

Economic Development and Employment Lands Strategy



Eurobodalla Shire Council, 2011

EXECUTIVE SUMMARY

The Economic Development and Employment Lands Strategy is a plan for growth of employment land in Eurobodalla over the long-term, out to the year 2030. Planning for population and employment growth needs to be undertaken well in advance of realising this growth to ensure the demand for employment and services is matched by the supply of jobs and businesses. The opportunities for employment and business growth need to be identified now, so that the next stages of planning for infrastructure and development can commence with some certainty.

This Strategy is the first stage of the employment land delivery process and will identify where opportunities may exist for future employment growth. These are identified as short, medium and long-term opportunities. The commencement of the following stages, such as detailed studies, infrastructure improvements, rezoning and development, will be influenced by regional and community priorities, the availability of funding and changes in market conditions. Land owners, developers, business owners, Council and other government agencies will all have a role to play in the progressing of the identified employment land opportunities.

Several investigations underpin the delivery of the Strategy, including economic profiling, employment land auditing and demand analysis and the identification of long-term employment land supply.

Economic Profiling

An updated economic and employment profile of the Eurobodalla has been undertaken to support this Strategy. Additionally, the current national and local drivers of economic development that will be expected to influence Eurobodalla's future have been analysed as part of a Strategic Influences Report. This Strategy is informed by the key issues outlined in these analyses and recommends a number of strategies that will support Council's current Economic Development Strategy.

Employment Land Audit and Demand Analysis

The results of an employment land audit and an employment land supply and demand analysis are presented in this Strategy. The analysis finds that there is sufficient available employment land to satisfy short-term economic development projections and needs. In addition, there are a number of employment land developments currently underway or in planning that will contribute to the Shire's employment growth. However, results show that there will be a need for additional employment land in the medium to long term, as well as a range of initiatives to foster a more diverse local economy.

Long-term Employment Land Supply

Eight sites are identified in this Strategy for further investigation for future employment lands. These sites rank highest in terms of a defined set of locational criteria and through a strengths, weaknesses, opportunities and threats (SWOT) analysis. All of the identified sites require further detailed investigations and in some cases a master planning exercise to critically evaluate their potential as future employment land.

This Strategy does not propose the rezoning of any parcel of land within the next five years, with the exception of the expansion of the Moruya North industrial area which has already been identified for rezoning through the Draft Local Environmental Plan (LEP) process. Over the next five years, the focus should be on facilitating the development or redevelopment of existing employment land, while at the same time commencing the necessary detailed investigations of identified future employment lands.

Capitalising on Eurobodalla's Strategic Advantages

The recommendations of this Strategy aim to ensure the economy of Eurobodalla moves forward through capitalising on the strategic advantages of the local area. Some of Eurobodalla's strategic advantages are its natural environment, lifestyle attributes and proximity to Canberra and Sydney. The recommendations have also had regard to a number of identified challenges in Eurobodalla and the initiatives required to overcome these challenges. A number of the key challenges facing Eurobodalla include protection of the natural assets, strong seasonality of business and employment, an ageing population, high unemployment, low employment participation and low wages.

Strategy Recommendations

This Strategy presents a range of recommendations to support Council's Economic Development Strategy and to progress the identified employment land opportunities in a timely manner. The economic development recommendations identify areas of specific focus, including capitalising on the Eurobodalla's strategic advantages, industry cluster opportunities and enhancing innovation. The employment land recommendations identify the necessary detailed studies or further planning exercises required to realise the opportunities and the appropriate timeframes for these.

The Strategy recommends reviews every five years in line with reviews of the Eurobodalla Local Environmental Plan and the development of an Action Plan reviewed on an annual basis to facilitate implementation of the Strategy.

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INTRODUCTION

Promoting economic growth and identifying future employment lands is critical to the economic well-being of the Eurobodalla Shire and its residents. This Economic Development and Employment Lands Strategy will support and strengthen Council's existing Economic Development Strategy, identify means of progressing existing employment lands and inform future reviews of the Local Environmental Plan (LEP) by identifying potential future employment lands.

The development of this Strategy has been made possible by the Department of Planning and Infrastructure's Planning Reform Fund program. Funding was granted to Eurobodalla Shire Council in 2010 to undertake a review of the Eurobodalla economy within the regional and state context, an employment land supply analysis, a review of the economic trends and drivers and the identification of opportunities and constraints to future employment land development.

The aims of the Strategy are:

- To identify the strategic context, key trends and constraints affecting economic development and employment land supply in the Eurobodalla Shire;
- To develop strategies to promote economic growth and identify potential future employment lands;
- To achieve and maintain employment land supply at a level to meet the needs of employment related development for the next 20 years;
- To inform a future review of the Eurobodalla Local Environmental Plan; and
- To provide a framework for building a partnership with the state government to achieve employment growth in the Eurobodalla over the next 20 years.

Strategy Methodology

The methodology for the development of the Strategy is based on four key phases, being:

Phase 1: Commencement and Preliminary Review – This phase included a review of previous studies, a preliminary assessment of available data, an understanding of any data gaps, undertaking of an employment land audit and a desktop review of land in the Eurobodalla Shire to identify potential future employment opportunities.

Phase 2: Background Studies – The findings of Phase 1 were then compiled into an Economic Development and Employment Lands Issues Paper. The Issues Paper provides a detailed assessment of the current state of the Eurobodalla economy and a summary of the Planning and Policy Framework that guides economic development. Based on the gaps identified in Phase 1, a consultant was engaged to undertake a Strategic Influences Report to provide a more in-depth analysis of the economic profile of Eurobodalla and the trends and drivers that will potentially influence the future economic development of the Shire.

Phase 3: Engagement – The engagement phase of the Strategy consists of a number of elements, including the establishment of a Steering Group of business and industry representatives, consultation with the local Chambers of Commerce and discussions with identified land owners.

Phase 4: Strategy Preparation, Exhibition and Adoption – The final phase draws together the outcomes of the previous phases into the development of a Draft Strategy for public exhibition, review and ultimately adoption by Council.

Structure of the Strategy

The Strategy is structured into three chapters and is supported by eleven appendices, as described below. Each chapter provides a brief summary of the key issues and implications for Eurobodalla, while the appendices provide full details of the background work undertaken to support the Strategy.

Chapter 1: Strategy Context – Chapter 1 identifies the current planning and policy framework at a regional and local level and explores the implications on Eurobodalla’s economic and employment future. This Chapter defines the nature of Eurobodalla’s location and population and identifies and analyses the strategic influences on economic development in the Eurobodalla, including regional economic drivers and local industry and business trends.

Chapter 2: State of the Shire – Chapter 2 summarises the current economic profile of Eurobodalla, highlighting important characteristics of the workforce and businesses, and explores the implications on future economic and employment directions. The key results of the employment land audit and the findings of an employment land supply and demand analysis are also presented.

Chapter 3: Strategic Directions - Chapter 3 outlines strategies for economic development in Eurobodalla, defines a set of employment land planning principles and locational criteria and presents eight potential future employment areas for consideration.

The Strategy is supported by 11 Appendices providing more details on matters outlined in this Strategy.

CHAPTER 1: STRATEGY CONTEXT

1.1 THE PLANNING AND POLICY FRAMEWORK

The following planning and economic strategies have informed the development of this Strategy:

State and Regional Planning

- NSW State Plan, 2010 and State Infrastructure Strategy, 2008
- South Coast Regional Strategy, 2007 and Settlement Guidelines, 2007
- Regional Development Australia Far South Coast Strategic Regional Plan 2010-2015

Local Planning

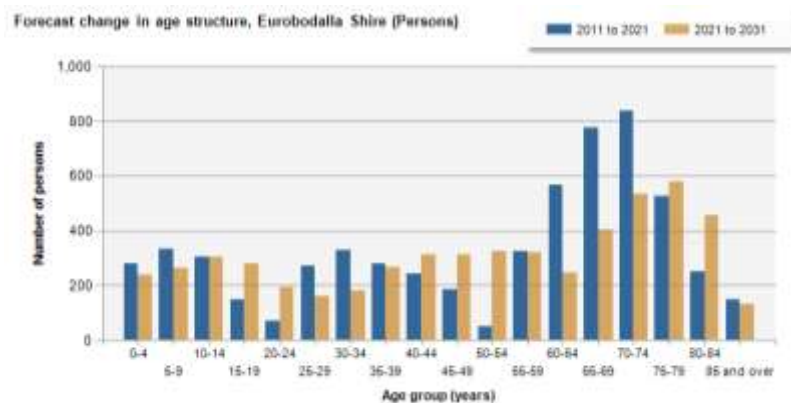
- Eurobodalla Retail Policy and Guidelines, 2006
- Eurobodalla Settlement Strategy, 2006
- Draft Eurobodalla Local Environmental Plan
- Town Centre Structure Plans and Development Control Plans
- Eurobodalla Economic Development Strategy, 2009
- Draft Community Strategic Plan, 2011

1.2 EUROBODALLA'S POPULATION – CURRENT AND PROJECTED

In 2011, the population of the Eurobodalla was estimated to be 38,893. Almost one quarter of Eurobodalla residents was aged over 65 in 2011, significantly higher than the New South Wales average. There was also a high proportion of children and young persons in the Eurobodalla in 2011. Similar to other regional areas of Australia, the proportion of young adults between the ages of 20 and 34 was low compared to the New South Wales average.

