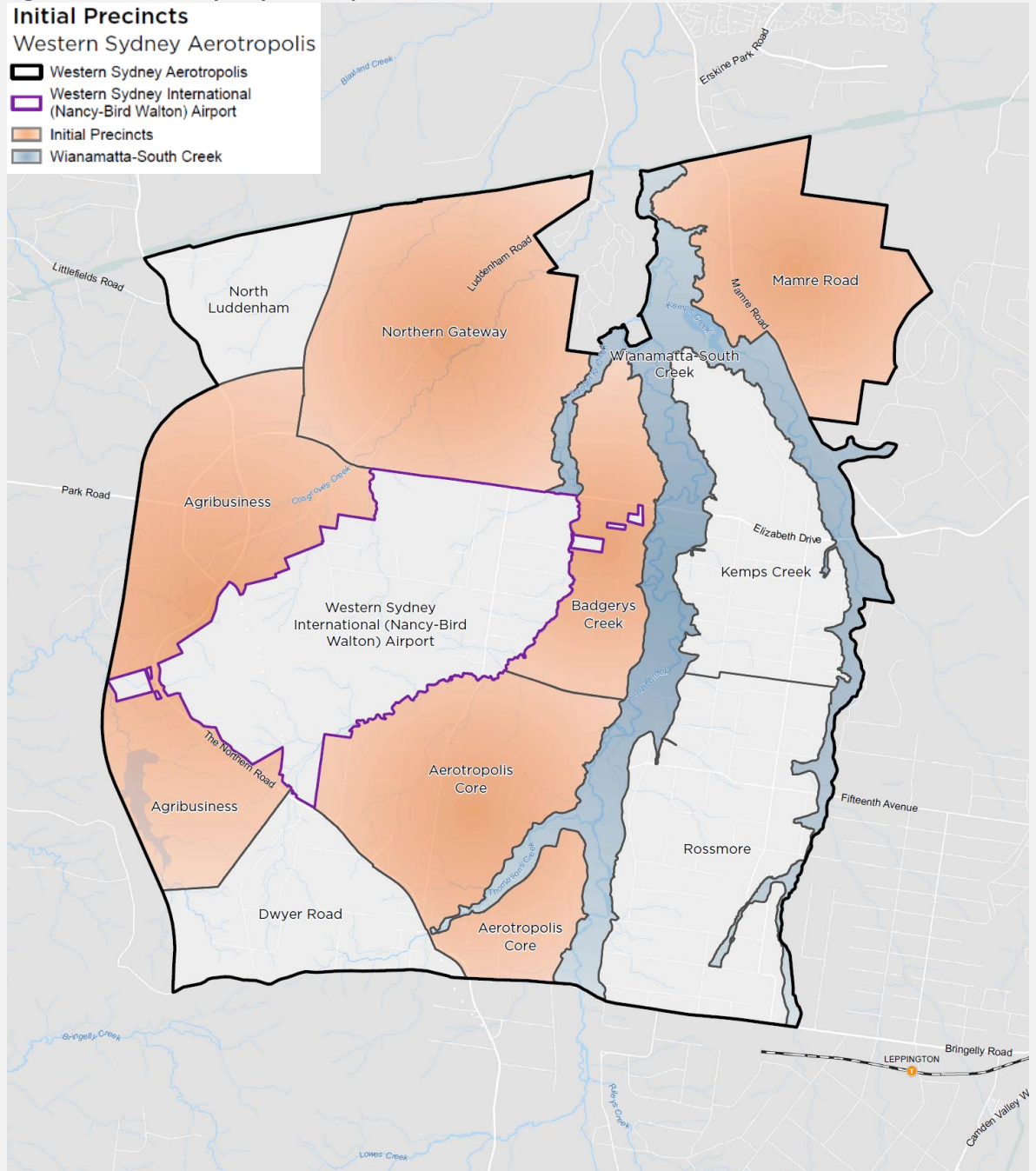
The Western Sydney Aerotropolis will be a metropolitan area with infrastructure, land uses and the economy centred on an airport. The Aerotropolis includes 11,200 hectares surrounding the New Western Sydney Airport, which has been designated into 10 precincts. The Western Sydney Aerotropolis is expected to generate over 100,000 new jobs and create between 28,000 and 34,000 new homes across all precincts.

In terms of Wollondilly, the Aerotropolis will create economic growth opportunities in a number of ways:

- Creating new homes for a future population of 78,000-95,000 who can become future visitors to the Shire
- Increasing industrial land values, making future employment land in Wollondilly potentially affordable and attractive
- Displacing some existing businesses, such as nurseries, which may be seeking new locations in proximity to the Aerotropolis
- Generating new industrial business opportunities for potential Tier 2 or Tier 3 suppliers to businesses located at the Aerotropolis, who either cannot afford the industrial land there or at the Western Sydney Employment Area or businesses that require specific buffers or extended land area for storage
- The future M9 Outer Sydney Orbital will create increased accessibility for the Shire and generate industrial land opportunities at the future intersection with the Hume Highway

Given the size, nature and scale of agricultural land in Wollondilly, it is not likely that the area's agricultural sector could produce the significant volumes required for export through the Aerotropolis and Airport.

