



Regional  
Development  
*Australia*

ILLAWARRA

# Greater Cities Partnership

ILLAWARRA - SHOALHAVEN

# SUPPORT FOR A CITY PARTNERSHIP

We are proud to endorse and support a City Partnership for the Illawarra-Shoalhaven.

Delivery of a transformative inter-regional City Partnership enables growth for the Illawarra-Shoalhaven economy and Greater Sydney as part of the group of Six Cities. It will expand trade linkages between regional NSW and Western Sydney to the Port of Port Kembla, which is NSW's port of growth.

The range of projects proposed in this Illawarra-Shoalhaven City Partnership will create key precincts, linked to each other and NSW. They will generate over 12,000 jobs and billions in revenue for the local and NSW economies.

RDA Illawarra is a neutral broker that has worked collaboratively with the Illawarra-Shoalhaven Joint Organisation (ISJO) and other stakeholders in local government, university, industry peak bodies and the private sector to develop this City Partnership. The result is a unified, agreed range of transformative activities that, when implemented as a City Partnership with the NSW and Commonwealth governments, will catalyse our economic development.

This Illawarra-Shoalhaven City Partnership aligns the planning and investment required to accelerate growth, create jobs and drive economic reforms. Developing the projects with Illawarra-Shoalhaven grass-roots stakeholders provides State and Commonwealth governments a solid regional platform on which to secure the future prosperity and liveability of our Cities in the South and South West of NSW.



**Eddy De Gabriele**  
Chair, RDA-Illawarra



**Gordon Bradbery AM**  
Chair, ISJO

# CITY PARTNERSHIP CONTEXT



Illawarra-Shoalhaven is the second major trade gateway for Greater Sydney and key to the future growth of the Six City Megaregion.

Additional jobs and economic growth within our region rely on enhanced connectivity with Western Sydney and regional NSW, as well as investment in manufacturing; service industries; renewable energy; and development of our visitor economy.

The Port of Port Kembla is an asset of national significance, critical to the future economic growth and development of NSW. Port Kembla is currently underutilised and is deemed by NSW Ports as the state's second container port and a 'NSW port of growth'.

Freight in Greater Sydney is set to double in the next 40 years, most of that growth is in the west and south-west of Sydney. The freight and passenger rail corridor developed through the City Partnership investment in the South-West Illawarra Rail Link (SWIRL) will reduce freight on the South Coast rail line and enable increased direct passenger movements to and from Western and Greater Sydney, which is a significant daily commuter corridor for over 26,000 people.

Population growth in Southwest Sydney will see an additional 70,000+ households within 50 km of Wollongong by 2040. Enhancements to major road corridors, such as duplication of Picton Road; access for residents of new housing developments from the

southern extension of the M1 and an improved public transport network that delivers a true 30-Minute City are key links in this City Partnership.

Job creation in Advanced Manufacturing is targeted through the expansion of the Precinct at HMAS Albatross and South Nowra.

Better road and rail access resulting from the Illawarra-Shoalhaven City Partnership will attract investment in manufacturing, renewable energy, ICT and tourism along the entire South Coast.

The City Partnership for the Illawarra-Shoalhaven is based on the development of key precincts at Port Kembla (manufacturing, trade and renewable energy); Wollongong (visitor economy); Shellharbour/Kiama (marine economy) and Nowra (advanced manufacturing). These precincts cannot thrive in isolation, and their connectivity with each other – and to the rest of NSW – is critical to their success.



# City Partnership Precincts



## Illawarra Sports & Entertainment Precinct

\$350M for Design & Delivery

## Port Kembla Industrial Precinct

\$25M for Strategic Master Plan

## Marine Tourism Precinct

\$70M for Design & Delivery

## Advanced Manufacturing Precinct

\$42M for Delivery  
(\$12M - Albatross;  
\$30M - South Nowra)

# City Partnership Connections



## Picton Rd Duplication

\$1,300M Planning, Design & Delivery

## South-West Illawarra Rail Link (SWIRL)

\$30M for Business Case

## Marine Tourism Highway (Blue Highway)

\$52M for Planning & Delivery

## 30-Minute Public Transport

\$10M Planning & Implementation

## M1 Southern Access

\$30M for delivery

# City Partnership Precinct Details



# Port Kembla Industrial Precinct



The Port of Port Kembla is an economic asset of national significance, critical to the future economic growth and development of NSW. Its deep-water harbour is surrounded by large parcels of employment-generating industrial land, and currently vacant employment land gives Port Kembla significant capacity for future growth.