Eurobodalla's population growth is predicted to continue, with the Department of Planning and Infrastructure's population forecasts suggesting an increase in population of approximately 14,000 persons between 2010 and 2031. The proportion of Eurobodalla's population aged between 60 and 79 will increase significantly during this period. The State Government's population forecasts show a net increase of almost 4,500 residents of working age (15 to 64) from 2006 through to 2031. However the South Coast Regional Strategy sets a target of 6,200 more jobs in the Shire by 2031. It is important for the Eurobodalla to plan for employment growth over and above that required solely to meet population growth, given the high unemployment rate and the potential for higher numbers of older persons who by choice or necessity may remain in the workforce for longer periods of time.

Figure 1: Forecast change in age structure, Eurobodalla, 2011 to 2021 and 2031



1.3 EUROBODALLA'S LOCATION

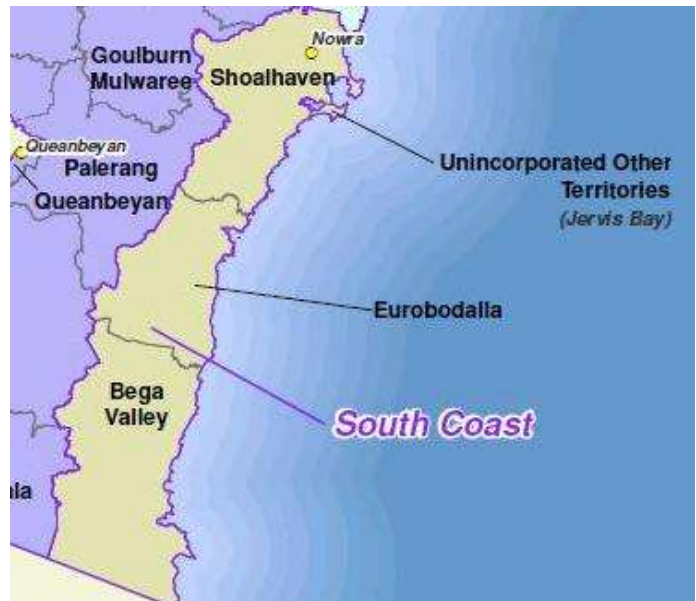
The Eurobodalla Shire is located on the South Coast of New South Wales, bordered by Bega Valley Shire to the south and Shoalhaven Shire to the north. The Shire stretches west to the mountain ranges that separate Eurobodalla from the Capital and Snowy Mountain region Councils of Palerang and Cooma-Monaro. Together with the Bega Valley and Shoalhaven Councils, the Eurobodalla forms part of the Far South Coast Region for the purposes of regional planning and the Regional Development Australia (RDA) program.

Following the region's main highways, the Eurobodalla is located approximately 280km south of Sydney via the Princes Highway and 150km east of Canberra via the Kings Highway. The Princes Highway generally forms the western boundary of the urban parts of Eurobodalla, with land the west of the Highway dominated by National Park, State Forest and agricultural land.

North Eurobodalla – The northern area centres on the Shire's largest commercial centre, Batemans Bay. Batemans Bay is identified as an important regional centre in the South Coast Regional Strategy. This area includes the Batemans Bay industrial area, the Surf Beach employment lands and a number of neighbourhood centres, including Batehaven, Malua Bay, Surf Beach and Mogo.

Central Eurobodalla – The central area is based around the major town of Moruya. Moruya is the main administration centre of the Eurobodalla. This area includes the Moruya industrial areas, the Moruya Airport and a number of neighbourhood centres, including Broulee and Tuross Head.

South Eurobodalla – The southern area centres on the major town of Narooma. Narooma is a key tourist destination in the Shire. This area includes the Narooma and Dalmeny industrial areas and a number of neighbourhood centres, including Bodalla, Dalmeny and Central Tilba.



Source: RDA FSC Strategic Regional Plan, 2010



Source: ESC Eurobodalla Settlement Strategy, 2006

1.4 ECONOMIC TRENDS AND DRIVERS

The economic trends and drivers influencing the Eurobodalla economy are described below:

National and State Drivers

Energy and carbon price movements and policies	Eurobodalla businesses will need to predict and plan for any business cost changes that may result from the introduction of a carbon price and changes in energy costs.
Demand and competition from emerging Asian economies	Businesses in Eurobodalla that can develop products or services that capitalise on the unique qualities of the local region in order to generate an export market and/or compete with businesses in the emerging economies will likely prosper in the increasingly global market.
Proliferation of new communications technologies	Businesses in Eurobodalla need to identify and take advantage of the opportunities that new technologies (such as the National Broadband Network) can offer, particularly with regard to business marketing.
Demographic changes – particularly growth and ageing	Eurobodalla's population is already significantly older than the national and state averages and the ageing phenomenon is forecast to continue. The older population must be seen by Eurobodalla businesses as an asset in terms of their economic contribution as employees and customers.

Local Drivers

Retail trends	Retail industry trends need to be accommodated in a manner that meets the expectations of the local community. Mechanisms to achieve this include a strong centres hierarchy, the facilitation of retail clusters and the use of local character statements.
Domestic tourism trends	Tourism businesses must undergo continuous improvement in order to keep their appeal fresh, relevant, competitive, aspiring and inspirational for visitors. Of particular importance will be the development of events and activities that provide tourists with an 'experience'.
Construction industry trends	The construction industry is driven by population growth, however analysis of development approvals over the last decade shows an underlying strength and sustainability in the construction industry.
Agricultural industry trends	Eurobodalla has good potential to embrace the growing trend of value-adding to existing agricultural industries and take advantage of growing export demand for niche markets, such as organic food and 'non-traditional' processed agricultural products. In addition, the growing trend towards agricultural self-containment as food security issues become more critical will drive the expansion and diversification of the agricultural industry.
Professional and Technical Service Industry Trends	A targeted and coordinated approach to growth in this sector, linked to growth in local higher education institutions, will be required to ensure Eurobodalla captures its share of growth in higher skilled and paid jobs.
Business locational trends	Recent business location trends have shown increasing home businesses and industry clusters. Potential employment lands should be located where business and industry can take advantage of the opportunity to form industry clusters.

1.5 KEY IMPLICATIONS

The Planning and Policy Framework

- To meet growth targets to 2030, land needs to be identified for new commercial and industrial development.
- Planning for employment lands must consider environmental objectives, requiring a balance to be struck between the scale of growth and the limits on growth.
- The majority of existing commercial and industrial centres in the Eurobodalla are already at the outer limits of growth potential, leaving redevelopment within most of the centres the principal growth avenue.
- There is no need for any change to the existing identified centres hierarchy.
- The identification of the roles and functions of industrial employment areas will assist in their marketing and the targeting of specific developments or industry clusters to those areas.

Economic Trends and Drivers

- The national and state drivers predominantly support business expansion into export markets in response to global issues and the opportunities arising from new technologies, while the local drivers support economic growth focused on self-containment. Business expansion in both local and export markets is required if a diverse and resilient economy with a wide variety of employment opportunities is to be delivered
- Businesses that have a diversified customer and sales base can best plan for anticipated economic shifts and will be more resilient to unexpected changes in both global and local markets.
- Strategic planning for the Eurobodalla, across the spectrum of land use, transport, economic, social and environmental planning, must have regard to both global and local trends and drivers.
- Facilitating the global expansion of local businesses will require a range of business support initiatives and the delivery of appropriate infrastructure, particularly new communications infrastructure.
- Supporting businesses to respond to local trends and drivers will require flexible land-use planning policies and a coordinated approach to economic development and land use planning.

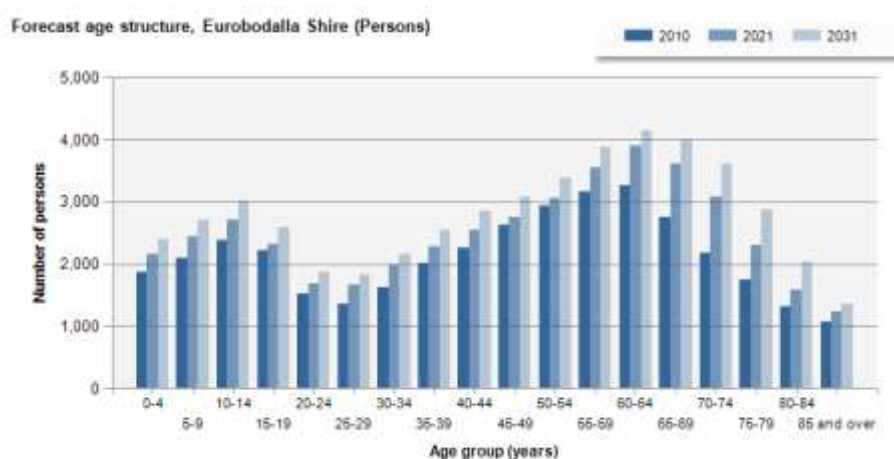
CHAPTER 2: STATE OF THE SHIRE

2.1 ECONOMIC AND EMPLOYMENT PROFILE

The key issues arising out of the economic and employment profile are outlined below.