Figure 5.2. Western Sydney Aerotropolis



Source: NSW Government (2019)

## 6. Our Growth Opportunities

### 6.1 Industry Growth Opportunities

Based on the analysis and consultation, a wide variety of future growth opportunities have been identified based on the specific competitive advantages and other features of the Wollondilly Shire economy. These opportunities have the potential to add local jobs above and beyond the employment that will naturally occur over time with the expected population growth. Furthermore, these growth sectors represent areas where local government efforts can have an impact on future employment outcomes. Coal mining will continue to be an important feature of the local economy, however, these activities are regulated by the State Government, and the Shire of Wollondilly has limited control over local outcomes in the mining sector.

Table 6.1. Future Economic Growth Opportunities, Wollondilly Shire

Industry	Description	Competitive Advantages
<b>Agri-business</b>	<ul style="list-style-type: none"> <li>• Agricultural production (poultry, vegetables, fruit, etc.)</li> <li>• Value-added processing of local production</li> <li>• Nurseries (fresh cut flowers, tree nurseries)</li> <li>• Agri-tourism (farm-stay, farm tour, café/restaurant, retail outlet)</li> </ul>	<ul style="list-style-type: none"> <li>• Existing agricultural production</li> <li>• Proximity to Sydney region (large population/customer base)</li> <li>• Current trends in food consumption (interest in eating locally produced foods)</li> </ul>
<b>Tourism</b>	<ul style="list-style-type: none"> <li>• New accommodation development (hotel/motel, destination holiday park, eco-accommodation, other short-stay accommodation)</li> <li>• Events (festivals, weddings, business events)</li> <li>• Agri-tourism (farm-stay, farm tour, café/restaurant, retail outlet)</li> <li>• Nature-based tourism experiences (trails, trekking, walking, mountain biking)</li> </ul>	<ul style="list-style-type: none"> <li>• Proximity to Sydney region (large population/customer base)</li> <li>• Future population growth of Western Sydney</li> <li>• Increasing trends towards more frequent, shorter duration trips</li> <li>• Significant natural areas (national parks, reserves and water catchment areas)</li> <li>• Unique character of towns and villages</li> <li>• Future expected industry growth</li> </ul>

Industry	Description	Competitive Advantages
<b>Industrial</b>	<ul style="list-style-type: none"> <li>• Transport/logistics related</li> <li>• Mix of small to medium sized enterprise (SME) industrial activities</li> <li>• Larger scale businesses with considerable outside storage needs</li> </ul>	<ul style="list-style-type: none"> <li>• Proximity to Western Sydney and Western Sydney Airport</li> <li>• Potential for more affordable industrial land</li> <li>• Access to Hume Highway and future M9</li> <li>• Future expected industry growth</li> <li>• Future growth of Western Sydney Aerotropolis</li> </ul>
<b>Professional Services</b>	<ul style="list-style-type: none"> <li>• Professional business services (accounting, legal, engineering, architecture, graphic design, property development, planning)</li> <li>• Small scale media and/or IT businesses</li> <li>• Small scale finance and insurance (financial advisory, financial planning, insurance brokerage)</li> </ul>	<ul style="list-style-type: none"> <li>• Increased opportunities to work from home or close to where one lives</li> <li>• Future expected industry growth</li> </ul>
<b>Healthcare</b>	<ul style="list-style-type: none"> <li>• Healthcare services (GPs)</li> <li>• Allied health services</li> <li>• Aged care/retirement living</li> </ul>	<ul style="list-style-type: none"> <li>• Large, growing and ageing local population</li> <li>• Natural environment and attractive landscapes</li> <li>• Proximity to major hospitals (Liverpool and Campbelltown)</li> <li>• Future expected industry growth</li> </ul>

Source: Lucid Economics



## 6.2 Catalyst Infrastructure / Projects

There are a range of catalyst projects that can substantially increase the competitiveness of the local economy and contribute to increasing local jobs. These catalyst projects are separated into projects over the short-term and other projects that will require more time and considerable input from partner organisations, such as the State and Commonwealth Governments.