The Port is NSW's largest motor vehicle import hub and bulk grain export interface, and has growing dry bulk, bulk liquid and general cargoes.

Significant developments are underway in the surrounding industrial precinct, including an LNG import terminal; a natural gas/hydrogen co-fired power station; renewable (wind) energy projects and manufacturing as well as the potential for Defence infrastructure.

Whilst several key landowners are developing plans for their own available land, holistic strategic master planning of the Port Industrial Precinct is needed to ensure long-term benefits are realised over the next 40 years.

The potential inclusion of a container port and Defence infrastructure at Port Kembla makes the development of a long-term plan even more important.

Funding for a Forty-Year Strategic Master Plan for the Port Kembla Industrial Precinct, which includes surrounding industrial lands

**2023** - Business Case and Strategic Master Plan funded  
**2026** - Business Case and Strategic Master Plan delivered

- Certainty of available industrial land area
- Deliver highest and best use of available land over a 40-year planning horizon
- Encourage private investment in emerging technology and renewable energy
- Supports the development of road and rail freight links to Western Sydney

**\$25M for wholistic Strategic Master Plan delivery**

# Advanced Manufacturing Precincts



HMAS Albatross and HMAS Creswell are identified as 'major defence bases' in the NSW Government's Defence and Industry Strategy (2017), which describes the rotary wing expertise in Shoalhaven as a regional strength that should be expanded.

Illawarra-Shoalhaven is home to several major multi-national defence companies employing a highly skilled workforce of over 1,900 people delivering over \$500 million in annual regional economic contribution.

Expansion of the Albatross Aviation Technology Precinct (AATP) – adjoining HMAS Albatross – and development of South Nowra's Industrial Lands (SNIL) will deliver further expansion in the advanced manufacturing sector, which is a key activity focus area.

The Illawarra region has a long history of manufacturing, based on steel and BlueScope's R&D and strong future capital investment pipeline. There are significant opportunities across both the Illawarra and Shoalhaven for growth of Advanced Manufacturing, including the Renewable Energy Zone and Hydrogen developments.

Intra-regional linkages between Illawarra's potential naval base at Port Kembla and Shoalhaven Defence industries are developing, along with the opportunity to grow STEM jobs.

- Expansion of the Albatross Aviation Technology Park to stages 5 & 6
- Develop nine new lots for aviation industry, seven with access to taxiway
- Infrastructure (roads, drainage, water, sewer and electricity) for South Nowra Industrial Lands.

**2023** - Stage 5 of the AATP under construction  
**2025** - Stage 5 employment progressing  
 - Infrastructure funding for SNIL secured  
**2026** - Stage 6 of the AATP under construction  
**2027** - SNIL site infrastructure complete.

- BCR of 15.1 (10 years)
- 150 FTE direct jobs, 451 indirect FTE jobs +10 FTE jobs during construction
- Impact on GRP of \$136.5M/a
- Introduces over 700 higher order STEM jobs to Illawarra-Shoalhaven by 2026
- Potential for 1,000+ jobs

**\$42M (\$12M – AATP, \$30M SNIL)**

Background

Key Deliverables

Milestones

Benefits

Commitment

# City Partnership Precinct Details





# Marine Tourism Precinct (Kiama-Shellharbour)



The recently opened Shellharbour Marina provides the foundation of a world-class Marine Tourism Precinct for the South Coast.

The intent is to incorporate an upgraded Kiama Harbour to create the hub of this Marine Tourism Precinct, which will form a key part of the South Coast Marine Tourism Strategy implementation to deliver a 'Blue Highway' from Wollongong-Shellharbour-Kiama-Nowra-Jervis Bay-Ulladulla and on to the Sapphire Coast.

A rejuvenated Kiama Harbourfront has been envisioned in the 'Kiama Harbour Revitalisation Action Plan' (2021) that provides a foundation for the creation of a Master Plan and Business Case. Enhancements to Kiama Harbour will augment improvements planned in Wollongong (Belmore Basin) and for the proposed Nowra Riverfront development.