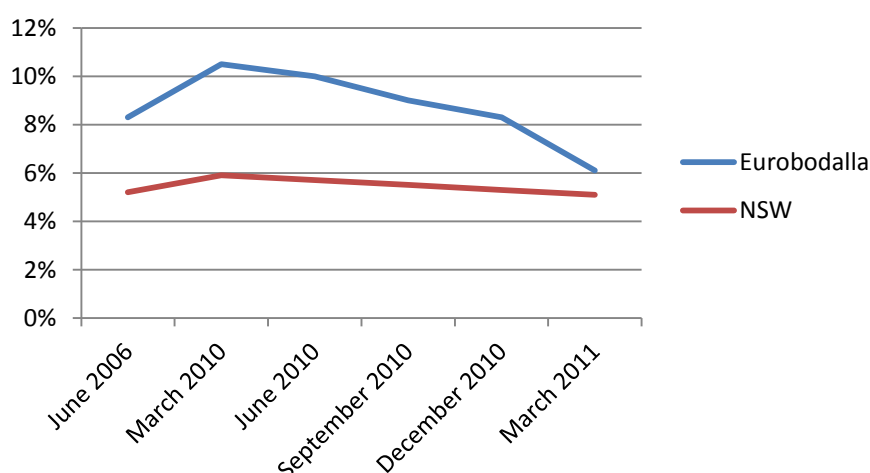
Low employment participation rate – In 2010, only 43.4% of the Eurobodalla population participated in the labour force (including employed and unemployed persons). This is quite low compared to the NSW average of 51.3%, and has declined from a rate of 47.1% in 2006.

Figure 2: Forecast age structure, Eurobodalla, 2010, 2021 and 2031



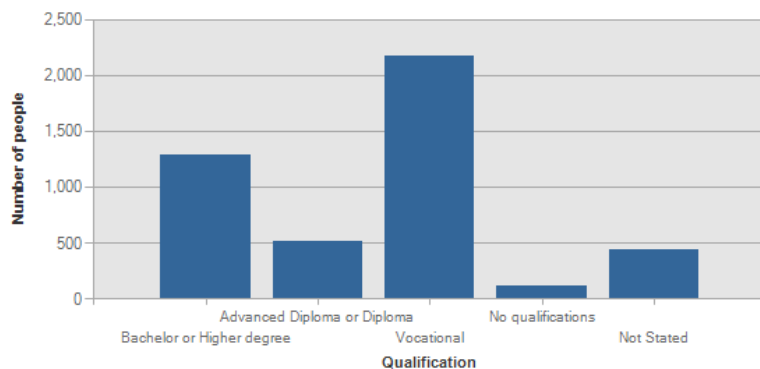
High unemployment rate - In June 2006, the unemployment rate in Eurobodalla was 8.3%, compared to the State average of 5.2%. By March 2010, the unemployment rate had risen to 10.4%, but by December 2010, it had fallen again to 8.3%. The unemployment rate is continuing to fall, reaching 6.1% in March 2011.

Figure 3: Change in Unemployment Rate, Eurobodalla and NSW, 2006 to 2011



Low participation levels in tertiary education - The Eurobodalla community has similar education enrolment rates to the NSW average for all levels, except for tertiary education which is below the State average. However, since 1996, almost 4000 more Eurobodalla residents had achieved a tertiary qualification.

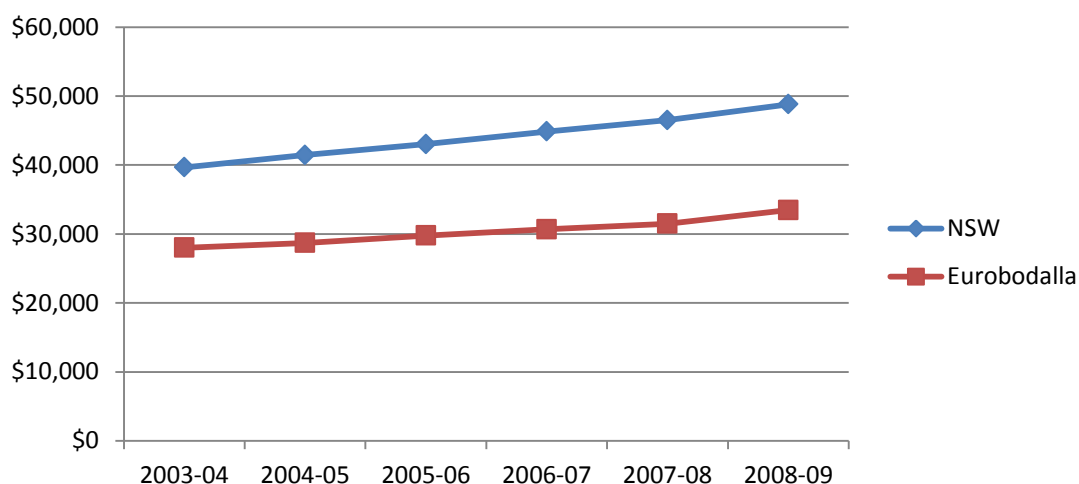
Figure 4: Change in highest qualification achieved, Eurobodalla, 1996-2006



Source: Australian Bureau of Statistics, 2006 and 1996 Census of Population and Housing (Enumerated)

Low average wage levels - The average wage of employed persons in Eurobodalla in the 2008-09 financial year was \$33,452, well below the NSW average of \$48,793. While the average wage of Eurobodalla's workers has been growing, the rate of growth is below the State average.

Figure 5: Change in average annual wage levels, Eurobodalla and NSW, 2003-04 to 2008-09

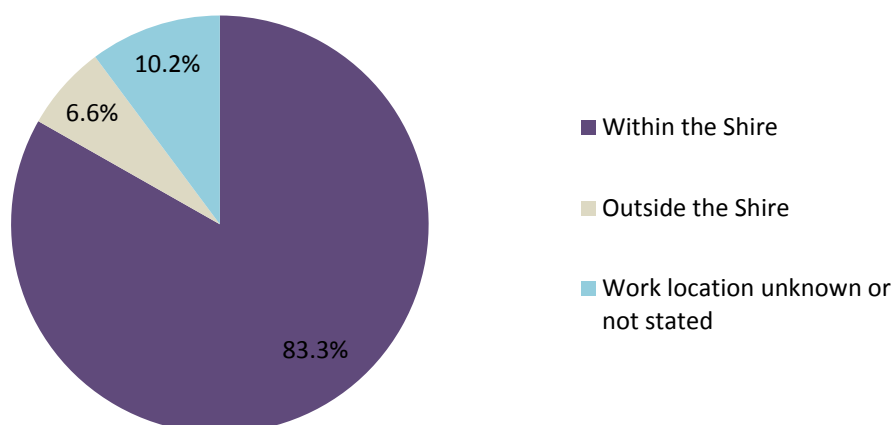


High levels of part-time work – Part-time work is a significant component of employment in Eurobodalla. In 2006, 16% of all workers work less than 16 hours per week, compared to 30% of all workers who work between 35 and 40 hours per week. In total, 40% of Eurobodalla workers were employed on a part time basis, compared to 29% across NSW, while 52% were employed on a full time basis, compared to 65% across NSW.

High levels of housing stress - Housing affordability in Eurobodalla is a significant problem, driven by low average income levels and high property prices. Low income households in rental accommodation also suffer from housing stress, particularly those in the private rental market. 58% of low and moderate income households in the private rental market were in housing stress in 2006, along with 49% of low and moderate income households in the private purchase market.

High employment self-containment - Approximately 95% of the jobs in Eurobodalla are occupied by residents. However, there are more workers in Eurobodalla than jobs – in 2006 there were 12,227 workers and 10,695 jobs. At least 6.6% of Eurobodalla residents leave the Shire for work, mostly in the construction industry.

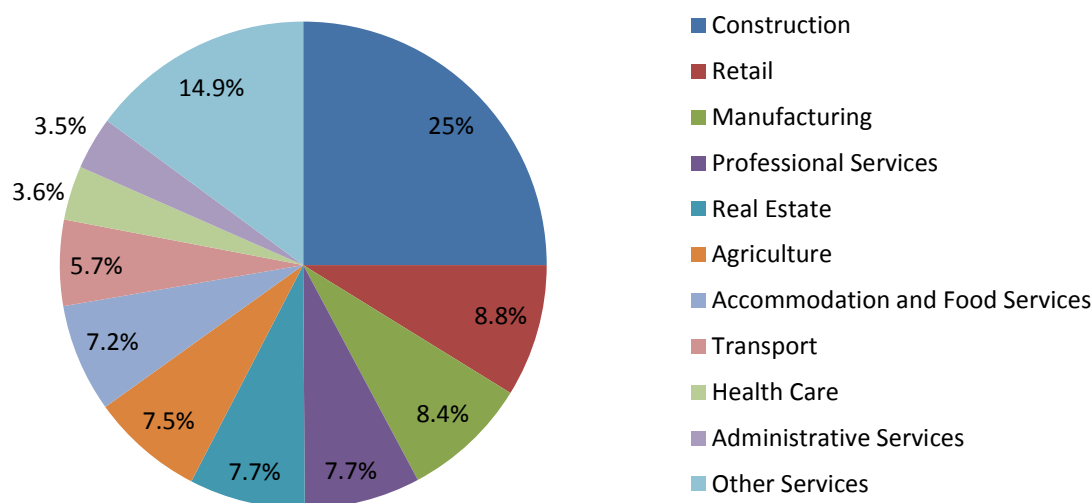
Figure 6: Employment Location of Residents of Eurobodalla, 2006



2.2 EXISTING BUSINESS CHARACTERISTICS

Using Australian Business Registry (ABR) data, a total of 3237 businesses were operating in Eurobodalla in 2010, an increase of 315 businesses since 2001. This represents an average increase of 32 businesses per year. However, the ABR data for business entries and exits shows that an average of 336 new businesses start every year, while an average of 304 businesses close every year. This rate of business start-up and closure is consistent with the national average of approximately 15% annually.