### Short-term Projects

- **Smart Working Hub:** create a shared working space that could provide access to high speed broadband internet as well as a range of services including various networking opportunities as well as opportunities to engage with entrepreneurs or small business advisors to encourage and incubate start-ups. The Smart Working Hub would provide an initial increase in commercial office space in the Shire.
- **More Industrial Land:** complete the Employment Lands Study in order to facilitate the creation of more industrial land.
- **New Visitor Accommodation:** identify and articulate the demand and need for a variety of new visitor accommodation and then proactively promote these opportunities to the market in order to attract investment. An increase in visitor accommodation would help to facilitate overnight visitation, creating a much greater economic impact than day-trip visitors (currently 80% of all visitors to the Shire).
- **The Great Burragorang Valley Walk:** development of a 300 km, multi-day walking trail across the region, which would attract more visitors to the Shire and meet the growing demand for nature-based products.

### Long-term Projects

- **Increase Rail Access:** advocate for greater frequency and better access to electric passenger rail services in order to increase accessibility of the broader region to local residents (and vice-versa). Consider the development of more park'n'ride facilities adjacent to existing stations.
- **Intermodal Facility:** provide support for the development of an intermodal facility between the rail line and the Hume Highway (depending on the location of the M9 intersection with the Hume Highway).
- **Increased Mobile Phone and Internet Connectivity:** advocate for improved mobile phone and internet coverage across the Shire.

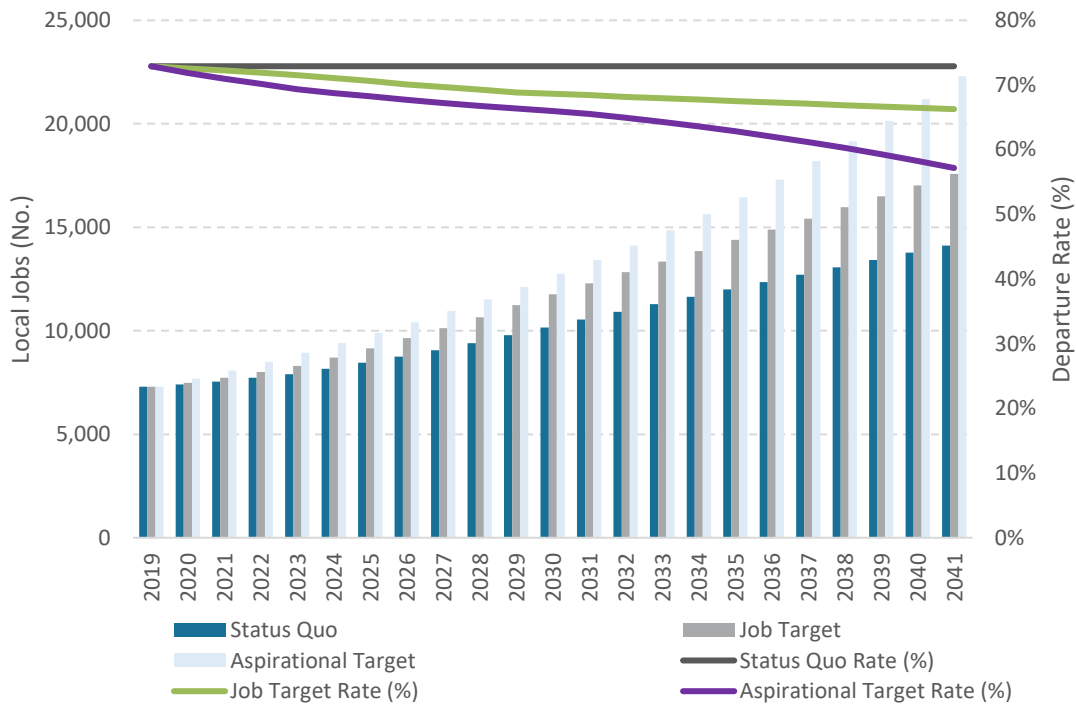
## 6.3 Jobs Target

The Shire is expected to reach a local population of just under 100,000 by 2041. This level of population growth will drive some employment outcomes through industry sectors like retail trade, education and healthcare, which are driven by population growth. Under a status quo scenario (i.e. a scenario where the proportion of people leaving the Shire every day remains at 73%), then there would be an increase of 6,800 jobs by 2041. These jobs represent population-driven jobs that are likely to occur to service the rapid pace of population growth. If a proactive approach to economic development can be taken and the opportunities identified above can be realised, an additional 3,500 jobs could be created across the Shire, representing a combined increase of 10,300 jobs between 2019 and 2041. The achievement of this job target would reduce the proportion of resident workers leaving the Shire from 73% to 66% by 2041.



The aspirational target of creating 15,000 new jobs by 2041 would lower the proportion of departing residents even further, moving from 73% to 57%.

Figure 6.1. Future Local Resident Employment and Worker Departure Rate, Wollondilly



Note: Departure rate represents the proportion of local resident workers who leave the Shire for work. Status quo assumes the rate of local resident workers leaving the Shire (i.e. 73%) is maintained.

