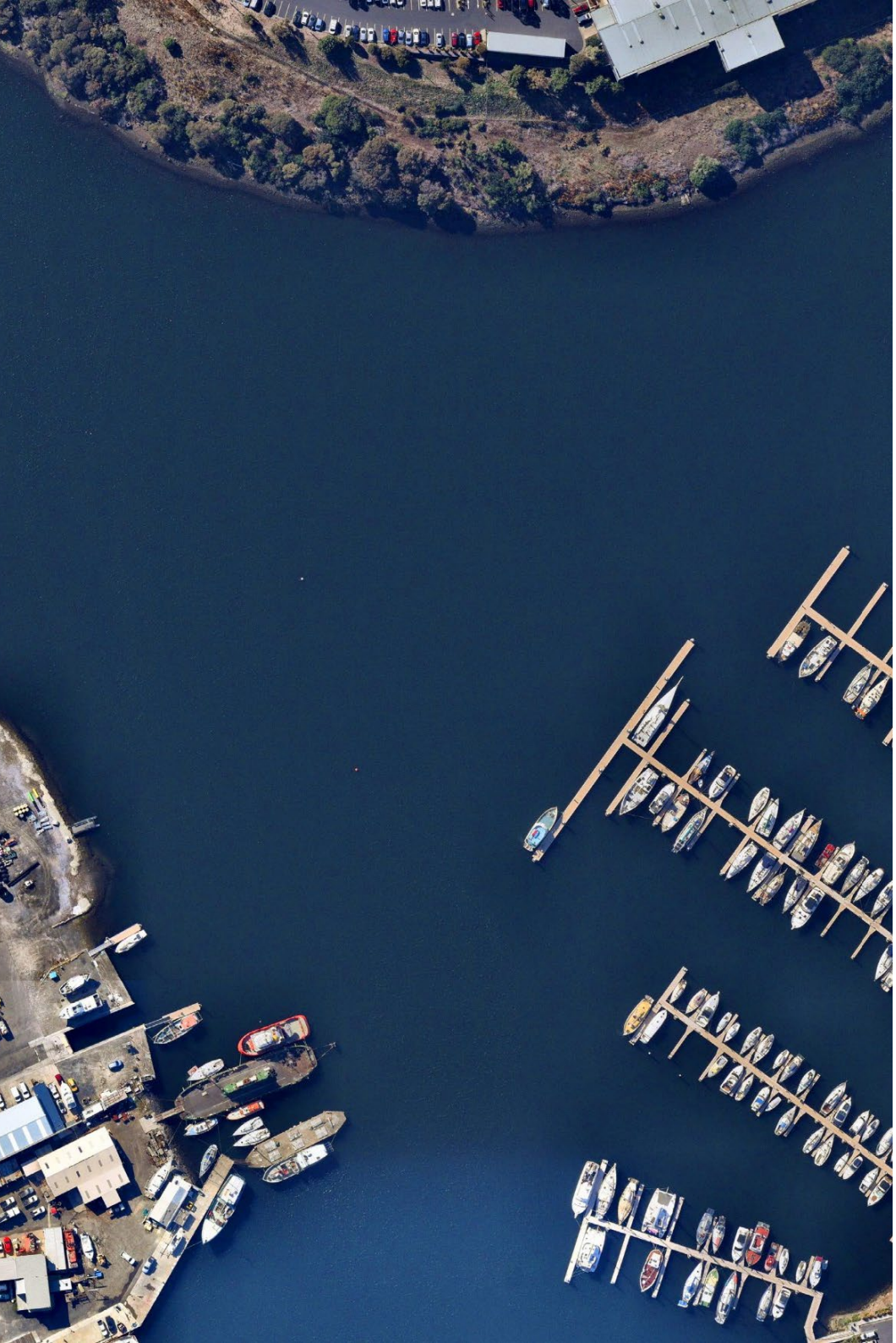
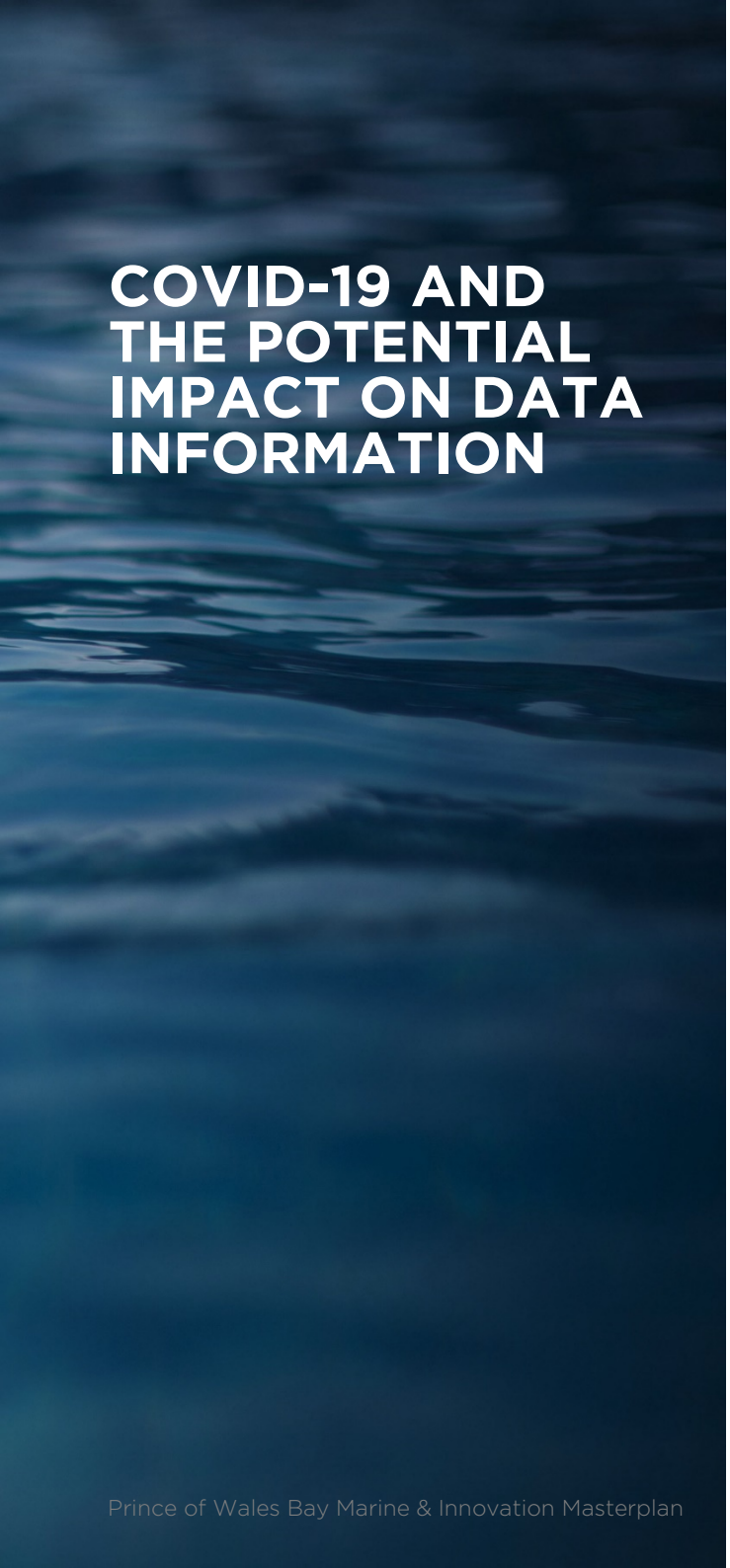


PRINCE OF WALES BAY MARINE AND INNOVATION MASTER PLAN

October 2021

GLENORCHY CITY COUNCIL | FUTURE GLENORCHY



COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

The data and information that informs and supports our opinions, estimates, surveys, forecasts, projections, conclusion, judgments, assumptions and recommendations contained in this report (Report Content) are predominantly generated over long periods, and is reflective of the circumstances applying in the past. Significant economic, health and other local and world events can, however, take a period of time for the market to absorb and to be reflected in such data and information. In many instances a change in market thinking and actual market conditions as at the date of this report may not be reflected in the data and information used to support the Report Content.

The recent international outbreak of the Novel Coronavirus (COIVID-19), which the World Health Organisation declared a global health emergency in January 2020 and pandemic on 11 March 2020, is causing a material impact on the Australian and world economies and increased uncertainty in both local and global market conditions.

The effects (both directly and indirectly) of the COVID-19 Outbreak on the Australian real estate market and business operations is currently unknown and it is difficult to predict the quantum of the impact it will have more broadly on the Australian economy and how long that impact will last. As at March 2020, the COVID Outbreak is materially impacting global travel, trade and near-term economic growth expectations. Some business sectors, such as the retail, hotel and tourism sectors, are already reporting material impacts on trading performance now and potentially into the future. For example, Shopping Centre operators are reporting material reductions in foot traffic numbers, particularly in centres that ordinarily experience a high proportion of international visitors.

The Report Content and the data and information that informs and supports it is current as at the date of this report and (unless otherwise specifically stated in the Report) necessarily assumes that, as at the date of this report, the COVID-19 Outbreak has not materially impacted the Australian economy, the asset(s) and any associated business operations to which the report relates and the Report Content. However, it is not possible to ascertain with certainty at this time how the market and the Australian economy more broadly will respond to this unprecedented event. It is possible that the market conditions applying to the asset(s) and any associated business operations to which the report relates and the business sector to which they belong could be (or has been) materially impacted by the COVID-19 Outbreak within a short space of time and that it will have a lasting impact. Clearly, the COVID-19 Outbreak is an important risk factor you must carefully consider when relying on the report and the Report Content.

Any Report Content addressing the impact of the COVID-19 Outbreak on the asset(s) and any associated business operations to which the report relates or the Australian economy more broadly is (unless otherwise specifically stated in the Report) unsupported by specific and reliable data and information and must not be relied on.

To the maximum extent permitted by law, Urbis (its officers, employees and agents) expressly disclaim all liability and responsibility, whether direct or indirect, to any person (including the Instructing Party) in respect of any loss suffered or incurred as a result of the COVID-19 Outbreak materially impacting the Report Content, but only to the extent that such impact is not reflected in the data and information used to support the Report Content.

Marine and Innovation Masterplan

Adopted Version 01: February 2021

The Glenorchy City Council commissioned Urbis Pty Ltd to lead a multidisciplinary team to develop the Marine and Innovation Masterplan and who have in collaboration with the Council prepared this document.

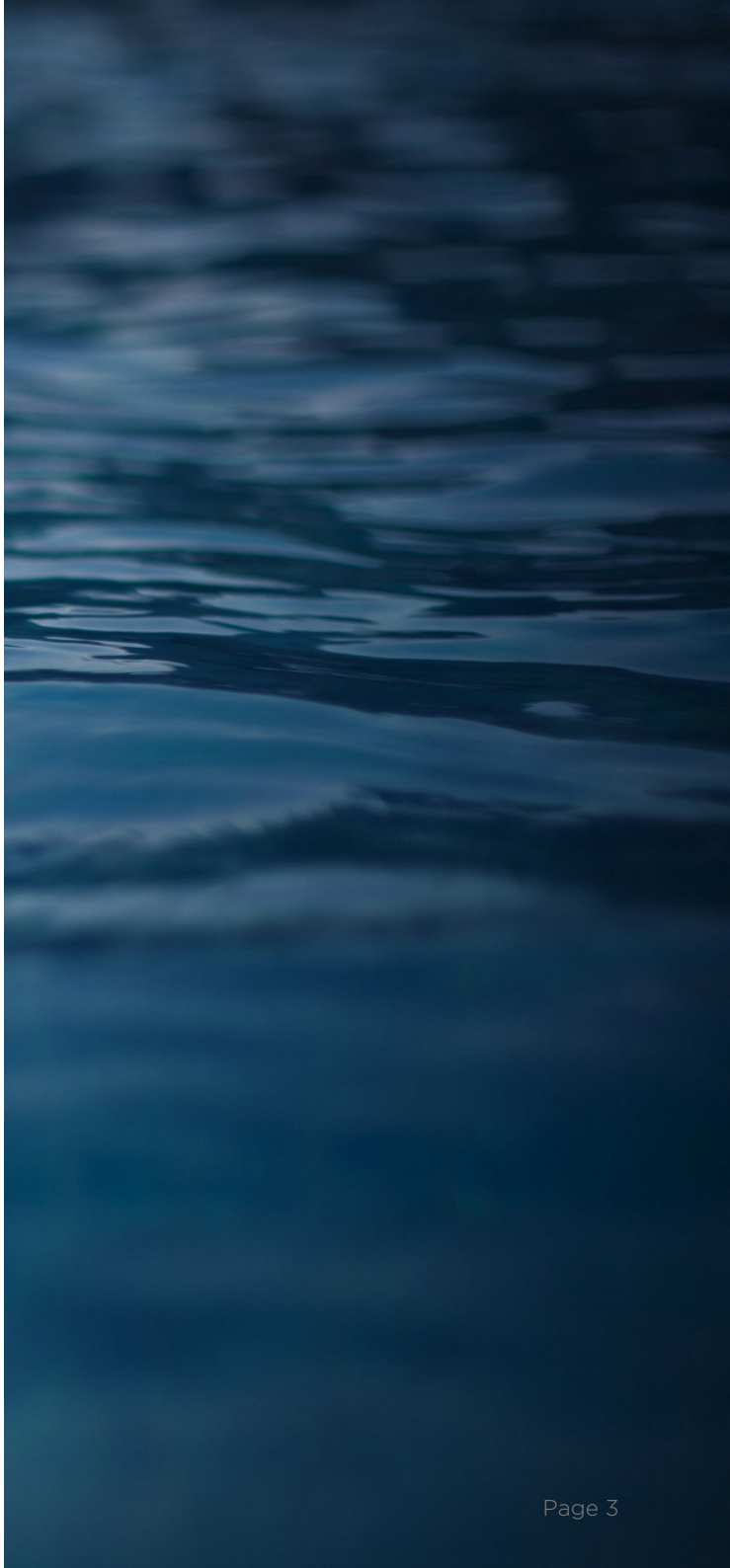
The team comprised:

Urbis Pty Ltd (principal consultant)

WSP (Transport Engineers)

Disclaimer: While every responsible effort has been made to ensure that this document is accurate and complete, Glenorchy City Council, Urbis Pty Ltd and its subconsultants do not warrant or represent that the information contained is free from errors or omissions and disclaim any and all liability to any person in respect of anything or the consequences of anything done or omitted to be done in reliance upon the whole or any part of this document.

Glenorchy City Council acknowledges the palawa community (Tasmanian Aboriginal community) as the original owners and continuing custodians of this island lutruwita (lu tru wee tah) Tasmania. palawa have a distinctive and age-old connection with their ancestral lands and waters. Glenorchy City Council respects and recognises the palawa's survival and continual connection with their country spanning more than 60,000 years.



CONTENTS

INTRODUCTION

Glenorchy City Council have engaged Urbis to prepare a 2021 masterplan for the Prince of Wales Bay marine precinct. This document follows on from the *Maritime Industry Precinct Strategic Plan (2008)* and the *Derwent Maritime Industrial Sites Masterplan (2012).*

THE MASTERPLAN SEEKS TO GUIDE INVESTMENT PRIORITIES TO MEET FUTURE DEMAND AND ENCOURAGE EXPANSION.

The Prince of Wales Bay (POWB) precinct has organically grown since its first inception, with development accelerating from the late 1980s. The precinct now encompasses over 50 businesses covering metal engineering, defence, technology, innovation and boat repair and manufacturing.

The POWB marine precinct is at a critical juncture where it needs to invest in strategies to help grow its market share, remain competitive and ensure long-term sustainability.

A key component of this study was engaging with the local businesses of the precinct to understand the current issues and importantly the future opportunities which can be optimised. These stakeholder discussions combined with an understanding of the key growth sector areas, has formed the basis of this masterplan.

Overall, the key objectives of this study are to:

- Determine how the marine cluster can generate new business/investment activity and retain/grow employment
- Identify ways to improve the connectivity and accessibility of the precinct as well as reduce conflict between uses
- Determine a future vision for the precinct which ensures a sustainable, diverse, collaborative and competitive maritime based precinct
- Identify key strategic actions for the precinct that will assist in growing the cluster, while mitigating competitive impacts
- Define a measured and practical implementation strategy to ensure the proposed actions and framework can be successfully guided and implemented in the future.

RESULTING FROM THIS STUDY, ARE SIX STRATEGIC DIRECTIONS THAT THE PRINCE OF WALES BAY PRECINCT CAN UNDERTAKE IN ORDER TO MEET THE LONG-TERM VISION.

REVIEW OF PREVIOUS KEY DOCUMENTS

In developing the 2021 masterplan for the POWB precinct, a review of the previous findings from the three key documents adjacent was undertaken.

These studies were all prepared for the Department of Economic Development and Tourism (now State Growth) and sought to understand how the precinct could be further developed to support a longer-term and sustainable vision for maritime industries in Southern Tasmania.

A number of the recommendations from these studies are yet to be implemented. As such, this study will review and have regard to the previous recommendations as well as consider new opportunities for the precinct given the current physical and economic context.

Maritime Industry Precinct Strategic Plan

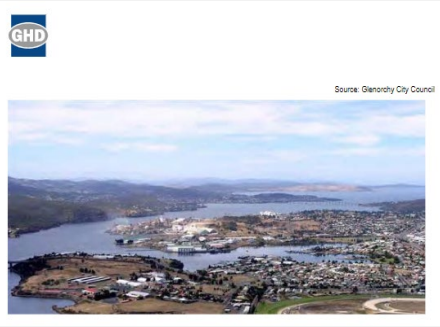
Prepared by: Maunsell / AECOM

Prepared for: Department of Economic Development and Tourism

Date of Strategic Plan: 19 May 2008

Objective: *The Strategic Plan will provide a long-term planning framework to enable the Maritime Industry Precinct to continue to develop in an integrated and sustainable manner and to ensure that it does not compromise surrounding, non-industrial land uses and environmental values associated with the area. It provides for the integrated management of landside and waterside functions.*

Lay-Up Berth Pre-Feasibility Study



Prepared by: GHD

Prepared for: Department of Economic Development, Tourism and the Arts

Date of Document: October 2010

Objective: *This study was aimed at supplementing previous reports that have described the bay as a potential site to expand on an already established marine business zone.*

Derwent Maritime Industrial Sites Masterplan

Prepared by: The Office of the State Architect

Prepared for: Department of Economic Development and Tourism

Date of Final Plan: 2012

Objective: *The purpose of this masterplan was to outline a long-term vision for the southern Tasmanian maritime industries, and to develop strategies to support that vision.*

PURPOSE OF THE MASTERPLAN

The purpose of the masterplan is to grow the POWB marine precinct into a thriving hub of economic activity, while maintaining its competitive positioning as the Southern Tasmanian base for maritime industry into the future.

The POWB precinct is a functioning marina as well as an established defence, technology, innovation, shipping, commercial, industrial as well as residential precinct. Going forward, it will be critical that the precinct positions itself to leverage growth in the maritime sector from both an existing user, as well as from a new business generation perspective.

With a growing maritime sector, this is a great opportunity to revisit the initiatives identified within the previous studies and engage and collaborate with local stakeholders and relevant Government bodies to develop a new masterplan and vision for the precinct.






APPROACH TO MASTERPLAN

The POWB Marine and Innovation Masterplan seeks to set out a long-range vision and key strategic directions to ensure that the precinct remains competitive and a hub of activity into the future. To set the future vision and direction for the precinct, the approach taken encompassed six key steps, shown adjacent, including:

1. **Review of previous initiatives and background documents** prepared for the Department of Economic Development, Tourism and the Arts, which guided the baseline for previous challenges identified.
2. **Through stakeholder engagement** with local businesses this group contributed insights, perspectives, and key focus areas for the future.
3. **Field investigations** were an integral piece to this assessment to understand the connectivity, movement and interaction of different uses.
4. **An issues and opportunities assessment** delved into the current physical challenges of the site that could be leveraged going forward and the economic positioning of the precinct more broadly.
5. **From the issues and opportunities assessment,** this provided the basis for preparing the **strategic objectives and key actions** to form the framework for the masterplan.
6. **Finally, a masterplan strategy** was developed to respond to the future vision of the precinct.

Our Approach

1.0 WHY A NEW MASTERPLAN?

WHY A NEW MASTERPLAN?

For a precinct like the POWB, the development of a masterplan is critical if a coordinated approach to improvement and growth is to be achieved, while maximising the competitive positioning.

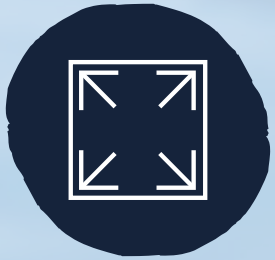
While the businesses of the POWB precinct are collaborative with a focus towards working together and leveraging capabilities, development of the precinct and the decision-making process, currently **lacks a coordinated approach.** To ensure the role of the precinct, primarily as a maritime industrial hub of activity is maintained, having clear actions in place through a masterplan strategy, will be critical into the future.

Often, the key inhibitor to development, growth and future proofing, can be **physical constraints.** This can range from limitations to movement and connectivity to fragmented land ownership and not best optimising the location, in this case being the waterfront. While a number of these are current constraints, through a coordinated approach, these can be improved to enhance the precinct as a whole, with the view to improving the **competitive positioning** and mitigating any loss to market share in the future.