The combination of assets at Wollongong, Shellharbour, Kiama and Nowra will form the hubs for the Marine Tourism strategy (the Blue Highway).

Develop a masterplan and business case for the redevelopment of Kiama Harbour

Upgrade to the Kiama foreshore and harbour

Development of a strategy for the development of commercial and recreational activities at Shellharbour Marina and Kiama Harbour

- 2024** - Funding secured for business case and planning
- 2026** - Masterplan and business case for Kiama Harbour redevelopment delivered
- 2028** - Upgrade to the Kiama harbour precinct complete

- Contributes to increase of \$1 billion in marine tourism-related spending
- Growth in yield from visitor trips
- Visitor dispersal and reduced seasonality of tourism
- Increased visitor numbers and participation in marine and land-based activities

**\$70M – Planning and business case**

# Illawarra Sports & Entertainment Precinct



The Illawarra Sports & Entertainment Precinct (ISEP) includes the NSW Government owned assets of the WIN Entertainment Centre and WIN Stadium, as well as Lang Park, the foreshore area and commercial opportunities nearby.

Reports in support of the detail planning and redevelopment of this key precinct have been recently delivered by Wollongong City Council and Business Illawarra. Both reports make the case that for the Illawarra to realise its potential as a major regional conferencing and event destination, a modern purpose-built conference facility and stadium will be required alongside new hotel stock and appropriate community and commercial developments.

The reports put forward strategic concept plans and recommendations for an integrated precinct to be developed that incorporates upgraded entertainment, conferencing and exhibition assets and inviting public spaces for the community, which together will stimulate the visitor economy and deliver a more liveable precinct for the local community.

Following delivery of the detailed master plan and business case outcomes, moving quickly to the redevelopment phase will ensure the benefits from the precinct are realised for the region.

A Business Case and detailed Master Plan for the precinct (currently funded)

Delivery model and legislative amendments to support redevelopment settled

Redeveloped sports and entertainment assets in the precinct

- 2023** - Business Case and Master Plan delivered
- 2024** - Detailed Design & Planning
- 2025** - Construction starts
- 2027** - Construction completed

- Attraction of major events to the Illawarra
- Increase in visitor numbers for tourism and conferences
- Increased employment in hospitality
- Supports Marine Tourism Precinct by activation of Wollongong foreshore
- Job creation during construction

**\$350M - Design and Delivery**

Background

Key Deliverables

Milestones

Benefits

Commitment

# City Partnership Connections



# Picton Road Duplication



Picton Road and Mount Ousley Road comprise a major freight connection between the M1 Princes Motorway and the M31 Hume Motorway. Currently the 27km stretch of road between the two major motorways is largely single lane, with only 8km of passing lanes divided over several sections.

This important arterial link down the Illawarra Escarpment already operates at capacity during certain periods of the day, making this upgrade project a major priority. Heavy vehicles make up 25% of its 20,000+ daily vehicle movements.

Recent improvements have focused on safety enhancements and Picton Road is forecast to reach capacity by 2025 and should be upgraded to a four lane, divided carriageway along its entire length, with suitable access to and from the Wilton (Bingara Gorge) and Macarthur Growth Areas expected to deliver an additional 73,000 homes nearby by 2040, placing further pressure on Picton Road.

Long-planned improvements to the Mount Ousley Interchange at the foot of Mount Ousley Road (on the M1 Princes Motorway) have recently been fully funded for completion. The upgrade to Mt Ousley Interchange and duplication of Picton Road over its entire length are best delivered together.

- Upgrade Picton Road to a full four-lane divided highway
- Construct safe access to/from residences
- Redesign Hume Highway interchange
- Widen Mt Ousley Rd from University of Wollongong to Picton Road.

**2024** - Planning and concept complete

**2026** - Detailed design complete

**2027** - Construction commenced

**2030** - Construction complete

- 360 ongoing jobs
- \$40.5M in additional annual overall output
- \$225M in yearly GSP
- \$42M annual saving in travel time, vehicle operating costs and safety
- Delivery of a key freight and commuter link between Port Kembla & Western Sydney.