Source: Lucid Economics

## 7. Economic Development Strategy

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### 7.1 Vision and Goal

The vision for the future economy has been established through the Community Strategic Plan and the Local Strategic Planning Statement.

The Community Strategic Plan sets the vision as Rural Living, defined by:

- **Rural setting and character:** The rural setting is obvious with farmland and natural areas located between separate towns and villages and residents experience and value this setting irrespective of where and how they live. Infrastructure provision and service levels are appropriate to this rural setting and character, as opposed to infrastructure provision and service levels experienced in more urban settings.
- **Viable agriculture:** Agriculture and associated industries are encouraged and supported and continue to be a productive, sustainable and integral part of our economy, community, landscape and environment.
- **Community lifestyle:** Our community values its sense of community spirit which is fostered through a strong identity with village life, a sense of belonging, and commitment to community participation and co-operation.
- **Diverse environment:** The Shire's diverse environmental assets, including its waterways and catchments, natural areas, biodiversity and agricultural lands are valued and protected because of their environmental, cultural and economic significance.
- **Heritage:** The Shire's wealth of heritage is valued and protected because of its cultural significance and its contribution to the local sense of place and belonging.
- **Towns and villages:** Development is carefully managed to maintain the separation of our towns and villages and their unique identities and strives to enhance their role as focal points which provide opportunities – housing, jobs, shopping, business, leisure, civic and cultural events, community facilities, education, and social interaction.

The theme of the current Community Strategic Plan is “all about how we need to maintain the value of Rural Living while at the same time creating new opportunities for growth and change”.

***The achievement of this vision is only possible through embracing the future change and taking the steps to proactively leverage new opportunities to create more local employment.***

The Local Strategic Planning Statement has the following land use vision for Wollondilly:

*An enviable lifestyle of historic villages, modern living, rural lands and bush.*

***The achievement of this vision is only possible through a proactive approach to land use planning that appreciates the commercial reality of investment and job growth as well as creating an environment that is not only conducive to future employment growth but one that attracts investment and new jobs.***

The clear goal of the Economic Development Strategy is the creation of local jobs for local residents.

### **How can the Council contribute to job growth?**

The Council cannot create new jobs beyond hiring its own staff. However, there are a variety of mechanisms and 'levers' at its disposal that can create an environment that encourages investment and job growth, including:

- **Planning:** Council is the local planning authority, responsible for allocation of land use and zonings as well as regulating development approvals for new premises that can generate new jobs.
- **Supporting Existing Businesses:** Council can support local businesses through its own procurement as well as through supporting local business organisations and if local businesses grow, they will employ more people.
- **Marketing and Promotion:** Council can market and promote the region for tourism, increasing awareness and driving an increase in visitors, which will create a higher demand for services that can then also generate demand for new jobs. Additionally, the Council can also make businesses aware of the opportunities in the Shire that can help to attract new businesses and jobs.
- **Investment Attraction:** Council can facilitate investment into new businesses, which will create new jobs, including attracting investment into new visitor products and experiences.

Consultation with stakeholders highlighted that the Council should play a very active role in economic development specifically in these four ways.

## 7.2 Strategy Overview

The following diagram (Figure 7.1) provides an overview of the Wollondilly Economic Development Strategy. The priority action areas have been defined through feedback from stakeholders regarding the most appropriate role of Council to support economic development as well as utilising the main levers that Council has that can influence the economy and support job creation.

The strategic initiatives provide further direction regarding the types of activities that will be undertaken to support economic growth and job creation. The strategy is supported by a detailed implementation plan.

Figure 7.1. Wollondilly Economic Development Strategy Overview



Source: Lucid Economics

### **Wollondilly Shire Response to the Coronavirus Pandemic (COVID-19)**

The Wollondilly Shire has released a Business Support Package (BSP), valued at over \$750,000 that contains a range of responses to the crisis to support local businesses, including:

- Prioritising local businesses for Council contracted service delivery
- Cutting payment terms in half for local businesses to help with cash flow
- Offering to defer commercial rates for business
- Waiving a range of fees for business and development applications
- Allowing many businesses to trade longer, provide take-away services and relaxing other restrictions

### 7.2.1 Planning

Planning is a regulatory role of Council and likely, the most significant tool that local governments have to support economic development. Council's planning role has two different but equally important functions; strategic planning that considers future community aspirations and identifies the need for and allocates land for future uses (i.e. development), and statutory planning that reviews and assesses development applications for future development.

Many new businesses to the Shire will require new premises and as a result, development of land will be required into the future. Future uses will likely range from industrial to commercial as well as a variety of retail and tourism uses. While Council is not the planning authority for much of the Shire (i.e. national parks, water catchment areas, etc.), it is the planning authority for most of the areas that would be considered for future industrial, commercial and/or tourism uses.