The key industries of relevance include commercial maritime manufacturing, defence, Antarctic vessel servicing, advanced manufacturing and local vessel repair and maintenance. With a clear focus on these five **key growth industry sectors** through the masterplan strategy, the POWB precinct can look to enhance its capacity and ability to do business within these industries going forward.

Lack of precinct coordination

Competitive positioning



Physical constraints

Growth in key industries

STRATEGIC CONTEXT

The POWB precinct is located 7km north of Central Hobart and is an inlet to the River Derwent.

The precinct has a functioning marina with 300 berths and a diverse range of maritime industry uses. This includes ship building and repair, machine workshops and manufacturers of highly specialised safety and nautical based equipment. Many of the businesses within the precinct have strong alliances and collaboration is a key part of success.

While there are many successful elements to the precinct, there are also some key opportunity areas to be leveraged to enable growth in the future.

These include:

- Creating a precinct that **retains a skilled workforce**
- **Mitigating physical constraints** from both a movement, connectivity, parking and land holding perspective. This is to encourage better movement and to grow and expand existing businesses.
- Hobart Port has better access and greater water depths, and more of a focus on the tourism sector and the Antarctic Division. In contrast, POWB precinct has a **clear focus on maritime industrial uses**, as well as innovation and is well positioned to provide a point of difference to Hobart Port and the rest of Tasmania.

DEVELOPMENT OF THE PRECINCT

The development of POWB precinct, while initially established in 1916, gained traction from the late 1980s onwards. Development within the precinct has been largely organic. As the precinct goes into its next phase, and with the development of a masterplan strategy, comes the opportunity to refocus.

1916
The Nyrstar Hobart zinc refinery opens, starting the industrialisation of the area

1936
Marine engineering specialists Taylor Bros establish in POWB

1943
Production in the POWB delivers more than 100 vessels to war efforts

1950
Public works commence post-war, with the Goodwood public housing development and Brooker highway constructed

1968
The Brooker highway is extended north to Berriedale

1988
Technopark is established as a leading technology hub

1989
Incat move operations to POWB to expand production capacity

Richardson Devine Marine (RDM) founded at POWB

1990
Incat's Hoverspeed Great Britain sets record for fastest transatlantic crossing. Incat continues to expand production facilities

2000
POWB expands as both a marine and defence, as well as a community hub

2008
Prince of Wales maritime industry precinct strategic plan is launched

2010
Brooker Highway upgrade aligns Elwick and Goodwood roads

Tasmanian fast ferry museum established and Stage 1 of the POWB marina is completed

The Tasmanian defence industry strategy is launched

1910 1920 1930 1940 1950 1960 1970 1980 1990 2000 2010

PRINCE OF WALES BAY POLICY CONTEXT

The policy context for the POWB precinct includes both planning and economic policies at the local and State level. The table below summarises the findings of a policy mapping exercise which identifies and prioritises the policy directions relevant to the future of the precinct. Key findings are:

- At a local level, the key policy priorities relevant to POWB are enhancing infrastructure capacity around ports and supporting key sectors including innovation and Research and Development (R&D), vessel building, repair and maintenance and advanced manufacturing. Local policies also support continued growth and development of a cluster around POWB.
- At the State level, key policy priorities that will shape the future strategic direction of the POWB precinct include developing innovation and the R&D sector, workforce and skills development, a research and education training sector focus and supporting existing industry clusters.

KEY	NA	Low	Medium	High
General Policy				
POWB Specific Policy				

	Environment improvement around Ports	Enhance infrastructure capacity at Ports	Public domain/ safety around Ports	Innovation, R&D sector development	Workforce and skills development	Vessel building maintenance sector focus	Defence sector focus	Advanced manufacturing sector focus	Research, education & training sector focus	Antarctic a sector focus	Increased collaboration/ cluster development
Local Policies											
Prince of Wales Bay Strategic Plan (2008)											
Derwent Maritime Industrial Sites- Masterplan (2012)											
Glenorchy Economic Development Strategy 2020-2025											
State Policies											
TasPorts Masterplan 2018											
Capital City Strategic Plan 2019-2029											
Tasmanian Trade Strategy											
Tasmanian Antarctica Gateway Strategy											
Tasmanian Defence Industry Strategy											
Tasmanian Advanced Manufacturing											

STAKEHOLDER ENGAGEMENT APPROACH

The 2021 master planning process was informed by a fresh and energised engagement program which included a wide range of stakeholders.

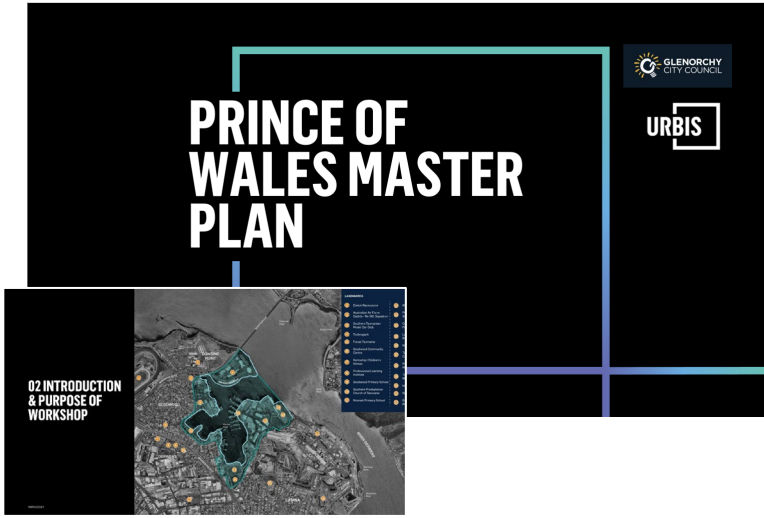
The intention of the engagement was to allow for strategic and targeted participation by key stakeholders to inform, test and validate the emerging findings of the masterplan.

Specifically, stakeholders helped inform and test:

- Existing physical constraints and opportunities of the current POWB precinct
- An understanding of key sectors, future growth opportunities and any impediments to growth
- Existing synergies between current users at POWB and opportunities to further strengthen these synergistic relationships
- Competitive positioning of the POWB precinct against other key maritime hubs
- Plans and intents for other marine hubs across Tasmania
- The previous vision and masterplan strategies for the POWB precinct and identify a new vision and strategies for the 2021 masterplan

Stakeholders directly consulted throughout the master planning process included:

- APCO Engineering
- Fiomarine Industries
- INCAT
- RDM
- Taylor Bros
- Liferaft Systems Australia
- Prince of Wales Bay Marina
- PFG Group
- Cleanlift Marine
- TasTAFE Metal engineering
- Eden Foods
- Tas Minerals Council
- Tasmanian Maritime Network
- Derwent Marine
- CBG Systems
- Department of State Growth
- Tasports
- Pivot Maritime International
- Silverleaf Investments
- Phoenix Marine
- Past Chair Tasmania Maritime Network
- Office of the Coordinator General



KEY FINDINGS FROM STAKEHOLDER ENGAGEMENT

New Infrastructure | **New Uses** | **Promotion & Management** | **Parking & Access** | **Planning Controls** | **Public Domain**

The key messages from the stakeholder engagement activities are summarised below.

Stakeholders identified the **competitive strengths** of the area including:

- Water access
- A protected, calm harbour for vessels
- Proximity to an industrial area
- The presence of a large and established maritime industry which work in a collaborative manner.

They broadly agreed that the underlying principles of the visions developed in the 2008 and 2012 masterplans were still relevant and important to businesses at POWB. There was also **consensus on the importance of a new masterplan** to set a clear direction for the growth of the precinct over the coming years.

There was broad **concern with the 'gentrification' of the POWB precinct away from maritime industrial uses** and the occupation of prime sites, including waterfront land, by non maritime uses. There was general support for changes to the land use planning regime to enshrine the future growth of the area for a maritime industrial precinct.

POWB precinct **requires enabling infrastructure** to support continued operations and growth of business. These include re-fuelling facilities, lay-up facilities and any associated dredging and dry storage for boats.

A key day to day operational issue was parking across the site. The **lack of parking spaces** was impacting workers and visitors to the precinct and creating conflicts between various users, including commuters. There was a broad consensus to improve parking and access across the POWB precinct.

POWB precinct businesses are highly collaborative with many businesses supporting each other along the supply chain. There was broad support to further enhance the collaboration between businesses in recognition of the competitive advantage this gives businesses within the precinct.

Stakeholders identified a **range of future growth opportunities** for their businesses. This included continued growth in vessel building, repair and maintenance for commercial and recreational vessels and new opportunities in the defence and Antarctic sectors.

The key institutional land uses in the precinct are Techno Park and the TasTAFE. **Stakeholders recognised the value of these key operators** and opportunities to further align their activities with the maritime industry and related sectors.

There was consensus that the **quality of the public domain across the precinct could be significantly enhanced.** A poor-quality public realm was seen as reducing the amenity of the areas, creating potential safety issues (also related to the public housing on Negara Crescent) and not creating a welcoming environment to visitors. Also increasing amenities for workers, such as food and beverage options, would help attract workers to the precinct.

2.0 PRECINCT CHALLENGES AND OPPORTUNITIES

LANDMARKS

1. Elwick Racecourse
2. Australian Air Force Cadets - No 501 Squadron
3. Southern Tasmanian Model Car Club
4. Technopark
5. Futsal Tasmania
6. Goodwood Community Centre
7. Kennerley Children's Homes
8. Professional Learning Institute
9. Goodwood Primary School
10. Southern Presbyterian Church of Tasmania
11. Moonah Primary School
12. Giblins Reserve
13. Prince of Wales Bay Sport Grounds
14. Lutana Woodlands Reserve
15. New Town Bay Golf Club
16. TasTAFE Bender Drive Campus
17. Prince of Wales Bay Marina
18. Treatment Plant
19. Incat
20. Incat- Layup Berth
21. Nyrstar Hobart Smelter

KEY PRECINCT OVERVIEW

LOCATED ALONG RIVER DERWENT, THE PRINCE OF WALES BAY PRECINCT IS A KEY EMPLOYMENT AREA IN GLENORCHY LGA.

The precinct is accessed from the Brooker Highway and Goodwood Road, two key city arterial connections. It is bound by Goodwood, a residential suburb and Lutana, a suburb with heavy industrial and residential mix.

The precinct has a distinct character and identity formed by its Marine industries and its geographic location along the River Derwent and the POWB foreshore itself. The precinct is formed around the POWB of which there are four key sub-precincts:

UNDERSTANDING THE CONNECTIVITY, PERMEABILITY AND MOVEMENT BETWEEN THE FOUR SUB-PRECINCTS AND THE BROADER PRECINCT ITSELF IS CRITICAL TO THIS MASTERPLAN. TRANSPORT AND PERMEABILITY IS DISCUSSED IN DETAIL OVER THE FOLLOWING PAGES.

KEY PRECINCT OVERVIEW

Bender Drive Area

This area is approximately 30 ha in size and is located north-west to the Nystar Zinc Smelter and Lutana. The area is largely zoned as general industrial. The key industries in the area are focused on marine based industries. The area also has a marina and a water treatment plant.

Innovation Drive Area

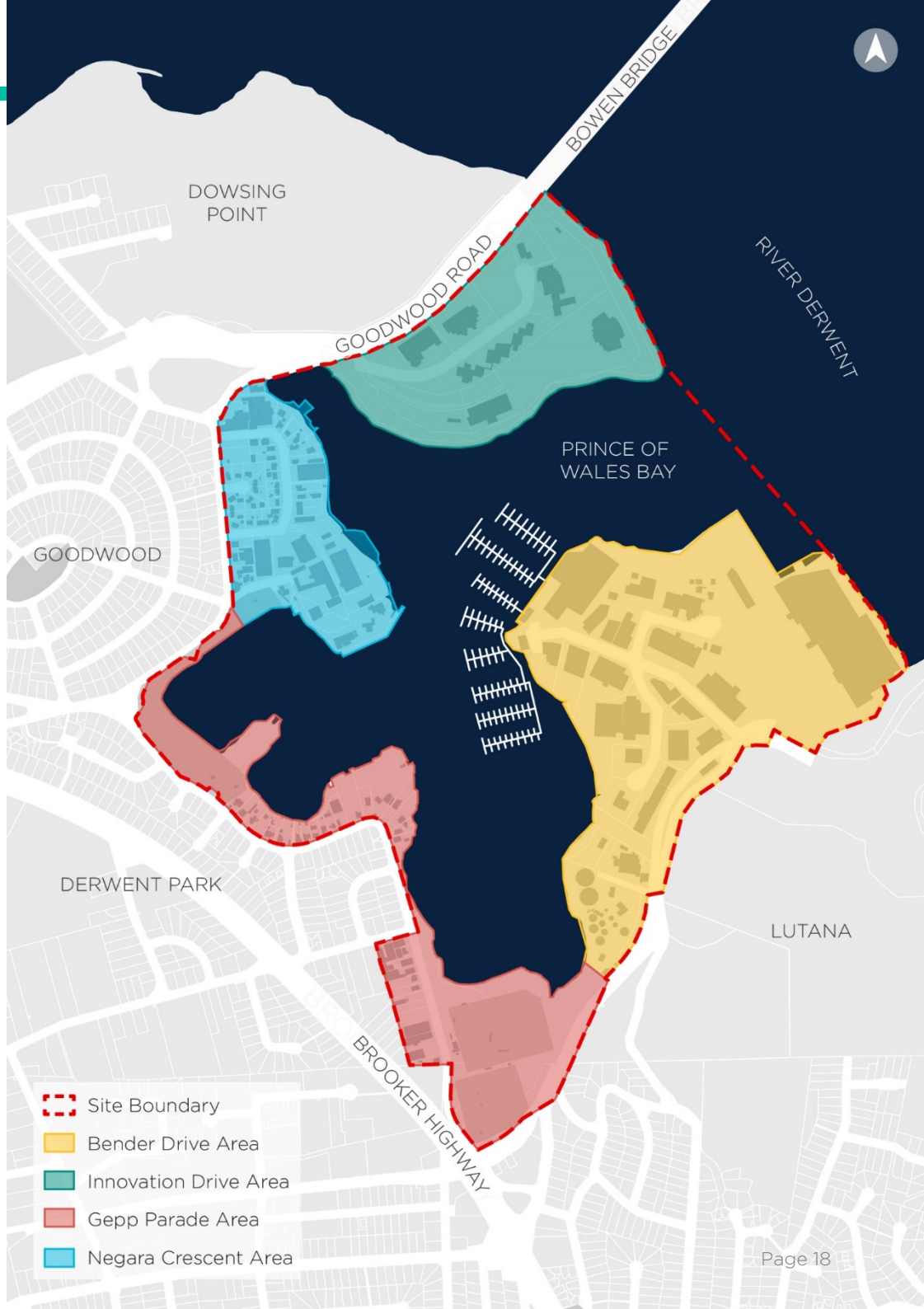
This area is zoned as Particular Purpose Zone 3-Technopark with the foreshore identified as an Environmental Management Zone. The 14ha area consists of a variety of office uses, including Technopark, owned and managed by State Growth, a key landholder within the precinct. This is also the location of the Qantas call centre.

Gepp Parade Area

The area has a mix of light industrial, recreational, open space and residential uses. This precinct expands over an area of 15 ha, with further established residential uses to the south. A large extent of the foreshore along the open spaces in this precinct is publicly accessible.

Negara Crescent

This 10ha area is zoned light industrial, however the area has mixed uses with remnant residential pockets, including department of housing properties. The foreshore is largely utilised for marine industrial functions.



EXISTING USES WITHIN PRINCE OF WALES BAY

The POWB precinct is diverse in its uses, however, has a clear industrial focus.

The majority of land uses within the precinct are employment based, forming approximately 37 ha of land area. From an industrial perspective, there is a mix of maritime related industries, other light industries and warehouses, while Innovation Drive has approximately 11 ha of commercial office space in a business park setting.

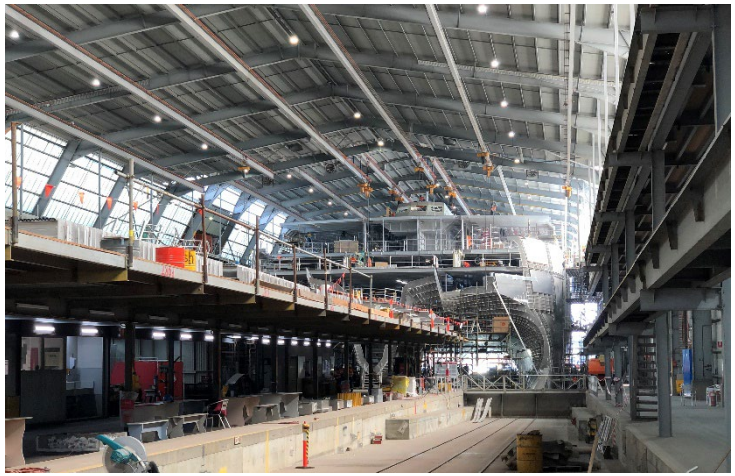
The POWB waters is a significant area that interfaces with all four sub-precincts as well as the River Derwent. There is approximately 6 km of foreshore that interfaces with a mix of uses – maritime employment functions, recreational areas, marina, as well as cultural indigenous assets. Not all businesses however engage with the water as part of their core function, with this only relating to approximately 50% of businesses.

The precinct has sizable community amenities and recreational areas mainly in the Gepp Parade Area. The Giblins Reserve, the soccer field and the softball park and public boat ramp all serve the precinct and wider community and provide access to the Bay to the general public.

There is the green edge along the Innovation Drive foreshore which has aboriginal and cultural significance. There is a need to enhance and also make the public foreshore more accessible for the local community and the wider Glenorchy residents to be able to access and enjoy.

Residential parcels with some social housing are located mainly in the Negara Crescent Area with some of these developed on industrial zoned land.

The 300 berth marina along the Bender Drive Area foreshore is a more recent use in the area which has brought more private users into the precinct.



EXISTING USES WITHIN PRINCE OF WALES BAY

While the POWB has a wide range of uses, the focus on industrial as the key role for the POWB precinct is clear.

The precinct is home to three major infrastructure and processing sites which have long-term lease expectations. This includes the Taswater Sewage Disposal site, Waste Transfer Station and the Zinc Works (adjoining precinct) all located along Derwent Park Road. This is further bolstered by the boat repair and manufacturing businesses. There are a number of key opportunity areas that the precinct can look to leverage.

Developing a masterplan that is consistent with this focus, and which mitigates potential gentrification away from the core focus, is critical to the strategic framework.

ENVIRONMENTAL AND OPEN SPACE

With almost 10 hectares of open and recreational spaces, the Prince of Wales Bay precinct has a diverse range of spaces which could be further activated.

- The open space and recreational areas in the precinct provide the foreshore access and visual connectivity to the waterfront in the precinct. These open spaces/ and recreational functions have a catchment beyond the precinct. Currently there is approximately 3 ha of open space and 6.8 ha of recreational land in the precinct, which caters to Goodwood and surrounding residents.

- Giblins Reserve is the main open space in the precinct with public access to the foreshore provided. There is limited opportunity to access the foreshore from the Princes of Wales Bay Sports Ground.

- The vegetated foreshore along Dowsing Point, has been identified as culturally significant and environmentally sensitive with a number of Aboriginal cultural heritage sites identified.

- Zoning overlays on the foreshore identifies waterway and coastal protection, coastal erosion hazard and coastal inundation hazard areas. The Bay areas adjacent to Gepp Parade are influenced by a bio-diversity protection overlay. Future development needs to consider these overlays and consider impacts of sea level rise.

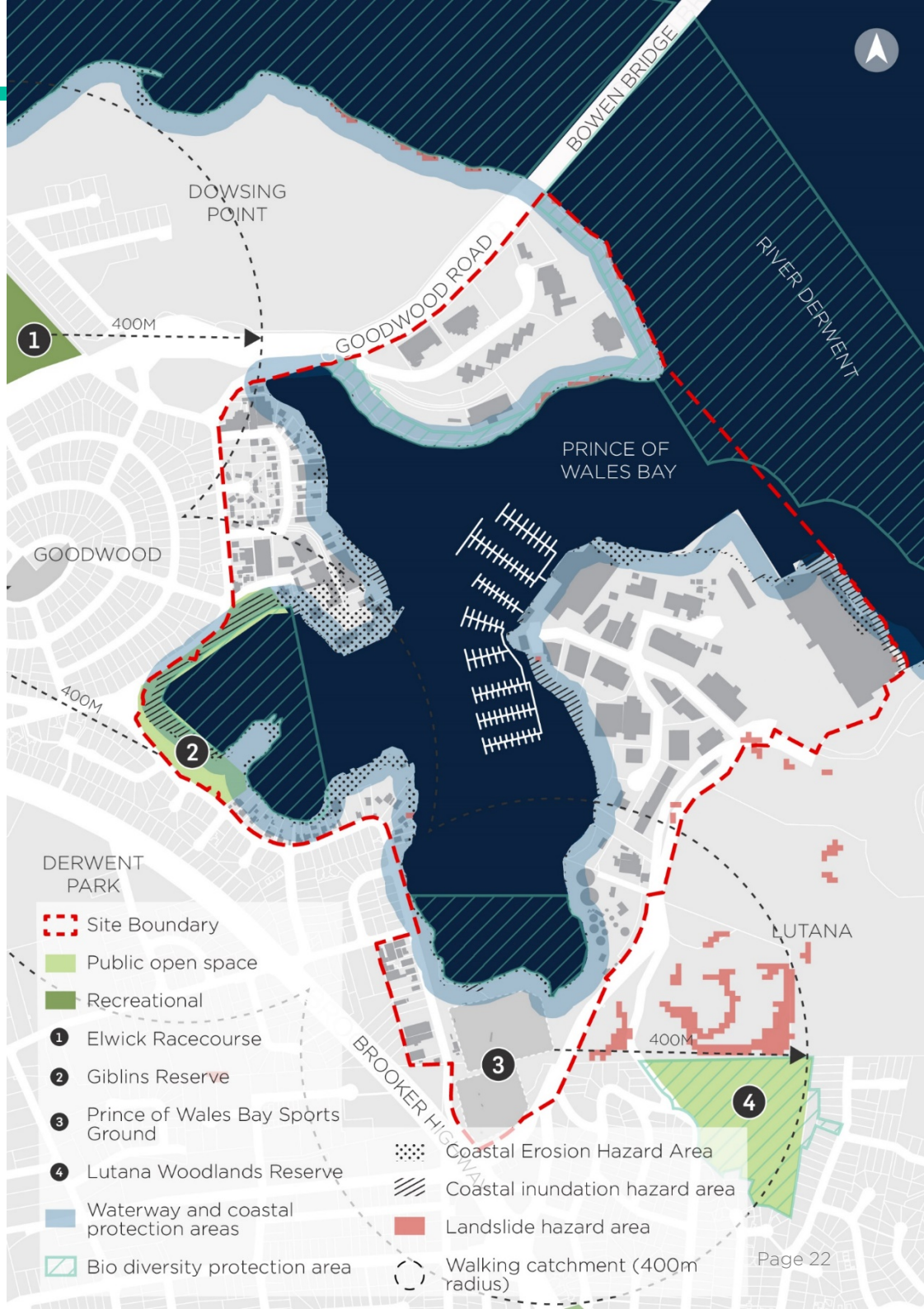
Giblins Reserve, main open space for precinct

Vegetated foreshore along Dowsing Point

ENVIRONMENTAL AND OPEN SPACE

Key opportunities to enhance usage, safety, accessibility and ongoing management.