**\$1,300M - Design and Delivery**

# South-West Illawarra Rail Link (SWIRL)



Through 2041, the population of the Illawarra is expected to grow by over 65,000 and Wollondilly by 50,000. Commuters from the Illawarra to Greater Sydney will grow from 26,000 (in 2016) to 46,000 by 2041 and from the Wollondilly from 16,000 to 39,000.

Container volumes are forecast to triple in the next 30 years at which time freight and passenger movements will be severely constrained.

Freight movements make up 40% of east-west peak road traffic and there is currently no rail alternative.

A freight (and commuter) rail connection between Port Kembla and Western Sydney is needed to alleviate expected land-side freight and passenger congestion.

Led by the NSW Government, this initiative urgently requires the funding and commissioning of a detailed network plan and business case to improve the resilience and connectivity of the Illawarra-Shoalhaven's rail network - including clear timeframes for delivery, detailed costings for each improvement and a complete investigation of the South West Illawarra Rail Link concept.

- Delivery of a contemporary, fully informed network plan and business case for SWIRL
- Planning and investment certainty.

**2023** - Funding announced for business case and initial planning

**2025** - Business Case and concept plan delivered

**2028** - Detailed design complete

**2029** - Construction commenced

**2032** - Construction complete

- \$2.6 billion in Gross Regional Product
- 1,100 new jobs for the region
- 360 ongoing jobs
- Meet future capacity required for efficient rail freight to/from Port Kembla
- Faster passenger services from/to Sydney & Western Sydney

**\$30M - Network Plan & Business Case**

Background

Key Deliverables

Milestones

Benefits

Commitment

# City Partnership Connections

## Marine Tourism Blue Highway



The NSW South Coast excels as a marine tourism destination and in 2017 hosted an estimated 10 million visitors, who spent \$2.6 billion. Visitor numbers are expected to rise to over 14 million by 2032.

This connection will advance marine tourism and recreational use of the South Coast by the completion of a 'Blue Highway' from Wollongong-Shellharbour-Kiama-Nowra-Jervis Bay-Ulladulla down to the Sapphire Coast. The hub of this boating precinct will be based on the recently opened Shellharbour Marina and a rejuvenated Kiama Harbourfront but will incorporate improvements envisioned for Wollongong (Belmore Basin) and for the planned Nowra Riverfront development.

This will be achieved by adding new boating assets and infrastructure along the Illawarra-Shoalhaven Coast. Integrating passive marine sightseeing with land-based activities (food/wine tours, coastal walks, cultural and indigenous activities) and in-destination events delivers a year-round visitor experience and will assist with delivering a more resilient visitor economy to the South Coast of NSW.

- Delivery of the Wollongong Harbour masterplan outcomes
- Completion of commitments in 'NSW South Coast Marine Tourism Strategy 2018'
- Development of a Master Plan for the South Coast 'Blue Highway'

**2024** - Development of Wollongong Harbour

**2025** - Masterplan and business case for Kiama Harbour redevelopment delivered

**2028** - Upgrade to the Kiama foreshore and harbour complete

- Increase of over \$1 billion in marine tourism-related spending
- A key bushfire recovery and tourism resilience (bushfire-resistant) initiative
- Growth in yield from visitor trips
- Visitor dispersal and reduced seasonality of tourism
- Increased visitor numbers and participation in marine and land-based activities

**\$52M – Planning and Delivery (estimated)**

# 30-Minute City (Public Transport)



The Illawarra-Shoalhaven region is the third most populous in Regional NSW and by 2041, the region's population is expected to increase to an estimated 505,000 people, with the majority of growth expected to take place within the Wollongong and Shellharbour LGAs.

Efficient, safe and effective public transport is the key enabler to connect regionally significant precincts that provide jobs, housing, goods and entertainment. Some residents in these precincts will find employment close to home, but many will travel to jobs and education in the regionally significant centres and employment lands.

The Illawarra-Shoalhaven region is poorly served by public transport, with only 0.29 access points (bus/train/ferry stops) per thousand residents – over 10 times fewer than Newcastle & Central Coast. As a result, over 88% of commuter trips are done by private vehicle. Inadequate access is exacerbated by poor interconnectivity of rail, bus and community transport and outdated route planning.