The increase in business numbers was largely in the following categories: Accommodation and Food Services (+73); Construction (+48); Retail Trade (+46) and Rental, Hiring and Real Estate Services (+40). The categories where business numbers decreased were Agriculture, Forestry and Fishing (-17), Manufacturing (-16) and Education and Training (-4).

Figure 7: All business by Industry, Eurobodalla Shire, 2010

Business Turnover (\$)

The most recent business turnover data from the ABS is for 2009. The majority (83%) of Eurobodalla businesses in 2009 had a turnover less than \$500k, while 9% had a turnover more than \$1m. When compared to the 2007 data, the proportion of businesses with a turnover less than \$500k decreased (from 84.4%) and the proportion of business with a turnover more than \$1m increased (from 7%).

The businesses with the highest turnover in 2009 were predominantly in the retail and accommodation and food services sectors. However, the businesses that demonstrated the strongest growth in turnover between 2007 and 2009 were in the manufacturing, transport and health sectors.

2.3 EXISTING BUSINESS VIEWS AND INTENTIONS

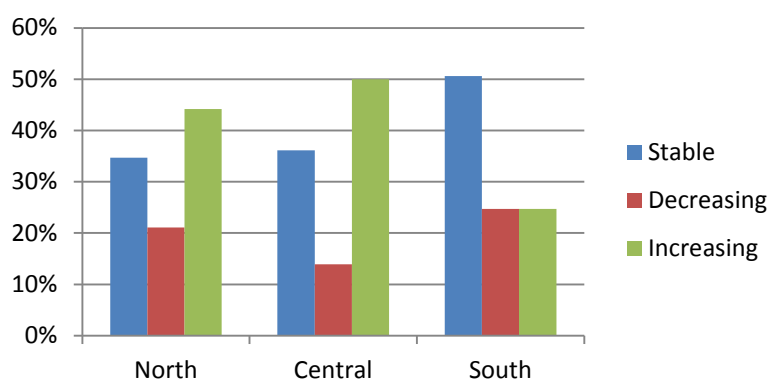
A survey of existing businesses was undertaken to inform the Strategy. The survey explored the views of existing business owners on current business conditions, future influences and future prospects. Some key responses are noted below:

Length of business	Over 60% of respondents started their business 10 or more years ago. This suggests that most businesses in Eurobodalla are established long-term enterprises.
Number of employees	Only 6 businesses (2.4%) surveyed employed more than 20 people. A total of 24 businesses (9.8%) employed more than 11 people and 65 businesses (26.4%) employed less than 2 persons.
Business turnover (\$)	Almost 80% of businesses surveyed reported stable or increasing business turnover, a positive indication of a resilient economy.
Business diversity	36% of businesses are diversified, with a mix of local, regional and international customers, compared to 25% locally-focused businesses.

Business intentions	133 businesses (54%) said that they planned to increase in some way in the next two years. 21 businesses (9%) said they would be closing or selling. For those 133 businesses that said they plan to increase, over 100 said they would be increasing their turnover by up to 50%, and 35 said they would be increasing their staff by up to 5 people.
Barriers to business growth	'Government regulations' were the most important perceived barrier, picked by almost 60 respondents. 'Lack of finance' and 'lack of demand' were also identified as growth barriers, each being picked by over 40 respondents.
External influences on business profits	The 'economic climate' was by far the most mentioned external factor impacting on profits, with 169 'yes' responses. 'Government policies' and 'local competition' attracted over 120 responses.

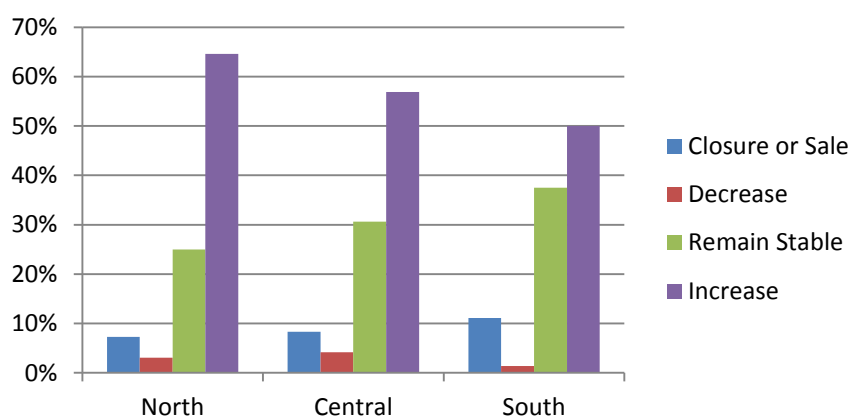
For two of the key questions in the survey, being those relating to the turnover of businesses over the last two years and the intentions of business owners over the next two years, a breakdown of responses in the three settlement areas in Eurobodalla provides some insight into business attitudes across the Shire. It can be seen that there was more growth in businesses over the last two years in the north and central areas of Eurobodalla, while the southern area remained more stable.

Figure 8: Business turnover in the last two years, North, Central and South Eurobodalla



Further, business confidence for growth over the next two years is stronger in the northern and central areas of the Shire, while again more businesses in the southern area expect continued stability.

Figure 9: Business intentions over the next two years, North, Central and South Eurobodalla



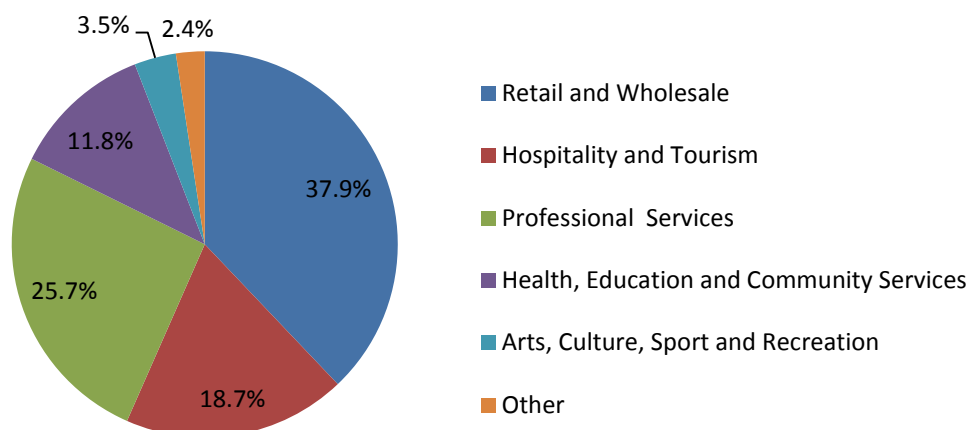
2.4 EMPLOYMENT LAND AUDIT

An Employment Land Audit was conducted during October 2010 to provide a snapshot of the current use of existing employment lands and current vacancy rates. All land zoned commercial or industrial in the Shire was identified and categorised in terms of land use and all vacant sites or premises were recorded. A summary of the employment land audit is provided below.

Commercial Land

A total of 795 businesses were counted in the land use audit in Eurobodalla's commercial areas.

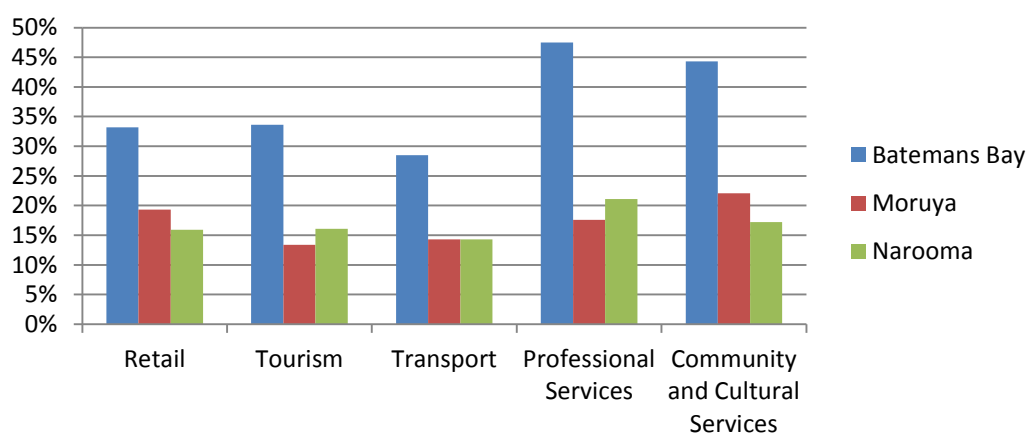
Figure 10: Business types on commercial land, Eurobodalla Shire, 2010



Across all commercial land in Eurobodalla, there is approximately 10% of land and premises currently vacant. All of the three major centres in Eurobodalla are consistent with around a 10% vacancy rate for premises, however Batemans Bay also has a high vacancy rate for land (9.5%), while Moruya and Narooma have less than 3% of land vacant.