- Enhance Giblins Reserve to provide safe and accessible public open space which can be further utilised by workers, visitors and residents.
- Open space should be integrated with and form part of the broader precinct, given the scale of this (~10 ha). Ensure access to the foreshore of the recreational area at Gepp Parade.
- Provide some small-scale food and beverage /amenity around the boat ramp area.
- Develop a heritage trail along Dowsing Point foreshore ensuring protection and proper management of Aboriginal cultural heritage legacy sites.



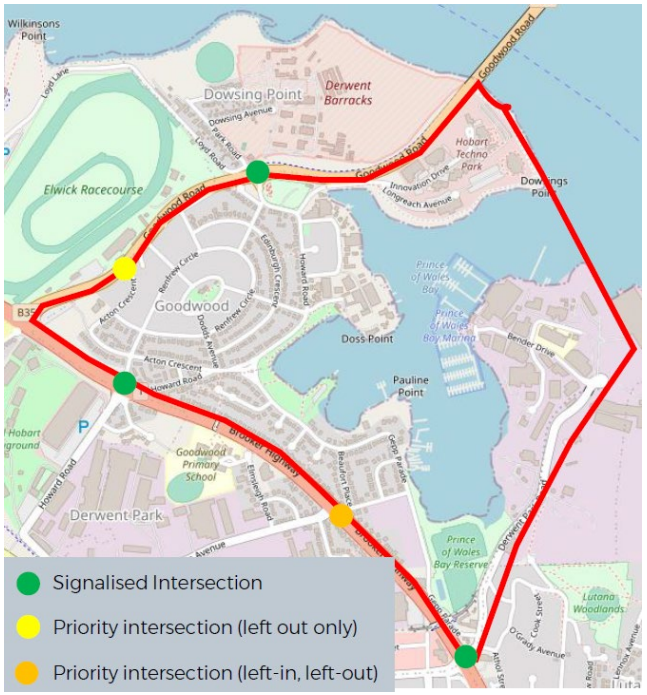
TRANSPORT ASSESSMENT

As part of the Marine and Innovation Masterplan process, Urbis engaged WSP Transport Engineers to review the transport, access and parking within the POWB precinct.

The report reviewed the key patterns of movement including:

- Through and adjacent to the precinct
- In and out of the precinct
- Within the precinct
- Supporting journey information

The observations, insights, findings and opportunities identified by WSP have been incorporated into the following pages, with the full report ***"Prince of Wales Bay precinct Transport and Preliminary Findings Summary"*** (12 April 2021) appended to this document in Appendix A.



VEHICLE ACCESS AND PARKING

How are the roads, public transport and the active network being used?

The key access or gateway entry points experience congestion with traffic calming infrastructure also limiting activity:

- Vehicular access to the precinct is predominantly via the Brooker Hwy, with Derwent Park Road connecting to the marina and maritime industrial premises (Derwent Park). As well, Goodwood Road connects to Technopark and businesses on Dowsing Point.
- Linked to key land uses and shifts of workers, movement peaks are noted to be around 7.30am and 4.30pm, with significant queuing on approach to intersections with the Brooker Highway.
- Key access points are at Derwent Park Road, Renfrew Crescent and Howard Road, whilst left-in access is provided at Lampton Avenue.
- Additional demand is observed at signalised exit points as these permit all movements upon exit, including across the Brooker Highway towards Glenorchy.
- Increased queueing storage capacity is provided at the exit points at Derwent Park Road and Howard Road, and additionally non-signalised priority left turns can be undertaken. Queuing vehicles were observed to block into the roundabout in the afternoon peak, in close proximity to residences.
- Freight traffic in the local area is currently restricted by physical traffic calming infrastructure, including speed humps.

VEHICLE ACCESS AND PARKING

How are the roads, public transport and the active network being used?

Parking availability is a significant issue, particularly with conflicting uses:

- Areas of off-street parking are largely tied to key employment locations, focused at Hobart Technopark and Derwent Park industrial and marine premises.
- Some areas of parking are provided at recreational locations including at Giblins Reserve and at Goodwood Park. The car parking in Bender Drive Area is also functioning at full capacity, with limited areas for expansion.
- A key challenge is encouraging transport mode shift away from private vehicle usage for Derwent Park employees, including provision of micromobility options and more appropriate end-of-trip facilities.

PRECINCT PERMEABILITY

How are the roads, public transport and the active network being used?

The area has limited pedestrian permeability which impacts movement and gives rise to safety concerns around the precinct:

- There is only one existing pedestrian crossing at Goodwood Road, and up to 475 metres between pedestrian crossing points of the Brooker Highway. The existing pedestrian and cycle ways are fragmented and do not service the entire precinct.

- There are no on-road bicycle lanes or protected bicycle lanes within the precinct. Gepp Parade and Howard Road have potential to form a key walking and cycling corridor supporting movement across the precinct, although no formal cycle infrastructure is provided. Due to the heavy vehicle traffic on Derwent Park Road, a parallel route utilising the disused rail corridor is considered more suitable for an all ages and abilities cycling route explained in more detail below.

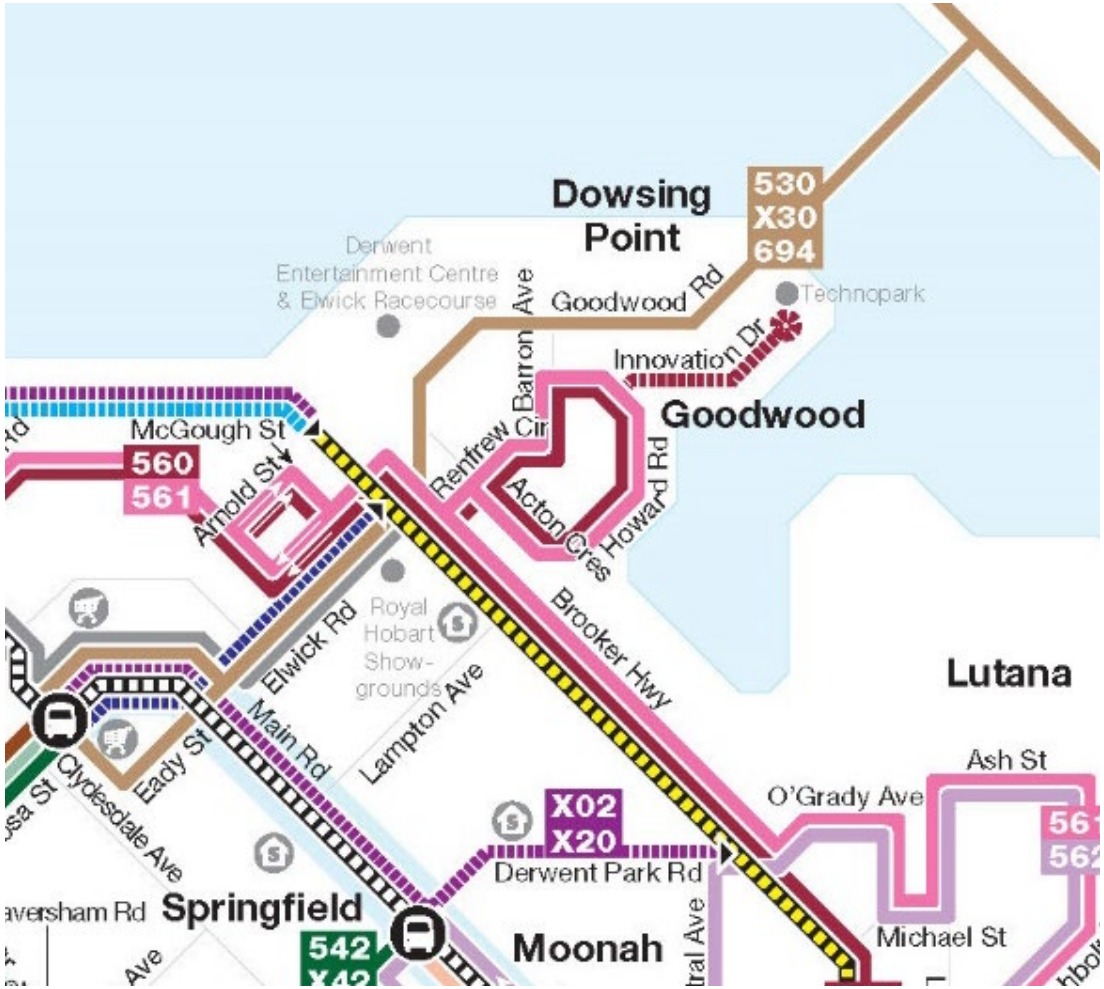
- The disused rail corridor 'Zinc Link' has the potential for walking and cycling to improve access to the precinct from Hobart, greater Glenorchy and the northern suburbs upriver via a regional greenway network. Further investigation and an understanding of how this could interact with current and future pedestrian and cycle paths could open the precinct and foreshore to greater activity levels and integration with surrounding uses.

PRECINCT PERMEABILITY

How are the roads, public transport and the active network being used?

Public transport provision is largely radial to/from Hobart CBD and includes:

- Two bus routes that use Brooker Highway and undertake a loop of Goodwood residential area, with peak hour services continuing to Technopark.
- Some bus stops have shelters however user facilities and supporting information is basic.
- A number of commuters are taking up worker parking causing user conflict.



Hobart North Network Map , Department of State Growth, 2020

IMPROVING CONNECTIVITY

Movement around the precinct is critical to the user and visitor experience. To improve connectivity, some key opportunities identified include:

1. Enhancing existing walking and cycling links on Goodwood foreshore and extension to Elwick Bay, as part of development of coherent active transport network within study area.

2. Providing increased walking and cycle permeability and accessibility across the Brooker Highway and Goodwood Road.

3. Creation of Zinc Link walking and cycling path to connect the precinct to Glenorchy, Hobart CBD and the northern suburbs.

4. Improve management of parking and access to key employment sites through innovative parking solutions.

5. Development of a traffic management plan to co-ordinate industrial and residential traffic mixes.

6. Improving vehicular signage and general site wayfinding on approach to the Bay.

7. Embrace affordable micromobility (small lightweight vehicles) options within the precinct and connections to a broader dedicated network.

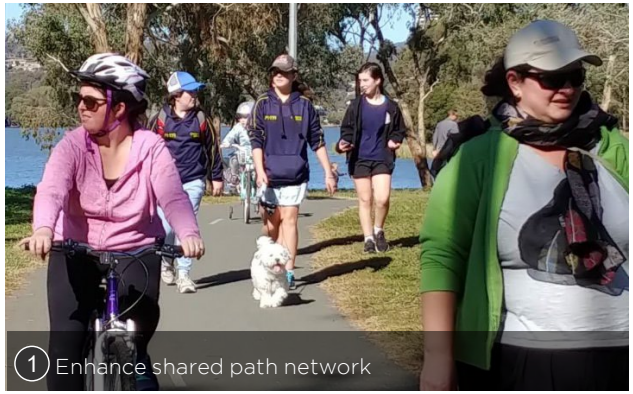
8. Future public transport options may include on-demand, electric and/or autonomous services.

9. Opportunity for Technopark and the precinct to become a test site for future micromobility initiatives and autonomous transit vehicles testing.

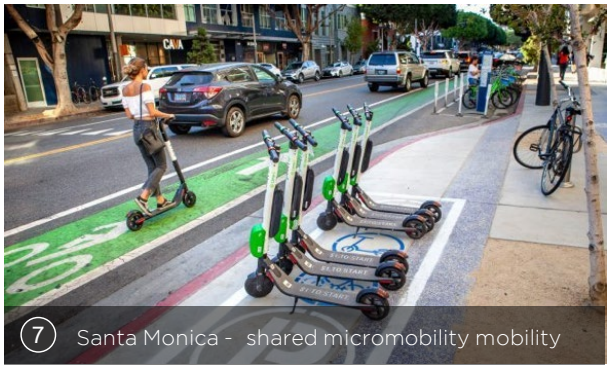
3 Existing Zinc link corridor – landscaped active link

4 Bender Drive Parking with potential for multistorey carpark integrated with amenities and landscaping

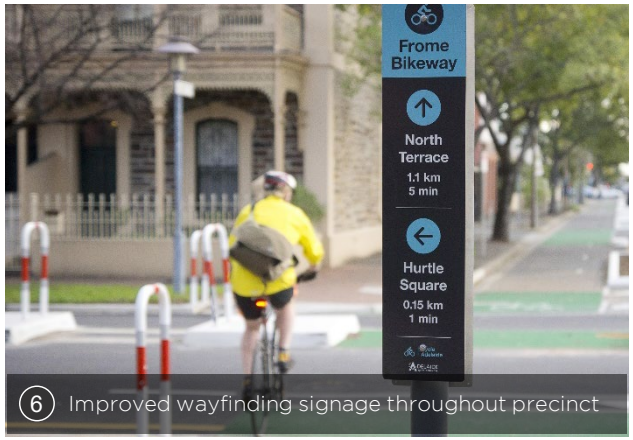
6 Improve wayfinding through signages



1 Enhance shared path network



7 Santa Monica - shared micromobility mobility



6 Improved wayfinding signage throughout precinct

3.0 ECONOMIC CONTEXT AND OPPORTUNITIES

PROFILE OF WORKERS & BUSINESSES

POWB precinct is located within a dynamic local economy underpinned by its location between the Derwent River, Glenorchy City Centre and Derwent Park industrial area. It also has a sizeable residential population which is distributed around the Bay and has influenced the growth and development of the area.

The local employment base can be characterised by two key aspects:

- Firstly, the workforce of 2,820 people is **slightly older and male dominated**, compared to the average in Greater Hobart.
- Secondly, the workforce has a strong **manufacturing and technical focus** highlighted by almost a third of workers being technician and trades workers and 40% of workers in the area in the manufacturing industry.

In the broader POWB area there are 373 businesses, the majority employing less than 20 employees each, with the predominate industries being:

- Construction (66)
- Transport and warehousing (60)
- Manufacturing (49)

Comparing the data on the number of businesses in previous years, **indicates a generally stable business environment** with little change in the overall number or type of businesses by industry.

Stakeholder Feedback:

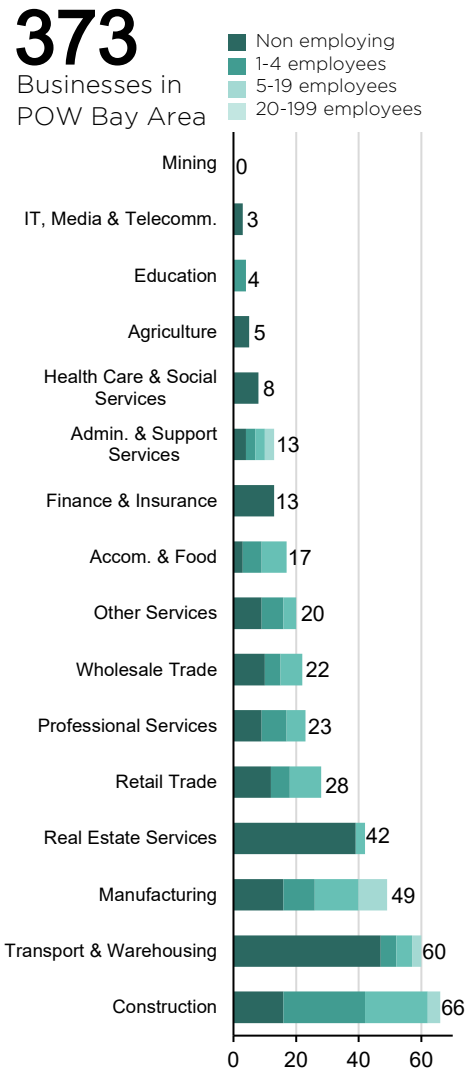
Discussions with stakeholders supported this notion and revealed that businesses in the POWB area tend to stay for extended periods of time and grow organically at the location. Many stakeholders noted a high desire to stay within the precinct and to expand and grow their business at their current sites.

PROFILE OF WORKERS & BUSINESSES

POWB Worker & Business Profile 2016

	Worker Study Area*	Greater Hobart	Tasmania
Total (2016)	2,820	99,361	215,366
Gender (M/F)	72% M 28% F	49% M 51% F	51% M 49% F
Workers below 40 years	40.6%	44.6%	42.6%
$41,601-$78,000	49.4%	37.8%	36.7%
Top 3 Occupations Employment in Total Study Area			
Technicians & Trades Workers	27.7%	12.7%	14.2%
Clerical & Administrative Workers	19.4%	15.6%	13.3%
Managers & Professionals	18.8%	34.7%	31.6%
Top 3 Industries of Employment in Total Study Area			
Manufacturing	40.9%	5.6%	7.1%
Public Safety and Administration	12.6%	11.5%	8.1%
Transport, Postal & Warehousing	12.1%	3.6%	4.4%

*Worker study area refers to the Destination Zones of Dowsing Point, Goodwood, Derwent Park and Lutana. Source: Source: ABS Working Population Profile 2016; Urbis



PROFILE OF LOCAL RESIDENTS

Stakeholder Feedback:
Discussions with stakeholders indicated that the quality and stock of the existing housing has impacted the amenity and safety of the public domain in some areas of POWB, particularly around Negara Crescent.

A unique feature of the POWB area is the **strong residential presence** with housing focussed along Gepp Parade, as well as Negara Crescent and adjacent to some of the industrial businesses. In some cases, the sharp contrast in uses does cause conflict.

An objective of the masterplan at the outset was to increase the opportunities for local employment and that includes for local residents. The socio-economic profile indicates there is **some opportunity for employment** in the areas of manufacturing and for technicians / trades with jobs generally not requiring tertiary qualifications.

The mixed land uses of the area are reflective of the ad-hoc historical growth of the precinct. Over the years, a range of manufacturing uses were attracted to the access to the Bay and the relative affordability of the surrounding land, blighted by the Zinc Works making it an affordable location for housing, including public housing.

In 2016, there was a residential population of 4,263 people and by virtue of the higher affordability of the residential area, generally the population had a **lower socio-economic profile**, compared to the average across Greater Hobart.

It is also notable that **13% of existing housing stock** is public rental, significantly higher than the average across Greater Hobart. A large amount of housing under a single owner may present opportunities for broad scale land use change in the medium to long term with proper engagement.