Strategic planning processes must consider market sentiment for future demand and should respond when demand can be identified. Without available land for certain uses (such as industrial), it will be impossible to generate new jobs in these areas into the future. The development approval process should also be supportive of developments that can provide future employment outcomes. While strict adherence to the planning framework and process is required, the development approval process can be delivered in a manner that instils confidence in the investor that they have selected the right location for their project.

#### **Strategic Initiatives**

- Support diversification of agricultural producers
  - Advocate for legislative changes at the state level to allow agricultural producers the same rights as vineyards (in terms of land uses and activity)
  - Develop a mechanism that can allow a diverse range of ancillary activity and developments on a farm to compliment the primary production or agricultural activities
  - Ensure any conditions on future development applications for diversification on farms is not commercially prohibitive and are fit for purpose and scale
- Focus on developments and projects that yield jobs
  - Strengthen the development facilitation group within Council of all key staff and led by the CEO or Director of Planning that would provide comment and participate in decision making regarding development approvals
  - Create a 'development facilitation process' which would identify larger projects that can generate new jobs and provide project proponents with a senior case manager, information regarding the DA planning process, the opportunity to present the project prior to lodging an application to receive feedback as well as other support
  - Market and advertise the 'development facilitation process'
- Case manage and assist proponents through the planning process
  - A uniquely skilled position to liaise between project proponents (for projects that would generate future employment) and the planning department.
  - The key responsibilities of the role would be to ensure project proponents are fully aware and understand the development approval process as well as the detail of information that will be required and at the same time assist all stakeholders to understand the commercial realities for these projects, including identifying any restrictions that would make the project unviable
- Facilitate more employment generating land in the Shire
- Advocate strongly for infrastructure to support economic development

### 7.2.2 Supporting Local Businesses

As is the case in most regional economies in Australia, the Wollondilly economy is dominated by small businesses (99% of all businesses have fewer than 20 employees). As the majority of local businesses are small business, supporting these businesses to grow can contribute to increasing local jobs. Support can include assisting local firms to build capacity, access new markets, access State and Commonwealth Government support programs and even maximising the Council's expenditure with local suppliers.

Having a vibrant local business segment can build confidence in other local businesses and act to attract new businesses. Successful local businesses will contribute to building vibrant towns and villages. In most advanced economies (such as Australia), up to 60%-70% of new jobs and investment will come from existing businesses, so a focus on local businesses is warranted.

#### Strategic Initiatives

- Support local agricultural producers to diversity and grow
  - Identify further local producers that are interested in diversifying
  - Engage specialist consulting expertise to work with local producers to assist them with business planning, financing and gaining development approval for diversification activities (if necessary)
  - Engage a specialist to assist in developing an agri-business/agri-tourism cluster / working group
- Develop and implement relevant industry action plans (e.g. agri-business/agri-tourism)
- Develop town-based marketing strategies
  - Work with major towns and its local businesses to identify specific market segments and identify any gaps regarding current product or service offering as well as any gaps in accessing potential customers
  - Devise strategies to better market local products and services to broad customer groups
- Connect local businesses to State and Commonwealth support programs
  - Regularly meet with State and Commonwealth Government organisations (including NSW Treasury / Industry NSW, Ausindustry, etc.)
  - Work with State and Commonwealth Government departments to identify various business support programs appropriate for local businesses
  - Identify and support any business training and capacity building programs appropriate for local businesses
  - Engage with local businesses and identify any appropriate business support programs they may qualify for and make the necessary introductions to State or Commonwealth Governments
- Support local business associations and chambers of commerce
  - Support local business associations and chambers through sponsorship
  - Work with local business associations and chambers to deliver appropriate business support programs (such as building a digital presence, better use of technology, etc.)
  - Support businesses to strengthen its advocacy for infrastructure

- Maximise procurement opportunities for local businesses
  - Conduct a review of Council procurement to identify what level of expenditure is spent with local businesses
  - Conduct an evaluation of Council’s procurement to identify potential projects suitable for local businesses
  - Conduct a workshop for local businesses (together with the chambers and business associations) regarding the tendering process at Council in order to inform local businesses the requirements Council has in place for procurement
  - Develop a preferential weighting for local businesses through the Council tendering process
- Provide a Business Support Package (BSP) for COVID-19 impacted businesses

### 7.2.3 Marketing and Promotion

Marketing and promotion of the region has been highlighted in the Destination Management Plan (DMP) and is required to raise awareness of the area and drive visitation. At the same time, marketing and promotion of the area is required to raise its profile as a business destination and promote the identified industry investment opportunities. Competition for visitors and businesses has increased dramatically over the last decade amongst local governments and many other local governments in Western Sydney are visibly seen as ‘open for business’ and aggressively pursuing investment opportunities (and providing the dedicated budgets to do so).