Looking at the three major centres in the Eurobodalla, it can be seen that Batemans Bay contains the largest share of all business types, while Moruya and Narooma are generally consistent in their share of commercial businesses.

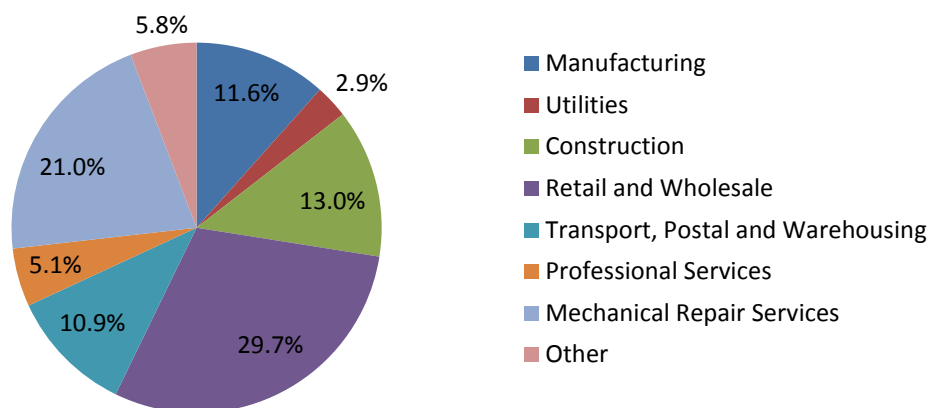
Figure 11: Proportion of commercial business types in the three major centres, 2010



Industrial Land

A total of 276 businesses were counted in the land use audit in Eurobodalla's industrial areas.

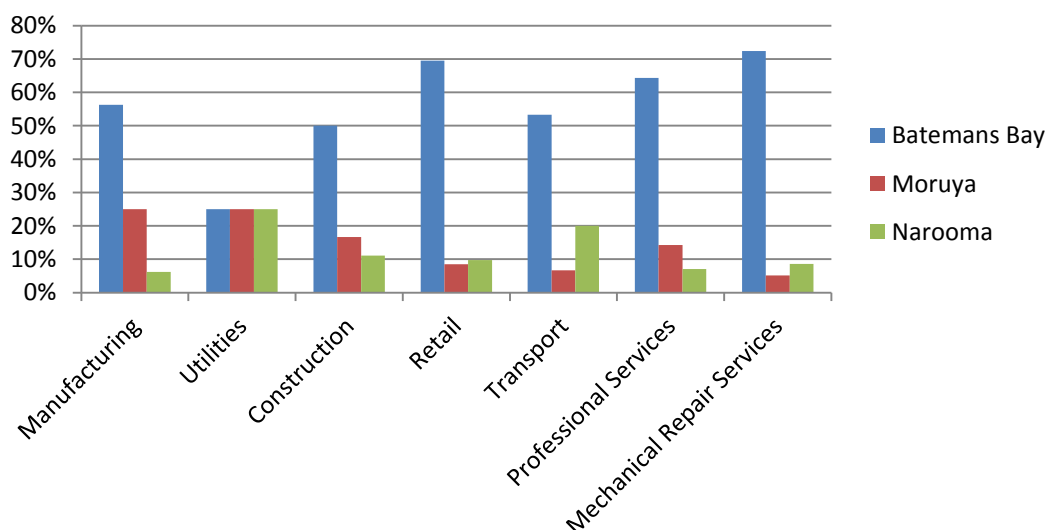
Figure 12: Business types on industrial land, Eurobodalla Shire, 2010



Across all industrial land in Eurobodalla, there is a 20% vacancy rate in terms of land available for development and an approximately 15% vacancy rate for premises. Of the major industrial areas in Eurobodalla, Moruya North has a significant vacancy rate for land (over 40%) and for premises (over 25%).

Looking at the three major industrial areas in the Eurobodalla, it can be seen that Batemans Bay contains the largest share of all business types. Moruya contains a greater proportion of manufacturing businesses compared to Narooma, while Narooma has a greater share of transport businesses.

Figure 13: Proportion of industrial business types in the three major industrial areas, 2010



2.5 EXISTING EMPLOYMENT LAND OPPORTUNITIES

Within existing commercial and industrial employment lands, there are a range of opportunities for new developments and redevelopments. These and other opportunities within existing employment lands in the Eurobodalla Shire need to be considered having regard to all existing and potential environmental and servicing constraints. For example, some employment lands contain vegetation, have watercourses or drainage corridors, or are subject to flooding. Importantly, the Federal Department of Climate Change and Energy Efficiency have reported that between 118 and 140 commercial properties in the Eurobodalla are potentially at risk from sea level rise.

North Eurobodalla

Batemans Bay Town Centre	<ul style="list-style-type: none"> • Occupation of the new Centrelink development on Flora Crescent. • Redevelopment of vacant land along Orient Street, south of Beach Road. • Redevelopment of the Bridge Plaza, between Clyde and North Streets. • Development of the Vesper Street vacant land, subject to provision of a service lane. • Increase in activities with longer operating hours and an increasing in-town residential population.
Batemans Bay Industrial Area	<ul style="list-style-type: none"> • Development on vacant land at end of Cranbrook Avenue. • Potential relocation of some bulky goods development to Surf Beach Employment Lands.
Surf Beach Employment Lands	<ul style="list-style-type: none"> • Development of a bulky goods precinct, along with hi-tech service industries. • Potential development of an emergency services precinct, associated with new ambulance station.
Batemans Bay Marina Proposal	<ul style="list-style-type: none"> • Potential expansion of marina to increase number of berths, provide additional marine service industries and associated commercial and tourist activities.
Hanging Rock	<ul style="list-style-type: none"> • Expansion of the library and educational campuses.
Neighbourhood Centres	<ul style="list-style-type: none"> • Potential redevelopment of the Batehaven Neighbourhood Centre. • Development of a number of vacant neighbourhood centres for local retail and community services, including at Sunshine Bay and Long Beach. • Potential redevelopment of the Malua Bay and Surfside Neighbourhood Centres. • Expansion of commercial development along Charles Street, Mogo.

Central Eurobodalla

Moruya Town Centre	<ul style="list-style-type: none"> • Expansion of the Queen Street Medical Centre. • Increase in activities with longer operating hours.
Moruya North Industrial Estate	<ul style="list-style-type: none"> • Development of the existing vacant lots.
Moruya East Industrial Estate	<ul style="list-style-type: none"> • Development of an approved 10 lot subdivision for industrial units.
Yarragee Industrial Estate	<ul style="list-style-type: none"> • Redevelopment of existing underutilised lots.

Moruya Airport	<ul style="list-style-type: none"> • Review and implementation of the airport concept plan.
Broulee	<ul style="list-style-type: none"> • Development of the vacant commercial land on Train Street. • Increase in tourist facilities within commercial lands along Coronation Drive and at the Broulee Surf Club.

South Eurobodalla

Narooma Town Centre	<ul style="list-style-type: none"> • Increase in tourist related developments, including tourist accommodation. • Potential for mixed use commercial and residential development within and adjacent to commercial areas. • Increase in activities with longer operating hours and an increasing in-town residential population.
Narooma Industrial Area	<ul style="list-style-type: none"> • Development of small expansion area along southern side of Glasshouse Rocks Road.
Dalmeny Industrial Area	<ul style="list-style-type: none"> • Potential redevelopment of small expansion area to the east of the existing employment area.
Bodalla	<ul style="list-style-type: none"> • Expansion of tourist and convenience shops, services and food and drink premises in the village. • Potential redevelopment of the former Bodalla Big Cheese site. • Improved utilisation of existing industrial land on Potato Point Road.
Brou Tip	<ul style="list-style-type: none"> • Potential expansion of green waste recycling and additional of food waste recycling.

2.6 EMPLOYMENT LAND SUPPLY AND DEMAND ANALYSIS

Modelling of the demand for future employment land on the basis of anticipated population growth and the current job mix has defined that a total of 104ha of employment land is required by 2030 to meet the job target identified in the South Coast Regional Strategy. This employment land covers commercial (16ha), industrial (30ha), education (38ha) and health (20ha) land. This Strategy focuses only on land for commercial and industrial development, as the identification of land for schools and health care facilities will be determined by the relevant government agencies in accordance with their own forward planning programs.

Further analysis of the commercial and industrial employment land demand was then undertaken, taking into account existing vacant land, assumptions of redevelopment potential, the need to plan for an oversupply of employment land and the potential reduction in developable areas due to environmental or servicing constraints, resulted in the need for 14.7ha of new commercial land and 44 ha of new industrial land in the Eurobodalla by 2030.