POWB Resident Profile

		Resident Study Area	Greater Hobart Area
	Population (2016)	4,263	224,462
	Average Age	37.6	39.2
	Average Household Income	$43,255	$79,304
	Housing Status	64% Owner 25% Private Rent 13% Public Rent	72% Owner 23% Private Rent 6% Public Rent
Top 5 Industries of Employment in Total Study Area			
	Yr 12 or Equivalent as highest level of schooling achieved	28%	52%
	Tertiary Education	13%	35%
	Unemployment Rate	7.6%	6.4%
	Top 3 Occupations in Study Area	1. Technicians & Trades Workers 17%	14%
		2. Labourers 16%	9%
		3. Clerical & Administrative 16%	15%
	Top 3 Industry of Employment	1. Manufacturing (13%)	5%
		2. Retail Trade (13%)	11%
		3. Public Administration & Safety (12%)	11%

Resident study area refers to the SA2 of Derwent Park-Lutana
Source: Source: ABS Census 2016; Urbis

TYPES OF MARITIME BUSINESSES & ACTIVITIES

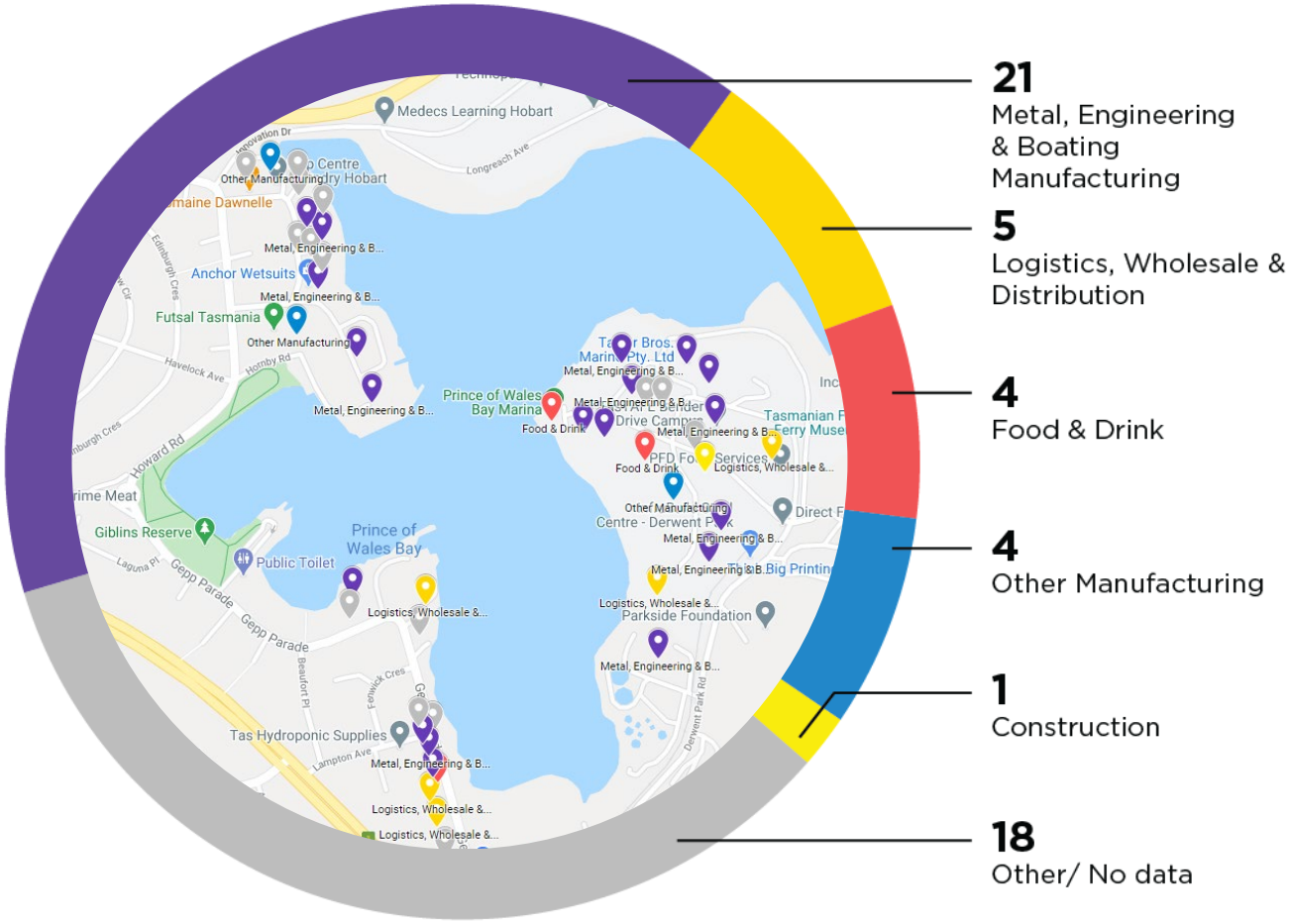
Stakeholder Feedback:
Discussions with stakeholders affirmed that businesses at POWB support each other through supply chain activities and even collaboration on major contracts to key customer markets. A common message from stakeholders was the need to continue to grow and strengthen the collaboration between businesses at POWB.

POWB precinct has organically formed a cluster of businesses involved in high-tech ship building and repair. As illustrated in the timeline earlier, this was strongly led by the establishment of Richardson Devine Marine and INCAT in the late 1980s which slowly drew in other businesses to support high-tech ship building and repairs.

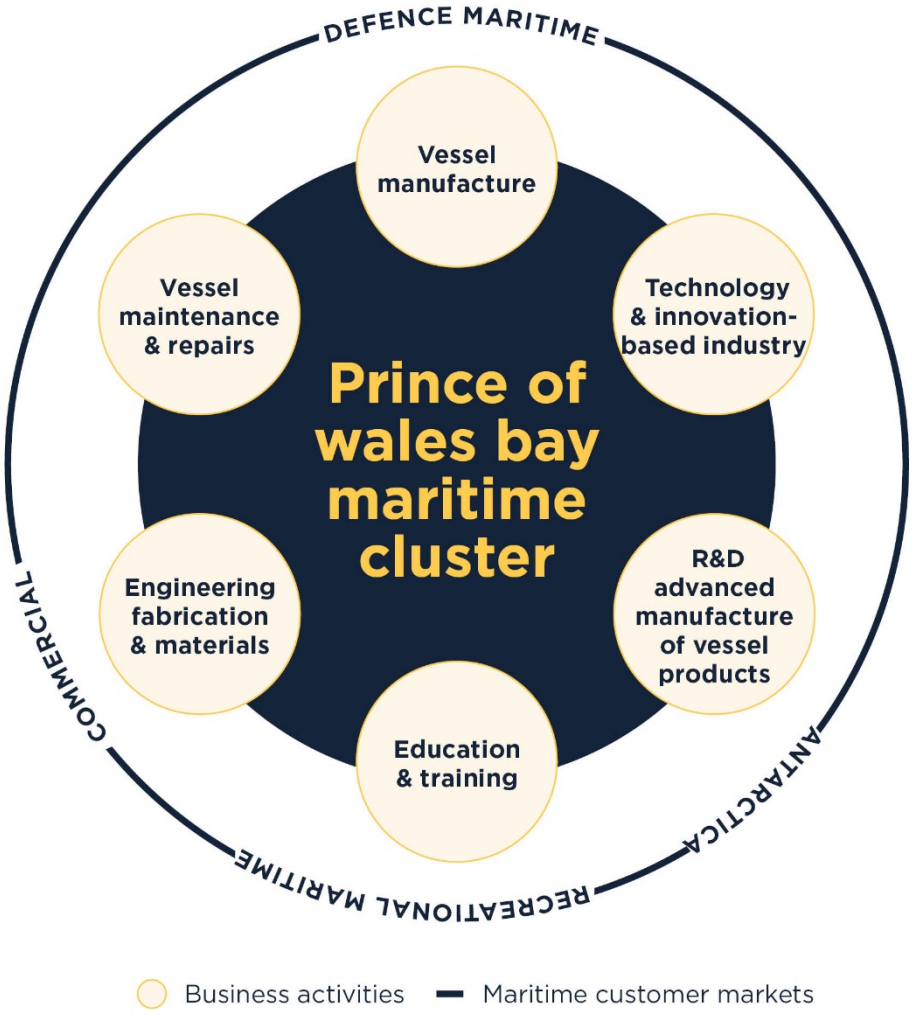
Today there are **around 20 businesses within the precinct involved directly in ship building, repairs and manufacturing of materials and product development with further businesses supporting this**. There is also an education and training facility at TasTAFE which has training partnerships with some of the major ship builders within the precinct. The adjacent map and diagram visually depicts the distribution of these businesses around POWB.

These **businesses share several commonalities, both in their activities and their customer markets**. The key common customer markets include maritime defence, commercial maritime operations (including tourism) and also future opportunities in the Antarctic sector, aligning with Hobart's position as Australia's key port for Antarctic related operations.

Industry Type Breakdown



MARITIME CLUSTER AT PRINCE OF WALES BAY



The commonality of businesses, business activities and customer markets has provided the precinct with a unique competitive advantage which has seen it grow from a few boat builders to a larger concentration of maritime industries and recognisable maritime cluster within Tasmania[1].

Maritime clusters are well recognised in both academic literature and government policy around the world. They are seen as *'a key strategic tool through which to support economic development and as a business strategy. Indeed, many governments acknowledge the important role maritime clusters play in not only promoting economic development, but also supporting potential innovation and technological development[2]'.*

Maritime clusters can vary in scale, from city or State level, such as Rotterdam or Hong Kong through to a smaller geographical concentrations, around individual ports, such as the case of POWB precinct, Henderson in Western Australia or Osborne in South Australia. The associated diagram illustrates the unique mix of businesses, activities and customer markets of the maritime cluster.

POWB precinct also meets three defining criteria[3] of a maritime cluster as it encompasses:

- **Businesses connected with other businesses** in related services demonstrated through the shared networks, supply chains and communication between POWB firms sharing knowledge, skills and training
- **Concentration and co-location of firms** to create competitive advantages in terms of workforce skills, specialised suppliers and service providers, and knowledge creation
- **Geographical proximity**, norms and trust are key to building localised capabilities, strengthening learning capacities, and ensuring competitiveness.

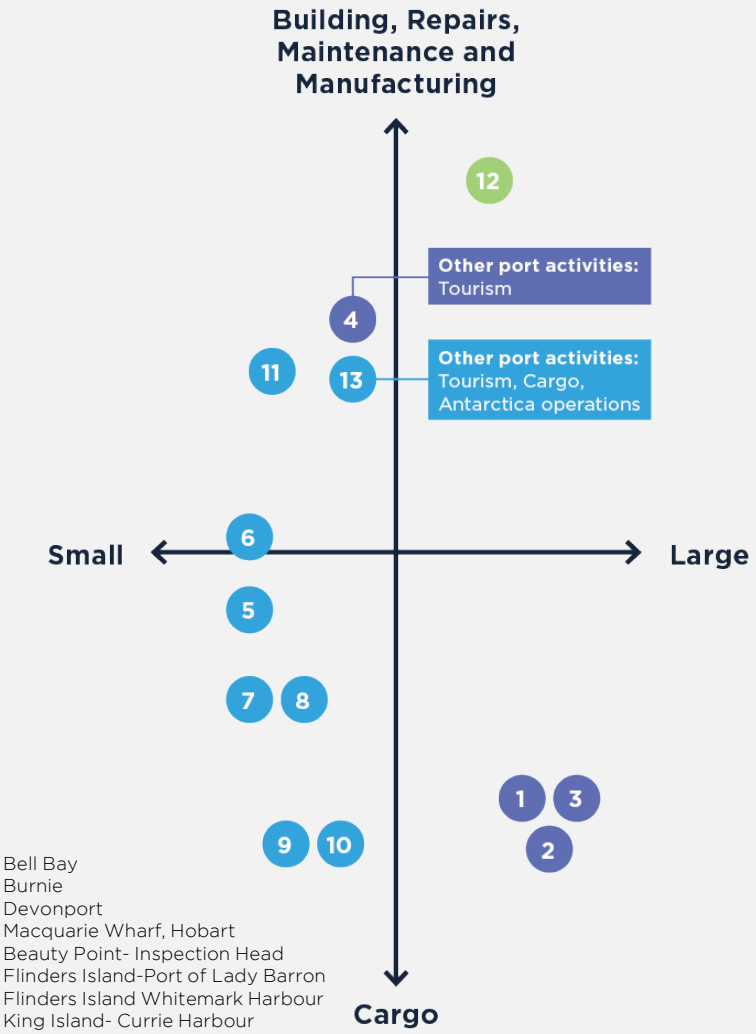
Discussions with stakeholders through the masterplan process recognised the existing value of the POWB precinct cluster, particularly in terms of sharing knowledge, supply chains and creating a competitive advantage through to shared contract tendering. Stakeholders also identified potential ways to enhance the clustering benefits through enhancing communication, shared branding and promotion. The case studies of larger scale maritime clusters at Henderson WA and Osborne SA in Appendix B, provide insights on how to support the growth and development of maritime clusters within the Australian context.

1. Wickham, M. & Hanson, D. (202) Industrial clustering in regional Australia: The role of chance, entrepreneurs and government in the Tasmania Light Ships Industry. University of Tasmania URL: https://www.semanticscholar.org/paper/Industrial-clustering-in-regional-Australia%3A-The-of-Wickham-Hanson/5e24218eabddec9445b1dde42d617e2114392652
2. Doloreux, D (2017): What is a maritime cluster?, Marine Policy 83 (2017) 215-220
3. Viedertye, R. (2013) Maritime Cluster Organizations: Enhancing Role of Maritime Industry Development, Procedia Social and Behavioural Sciences 81 (2013) 624-631

CURRENT COMPETITIVE POSITIONING WITHIN TASMANIA

The POWB precinct holds a unique position within Tasmania's network of maritime ports. As shown on the competitive analysis diagram, most maritime hubs are focused on cargo, whereas the **POWB cluster is the predominate manufacturing, repair and maintenance port in Tasmania, particularly for medium sized vessels.**

POWB Competitive Analysis



1. Bell Bay
2. Burnie
3. Devonport
4. Macquarie Wharf, Hobart
5. Beauty Point- Inspection Head
6. Flinders Island-Port of Lady Barron
7. Flinders Island Whitemark Harbour
8. King Island- Currie Harbour
9. King Island- Port of Glassy
10. Stanley
11. Strahan
12. Prince of Wales Bay
13. Port Huon

CURRENT COMPETITIVE POSITIONING WITHIN TASMANIA

Macquarie Wharf is a functional commercial and multipurpose precinct with a focus on Antarctic vessels, log exports, common user facilities, container services and cruise facilities. There are early plans in place to upgrade Macquarie Wharf to be able to grow these key areas to a larger scale into the future. As the second port in Hobart, growth of the POWB has been shaped by the continuing transition of Macquarie Wharf, particularly towards recreation and cruise facilities, as outlined in the TasPorts Masterplan 2018. This has seen some commercial boat maintenance and repairs move to the POWB in recent years.

The future of Queens Domain Slipyards will also influence the long-term growth of POWB. Queens Domain Slipyards is located on the periphery of the Port of Hobart and has slipways for repair and maintenance of vessels but is limited by vessel size. It is expected to remain as is in the short term. However, according to the *Derwent Maritime Industries Sites Masterplan 2012*, there is long-term potential that the Domain Shipyard may be redeveloped for alternative uses. This could see a potential relocation of this function elsewhere in the long term, including the potential to be relocated to POWB.

Plan for Port of Hobart Upgrade, Tas Ports 2018

QUEENS DOMAIN SLIPYARDS
3 slipways for repairs and maintenance of large vessels

PERFORMANCE OF MARITIME MANUFACTURING INDUSTRY IN TASMANIA

The economic performance of the key activities of the POWB cluster of maritime manufacturing, repair and maintenance, can be best understood by looking at the 'transport equipment manufacturing' sector.

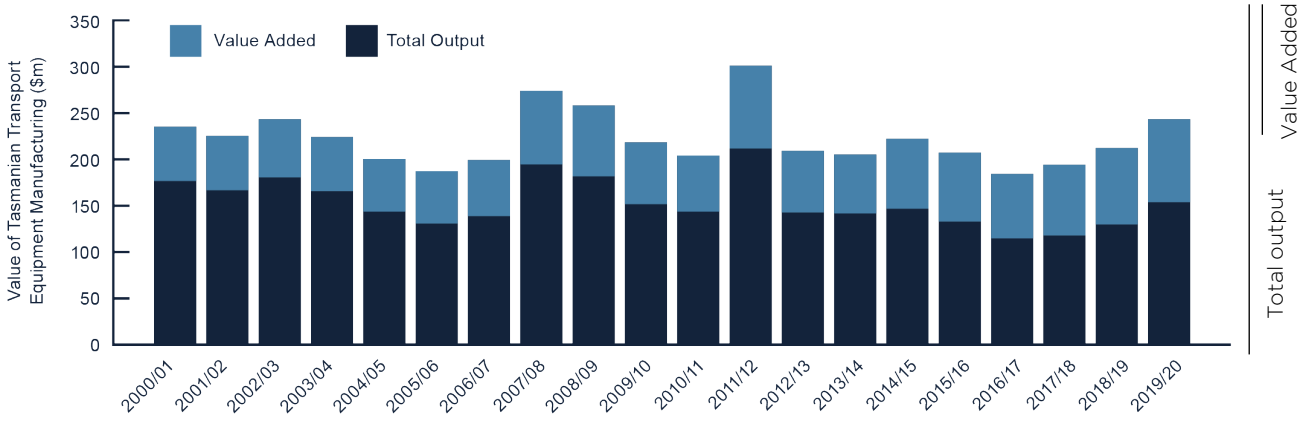
IN 2019/20 THE TRANSPORT EQUIPMENT MANUFACTURING (TEM) SECTOR WAS WORTH $243M TO THE TASMANIAN ECONOMY.

It is a highly cyclical industry but has shown growth of around 7% per annum since 2016/17. It is also important to note, that the value add, that is the additional value each producer will bring to products along the supply chain, has increased over time indicating that the Tasmanian vessel building industry is increasing in productivity and creating higher order products.

The industry employs just over 1,000 workers, a decline of about 500 since 2001/02. However, discussions with stakeholders suggest that the nature of the jobs have evolved towards more highly skilled and technical work.

City of Glenorchy is the predominate location for transport equipment manufacturing activity in Tasmania. In 2019/2020, 63% of value added generated by the sector was from the City of Glenorchy and 60% of workers in the industry were also located in the City of Glenorchy. This underpins the notion of POWB as an important maritime cluster for Tasmania.

Value of Transport Equipment Manufacturing, Tasmania



TASMANIA

$90M Value added of transport equipment manufacturing in Tasmania 2019/20

12% Growth in value added of transport equipment manufacturing sector in Tasmania between 2014/15 and 2019/20

1,007 Employed in transport equipment manufacturing in Tasmania 2019/20

CITY OF GLENORCHY

63% Of value added in TEM generated from City of Glenorchy in 2019/20

$57M Of value added by TEM businesses located in City of Glenorchy for the year 2019/20

60% Of TEM workers employed in City of Glenorchy in 2019/20

Source: Tasmanian Economic Profile and Glenorchy City Economic Profile, id Informed Decisions 2021. The Transport Equipment Manufacturing sector provides broad insights into the maritime manufacture, repairs and maintenance activities given the absence of large non-maritime transport equipment manufacturing activities (i.e. cars, rail transport equipment) in Tasmania.

GROWTH OUTLOOK FOR RELATED INDUSTRIES & CUSTOMER MARKETS

This table summarises the broader outlook of key customer sectors related to maritime industry activities at POWB.
It provides a picture of key market outlooks and State Government initiatives which will provide opportunities for businesses at POWB over the next 5-10 years.

Industry	Importance to Tasmania	Growth Outlook	Key State Government Initiatives	Key Drivers for Growth	Current Sector Role at POWB	Considerations for POWB
Commercial maritime manufacture	• High - Tasmania recognised for its design, manufacture and fit out of maritime vessels for both domestic and international markets	• Strong - Indications from local businesses indicate there is strong continued growth in this sector.	• State Government actively promoting Tasmania's commercial maritime industry capacity to external markets	• Continuing change of function at Port of Hobart • Growth in marina activity • Future of Domain Slipyards	• Focus sector of POWB and established international reputation in commercial maritime manufacture. Anchor tenants continue to attract other businesses.	• Enhance capacity for POWB businesses through training, collaboration and promotion
Defence	• High - Key customer market for maritime industry in Tasmania with more than 35 businesses servicing the defence industry	• Strong - Australia planned defence capability investment is $195b between 2016-2026	• State Government actively promoting Tasmania's defence maritime industry capacity	• Commonwealth investment in defence • Increased interest in maritime defence industry capacity from international markets	• Existing key customer market for some businesses	• Enhance joint tendering opportunities for defence contracts • Enhance security and presentation of POWB to external customers
Antarctic	• High - Hobart recognised as Australia's hub and an international Antarctica gateway	• Strong - Growth underpinned by plans for Antarctica Operations at Macquarie Dock; implementation of Antarctica Gateway Strategy and new US icebreaker to Hobart	• State Government actively promoting Tasmania's role as an international Antarctica gateway and investing in new supporting infrastructure at Macquarie Dock in Hobart	• Presence of major Australian and US icebreakers in Hobart creates repair and maintenance opportunities for local businesses	• Currently not a key market for POWB businesses but some stakeholders plan to expand to service new icebreakers in Hobart	• Enhance ability for joint tendering • Optimise opportunity for repair and maintenance work at POWB
Advanced manufacturing	• High - Manufacturing is the fifth largest industry in Tasmania. Maritime related advanced manufacturing is a key subsector valued at $113m	• Strong - Manufacturing in Tasmania growing by ~3% per annum, in contrast to mainland where manufacturing industry is contracting	• State Government actively promoting Tasmania's capability through the *Advanced Manufacturing Action Plan 2024*	• Government initiatives to grow advanced manufacturing including skill development, capacity building, increased industry collaboration and promotion	• Many businesses involved in advanced manufacturing at the POWB site, particularly in the area of maritime. • On-site training through TasTAFE for metal fabrication	• Enhance capacity for POWB businesses through training, collaboration and promotion
Local vessel repair and maintenance (R&M)	• High - Hobart is a key maritime port for Tasmania and home to strong commercial and recreational vessel markets	• Strong - commercial vessel growth driven by relocation of R&M activity away from Macquarie Wharves. Recreation vessels market also growing, evidenced by success of POWB Marina	• TasPorts strategy to refocus of Port of Hobart is relocating R&M work to POWB	• Continuing change of function at Port of Hobart • Growth in marina activity • Future of Domain Slipyards	• Key focus for many existing POWB businesses. Includes commercial and recreational vessels.	• One stop shop for R&M of local vessels • Ensure long term water accessibility to support R&M activities

Sources: Defence Tasmania Maritime Prospectus, Government of Tasmania 2020; Tasmania Antarctica Gateway Strategy, Department of State Growth 2017;
Advanced Manufacturing Action Plan 2024, Department of State Growth 2020; Tasmania Maritime Prospectus, Department of State Growth 2020 feedback from Stakeholders

4.0 MASTERPLAN STRATEGY

STRATEGIC POSITIONING

STRATEGIC CONTEXT

Policy support for a maritime industrial hub

- Collaborative business environment
- Physical opportunities to leverage
- Unique competitive positioning
- Align with future key industry sectors

VISION

"The Prince of Wales Bay precinct is a collaborative and competitive hub of marine industries in southern Tasmania which attracts diverse and complementary businesses. It functions as a one-stop destination for all marine related activity".