Given the Shire’s strategic location as well as many of the unique competitive advantages, it is important to market and promote these opportunities widely and through various partnerships (i.e. Western Sydney Investment Attraction Office, Destination NSW, etc.), however, this activity must be adequately resourced.

#### **Strategic Initiatives**

- Maintain strong communications regarding the economy, tourism and future development
  - Provide press releases/announcements regarding economic development or tourism successes
  - Provide regular economic and tourism updates to businesses and communities
  - Conduct an annual economic and tourism forum with local businesses
- Develop and maintain a suite of marketing materials
  - Develop an investment prospectus to promote investment in the region as well as specific investment opportunities (including tourism investment)
  - Work with Destination Sydney Surrounds South and surrounding LGAs including Camden and Wingecarribee to boost promotion of the region to Sydneysiders
- Proactively market investment opportunities
  - Participate in various industry meetings and events (i.e. CEDA, PCA, etc.) in order to network with potential investors and their advisors
  - Post marketing materials online so they are easily accessible from a central website
  - Attend relevant industry conferences and/or exhibitions focused on identified targeted industries
- Support local events that attract visitors
  - Support local community groups that manage events to help them to attract as many external visitors as possible
  - Contribute funding to events that attract significant visitors from outside of the Shire
  - Ensure that Council’s regulatory processes to run events within the Shire is simple and efficient
  - Promote local events through all of Council’s communications channels

### 7.2.4 Investment Attraction

Attracting investment from outside of the Council area is important to foster and support economic and employment growth as well as the ongoing diversification and evolution of the local economy. It provides a significant economic stimulus, as new businesses in the community not only provide new jobs, but can also bring in new technology, spawn innovation, build depth within existing industries as well as stimulate additional investment and job creation through supply chains.

While local government cannot control the investment decisions of private sector businesses (or State and Commonwealth Governments), the Council can help to create an environment that is conducive to investment. This environment is bolstered through a positive customer service attitude as well as a strong local and extended network of various businesses to support future investment into the area. The Council should be in a position to facilitate future investment into the Shire through a number of support mechanisms.

#### **Strategic Initiatives**

- Encourage and attract investment into new tourism products, accommodation and experiences
  - Support the creation of short-stay accommodation
  - Investigate the opportunity for a destination holiday park
  - Investigate the potential for eco-accommodation together with NSW National Parks and Wildlife
  - Pursue the potential for a nationally significant hiking and walking trail
- Conduct proactive business development activities to engage with prospective investors
  - Utilise existing State and Commonwealth networks to promote investment opportunities to national and international investors
  - Build a system of potential investors and their advisors through networking
- Facilitate investment projects through providing individual case management and information provision
  - Develop a business case for a food manufacturing and processing plant
  - Provide a case manager for investment projects with the potential to deliver more than 10 new jobs
  - Provide potential investors with a range of information regarding the local economic and/or tourism environment
  - Coordinate site inspections as well as any required meetings with Council (or any of its departments) and/or any local businesses
- Seed new ways of working, including Smart Working Hub

#### **Economic Development Implementation Plan**

A detailed Implementation Plan will detail specific activities and tasks for Council to undertake and become an annual program of work. The Implementation Plan is organised and aligned to the Priority Action Areas and Strategic Initiatives highlighted above in order to provide, consistent long-term direction as well as the flexibility to adapt and change to a constantly evolving economic environment.



## 8. Measuring Progress

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This strategy should be reviewed in five years with an annual report of the program of work. An interim review should be conducted in 2022 after the release of the 2021 Census data, which will help to better understand commuter patterns and the self-containment rate (i.e. the proportion of local resident workers that live and work within the Shire) and the subsequent percentage of people that leave the Shire for work every day.

Progress will be measured and monitored in two ways:

- Tracking the number of local jobs (as defined through Economy ID and future Census releases)
- Tracking progress against the annual program of work

In tracking progress in these two ways, it is important to recognise that the Council does not control the number of local jobs created nor the location of these jobs. The purpose of this Economic Development Strategy is to encourage future local employment growth in an attempt to stem the significant number of local residents leaving the LGA every day for work. Tracking local employment will be the best way to measure the effectiveness of this Strategy.

While the Council does not control the creation of local jobs, it can control the activities that it undertakes every year to support economic and tourism development. In this way, tracking progress against the annual program of work will identify the degree to which the Council is implementing this strategy. The annual program of work should be reviewed based on reaching the identified key performance indicators (KPIs) as well as the effectiveness of these activities in contributing positively to job growth. Activities and KPIs should be adjusted according to current conditions and the experience of the previous year.