Activation of our regionally significant precincts requires a significant improvement in public transport, that will only come as a result of a master plan.

- Transport modelling based on current and planned precincts and demographics
- Delivery of an Illawarra-Shoalhaven public transport Masterplan
- Planning of new routes and timetables that connect key precincts

**2023** - Funding secured for modelling and master planning

**2024** - Masterplan delivered

**2025** - Planned changes implemented and regular reviews underway

- Increased use of public and active transport modes
- 30-minute City concept achieved
- Alleviates regional congestion
- Delivers a more liveable region
- Reduces land and investment required for road network

**\$10M - Planning (estimated)**

# M1 Southern Access (Tripoli Way)



A central interchange connected to the Albion Park (Tripoli Way) and the State road network bypass will reduce congestion, travel times and traffic delays on the Illawarra Highway from the Southern Highlands and through urban growth areas to the east and north of the Illawarra.

Construction is underway on up to 7,000 dwellings at Calderwood Valley (west of Albion Park). Development of this magnitude will significantly increase vehicle movements and require the provision of a directly connected Central Interchange.

The extension of Tripoli Way to the M1 Motorway on and off ramps and an improved intersection with the Illawarra Highway will divert increased traffic volumes from Albion Park CBD and will improve access to Shellharbour, Wollongong and Western Sydney.

- M1 Albion Park interchange which connects Tripoli Way directly to newly constructed on / off ramps and the State road network.

**2024** - Additional interchanges planned

**2026** - Construct an interchange to connect Tripoli Way directly to the M1 ramps and State roads

- Benefit cost ratio is over 5
- Increase road and pedestrian safety within Albion Park and a vibrant town centre
- Better road network efficiency between urban growth centres and employment lands, Shellharbour Airport and Marina
- Improve access and liveability for new communities especially Calderwood
- More effective east-west link on State and Local Road network
- Unlocks opportunities in education and business