KEY DRIVERS FOR CHANGE

- Formalise precinct coordination
- Enhance competitive positioning
- Improve amenity and physical constraints
- Leverage focus Industries

MASTERPLAN STRATEGIC DIRECTIONS

STRATEGIC DIRECTION 1:

Enhance business growth opportunities for POWB

Objective:
To identify strategic upgrades with varying capital cost and high returns to support continued growth of the precinct

STRATEGIC DIRECTION 2:

To support continued growth by unlocking underutilised land

Objective:
Support long term growth and potential expansion opportunities

STRATEGIC DIRECTION 3:

Support development of Maritime Cluster of excellence

Objective:
To support growth through strengthening branding, management, promotion and skills at POWB

STRATEGIC DIRECTION 4:

Manage parking and access

Objective:
To manage existing access and parking arrangements to ensure long term growth and efficiency around POWB.

STRATEGIC DIRECTION 5:

Enhance public domain and amenity

Objective:
To enhance the amenity of the public domain for workers and visitors to POWB

STRATEGIC DIRECTION 6:

Support growth through simplified planning framework

Objective:
To ensure the regulator framework supports the long-term economic growth for the precinct

MASTERPLAN VISION & PRINCIPLES

This vision seeks out for the Prince of Wales Bay precinct to:

- Be the leading maritime industrial hub for southern Tasmania
- Attract and retain skilled employment
- Improve internal connectivity and movement
- Enhance public amenity for workers and visitors
- Facilitate collaboration of businesses
- Lead research and development and skills training
- Support continued expansion of business
- Mitigate gentrification through policy
- Unlock infrastructure investment opportunities

From this, the **six strategic directions and actions** have been identified and detailed on the following page.

MASTERPLAN STRATEGIC FRAMEWORK

STRATEGIC DIRECTION 1:

Enhance business growth opportunities for POWB

Objective:
To identify strategic upgrades with varying capital cost and high returns to support continued growth of the precinct

Actions:

1.1 Investigate feasibility of re-fuelling options

1.2 Investigate the feasibility and costs of further dredging to increase water depth in specific areas of the bay

1.3 Investigate the feasibility of using an existing lay up berth as a common user facility (dependent on dredging)

1.4 Investigate market demand and feasibility of boat storage facility

1.5 Investigate feasibility to develop a larger capacity travel lift for boats

STRATEGIC DIRECTION 2:

Support long term growth and potential expansion opportunities

Objective:
To support continued growth of maritime sector by unlocking underutilised land

Actions:

2.1 Encourage appropriate land uses on industrial-zoned land

2.2 Investigate development potential of underutilised sites

2.3 Work with State Growth to position Technopark as a destination for R&D for advanced manufacturing and maritime industries

2.4 Support proposal to expand marina and ensure any proposed uses are complementary

STRATEGIC DIRECTION 3:

Support development of Maritime Cluster of excellence

Objective:
To support growth through strengthening branding, management, promotion and skills at POWB

Actions:

3.1 Strengthen on-site training and skills development opportunities for the maritime industry sector

3.2 Investigate the viability of a management vehicle to guide long-term growth of POWB through promotion, branding, skills training and better communication between businesses

3.3 Develop a branding, identity and promotion strategy for the precinct

STRATEGIC DIRECTION 4:

Manage parking and access

Objective:
To manage existing access and parking arrangements to ensure long-term growth and efficiency around POWB

Actions:

4.1 Investigate opportunities to improve traffic issues through public transport improvements

4.2 Investigate technical and commercial viability of innovative traffic management solutions

4.3 Support development of a continuous active network of pedestrian and cycle ways including the Zinc Link

STRATEGIC DIRECTION 5:

Enhance public domain and amenity

Objective:
To enhance the amenity of the public domain for workers, local residents and visitors to POWB

Actions:

5.1 Develop a strategy for public domain improvements in key areas. This should include wayfinding, gateway and security elements for existing users

5.2 Leverage the significant open space and provide greater connectivity to benefit local workers and residents

5.3 Celebrate the cultural heritage along the Innovation Drive Foreshore by creating a unique heritage interpretation/ landscape

STRATEGIC DIRECTION 6:

Support growth through a simplified planning framework

Objective:
To ensure the regulator framework supports the long-term economic growth for the precinct

Actions:

6.1 Consider the introduction of a S*pecific Area Plan* for the POWB to ensure its long-term growth as a maritime/ industrial precinct

6.2 Support future development of additional food and beverage amenity for workers through providing a supporting planning framework

MASTER PLAN ACTIONS

1.1 Potential area for re-fuelling facility

1.2 Potential dredging to remove sediment from key commercial areas

1.3 Utilise existing/proposed lay up berths (reliant on 1.2)

1.4 Potential location for dry dock facility

1.5 Potential location for larger boat travel lift

2.1 Encourage appropriate land uses on industrial-zoned land

2.2 Investigate development potential of 3 sites

2.3 Further innovation opportunities at Technopark

2.4 Potential to expand marina

2.5 Investigate long-term relocation of domain slipyards

3.1 Strengthen on-site training investment

3.2 Management mechanism

3.3 Branding and promotion strategy

4.1 Enhance public transport

4.2 Innovative traffic management solutions

4.3 Continuous active pedestrian network, including Zinc Link

5.1 Public domain strategy

5.2 Leverage open space through better connectivity

5.3 Heritage trail to celebrate culture and heritage

6.1 Specific Area Plan

6.2 Support food and beverage amenity

*Green indicates action not shown on map

01 ENHANCE FUNCTION AND BUSINESS GROWTH OPPORTUNITY

Objective:
To identify strategic upgrades with varying capital cost and high returns to support continued growth of the precinct

Actions
Council to **advocate** for the following actions:

1.1 Investigate feasibility of re-fuelling options

1.2 Investigate the feasibility and costs of further dredging to increase water depth in specific areas of the bay

Key Actions / Context

The following priorities will support the on-going operation and continued growth of businesses within the POWB precinct.

1.1 Re-fuelling facility

A re-fuelling facility would enable the precinct to be a 'one-stop shop' for vessel and maintenance services. Currently vessels need to travel across the River Derwent to Lindisfarne which is costly and time intensive. Furthermore, fuel for boats being manufactured within the precinct must be tankered in. The commercial feasibility and funding required for delivering either a permanent facility or a barge within the bay, should be considered.

1.2 Increasing water depth

Silt and sediment build up continues to impact water depth at the entry and within POWB. This restricts the movement of larger vessels and therefore maintenance and repair opportunities for businesses. Further investigation is required to assess the lobbying process, feasibility and environmental impact in undertaking dredging to key areas of the bay. Engage relevant stakeholders for discussions with Government, including with Tasports.

Benefit of Change

Implementation of Actions 1.1 and 1.2 are likely to enhance the competitiveness of POWB precinct by:

- On-site re-fuelling to create improved business efficiency and expansion of services, leading to income benefits.
- Ensuring efficient access for vessels of a range of sizes through the Bay by increasing water depth
- Opening the precinct to new markets through the ability to repair and maintain larger vessels with better facilities

01 ENHANCE FUNCTION AND BUSINESS GROWTH OPPORTUNITY

Objective:
To identify strategic upgrades with varying capital cost and high returns to support continued growth of the precinct

Actions
Council to **advocate** for the following actions:

1.3 Investigate the feasibility of using existing lay up berths as a common user facility (dependent on dredging)

1.4 Investigate market demand and feasibility of boat storage facility

1.5 Investigate feasibility to develop a larger capacity travel lift for boats

Key Actions / Context

1.3 Common user facility

A lay up berth, for repair and maintenance of larger vessels, would open new opportunities for businesses within the precinct. This could be achieved through the commercialisation of existing privately-owned lay up berths, creating common user facilities. Use of existing lay up berths is dependent on dredging, as outlined in Action 1.2, as well as appropriate environmental and commercialisation strategies formulated.

1.4 Additional dry boat storage

There is currently pressure on space for boat storage. The inclusion of a dry boat storage facility would address storage capacity constraints, with the POWB precinct being the first in Tasmania to possibly include this facility. The market demand, development feasibility and most suitable locations for a dry boat storage facility should be investigated further.

1.5 Larger capacity boat travel lift

It has been identified that the current travel lift located in the waters around the Negara Crescent Area is limited in its capacity for larger vessels. Therefore, the potential for a new, larger capacity boat travel lift should be investigated, noting that this may rely on further dredging occurring in the waters around Negara Crescent Area (as per 1.2).

Benefit of Change

Implementation of Actions 1.3, 1.4 and 1.5 are likely to enhance the competitiveness of POWB precinct by:

- Allowing for efficient and shared use of existing infrastructure through a Common User Facility
- Dry boat storage would see vessels off the water and reduce repair and maintenance needs
- Additional business to be generated through the ability to repair and maintain larger vessels with better travel lift facilities

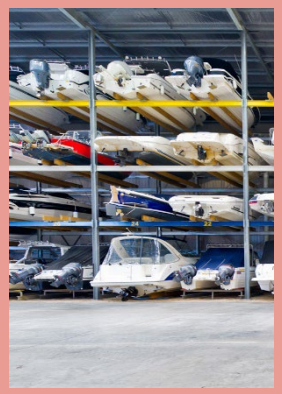
01 ENHANCE FUNCTION AND BUSINESS GROWTH OPPORTUNITY

SPATIAL OPPORTUNITIES

1.1 Potential areas for re-fuelling activities

1.2 Dredge key commercial areas of bay to reduce ongoing sediment build-up

1.3 Utilising existing lay up berths as common user facilities



1.4 Potential for boat storage

1.5 New boat travel lift

02 SUPPORT MARITIME INDUSTRY GROWTH AND EXPANSION

Objective:
To support continued growth of maritime sector by unlocking underutilised land

Actions
Council to **advocate** for the following actions:

2.1 Encourage appropriate land uses on industrial-zoned land

2.2 Investigate development potential of three underutilised sites

2.3 Work with State Growth to position Technopark as a destination for research and development for advanced manufacturing and maritime industries

Key Actions / Context

Through better usage and alignment of some of the underutilised land within the POWB precinct, this could assist in future business growth and expansion opportunities. The following strategies, along with those in Strategic Direction 6, prioritise long term growth of maritime industry functions.

2.1 & 2.2 Long-term expansion areas

Lack of space for expansion is a key concern for existing businesses. Of the few vacant or undeveloped sites, very limited have water access. The Masterplan has identified sites that should be investigated further to encourage appropriate land uses are developed. The three underutilised sites (identified on the following map) present a short-term opportunity with appropriate land uses also encouraged on sites that are industrial zoned for longer term business expansion potential.

2.3 Continued investment in Technopark

Technopark has a key focus on developing, supporting and marketing, viable and sustainable technology and innovation. Continued investment and growth in research and development and manufacturing at Technopark will form a critical component for the precinct going forward. While investment in research and development creates a competitive edge, it can deliver direct benefit to existing businesses through innovation and manufacturing.

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Benefit of Change

Implementation of the Strategic Direction 2 actions will support the growth of vibrant and sustainable maritime industries within the POWB precinct by:

- Allowing businesses to grow and expand their operations
- Providing new development sites to attract new maritime related industries
- Enhancing the training and skills development capacity for businesses and activities related to maritime industries

02 SUPPORT MARITIME INDUSTRY GROWTH AND EXPANSION

Objective:
To support continued growth of maritime sector by unlocking underutilised land

Actions
Council to **advocate** for the following actions:

2.4 Support potential to expand marina and ensure any proposed uses are complementary

Key Actions / Context

2.4 Support marina expansion

The POWB Marina is a recent addition to the area and has created business opportunities for the repair and maintenance of recreational boats. Stakeholders generally supported the proposal to expand the existing marina, recognising anecdotally the level of demand for additional berths, the relative affordability compared to mainland options, and the new business opportunities it could create.

It will be important to ensure further marina berth development does not impede access to the water for surrounding businesses and land-owners. Furthermore, any other uses proposed attached to the marina should be complementary to it's primary activity.

Benefit of Change

Implementation of Action 2.4 will support the growth of sustainable maritime uses within the POWB precinct by:

- Supporting growth of the existing marina, which will open further opportunities for existing maritime businesses and create additional activity.

02 SUPPORT MARITIME INDUSTRY GROWTH AND EXPANSION

SPATIAL OPPORTUNITIES

2.1 Encourage appropriate land uses developed on industrial zoned land

2.3 Continued investment and growth at Technopark

2.2 Investigate feasibility of utilising 3 identified development sites for long-term maritime use

2.4 Proposal to expand marina and provide complementary facilities

Prince of Wales Bay Marine & Innovation Masterplan

03 SUPPORT DEVELOPMENT OF MARITIME CLUSTER OF EXCELLENCE

Objective:
To support growth through strengthening branding, management, promotion and skills at POWB

Actions
Council to **advocate and partner** for the following actions:

3.1 Strengthen on-site training and skills development opportunities for the maritime industry sector

3.2 Investigate the viability of a management vehicle to guide long-term growth of POWB through promotion, branding, skills training and better communication between businesses

3.3 Develop a branding, identity and promotion strategy for the precinct

Key Actions / Context

Successful maritime clusters support the growth and development of the soft infrastructure such as skills training, branding, identity and promotion.

3.1 Continued skills and training development

Skills and training development provide maritime clusters, like POWB, with a competitive advantage over other maritime industry businesses. TasTAFE already provides on-site tertiary training in metal fabrication and has existing skills partnerships with businesses within the precinct. There is an opportunity to explore further skills and training opportunities for local businesses to ensure long-term growth of the maritime industry and the ability to support and retain skilled workers.

3.2 A new management vehicle

Whilst POWB has grown organically as a cluster over the past forty years, the future growth requires collaboration from all stakeholders and overall strategic direction. Successful maritime clusters in Australia and elsewhere, have used management vehicles to enhance the collaboration and collective knowledge of businesses when tendering for larger contracts, further enhancing their competitive advantages. Further investigation should consider a range of management vehicle options which broadly cover the functions outlined on the following page. Two examples of successful structures used at Bell Bay, Tasmania, and the Port of Newcastle are shown on the following page.

3.3 Branding, identity and promotion strategy

A singular branding and promotion platform would further enhance the identity and reputation of maritime industry businesses at POWB. This could be used for promotional activities, online/mobile applications and continue through to branding assets within the public domain.

Benefit of Change

Implementation of the Strategic Direction 3 actions are likely to enhance the identity and brand value of the POWB precinct by:

- Providing leadership in the maritime industry across Australia through skills and training
- Creating a strong identity and brand which aligns with excellence and innovation in the maritime industry
- Better collaboration leading to a more coordinated approach when tendering for larger scale contracts
- Establish a singular, representative body, to guide the long-term growth and to ensure a clear decision-making process is in place
- Increasing opportunities for business-to-business collaboration through enhanced communications, network, research and development and skills training at POWB

POTENTIAL MANAGEMENT MECHANISMS

HAVING A MANAGEMENT MECHANISM IN PLACE IS CRITICAL FOR A PRECINCT OF THIS SCALE TO BE ABLE TO STREAMLINE BUSINESS OPERATIONS, COLLABORATE, ENSURE FOCUS ON THE KEY CUSTOMER AND INDUSTRY SEGMENTS AND IMPORTANTLY, ENSURE THE PRECINCT IS PLAYING TO ITS COMPETITIVE STRENGTHS.

Defining the Role

In considering a management mechanism for the POWB precinct, the key areas of focus should include:

- Assist with the implementation of the masterplan
- Manage major works being undertaken
- Liaise with key groups (i.e. Council, State Growth, Crown Land, Marine & Safety Tasmania)
- Promotion and marketing of the precinct and maritime industry, working towards key tenant and investment attraction
- Focus on branding and identity including the website
- Engage in precinct wide collaborative skills training
- Creating better co-ordination on tendering processes
- Identify new business opportunities

Membership Structure

Members should encompass a range of stakeholders to ensure the optimal outcome for the precinct, this includes:

- POWB landowners
- Industry representatives (i.e. Tasmanian Maritime Network; Polar Network)
- Glenorchy City Council
- State Growth Tasmania
- Residents
- Other key bodies

Funding Options

Potential funding options have been identified including:

- A membership fee-based structure
- A Council or State Grant as part of the implementation of the 2021 masterplan
- A combination of both

While a Council or State Grant could be an initial option during the establishment phase, it would be expected that this would evolve into a membership fee structure after some time.

SUCCESSFUL MANAGEMENT GROUPS

THE BELL BAY ADVANCED MANUFACTURING ZONE (BBAMZ)

"The BBAMZ aim is to lift the profile of the Bell Bay zone locally, nationally and internationally as well as build a sense of community pride in the region" (Bell Bay Advanced Manufacturing Zone)

The BBAMZ was formed in 2015, after transitioning from being a community consultive committee in 2013. The aim of the group was to encourage better collaboration and grow the region's capabilities. The group includes 23 businesses and 9 state or government bodies. In 2020, BBAMZ became a company limited by guarantee. While initially funded through a grant, this has since moved to a membership fee structure.

Members benefit from:

- **Increasing resilience of businesses by diversifying into new markets**
- **Leveraging opportunities to be more efficient**
- **Investigating opportunities to achieve cost savings or cost avoidance for businesses by collaborating**
- **Connecting businesses with Government programs**
- **Investigating collaborative tendering opportunities for new markets**
- **Networking with other businesses in and outside of the precinct**
- **Raising the profile of manufacturing in Bell Bay**
- **Investigating new businesses for the Bell Bay precinct to grow the number of jobs**
- **Advocacy role with State and Federal governments**
- **Liaising with local and state government on potential developments for Bell Bay**

Source: Bell Bay Advanced Manufacturing Zone

PORT OF NEWCASTLE COMMUNITY LIAISON GROUP

This community liaison group was established in 2014, with meetings occurring quarterly.

The group "*provides an opportunity for the community to engage with the port, learn about its operations and provide feedback*". (Port of Newcastle)

The group's membership comprises representatives of community, business, industry and government with an interest in the operation of the port. The group has a strong focus on supporting the local community through various sponsorship and financial contributions to the community.

04 IMPROVE ACCESS AND PARKING

Objective:
To manage existing access and parking arrangements to ensure long-term growth and efficiency around POWB

Actions
Council to **advocate and partner** for the following actions:

4.1 Investigate opportunities to improve traffic issues through public transport improvements

4.2 Investigate technical and commercial viability of innovative traffic management solutions

Key Actions / Context

Developing an integrated traffic management strategy and improvement of active transport (pedestrian and cycling) connections through the precinct will enhance the experience of travelling to and from the precinct for both workers and the surrounding community.

4.1 Address traffic issues through public transport improvements

As part of this, improvement of public transport should be investigated as a critical component to accessibility. This could include extension of bus services, improvement of bus stops and smart bus information throughout the precinct.

4.2 Investigate innovative traffic management solutions

Stakeholder discussions have raised concerns for key traffic related issues focused on congestion and conflict. A holistic integrated transport study followed by solutions to alleviate the issues of congestion, access, and wayfinding and car parking needs to be prepared. Develop a precinct wide parking and access strategy to address requirements. Exploration of innovative parking solutions will be an important consideration for the precinct in the future. This includes consideration for the nature of shift work, which results in key periods of high activity, and resultant need for parking spaces. The opportunity for the inclusion of micromobility options as well as changes to vehicle usage in the future through technology such as autonomous vehicles could be considered.

Benefit of Change

Implementation of Actions 4.1 and 4.2 are likely to mitigate access and parking issues within the POWB precinct by:

- Improving the connection and experience for businesses as well as the surrounding residents
- Better connection to the rest of Glenorchy through improved public transport infrastructure
- The broader community can access and enjoy the foreshore, in a high-quality public domain
- Better wayfinding and permeability
- Improved localised traffic and parking outcomes

04 IMPROVE ACCESS AND PARKING

Objective:
To manage existing access and parking arrangements to ensure long-term growth and efficiency around POWB

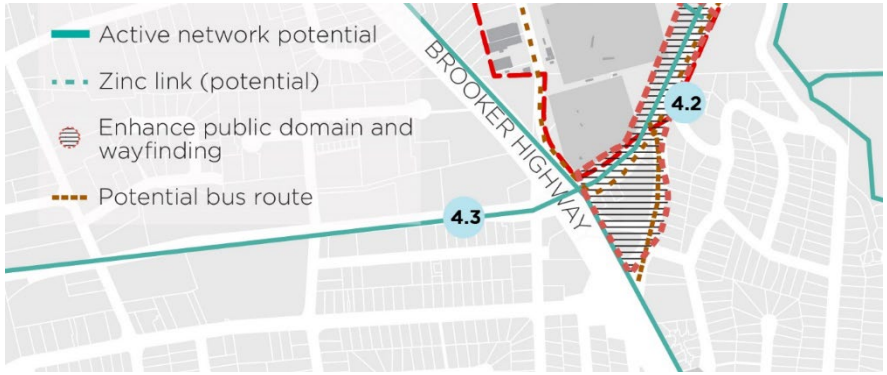
Actions
Council to **advocate and partner** for the following actions:

4.3 Support development of a continuous active network of pedestrian and cycle ways including the Zinc Link

Key Actions / Context

4.3 Extensive pedestrian and cycling network including Zinc Link

Investigate the feasibility of building a well-connected network of pedestrian and cycle ways to improve connection within the precinct as well as to the surrounding areas. As part of this, utilising the disused rail spur should be considered as part of the broader connectivity and future access of the precinct. The Zinc Link presents an opportunity to connect the precinct with broader Glenorchy and surrounds, as well as integrate the recreational and open spaces and foreshore for use by local residents.