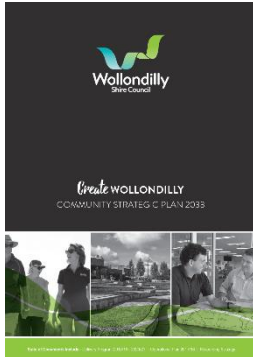
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## Appendix A: Strategic and Planning Context

### Community Strategic Plan



The Community Strategic Plan 2033 represents the long term plan for the community and expresses the aspirations of the community, setting strategies to achieve these aspirations. The Community Strategic Plan is based on intensive consultation and engagement with the community and forms an overarching strategy for the future. It becomes a key influence for other strategic plans (including the Destination Management Plan, Local Environmental Plan, Smart Shire Plan and others, including the Economic Development Strategy). These other strategic plans then provide inputs into Council's 4 year delivery program and its operational plan. As such, all of these strategies are important in delivering on the aspirations highlighted in the Community Strategic Plan and directing Council's day-to-day operations.

The theme of the Community Strategic Plan is *Create Wollondilly*, which is meant to maintain the value of Rural Living while at the same time creating new opportunities for growth and change.

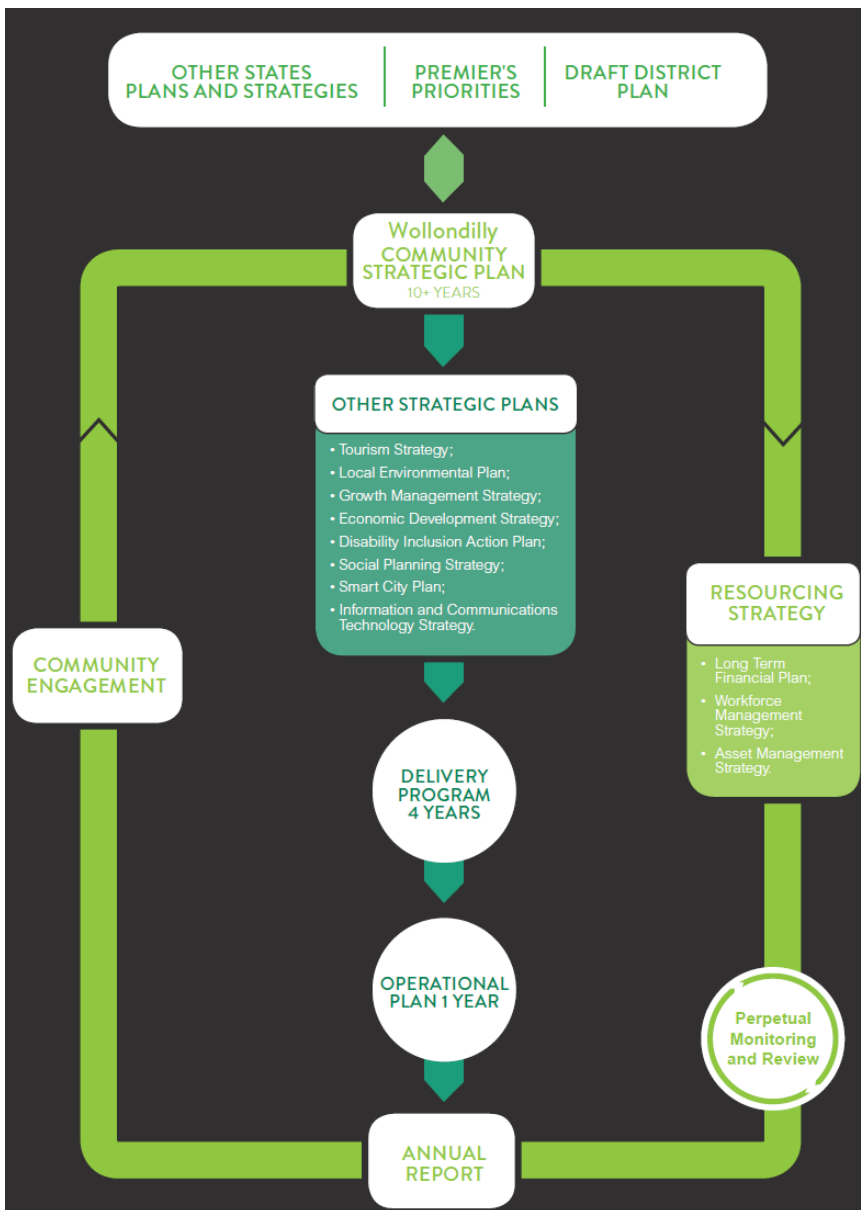
One of the Plan's five themes is 'Sustainable and Balanced Growth', which highlights a number of specific outcomes, including:

- A built environment that supports liveable communities, respects the character, setting and heritage of our towns and villages and retains the vision of Rural Living.
- A unique environment and rural landscape balanced with managed growth that is consistent with Council's Position on Growth and vision of Rural Living.
- A strong local economy providing employment and other opportunities.
- Expansion of employment and other opportunities based on the Shire's natural assets, strong agricultural base and tourism potential.
- A strong and viable agricultural sector supported by the protection and preservation of agricultural assets and resources.