Table 1: Estimated Employment Land Area required in Eurobodalla by 2030

Job Category	Job Target	Base Land Area Required (ha)	Oversupply (Area x 2 or 3)	Less Existing Vacant Land (ha)	Less use of vacant premises and redevelopment	Total Land Area Required (ha)
White collar/ clerical	1014	3	6			
Retail	1499	13	26			
Total Commercial	2513	16	32	11ha	30%	14.7
Warehousing/ storage	230	17	51			
Manufacturing (incl. hi tech)	282	4	12			
Construction	335	8	24			
Repairs	127	1	3			
Total Industrial	974	30	90	35ha	20%	44
Schools	381	38	n/a	n/a	n/a	
Health care	595	20	n/a	n/a	n/a	
Total Community	976	58	58	n/a	n/a	58
TOTAL	4463	104	180			116.7

An estimate of the job capacity of existing and potential future employment lands identifies a potential shortfall of commercial land and a potential excess of industrial land by 2030. However, as demonstrated by the Employment Land Audit, a number of retail jobs (bulky goods retail, wholesale retail) are provided in industrial areas, so an undersupply of jobs on commercial land and an oversupply on industrial land is not unexpected or inappropriate.

Table 2: Comparison between Job Target and Estimated Job Capacity, Eurobodalla, 2030

Job Type	Job Target	Job Capacity
Commercial	2513	2279
Industrial	974	1510
Home-based	1736	1736
Health	595	595
Education	381	381
Total	6199	6501

Based on the location of existing vacant and proposed new employment lands, it can be seen that the bulk of new commercial jobs are targeted for the northern precinct, in and around Batemans Bay, while the distribution of industrial jobs across the Shire is more evenly spread amongst the three regions.

Table 3: Location of new jobs, Eurobodalla, 2030

Location	Commercial Jobs	Industrial Jobs
North	47.1%	30.6%
Central	23.7%	37.8%
South	29.2%	31.6%

2.7 KEY IMPLICATIONS

Economic and Employment Profile

- Continuing high dependency levels resulting from an ageing population and a small workforce can lead to labour force shortages and service deficiencies.
- An essential element of addressing both unemployment and labour force dependency, particularly in the short term, will be increasing the skills of existing unemployed persons in appropriate occupations and industries.
- Education providers need to be aware of and manage the consequences of training programs on the supply of employment across the economy.
- To address the loss of skills resulting from the ageing of the population, Eurobodalla needs to encourage young professionals to stay and attract more to move to the area. In addition, programs to retain older persons within the workforce for a longer period will assist in minimising the loss of skills.
- Across those industries that service the current population and the tourism market, there is relative diversity, reflecting the isolation of the Shire from surrounding areas. However, diversity beyond the service economy is low and it will be necessary to increase overall industry diversity in the future.
- A wide range of measures can facilitate business growth, including improved tourism and marketing, release of more land, better facilities, lower regulation, improved skills and access to finance.

Employment Land Audit

- There is capacity within existing employment areas for new commercial and industrial development and for growth in existing businesses.
- Economic development strategies should be targeted to areas of high vacancy rates, such as the Moruya North industrial area, to firstly identify any specific barriers to the development of those lands and then to assist in overcoming those barriers.
- There is a need to promote industrial areas for industrial activities and direct bulky goods and wholesale retail businesses to appropriate alternative locations.

Employment Land Supply and Demand Analysis

Strategies for North Eurobodalla

- Reinforce the regional centre status of Batemans Bay;
- Facilitate the redevelopment of vacant land in Batemans Bay in a timely and economic manner;
- Encourage new industrial development to locate within the Batemans Bay industrial area;
- Provide for alternative locations for bulky goods retailing, such as the Surf Beach Employment Lands; and
- Ensure development in neighbourhood centres respects the existing centres hierarchy.

Strategies for Central Eurobodalla

- Attract major new industrial developments to industrial land in the vicinity of Moruya;
- Redevelopment of the Moruya Airport will allow for an aviation-based commercial and industrial cluster to develop and improve air-transport logistics to facilitate growth in a wide range of businesses across the Shire; and

- Capitalise on the significant heritage and character aspects of the Moruya Town centre and reinforce the existing administrative, rural support and cultural functions and activities.

Strategies for South Eurobodalla

- Focus on the natural assets of the region and the opportunities for tourism and environmentally-based businesses;
- Identify opportunities for rural-based industries and 'green' technologies, such as solar or wind farming; and
- Facilitate opportunities for more professional services and tourist accommodation between the three commercial centres in Narooma.

CHAPTER 3: STRATEGIC DIRECTIONS

3.1 ECONOMIC DEVELOPMENT STRATEGIES

Eurobodalla Shire Council adopted an Economic Development Strategy in 2009. This Economic Development and Employment Lands Strategy is not intended to replace the current Economic Development Strategy, but has considered ways to support the existing strategy.

Narrow marketing focus to strategic advantages and target businesses that can profit from those advantages

Eurobodalla has a number of strategic advantages including:

- Easy access by road and air transport to Sydney and Canberra;
- Excellent coastal and rural lifestyle opportunities;
- Significant areas of National Park and State Forest;
- Productive agricultural lands and coastal areas;
- A rich and diverse economic history relating particularly to mining, timber and agriculture;
- A regional service and administrative centre role;
- Positive trends in population growth and diversity;
- A community with a strong sense of identity, community spirit and a desire for sustainable growth; and
- Popularity as a tourist region.

Marketing the Eurobodalla to attract new industry and business should focus on these and other strategic advantages.

Link economic development actions to educational, social and environmental infrastructure

Economic development actions supporting new industry opportunities should have regard to the availability of relevant skills and the training capacity of educational institutions to provide the skills. Actions relating to or associated with labour market planning, such as the retention of skilled young people in the local area or the retention of older persons in the workforce, should have regard to the availability of support services. Being aware of these linkages will identify the best use of existing or planned educational, social and environmental infrastructure and any improvements that can be made to further the aims of the economic development actions.

Work closely with businesses in knowledge intensive service sector to help that sector expand

A strong focus on working with businesses in the knowledge intensive service sector, such as finance, information technology, design and marketing businesses, would have benefits across the entire economy, as these businesses provide services that will assist other businesses to become more efficient, innovative and productive. Businesses in this sector also generally provide higher wages and contribute to the increase of skills across the workforce.

Actively facilitate innovation across the Shire's economy

The capacity to innovate is a key driver of economic growth. A number of actions in Council's Economic Development Strategy relate to the enablers of innovation, particularly in relation to the development of business networks, the provision of information to businesses and the improvement of local skills. These actions should be continued, with the goal of expanding innovation capacity across the economy.

Innovation will facilitate economic growth to a level over and above that generated by population growth. Reliance on population growth alone will not deliver the level of employment growth required to achieve a truly prosperous economy.

3.2 EMPLOYMENT LAND PLANNING PRINCIPLES

In reviewing the principles outlined in the State Government's Settlement Planning Guidelines, and having regard to the outcomes of the investigations informing this Strategy, the following eight planning principles for employment land development in the Eurobodalla have emerged.

- Principle No. 1:*** That all appropriate efforts should be made to facilitate the development of existing vacant commercial or industrial land, prior to the release of any further significant areas of commercial or industrial land to the market.
- Principle No. 2:*** That planning for employment land supply into the long term should be commenced within the next 5 years and that the release of land should be undertaken ahead of the market but in an orderly and efficient manner to avoid market saturation.
- Principle No. 3:*** That the needs for provision of employment lands be balanced with the need to protect important environmental areas, so that development outcomes can satisfy both needs as much as is practicable in the circumstances of each case.
- Principle No. 4:*** That land uses and subdivision controls for employment lands be designed to facilitate the maximisation of employment generating land uses.
- Principle No. 5:*** That future employment lands be provided in accessible locations to service the three distinct population centres in the north, central and southern parts of the Shire and that transport connections between the centres be improved.
- Principle No. 6:*** That future employment lands be determined having regard to the need to increase economic and employment diversity, by basing employment land decisions on known or anticipated business location needs and the potential for business clusters to establish and grow.
- Principle No. 7:*** That the existing and preferred future centres hierarchy be protected through appropriate zoning and development controls and that proposed developments that are compatible with the hierarchy be facilitated and supported.
- Principle No. 8:*** That centres remain compact in form and land use, particularly for core retail and commercial activities, with opportunities for non-core retail and commercial development to be provided in appropriate locations adjacent to centres.

3.3 EMPLOYMENT LAND LOCATIONAL CRITERIA

While the above planning principles apply to all employment developments, it is necessary to specifically define the criteria by which new employment lands are selected. Application of the following five criteria should ensure that the most suitable lands are identified as future employment lands.

- Criteria No. 1:** Proximity to existing populations and infrastructure.
- Criteria No. 2:** Accessibility and proximity to the Princes Highway.
- Criteria No. 3:** Minimal environmental constraints.
- Criteria No. 4:** Minimal impact on adjoining properties.
- Criteria No. 5:** Expansion opportunity.
- Criteria No. 6:** Avoidance of out-of centre or strip employment outcomes.