Benefit of Change

Implementation of Action 4.3 is likely to mitigate access and parking issues within the POWB precinct by:

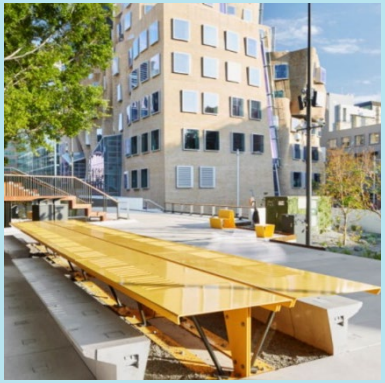
- Improving the connection and experience for businesses as well as the surrounding residents
- The broader community can access and enjoy the foreshore, in a high-quality public domain
- Better wayfinding and permeability
- Improved localised traffic and parking outcomes

04 IMPROVE ACCESS AND PARKING

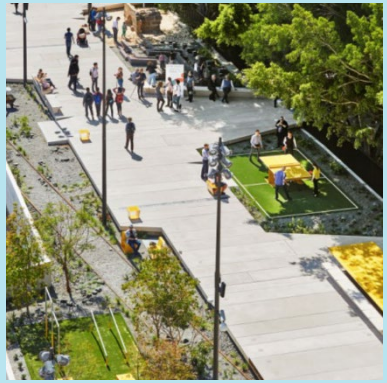
SPATIAL OPPORTUNITIES

4.1 Address public transport improvements

4.2 Investigate innovative traffic management solutions



4.3 Support development of continuous active network of pedestrian and cycle ways to connect the precinct to surrounding areas



Investigate feasibility of Zinc Link to provide pedestrian and cycle accessibility

05 ENHANCE THE PUBLIC DOMAIN AND AMENITY

Objective:
To enhance the amenity of the public domain for workers, local residents and visitors to POWB

Actions
Council to **deliver and partner** for the following actions:

5.1 Develop a strategy for public domain improvements in key areas - this should include wayfinding, gateway and security elements for existing users

5.2 Leverage the significant open space and provide greater connectivity to benefit local workers and residents

Key Actions / Context

Enhancements of public domain and amenity will improve the experience of the precinct to workers and visitors whilst ensuring safety.

5.1 Develop strategy for public domain improvements

Key locations in the precinct have been identified for the streetscape and public domain improvements that would help enhance the experience for visitors as well as local users. Wayfinding strategies that extend throughout the site will better orientate the users. Gateway elements and local landmarks linked to precinct branding will help develop the precinct identity. Better lighting, signage and security elements will ensure a safe precinct for businesses and visitors.

5.2 Leverage and integrate significant open space

POWB precinct has access to the largest amount of open space and sports fields within Glenorchy (~10 ha). Accordingly, there are several current projects and existing strategies being undertaken by Council. The public domain outcomes of the masterplan will look to leverage the work being undertaken, and further encourage appropriate activation and connectivity to ensure engagement with the local resident community.

Benefit of Change

Implementation of Actions 5.1 and 5.2 are likely to enhance the experience of POWB precinct by:

- Improving wayfinding and safety within the precinct
- Create gateway nodes at key access points that become local landmarks
- Further activate the open spaces and integrate better with the local community

05 ENHANCE THE PUBLIC DOMAIN AND AMENITY

Objective:
To enhance the amenity of the public domain for workers, local residents and visitors to POWB

Actions
Council to **deliver and partner** for the following actions:

5.3 Celebrate the cultural heritage along the Innovation Drive Foreshore by creating a unique heritage interpretation/ landscape

Key Actions / Context

5.3 Celebrate the cultural heritage

The foreshore of the Innovation Drive Area has the potential to be a cultural heritage trail that interprets the Aboriginal heritage of the area and Bay. The publicly accessible trail should adopt native landscape plantings and connect the foreshore to the immediate Technopark, the surrounding precinct as well as across to Dowsing Point, and provide lookout points to view the Bay and the Derwent River. The strategy should become part of the celebration of the larger Derwent River Foreshore Aboriginal Cultural Heritage and its management strategy.

Benefit of Change

Implementation of Action 5.3 is likely to enhance the experience of POWB precinct by:

- Acknowledgment of Aboriginal cultural heritage in the bay and foreshore, improving general education and appreciation of the cultural heritage
- A heritage themed pedestrian trail that can be part of the local tourist attraction with great views of the Derwent River and the Bay.

05 ENHANCE THE PUBLIC DOMAIN AND AMENITY

SPATIAL OPPORTUNITIES

5.1 Develop strategy for public domain improvements

5.2 Leverage and integrate open space areas

5.3 Celebrate the cultural heritage via Heritage Trail

06 PLANNING FRAMEWORK TO SUPPORT GROWTH

Objective:
To ensure the regulator framework supports the long-term economic growth for the precinct

Actions
Council to **deliver and advocate** for the following actions:

6.1 Consider the introduction of a *Specific Area Plan* for the POWB to ensure its long-term growth as a maritime/industrial precinct

Key Issue/Context

Changes to planning and regulatory policies have the potential to support growth of businesses and reduce potential conflict of development within the POWB precinct.

6.1 Specific Area Plan

Stakeholder discussions indicated that the existing land use planning controls are restricting the continued growth of the precinct by preventing the expansion of maritime industry activities on some sites and allowing some non-maritime related businesses in other parts of the precinct.

Glenorchy City Council's new planning scheme has come into effect which will streamline some land use controls, while supporting a wide range of industrial uses, not just maritime industry uses. An alternative instrument is a Specific Area Plan (SAP) which can establish land use controls specific to the desired character of an area, in this case, a maritime industrial precinct.

The SAP should be developed in a consultative matter with landowners to ensure that it provides both certainty around the future uses that could locate within the precinct and sufficient flexibility for landowners to undertake a wide range of activities related to their business.

The intent of any SAP would be to maintain the role of the precinct and optimise future economic growth of the precinct.

Benefit of Change

Implementation of Action 6.1 is likely to enhance the growth potential of POWB Marine precinct by:

- Allowing existing maritime businesses to expand and evolve their operations
- Encouraging investment of new maritime industrial businesses at POWB
- Discouraging gentrification of the POWB, away from maritime industrial uses and maintaining the role of the precinct

06 PLANNING FRAMEWORK TO SUPPORT GROWTH

Objective:
To ensure the regulator framework supports the long-term economic growth for the precinct

Actions
Council to **deliver and advocate** for the following actions:

6.2 Support future development of additional food and beverage amenity for workers through providing a supporting planning framework

Key Issue/Context

Changes to planning and regulatory policies have the potential to support growth of businesses and reduce potential conflict of development within the POWB precinct.

6.2 Promote further food and beverage for local workers

A SAP will also provide greater planning controls around the type of food and beverage outlets in the precinct. A future SAP should ensure food and beverage outlets are tailored towards the needs of the local community and workers with less of a focus towards creating destination dining options that do not align with the greater focus and core maritime industrial use.

Benefit of Change

Implementation of action 6.2 is likely to enhance the growth potential of POWB Marine precinct by:

- Enhance food and beverage options for the users of the precinct

06 PLANNING FRAMEWORK TO SUPPORT GROWTH

SPATIAL OPPORTUNITIES

6.1 Develop Specific Area Plan for precinct

6.2 Support future development of additional food and beverage & amenities

(indicative locations for sites provided on map and does not reflect quantum)

5.0 MASTERPLAN IMPLEMENTATION

IMPLEMENTING THE ACTIONS

The summary table over page indicates whether each of the actions will fall under a *deliver, partner or advocate* platform, as explained below and the indicative timing for each.

The implementation plan in some cases, also considers dependencies between different strategies.

IMPLEMENTATION METHODS

DELIVER

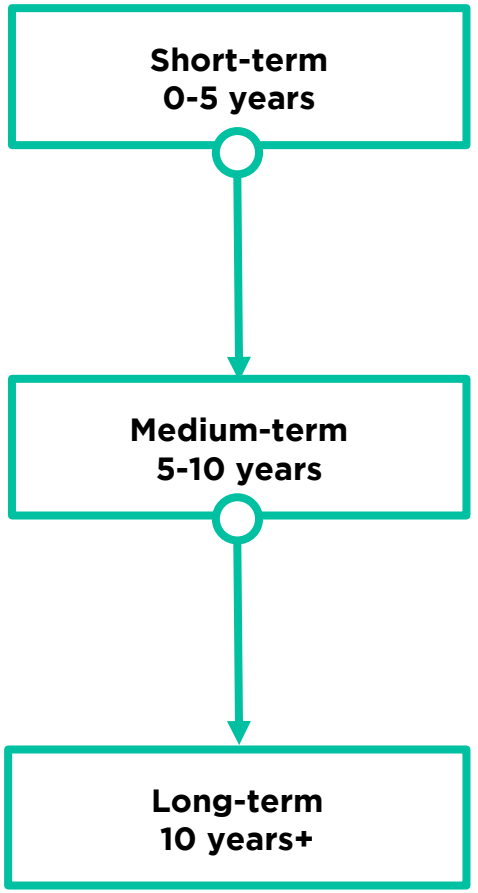
Actions that are marked 'Deliver' refer to projects that Glenorchy City Council will administer and deliver directly. Each action will require further investigation, community input, planning and financing. Each project will also require an implementation program which will be linked to the Council Plan, Annual Plans and budget process to ensure a whole of Council approach. Funding may come from a variety of sources including government grants and through partnerships with the community and development industry.

PARTNER

Actions that are marked 'Partner' refer to projects that Glenorchy City Council will deliver in conjunction with either state agencies, community groups, land-owners or the development industry. Funding may come from a variety of sources including government grants and through partnerships with the community and development industry.

ADVOCATE

Actions that are marked 'Advocate' involve private land that can deliver public amenity benefits, community services and/or precinct 'activation'. Council will work with land-owners, the development industry and wider community to assist in the delivery of these projects.



IMPLEMENTATION PLAN

Short term = 0-5 years, Medium term = 5-10 years, Long-term 10+ years

No.	Action	Deliver	Partner	Advocate	Timing	Stakeholders
1.1	Re-fuelling			✓	Short-term	Glenorchy City Council, landowners
1.2	Dredging			✓	Long-term	Glenorchy City Council, landowners, Government, Tasports
1.3	Lay Up Berth			✓	Long-term	Glenorchy City Council, landowners
1.4	Dry Boat Storage			✓	Short-term	Glenorchy City Council, landowners
1.5	Boat Travel Lift			✓	Medium-Term	Glenorchy City Council, landowners
2.1	Industrial Zoned Land for Business Expansion			✓	Long-term	Glenorchy City Council, Government
2.2	Development of Underutilised Sites			✓	Long-term	Glenorchy City Council, landowners
2.3	Technopark Repositioning			✓	Short-Medium Term	Glenorchy City Council, State Growth
2.4	Marina Expansion			✓	Short-term	Glenorchy City Council, landowners
3.1	Skills and Training Development		✓		Short-term	Glenorchy City Council, TasTAFE
3.2	Management Vehicle		✓		Short-Medium Term	Glenorchy City Council, State Growth, landowners
3.3	Branding and Promotion Strategy		✓		Short-term	Glenorchy City Council, landowners
4.1	Public Transport Improvements		✓		Short-term	Glenorchy City Council, landowners
4.2	Innovative Traffic Management Solutions		✓		Short-term	Glenorchy City Council, landowners
4.3	Extensive Pedestrian and Cycling Network including Zinc Link		✓		Medium Term	Glenorchy City Council, landowners
5.1	Public Domain Strategy	✓			Short-term	Glenorchy City Council
5.2	Leverage Open Space	✓			Short-term	Glenorchy City Council
5.3	Celebrate Cultural Heritage	✓			Short-term	Glenorchy City Council
6.1	Specific Area Plan	✓			Short-term	Glenorchy City Council
6.2	Worker Amenities			✓	Short-term	Glenorchy City Council, landowners

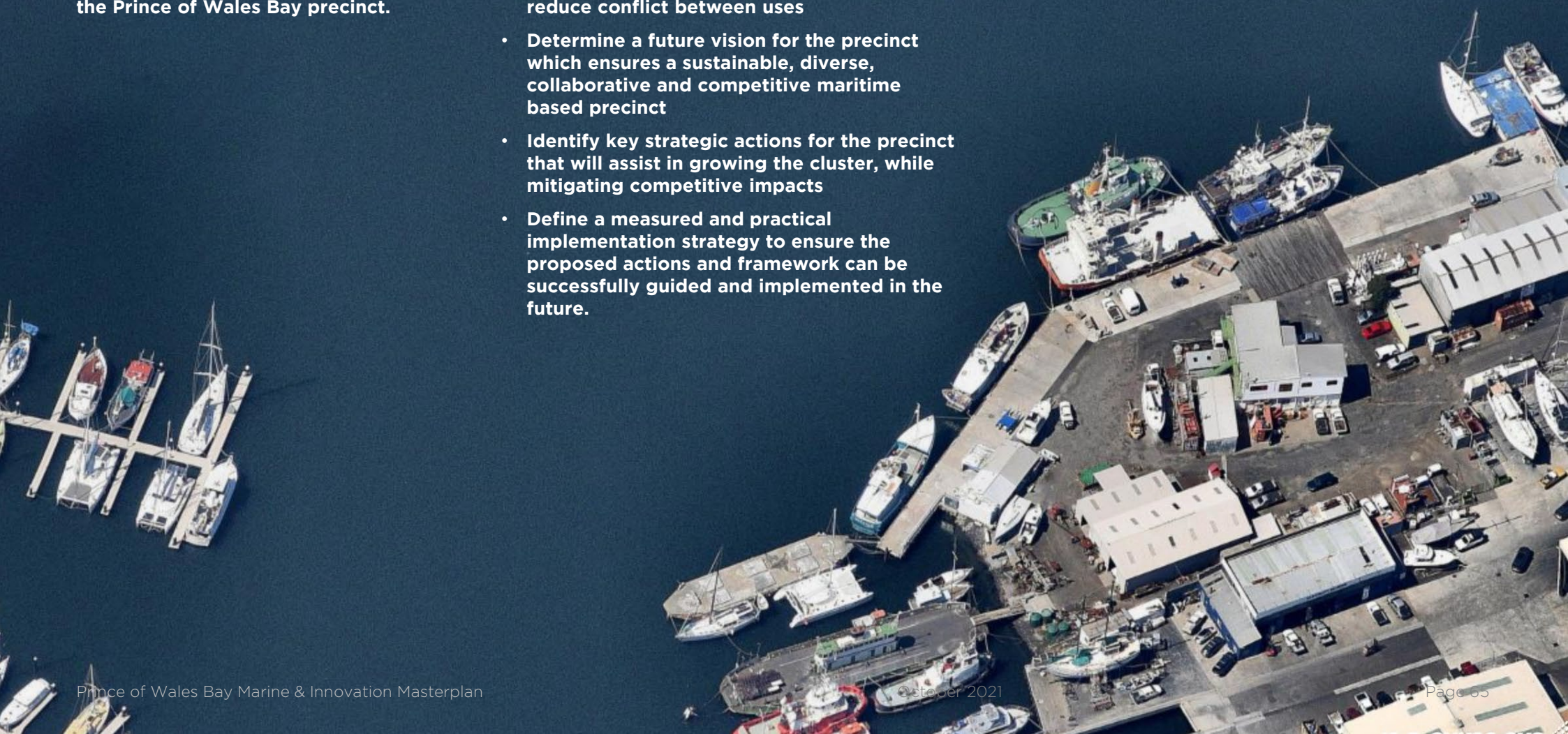
WAY FORWARD

The 2021 Marine and Innovation Masterplan has a strategy that starts from the low-investment-limited-policy-input based "quick wins" and through to the greater-investment-high-complexity opportunities which will be game changing to the future of the Prince of Wales Bay precinct.

The masterplan strategy has sought to:

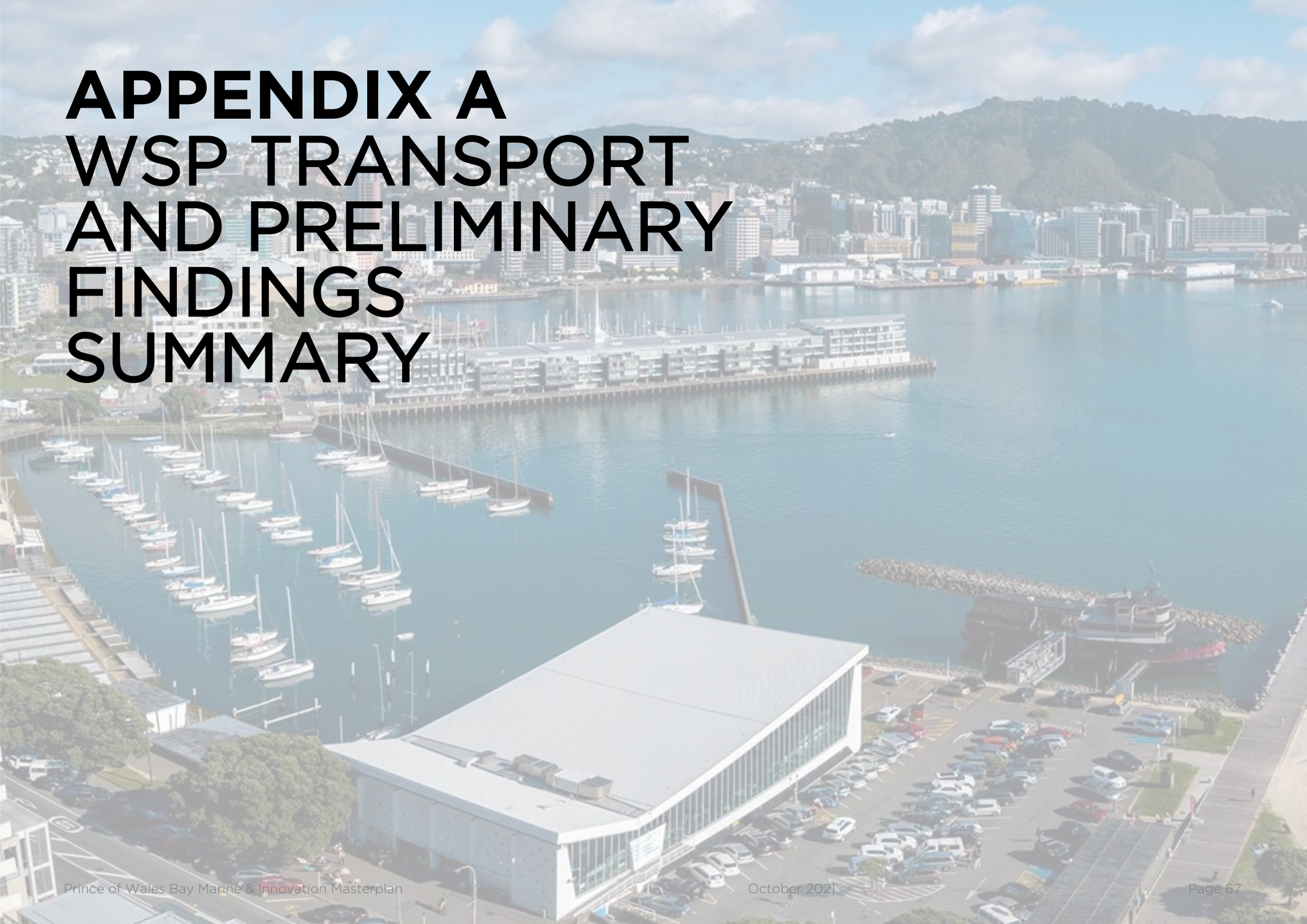
- **Determine how the marine cluster can generate new business/investment activity and retain/grow employment**
- **Identify ways to improve the connectivity and accessibility of the precinct as well as reduce conflict between uses**
- **Determine a future vision for the precinct which ensures a sustainable, diverse, collaborative and competitive maritime based precinct**
- **Identify key strategic actions for the precinct that will assist in growing the cluster, while mitigating competitive impacts**
- **Define a measured and practical implementation strategy to ensure the proposed actions and framework can be successfully guided and implemented in the future.**

THE MASTERPLAN SEEKS TO GUIDE INVESTMENT PRIORITIES TO MEET FUTURE DEMAND AND ENCOURAGE EXPANSION.



6.0 APPENDIX

APPENDIX A
WSP TRANSPORT AND PRELIMINARY FINDINGS SUMMARY



Prince of Wales Bay Marine Precinct

Transport preliminary findings summary

May 2021

Introduction

This report presents preliminary findings relating to transport, access and parking within the Precinct.

Findings have been collated based on a site visit undertaken on 2 February 2021, plus review of background information and documentation provided at project inception.

In reviewing the Transport materials and conducting the site visit the following considerations were made:

- Door to door journeys, not just individual modal trips, were considered in the context of journeys through, in/out and within the precinct.
- The user mindsets of customers making those journeys i.e. pragmatic, habitual, adventurous
- The role of roads and streets as a movement network and public spaces in their own right

This represents a People, Place & Movement approach to transport networks. Each element could be further detailed through user mindset testing and Movement and Place mapping tasks and supported with quantitative performance assessment

The following slides will outline key details relating to:

- Movements through and adjacent to the the precinct
- Movements in and out of the precinct
- Movements within the precinct
- Supporting journey information

Movements through, and adjacent to the precinct

—The precinct is bounded by the Brooker Highway to the west, Goodwood Road and the Bowen Bridge to the north and Derwent Park Road to the east.