The Economic Development Strategy contributes directly to three specific strategies in the Community Strategic Plan, including:

- **Strategy GR3 – Economic Development and Tourism:** Enhance economic development and tourism in Wollondilly Shire through the implementation of the Economic Development Strategy and the development of a Tourism Strategy and an Employment Strategy.
- **Strategy GR7 – Agriculture:** Encourage and support agriculture and associated industries so that they continue to be a productive, sustainable and integral part of our economy, community, landscape and environment.
- **Strategy GR8 – Advocacy:** Advocate strongly for the interests of Wollondilly and its community in relation to planning and economic development outcomes and improved public transport services.

Figure A.1. Economic Development Strategy Relationship with Other Council Plans

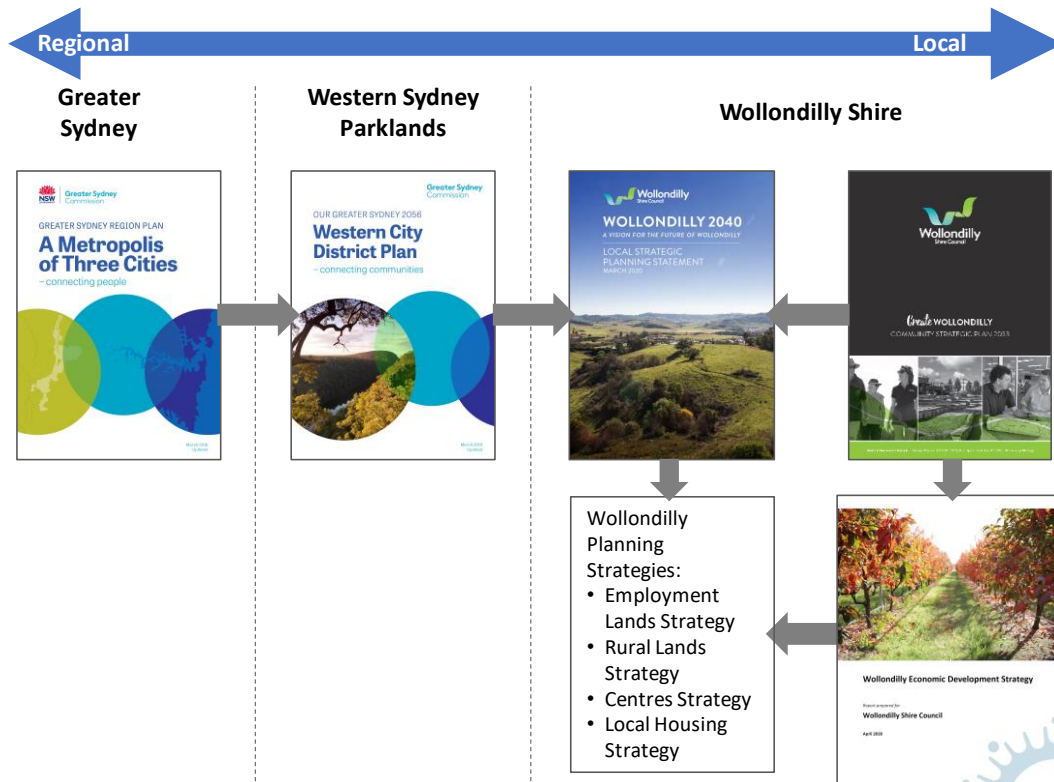


Source: Wollondilly Shire Council (2017)

## Planning Context

There are a variety of important planning documents to consider and that will have a relationship and link to the Economic Development Strategy, as highlighted in Figure A.2. At the same time, the Economic Development Strategy will influence and provide direction for a number of additional planning studies and future iterations of the Local Strategic Planning Statement. Specifically, the Economic Development Strategy provides direction regarding the future evolution and growth of the local economy, including specific growth opportunities and initiatives to generate local jobs and tackle issues highlighted in other local strategies and plans.

Figure A.2. Planning Context and Relationships, Wollondilly Economic Development Strategy



Source: Lucid Economics

## Strategic Context

The Economic Development Strategy will work together with other existing Council strategies, including the Destination Management Plan (DMP) and the Smart Shire Strategy. The Economic Development Strategy recognises the role and function of tourism in the local economy and has adopted a number of initiatives from the DMP. At the same time, the Economic Development Strategy recognises the role of technology and has equally adopted items from the Smart Shire Strategy, where appropriate.

The Western Sydney City Deal and the Western Sydney Aerotropolis Plan are other strategic documents that have been acknowledged and leveraged in terms of the Economic Development Strategy through identifying specific opportunities stemming from both documents.

Figure A.3. Strategic Context for the Economic Development Strategy



Source: Lucid Economics



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