**\$30M - Planning & Delivery**

Background

Key Deliverables

Milestones

Benefits

Commitment

# Illawarra-Shoalhaven

## AT A GLANCE



Illawarra-Shoalhaven Land area | 5,656km<sup>2</sup>

Population | 429,921

Illawarra length | ~100km

Number of workers | 212,000

Shoalhaven length | ~115km

Gross Regional Product | \$23.5B

Sole Traders | 57%

Tourism Gross Regional Product | \$1.35B

Business with turnover less than \$200k/a | 60%

### Major Industries (Employment)



Health Care & Social Assistance



Retail



Education & Training



Construction



Public Administration & Safety

### Highest Economic Output Industries



Construction



Manufacturing



Health Care & Social Assistance



Professional Scientific & Technical services



Finance & Insurance

Access to public transport | 0.29 public transport stops per 1,000 residents

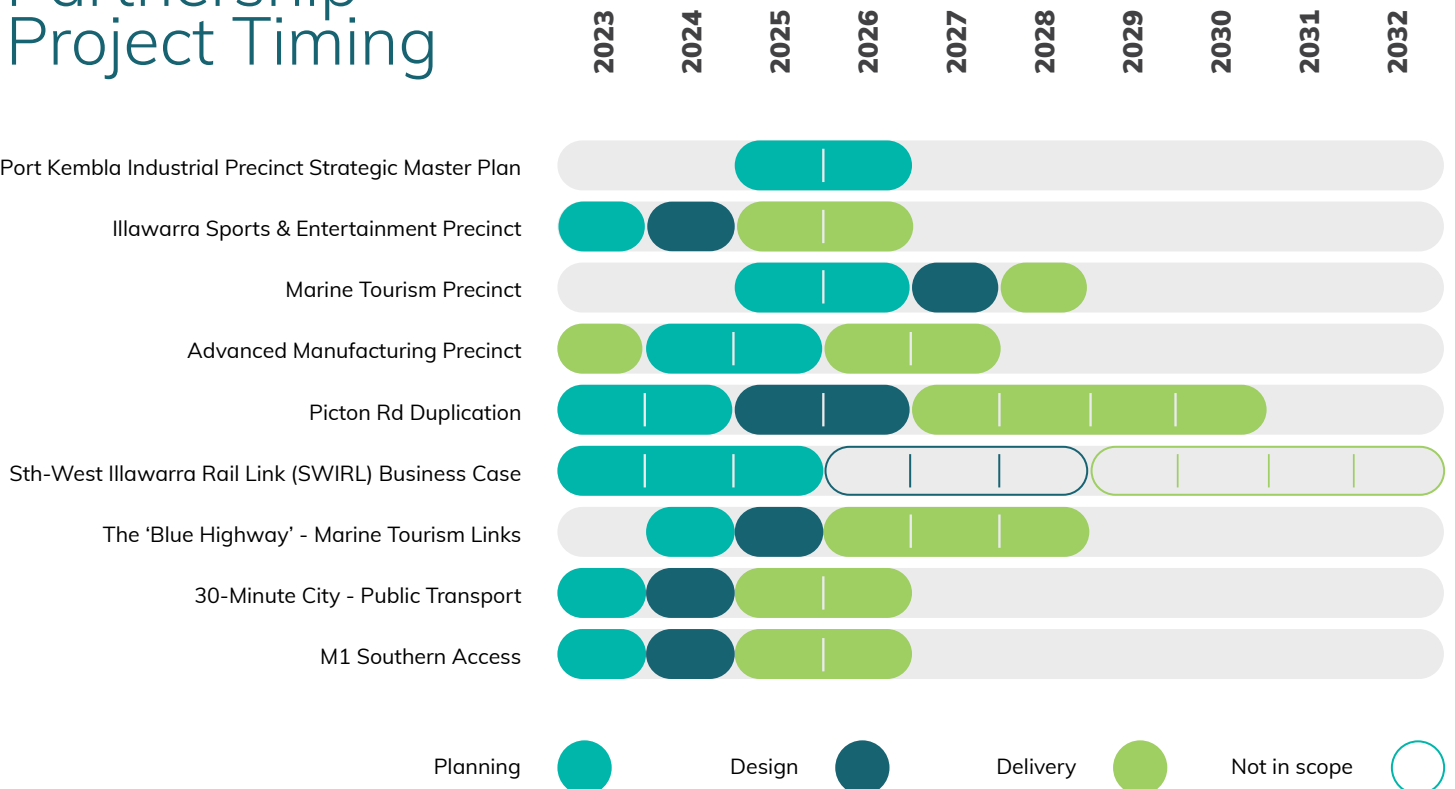
Indigenous Population | 3.69%

**VISION A CONNECTED, DIVERSE AND RESILIENT ECONOMY FOR THE ILLAWARRA-SHOALHAVEN**

- OBJECTIVES**
- Develop key city precincts
  - Activate linkages that improve liveability
  - Improve freight & passenger connectivity with Greater Sydney
  - Cultivate a year-round visitor economy
  - Generate 12,000+ new jobs

THEMES	PRECINCTS	CONNECTIONS
Port & Advanced Manufacturing	<b>Port Kembla Industrial Precinct</b> \$25M for Strategic Master Plan	<b>Picton Rd Duplication</b> \$1,300M Planning, Design & Delivery
	<b>Advanced Manufacturing Precinct</b> \$42M for Delivery (\$12M - Albatross; \$30M South Nowra)	<b>South West Illawarra Rail Link (SWIRL)</b> \$30M for Business Case
Visitor Economy	<b>Marine Tourism Precinct</b> \$70M for Design & Delivery	<b>Marine Tourism Highway (Blue Highway)</b> \$52M for Planning & Delivery
	<b>Illawarra Sports &amp; Entertainment Precinct</b> \$350M Design & Delivery	<b>30-Minute City - Public Transport</b> \$10M Planning & Implementation
		<b>M1 Southern Access</b> \$30M for delivery
<b>TOTAL</b>	<b>\$487M</b>	<b>\$1,422M</b>

# City Partnership Project Timing



The Illawarra-Shoalhaven Greater Cities Partnership will deliver transformative change to the region through the planning and delivery of interconnected precincts.

It will generate 12,000+ jobs and billions in regional value from the development of Port Kembla, Advanced Manufacturing and the Visitor Economy and the creation of connections that link them together and enhance the liveability of the region.



The parties below have collaborated in the development of the projects and initiatives in this Prospectus, which will be pursued individually and collectively.