—Adjacent to the Precinct, the **Bowen Bridge is considered an underutilised river crossing** due to road network access. The Department of State Growth is currently investigating opportunities to upgrade the capacity of the East Derwent Highway and create more direct connections to Glenorchy from the Airport and rapidly growing eastern suburbs.

—To the north of the Precinct, and critical to the state freight network, the **Bridgewater Bridge will be replaced in the next five years**. This will create significant network disruption in the short term, but result in **improved road freight connections from the Precinct to the Brighton Intermodal Freight Park and the north of the State** (including the major northern seaports) in the medium to long term.

Figure 1: The Brooker Highway provides a key link between the precinct and central Hobart. It also segregates the precinct from Greater Glenorchy.

Movements through, and adjacent to the precinct

— Investigations are continuing relating to activation of the **Northern Suburbs Transit Corridor**, which connects Hobart to Brighton, passing through Glenorchy. The existing freight rail line was decommissioned in 2011 when the Brighton Intermodal Transport Hub was opened.

— Following an initial investigation, **bus rapid transit and light rail options were recommended for further analysis.**

— **Glenorchy City Council is strong advocate for the corridor** and is undertaking precinct planning for the activity centres of Moonah, Glenorchy and Claremont.

— **Work is continuing to determine the most effective transport solution** and **progress the development of a submission** for consideration by government.

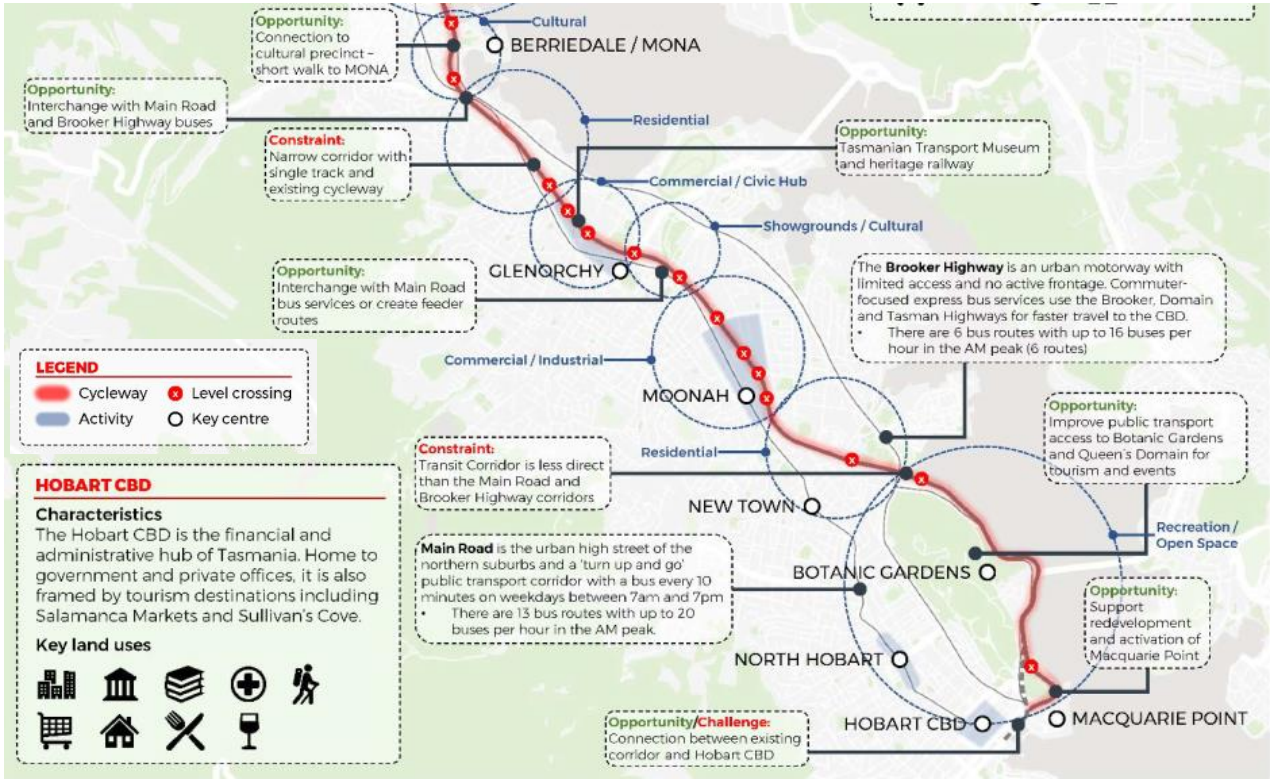


Figure 2: Extract of opportunities and constraints map, showing Northern Suburbs Transit corridor route and key activity centres.

Movements through, and adjacent to the precinct

— The study area is **surrounded by many cultural sites, commercial and local centres and large employment sites.**

— **Movement to these sites has limited impact within the study area** as is focused on key movement corridors Goodwood Road and Brooker Highway, although this does add to capacity constraints at key intersections providing access to and from the study area.

— **Surrounding attractors creates demand to move from the study area across Goodwood Road and Brooker Highway**, both vehicular and non-vehicular. This means permeability and provision of safe, regular connections across these corridors is vital.

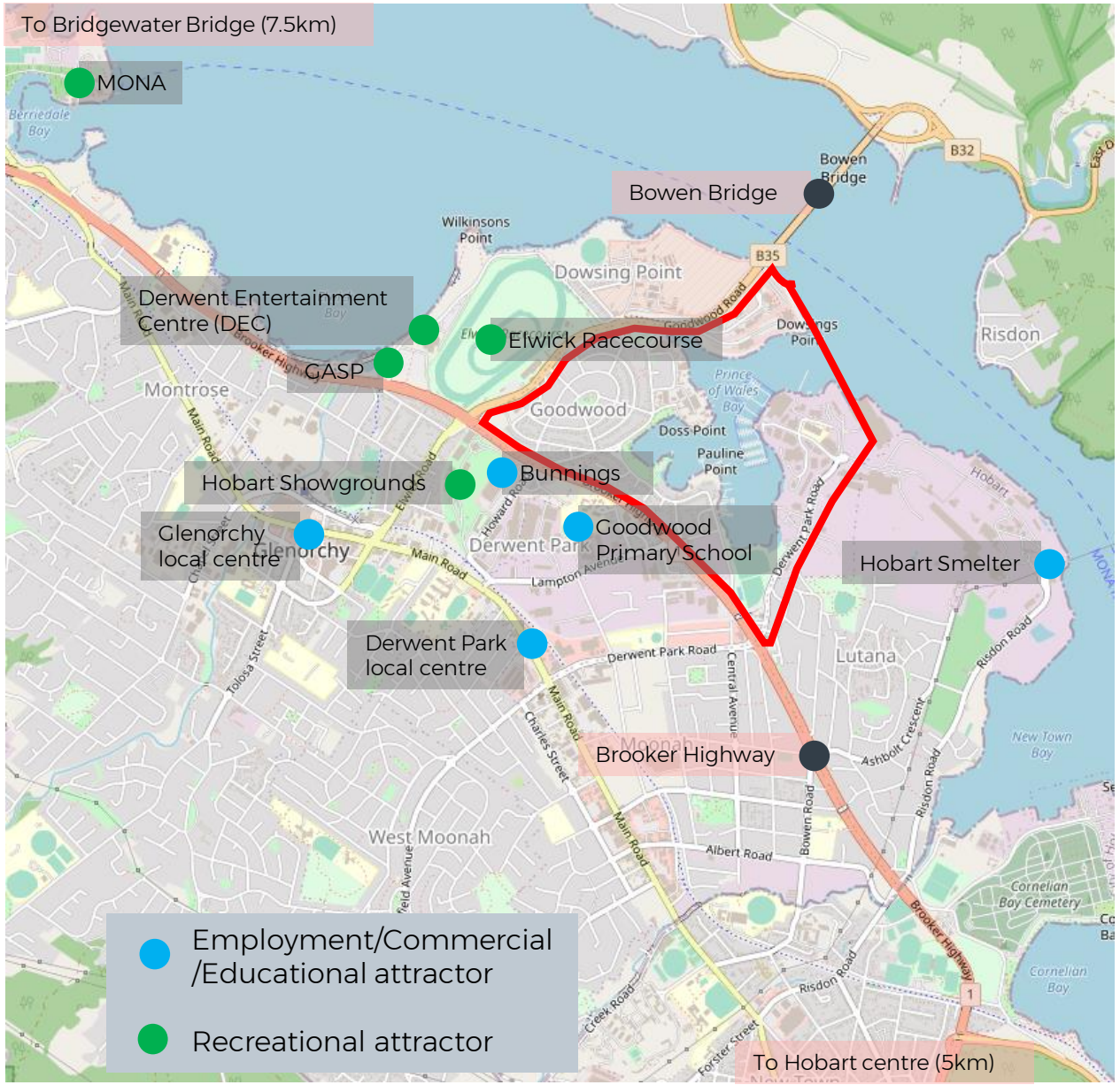


Figure 3: Key attractors within vicinity of the study area, shown in red (Source: Open Street map)

Movements in and out of the precinct

The Prince of Wales Bay study area is shown in Figure 4. Key employment attractors noted in the area include:

— Marine industrial premises and TAFE campus in the Bender Drive area

— Commercial and industrial premises on Gepp Parade and at adjacent to Howard Road

— Hobart Technopark

Key additional recreational attractors in the area include:

— Prince of Wales Bay Marina

— Prince of Wales Bay Reserve & sports pitches

— The foreshore at Giblins Reserve

— Model Park, Howard Road

These key attractors will form the basis of understanding the key transport requirements for the precinct and associated opportunities and challenges.

Additionally, it is noted that these attractors form **key anchors around which to increase the level of activation** in the precinct, by increasing the time people spend in the area. The site visit highlighted the need to **make the precinct more inviting for people** as well to operate efficiently for vehicular movement.

Figure 4: Area reviewed during site visit and key attractors noted (Source: Open Street map)

Movements in and out of the precinct - overview

— **Vehicular access to the Precinct is predominantly via the Brooker Hwy**, with Derwent Park Road connecting to the PoW Bay marina and maritime industrial premises of Derwent Park, and Goodwood Road connecting to Technopark and businesses on Dowsing Point.

— Linked with key land use and employment shifts, the **key movement peaks are noted to be around 7.30am and 4.30pm**.

— During the site visit some vehicle **queuing was noted at peak times on approach to intersections with the Brooker Highway**. This is known to lead to 'rat running' through the study area and Lutana to avoid congested intersections.

— **Public transport provision largely radial to/from Hobart CBD**. Two bus routes use Brooker Highway and undertake a loop of Goodwood residential area, with peak hour services continuing to Technopark. Some bus stops have shelters however user facilities and supporting information is basic.

— A one year trial of a **Derwent River ferry service is expected to include a stop at DEC.**

Figure 5: Queuing on approach to the Brooker Highway extends into roundabout at Renfrew Circle/Acton Crescent in the weekday afternoon peak.

Figure 6: Bus service and stop infrastructure in Goodwood

Movements in and out of the precinct - access

— Vehicular access points to the study area are shown in the figure opposite. **Key access points are at Derwent Park Road, Renfrew Crescent and Howard Road, whilst left-in access is provided at Lampton Avenue**.

— **Additional demand is observed at signalised exit points as these permit all movements upon exit**, including across Brooker Highway towards Glenorchy.

— Increased queueing storage capacity is provided at the exit points at Derwent Park Road and Howard Road, and additionally non-signalised priority left turns can be undertaken. There is reduced storage space at Renfrew Crescent, where the intersection is under 70m from the roundabout at Renfrew Crescent and Acton Crescent. **Queuing vehicles were observed to block into the roundabout in the afternoon peak, in close proximity to residences.** This may be linked with signal timing adjustments made to seek to reduce and discourage internal 'rat running' aligned with peak PM demand.

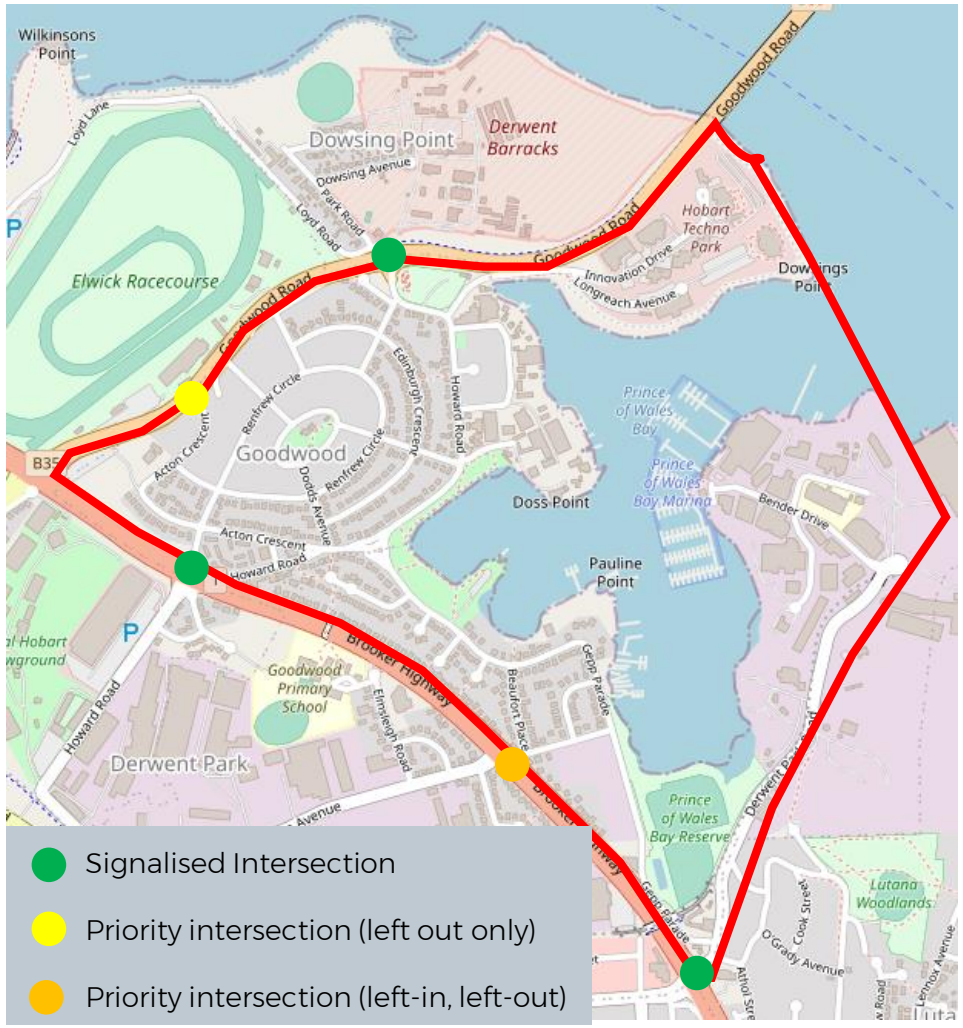


Figure 7: Vehicular access points to the study area

Movements in and out of the precinct - permeability

— **Precinct gateways are not visually attractive for walking and cycling**. Access requires crossing this busy, vehicular prioritised, primary road network. Only one existing pedestrian crossing of Goodwood Road, and it is up to 475m between pedestrian crossing points of Brooker Highway.

— At signalised intersections, **pedestrians required to complete multi-stage crossings**, with high speed left turn lanes often not signalised, providing a **low comfort experience.** There are proposals to upgrade crossing facilities at the intersection of Goodwood Road and Howard Road as part of the DEC development.

— Footbridge at Goodwood Primary School does **not provide accessible crossing route as no ramps provided,** also restricting its use for cycling, particularly for those unable to carry a bicycle up stairs. These are also **unlit which may contribute to a lack of feeling of safety** during hours of darkness. This is a very important connection given the lack of a school within the study area.

— There is **no current protected cycle link between the precinct and Glenorchy centre** or connection into the Intercity Cycleway, although Howard Road shared use path link currently under construction as part of development.

Figure 8: Pedestrian crossing locations bordering the study area

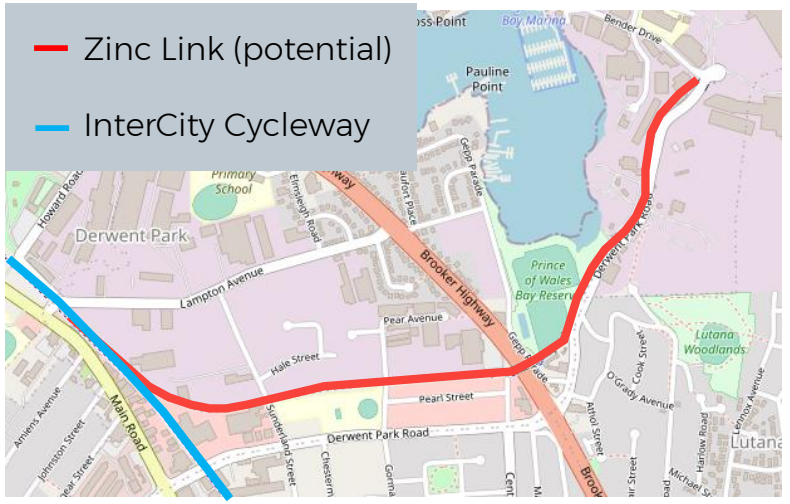
Movements in and out of the precinct – Zinc Link

— Potential to **utilise disused rail spur as walking and cycling 'Zinc Link'** to improve access to the Precinct from Hobart, Glenorchy and the northern suburbs upriver via a regional greenway network.

— During the site visit it was noted this would **need to be combined with an access strategy** due to existing fences preventing permeability to adjacent sports facilities and green spaces.

Figure 9: Lack of access noted to green spaces along the proposed Zinc Link

Figure 10: Zinc Link potential connection (map below) over Brooker Highway via existing bridge (top left), continuing to Derwent Park Maritime industrial area (top right)



Movements within the precinct – kerbside & parking

— Freight traffic in the local area is currently **restricted by physical traffic calming infrastructure**, including use of speed humps on Gepp Parade to reduce speed of vehicles.

— Whilst large sections of the kerbside is free and unrestricted, limited **timed loading kerbside areas** can be introduced, following consultation, at the request of individual businesses.

— Within Technopark, a potential lack of suitable parking was noted with the **overflow parking site utilised**.

Figure 11: Traffic calming measures in residential areas (left), and large stretches of unrestricted kerbside parking (right)

Figure 12: Timed loading zone restriction outside industrial premises on Negara Crescent

Figure 13: Demand for overflow parking at Technopark

Movements within the precinct – off street parking

— Areas of **off-street parking are largely tied to key employment locations**, focused at Hobart Technopark and Derwent Park industrial and marine premises.

— Some areas of parking are provided at recreational locations including at Giblins Reserve and at Model Park.

— As noted previously, there is potential lack of existing parking provision noted at Technopark, where overflow parking is heavily utilised.

— Glenorchy Parking Strategy 2017-27 identifies key actions relating to parking infrastructure, management, enforcement finance and education. Includes actions relating **to provision of bicycle parking, electric vehicle parking, parking directional signing strategy and review of safety issues within car parks** which will likely impact Bay area.

Figure 14: Areas of off street parking identified within the study area. Source: Google Earth

Movements within the precinct – active transport

— The **foreshore at Giblins Reserve presents an attractive green space for walking, cycling and recreation** close to large residential area. There are also shared path walking and cycling trails at the nearby Lutana Woodlands Reserve. There are opportunities to increase accessibility and permeability to these existing trails.

— **No on-road bicycle lanes or protected bicycle lanes were observed within the study area**. Gepp Parade and Howard Road have potential to form a key walking and cycling corridor supporting movement across the study area. Howard Road footpath has recently been upgraded to 2.5m width although there are regular obstacles in the footway. With these removed this could form a dedicated shared use path.

— A **lack of cycle parking facilities** at key destinations was noted.

— Advanced Stop Lines (ASLs) for cyclists with associated painted 'tails' are installed at Renfrew Circle and Howard Road at the junction with Brooker Highway although these are not supported by a wider network within the study area.

— As part of the DEC development a new **shared use path from the DEC along Loyd Road** will be constructed, providing an active transport link to the study area.