3.4 POTENTIAL FUTURE EMPLOYMENT LANDS

Based on the employment land demand analysis in Chapter 2 and the employment land planning principles and locational criteria identified above, eight investigation areas have been identified for further review as to their suitability for future employment lands. Four of the areas are identified for future commercial development and four for future industrial development. These areas are in addition to the Surf Beach Employment Land which has already been identified and is currently the subject of planning proposals.

For each investigation area, a desktop analysis has been undertaken to determine potential suitability for future development based on location, site characteristics, site constraints and accessibility. A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis has been conducted for each area along with a site analysis. Each area has been categorised as high, medium or low priority for development in the short (1-5 years), medium (5-10 years) or long (10-20 years) term. This chapter summarises the key issues for each area, grouped into the three settlement precincts in Eurobodalla.

The identified potential future commercial areas will only achieve 74.7% of the land area required to meet the demand for new commercial employment land. However, as shown in the Employment Land Audit, a number of retail jobs are provided in industrial areas, principally through bulky goods retail development and wholesale retail premises. The Audit found that 30% of industrial lots were occupied by a retail or wholesale business.

The identified potential future industrial areas will only achieve 68.4% of the land area required to meet the demand for new industrial employment land. However, as this result is based on relatively low assumed development rates in the two larger areas, there may be capacity within these identified employment lands to meet more of the anticipated demand.

North Eurobodalla

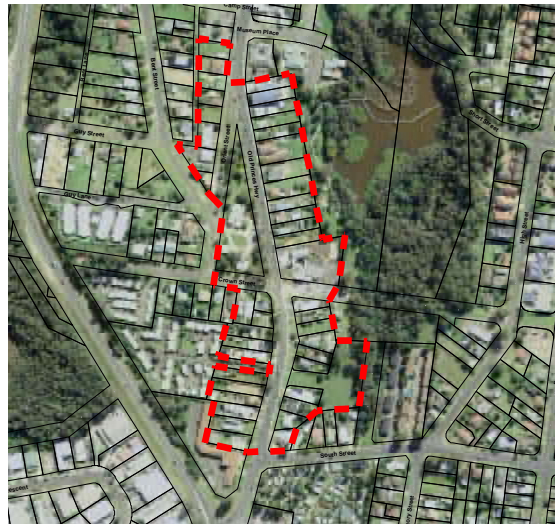
North Eurobodalla Area No. 1: Beach Road, Batemans Bay

- Potential for a mix of commercial and high density residential development.
- Difficult site constraints including flooding, the impacts of sea level rise, topography, access and heritage.
- Key gateway site to Batemans Bay, with potential for positive urban design and public realm outcomes.
- Likely development viability, given potentially significant development costs.
- Any development of the site would potentially need to accommodate, in some form, existing activities on the site, including the Batemans Bay Visitors Centre, parking and access roads, public open space, a small cemetery and the residential flat building at 2 Bent Street.
- Relationships of the land to surrounding land and development, with improved vehicular and pedestrian access, must be considered.
- High priority area for development in the short to medium term, subject to a master planning exercise to determine the most appropriate future land uses, development footprint and access arrangements for the area, having specific regard to the impacts of sea level rise on the site.



North Eurobodalla Area No. 2: Old Princes Highway, Batemans Bay

- The Old Princes Hwy is an important alternate route to the Princes Hwy for local traffic and to connect the commercial and industrial areas of Batemans Bay.
- With heavy traffic volumes and the conversion of some premises to a commercial use, it is not suitable in the long term for continued use as single residential dwellings.
- There remains many single dwellings and a number of vacant sites in this area, providing significant potential for additional job creation.
- Need to consider traffic movements, road and pedestrian safety and car parking.
- Land uses should include a mix of town centre related commercial (eg. professional offices) and higher density residential development. Opportunity for conversion of existing dwellings to appropriate edge-of centre commercial development.
- Opportunity also exists for some small-scale cottage industries.
- High priority area for development in the short to medium term, subject to a master planning exercise to explore opportunities for road network and car parking improvements in the area.



North Eurobodalla Area No. 3: James Street and Tomakin Road, Mogo

- Immediately adjacent to the Mogo commercial centre.
- Mogo currently has a defined area for commercial expansion along Charles Street, but lacks a defined industrial area.
- The land is relatively flat and partly cleared, with excellent access opportunities.
- Potential for small-scale light industries, and given Mogo's existing character, may be suitable for boutique art and craft industries.
- The land fronting James Street could be a future expansion of the commercial part of the town, or it could also be identified for small-scale light industrial activities.
- Opportunities to expand the services offered at Mogo beyond the tourist market should also be explored.
- Development of both of these sites would ensure the town of Mogo remains compact and walkable, subject to addressing potential pedestrian and traffic conflicts on Tomakin Road.
- Medium priority area for development in the medium term, subject to detailed investigations to determine the suitability of the land for employment generating development, access arrangements and the timing of delivery of employment generating developments.
- That consideration be given to undertaking a vision exercise with the Mogo community to determine the type of employment generating developments appropriate for the town.



Central Eurobodalla

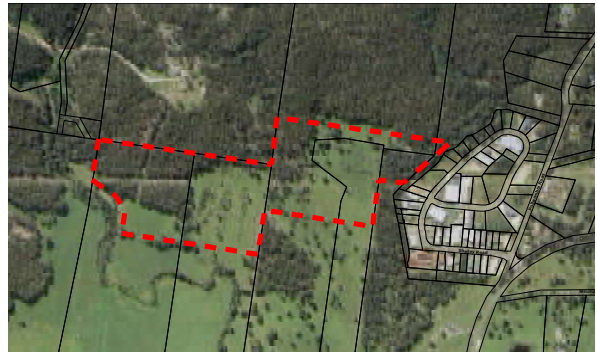
Central Eurobodalla Area No. 1: Campbell and Page Streets, Moruya

- The subject area along Campbell and Page Streets is to the western and southern fringes of the existing commercial core, within easy walking distance, by virtue of the traditional grid street pattern.
- Historically, the subject area has contained a mix of civic, commercial, community and residential development, and new commercial development through conversion of dwellings to professional offices has occurred. Given the significant heritage of the subject area, it is appropriate that this mix of uses continue into the future.
- Opportunity also exists here for some small-scale cottage industries.
- The protection of heritage significance and the provision of car parking will be important issues in the continued conversion of dwellings in this area to commercial or community activities.
- High priority area for development in the short to medium term, subject to a master planning exercise to determine the most appropriate future land uses and potential development footprints for the area.



Central Eurobodalla Area No. 2: Moruya North Industrial Area Expansion

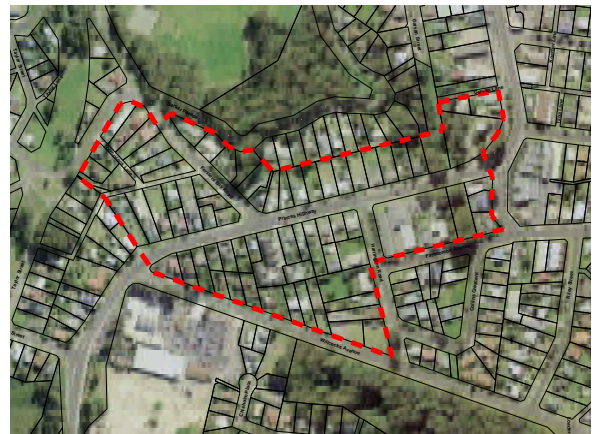
- The subject land has already been identified as a potential future employment area and the process of rezoning the land for industrial development is underway. However, the area previously identified for possible rezoning has been found to be larger than the potential developable area of the land.
- The larger area previously defined is constrained by the Moruya River floodplain, watercourses and vegetation that constitutes an endangered ecological community. Access to the land is also constrained by vegetation and watercourses. The smaller area defined in this Strategy remains potentially suitable for development as employment lands, however detailed studies of the land are yet to be done.
- High priority area for development in the medium term, subject to detailed investigations to determine the extent of land suitable for employment generating development, the type of employment generating developments appropriate for the land, access arrangements and the costs and timing of delivery of employment generating developments.
- Feasibility studies of the area should also explore the feasibility of alternative expansion opportunities for the existing industrial estate.



South Eurobodalla

South Eurobodalla Area No. 1: Princes Highway, Narooma (between Narooma Hill and Narooma Plaza)

- Any development in this area should not be in the form of a strip of retail or commercial development, but should include a mix of town centre related commercial (eg. professional offices) and higher density residential development or tourist accommodation.
- There is potential in this location for some small-scale cottage industries.
- Provision of car parking will be an important issue in the continued conversion of dwellings in this area to commercial or community activities.
- High priority area for development in the short to medium term, subject to a master planning exercise to determine the most appropriate future land uses and potential development footprints for the area.



South Eurobodalla Area No. 2: Dalmeny Industrial Area Expansion

- The subject land is the most logical area for expansion of the Dalmeny industrial area, notwithstanding its current inclusion within the Dampier State Forest. Unlocking this land will require negotiations with Forests NSW into the possibility of a land swap arrangement or some other mechanism to remove the land from the State Forest estate.
- Medium priority area for development in the medium term, subject to negotiations with Forests NSW and detailed investigations (in particular flora and fauna studies) to determine the extent of land suitable for employment generating development, the type of employment generating developments appropriate for the land and the costs and timing of delivery of employment generating developments.



South Eurobodalla Area No. 3: Bodalla Industrial Area Expansion

- The land is adjacent to a small industrial precinct on Potato Point Road. The Bodalla Primary School and Bowling Club are also adjacent to the site.
- The site appears relatively unconstrained and the size of the area provides for an expanded employment area for a large number of lots and the opportunity for a mix of lot sizes.
- The relatively flat land suggests suitability for large floor plate industrial developments.
- The location adjacent to a village with a relatively small local population may limit demand for an expanded employment area.
- However, given the site is close to the Princes Hwy, yet not with direct frontage, industrial development that requires good access, but does not require excellent exposure may be suitable. Rural support industries may find this a suitable location.
- An appropriate staging program with development timeframes will need to be developed in order to ensure existing land owners and potential developers have some certainty over the future of the land.
- Low priority area for development in the medium to long term, subject to detailed investigations to determine the extent of land suitable for employment generating development, the type of employment generating developments appropriate for the land, access arrangements and the costs and timing of delivery of employment generating developments.
- Buffers to protect sensitive adjoining land uses must be provided as part of any development of the land.



3.5 ASSESSMENT OF POTENTIAL EMPLOYMENT LANDS

All of the potential future employment lands identified in the Strategy have been assessed having regard to the five employment land locational criteria. The following table presents the findings of this assessment.

Employment Land	<i>Criteria No. 1:</i> Proximity to existing populations and infrastructure.	<i>Criteria No. 2:</i> Accessibility and proximity to the Princes Highway.	<i>Criteria No. 3:</i> Minimal environmental constraints.	<i>Criteria No. 4:</i> Minimal impact on adjoining properties.	<i>Criteria No. 5:</i> Expansion opportunity.	<i>Criteria No. 6:</i> Avoidance of out-of centre or strip employment outcomes.
North Eurobodalla						
Beach Road, Batemans Bay						
Old Princes Hwy, Batemans Bay						
Tomakin Rd and James St, Mogo						
Central Eurobodalla						
Campbell St and Page St, Moruya						
Moruya North Industrial Area						
South Eurobodalla						
Princes Hwy, Narooma						
Dalmeny Industrial Area						
Bodalla Industrial Area						

	High Suitability
	Moderate Suitability / Requires further detailed studies
	Low Suitability

3.6 POTENTIAL FUTURE EMPLOYMENT LANDS –PRIORITY AND TIMING

In the above discussion on potential future employment lands, reference is made to high, medium and low priorities and short, medium and long terms. In this Strategy, these terms have the following meanings:

High Priority	Detailed planning and further investigations should be commenced within 2 years.
Medium Priority	Detailed planning and further investigations should not be commenced within 4 years.
Low Priority	Detailed planning and further investigations should not be commenced within 7 years.
Short Term	Delivery of employment generating development should occur within 5 years.
Medium Term	Delivery of employment generating development should not occur for 5 – 10 years.
Long Term	Delivery of employment generating development should not occur for 10 – 20 years.

Where reference is made to the **longer term**, this means development should not occur within 20 years.

Notwithstanding the priority and timing recommendations contained in this Strategy, the actual delivery of new employment lands will be dependent upon a range of factors, including the availability of land for development, infrastructure capacities and the timing of required upgrades, the demand for new employment lands over time and other market forces.

This Strategy should be reviewed every five years in conjunction with the Eurobodalla Local Environmental Plan review to ensure employment land planning is flexible to accommodate changing circumstances. The Strategy should also be accompanied by an Action Plan that is reviewed on an annual basis allowing for greater flexibility.

3.7 STRATEGY RECOMMENDATIONS

Economic Development

1. That Council's Economic Development Strategy be supported by:
 - Narrowing the marketing of Eurobodalla to focus on the strategic advantages of the area;
 - Identifying businesses or industries that can profit from Eurobodalla's strategic advantages and undertaking some targeted business attraction programs;
 - Facilitating the establishment or growth of industry clusters in the Shire;
 - Lobbying for the early roll-out of the National Broadband Network in the Eurobodalla;
 - Establishing a working group of businesses in the professional services sector to work towards expansion of that sector;
 - Continuing the close collaboration between Council and education and employment providers with a focus on skills development and labour market planning;
 - Continuing to improve accessibility to relevant information in order to assist businesses to respond to global and local market trends;
 - Actions that will facilitate a more diverse economy and more diversified businesses, such as targeted business attraction and growth plans; and

- Continuing to build business networks, with a focus on building and enhancing the drivers and enablers of innovation.

Employment Lands

2. That the sites identified within this Strategy for potential new employment lands be further investigated in the order of priority defined in this Strategy.
3. That more detailed planning investigations into potential future employment lands be undertaken with a view to achieving a balance between the desired outcomes of economic growth and environmental protection.
4. That the existing centres hierarchy as described in the Eurobodalla Settlement Strategy be retained and reinforced through all economic development and planning actions.
5. That further work be undertaken to establish a hierarchy of industrial lands in the Shire to outline appropriate roles and functions of each industrial area.
6. That, in undertaking strategic planning within the Eurobodalla (including land use planning, social planning, environmental planning and infrastructure planning), the global and local economic trends and drivers are recognised, understood and taken into consideration.
7. That development of existing vacant employment land be facilitated as a priority, in advance of the delivery of any new employment lands. Notwithstanding this priority, opportunities for edge-of centre commercial activities, such as offices within existing dwellings, in the areas identified within this study adjacent to the Batemans Bay, Moruya and Narooma centres, should continue to be facilitated.
8. That areas with high vacancy rates, such as the Moruya North industrial area, be investigated in more detail to identify any specific barriers to development and to determine any targeted strategies that can be implemented to assist in overcoming those barriers.
9. That more detailed planning investigations into potential future employment lands address the needs and issues relevant to each of the three broad settlement areas within the Eurobodalla.
10. That more detailed planning investigations into potential future employment lands have regard to the employment lands planning principles and locational criteria identified in this Strategy.

Strategy Review and Implementation

11. That an Action Plan be developed and reviewed annually to facilitate implementation of the Strategy.
12. That the Strategy be reviewed every five years in conjunction with the preparation of reviews of the Eurobodalla Local Environmental Plan.

Employment Lands Summary

Potential New Employment Lands – North Eurobodalla

Beach Road, Batemans Bay	High Priority	<ul style="list-style-type: none"> • Delivery in the short to medium term, subject to the undertaking of a master planning exercise to determine the most appropriate future land uses, development footprint and access arrangements.
Old Princes Highway, Batemans Bay	High Priority	<ul style="list-style-type: none"> • Delivery in the short to medium term, generally in the form of the conversion of dwellings to appropriate edge-of centre commercial development, and subject to a master planning exercise with regards to potential road changes and redevelopment opportunities. • Ensure the appropriate provision of car parking in development proposals.
Tomakin Road and James Street, Mogo	Medium Priority	<ul style="list-style-type: none"> • Delivery in the medium term, subject to detailed investigations to determine the suitability of the land for employment generating development, access arrangements and the timing of delivery of employment generating developments. • Consideration be given to undertaking a vision exercise with the Mogo community to determine the type of employment generating developments appropriate for the town.

Potential New Employment Lands – Central Eurobodalla

Campbell and Page Streets, Moruya	High Priority	<ul style="list-style-type: none"> • Delivery in the short to medium term, generally in the form of the conversion of dwellings to appropriate edge-of centre commercial development, subject to a master planning exercise to determine the most appropriate future land uses and redevelopment opportunities. • Ensure the protection of heritage and provision of car parking in development proposals.
Moruya North Industrial Estate Expansion	High Priority	<ul style="list-style-type: none"> • Delivery in the medium term, subject to detailed investigations to determine the extent of land suitable for employment generating development, the type of employment generating developments appropriate for the land, access arrangements and the costs and timing of delivery of employment generating developments. • Feasibility studies of the areas should also explore the feasibility of alternative expansion opportunities for the existing industrial estate.

Potential New Employment Lands – South Eurobodalla

Princes Highway, Narooma	High Priority	<ul style="list-style-type: none"> • Delivery in the short to medium term, generally in the form of the conversion of dwellings to appropriate edge-of centre commercial development, subject to a master planning exercise to determine the most appropriate future land uses and redevelopment opportunities. • Ensure the appropriate provision of car parking in development proposals.
Dalmeny Industrial Area Expansion	Medium Priority	<ul style="list-style-type: none"> • Delivery in the medium term, subject to the outcome of negotiations between Council and Forests NSW with regard to the potential removal of the subject land from the Dampier State Forest and detailed investigations to determine the extent of land suitable for employment generating development, the type of employment generating developments appropriate for the land and the costs and timing of delivery of employment generating developments.
Bodalla Industrial Area Expansion	Low Priority	<ul style="list-style-type: none"> • Delivery in the medium to long term, subject to detailed investigations to determine the extent of land suitable for employment generating development, the type of employment generating developments appropriate for the land, access arrangements and the costs and timing of delivery of employment generating developments. • Buffers to protect sensitive adjoining land uses must be provided as part of any development of the land.