Figure 15: Potential lack of cycle parking at places of employment

Figure 16: High quality green spaces and walking/cycling paths within the precinct including Giblins Reserve

Movements within the precinct – active transport

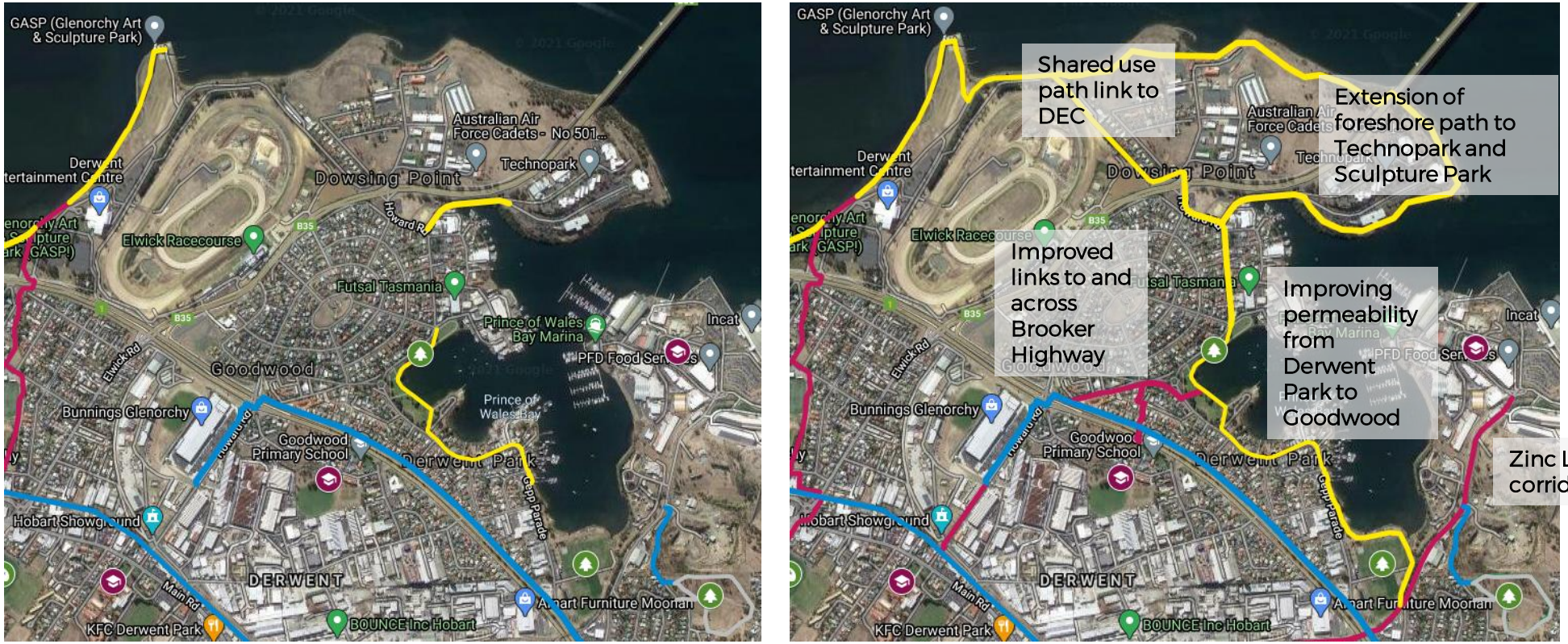


Figure 17: Current (left) and proposed (right) network of paths, tracks and trails within the Bay area, with key themes highlighted. Opportunities to deliver these as both walking and cycling routes should be investigated to create a coherent active transport network through the precinct. Source: Glenorchy City Council

Movements within the precinct – emerging modes

— Embracing the continued rise of micromobility, electric and autonomous presents an opportunity to support the existing transport network and reduce the current car dominance within the area.

— The **Sustainable Hobart Action Plan 2020-2025** identifies the following actions relating to these emerging modes:

— install **fast charging infrastructure** to support rise in electric vehicles

— **trial of micromobility** options in Hobart

— development of **charging infrastructure for electric micromobility vehicles**

— **trial of autonomous vehicles**

— use of emerging modes for **last-mile deliveries**

— Whilst some of these are longer term initiatives (and will need supported by advances in design guidance and legislation), there is an opportunity for Prince of Wales Bay or the wider Glenorchy area to push for inclusion as part of trials and infrastructure roll-out, which could focus on a specific location such as Hobart Technopark.

— The Glenorchy Parking Strategy 2017-27 identifies an action to develop a plan for providing electric car/bike parking spaces in Council owned car parks.

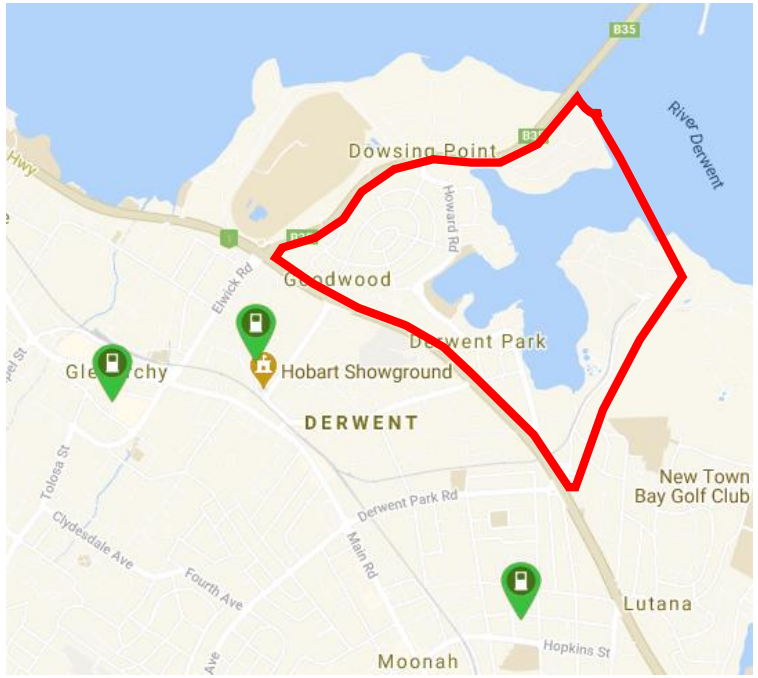


Figure 18: Location of existing electric vehicle fast chargers in vicinity of the study area. Source: PlugShare

Supporting journey information

— There are significant opportunities to review **provision of wayfinding** and the supply of supporting **coherent journey information** throughout the precinct to **support more efficient and sustainable transport choices**. This could include (in line with signage manual):

— **Dedicated walking and cycling wayfinding** signage, on-road wayfinding and mapping

— Review of designated **heavy vehicle routes and associated signage**

— Provision of **real-time public transport information** at bus stops and places of employment

— Improvements to **signage strategy on vehicular approach to precinct.** Particularly, this will focus on minimising internal travel through the precinct through signing key destinations from the most appropriate gateways (as identified in Figure 7). This will also help manage demand across the gateways. From the site visit it appears Renfrew Crescent gateway operates close to capacity so managing traffic in this area could be prioritised. It is known that introduction of travel time information on Brooker Highway is being considered by State Growth.

— These interventions can **improve user journey experience** whilst also **supporting enhancement of an identity** for the precinct and **increased visitation**.

Figure 19: Examples of information signage from other jurisdictions used to encourage visitation and create a visual identity for an area.

Figure 20: Examples of dedicated pedestrian and cycle wayfinding in Adelaide.

Key challenges and opportunities

Opportunities	Challenges	Stakeholder questions
• Creation of Zinc Link walking and cycling path. (1) • Enhancing existing walking and cycling links on Goodwood foreshore and extension to Elwick Bay, as part of development of coherent active transport network within study area. (2) • Improve management of parking demand at key employment sites including overflow parking at Technopark. (3) • Improving vehicular signage on approach to Bay. (4) • Embrace affordable micromobility options within the precinct and connections to a broader dedicated network. • Future public transport options may include on-demand, electric and/or autonomous services • Providing increased walking and cycle permeability and accessibility across Brooker Highway and Goodwood Road. (5)	• Encouraging mode shift away from private vehicle for Derwent Park Road area employees, including provision of appropriate end of trip facilities. (1) • Providing access to and from the Zinc Link and nearby green and open spaces for residents and visitors (2) • Funding improvements to public transport provision required for a more extensive and higher frequency service – including better connections to high frequency PT corridors. • Managing peak period egress demand to avoid 'rat running' through study area. • Legislation changes required to permit use of micromobility modes.	• How could we improve accessibility and permeability of the area? Are there any committed upgrades at precinct gateways/key intersections? • How could we increase access to the broader public transport network? • Will current bus routes servicing future needs? • How could we encourage sustainable transport behavior including walking and cycling? • Do you feel a traffic management plan would benefit the Precinct? What key elements would this cover? • Do you see the need for future ready mobility options – including electric, shared, connected, autonomous and/or on-demand services?

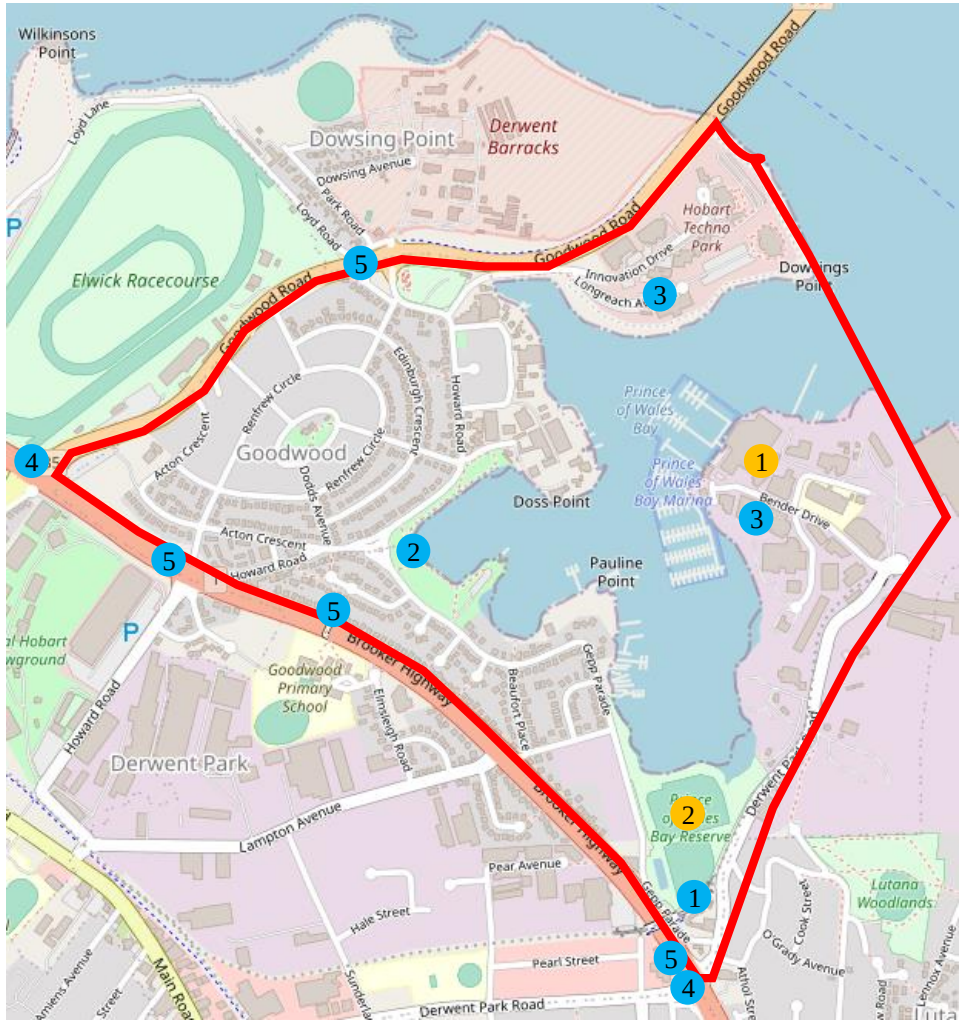


Figure 21: Summary of location-based issues and opportunities. Source: Open Streetmap

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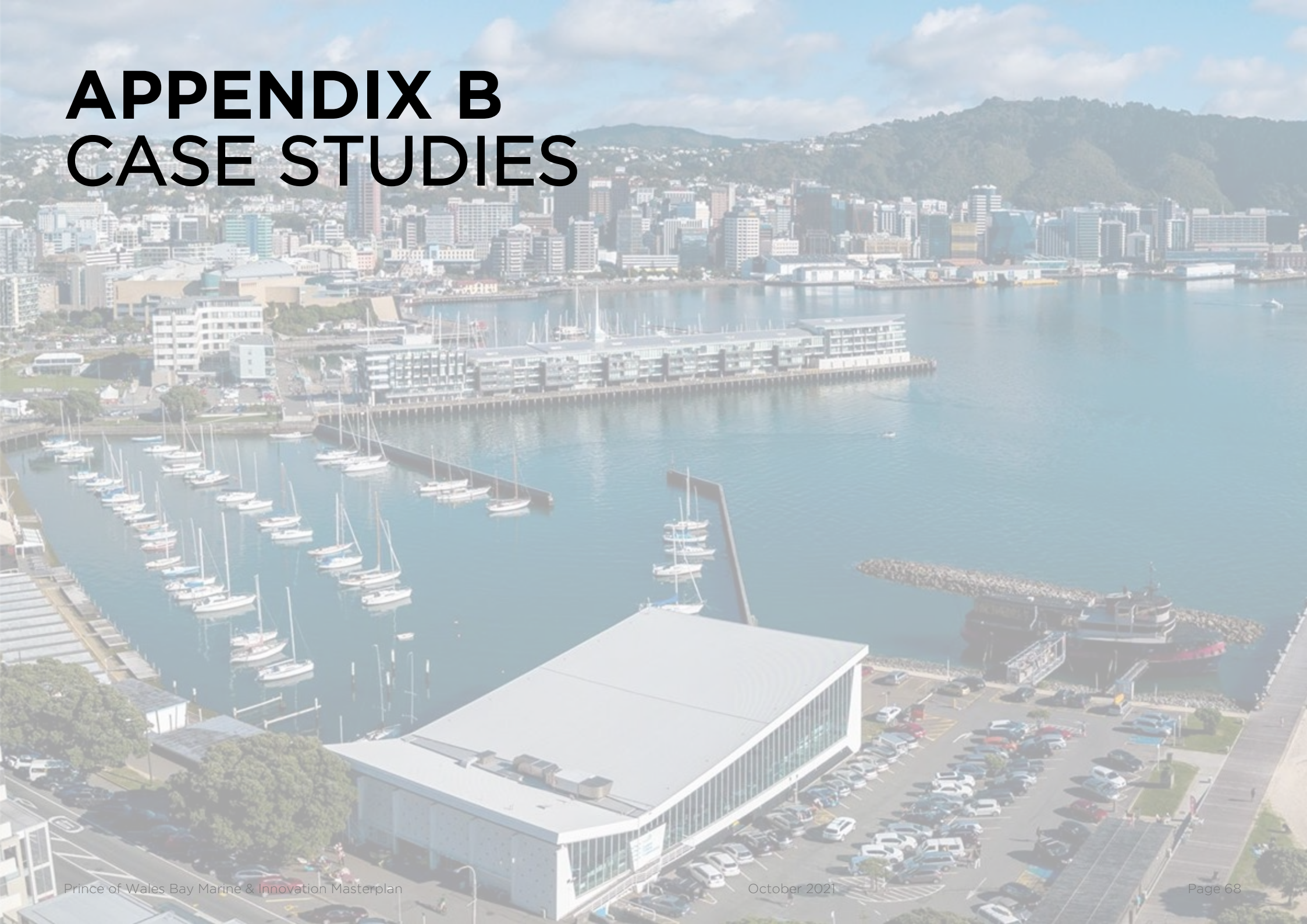
APPENDIX B
CASE STUDIES



CASE STUDY: HENDERSON, WESTERN AUSTRALIA

Background

Henderson is a suburb in Perth, located within the City of Cockburn and is situated 30km south-west of Perth's central business district. The Australian Marine Complex (AMC) is an integrated marine industrial facility located in the suburb – developed to facilitate and enhance the opportunities created by the clustering of sectors servicing the marine, defence, oil and gas and resources industries.

The AMC consists of the five precincts. Some of the companies located in the precinct include ASC Pty Ltd, Austal Ships, BAE Systems Australia and Strategic Marine.

Key features

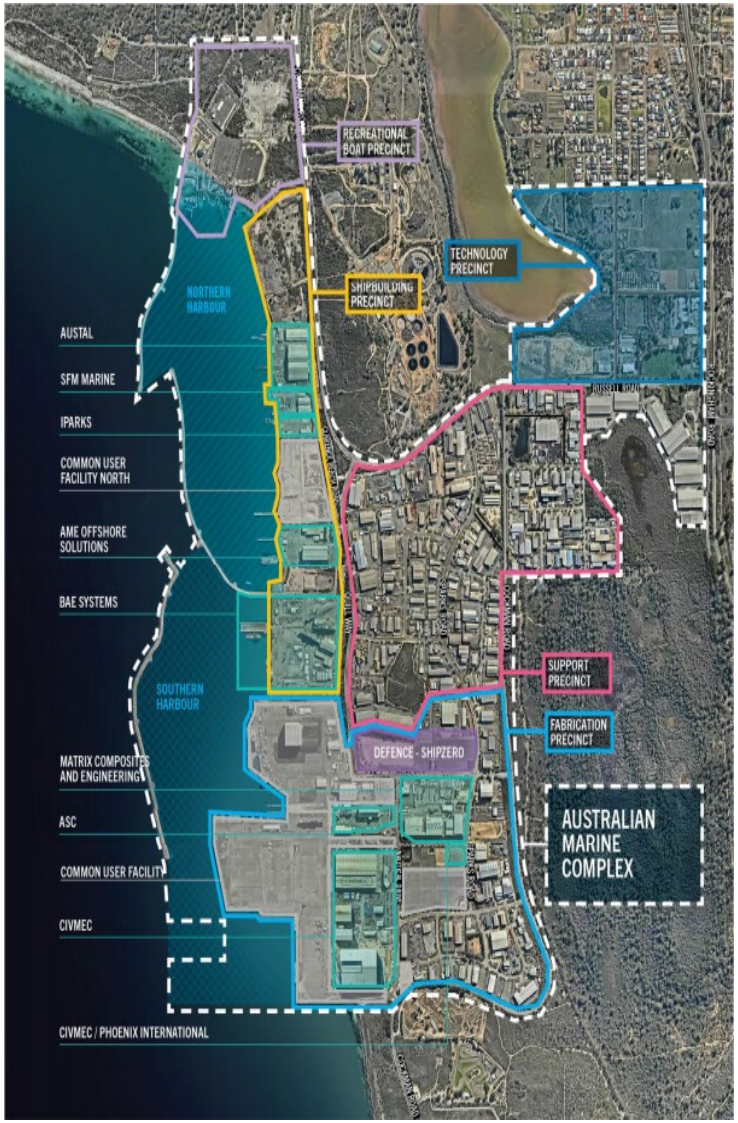
- The Shipbuilding and Repair Precinct provides construction and maintenance of commercial and smaller Defence vessels; manufacturing, engineering, repair and refurbishment; and support services.
- The Technology Precinct fosters innovation, entrepreneurship and growth within the marine, defence, oil and gas, and resource technology sectors.
- The Support Industry Precinct houses specialist businesses including leading manufacturing, design and service companies.
- The Fabrication Precinct provides facilities to enable companies to secure and deliver major fabrication and assembly projects.
- The Recreational Boat Precinct caters for expansion of leasehold development within the Maritime Business Park, attracting businesses that service the recreational boating community.

Relevance to Prince of Wales

Whilst this case study is significantly larger than the POWB, it provides a useful reference for an established maritime and ship building cluster within Australia. It is also similarly anchored by a key tenant, Austral, who is the primary Australian competitor shipbuilder to Incat.

The key features of Henderson which are relevant to the future growth and development of POWB are:

- Presence of on-site training facility focused on upskilling the local workforce and presenting Henderson as a leader in skills, innovation and R&D.
- Business centre with professional function training suites, acts as point of reference and information for innovation community and enables interaction between providers and clients.
- Zoning tailored towards the users within the precinct with the "Approved Industrial Purpose" which allows round the clock operations.
- Common User Facility which is commercially run and managed by the overall site manager.
- Strong Branding and promotional presence 'Australian Marine Complex'- managed by State Government with website.
- Has AMC Management to be the facility manager of the CUF, marketing activities and co-ordinate users across the site.
- Whole precinct has strong mission statement and plan which focuses on whole-of-precinct tendering.



Sources:
https://www.commerce.wa.gov.au/sites/default/files/atoms/files/amc_brochure_may_2016.pdf

CASE STUDY: OSBORNE, SOUTH AUSTRALIA

Background

The Osborne Naval Shipyard is on of Australia's premier naval industry hub. The precinct is located at Osborne, 25 kilometres north-west of Adelaide's CBD, and is a 35-minute drive from Adelaide International Airport. It is also close to major national defence precincts Technology Park Adelaide and the Edinburgh Defence Precinct.

The Osborne Naval Shipyard is the most advanced and modern shipbuilding facility in Australia focusses on defence and commercial shipbuilding and ship sustainment projects.

Key features

- High-tech submarine construction and maintenance facilities
- Largest naval shipbuilding hub incorporating world class warship design and construction skills
- Has common user shipbuilding facilities including a 213-metre wharf, runway, dry berth, transfer system and the largest ship-lift in the southern hemisphere
- Has a commercial and education precinct including the Naval Shipbuilding College
- Houses the Navy Headquarters South Australia, Ship Build Program Office and technical laboratories
- Has access to the national transport network including road, rail and deep-sea port
- Suppliers have access to development-ready land in the adjacent Port Direct area

Relevance to Prince of Wales

Osborne is also significantly larger than Prince of Wale Bay, but again, has a number of innovative features which are useful reference to POWB.

The key features of Osborne which are relevant to the future growth and development of POWB are:

- Adjacent Port Direct Area: Land release managed by SA Gov for general industry to support the Shipyard. This provides land for future businesses who want to locate close to the other users at Osbourne but do not require water access.
- Development of a Common User Facility (significantly larger in size) which is used by a range of businesses across the Precinct
- Commercial and education precinct which includes a Naval Shipbuilding College and R&D facilities to enhance knowledge and for commercial opportunities

Sources:
https://www.defencesa.com/precincts/osborne-naval-shipyard/


GLENORCHY
CITY COUNCIL
FUTURE
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