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SOUTH WEST REGIONAL BLUEPRINT



South West Regional Blueprint

December 2014

South West Development Commission
Regional Development Australia – South West

In completing the Blueprint, the South West Development Commission and Regional Development Australia – South West acknowledge the South West Noongar people, the many regional partners and stakeholders, and the collective work of staff all of whom have contributed to making the South West of Western Australia a better place to live.

The South West Development Commission and Regional Development Australia – South West would like to acknowledge TME for their commitment and creativity in helping to develop this Blueprint.



Town Planning Management Engineering

FOREWORD

Defining the regional development task for a region is not for the faint-hearted. If we accept the task for regional development at the broadest level is twofold – to help a region grow and to improve the quality of life such that people want to live in the region, then it is important to have clarity in an environment where development can mean many things to many people.

The objective of the South West Regional Blueprint is to build prosperity through jobs and population within the South West region of Australia. It represents a commitment by the two lead agencies for regional development – the South West Development Commission and Regional Development Australia – South West to form a common perspective of the strengths and challenges of the South West and to clearly speak with one voice about what we can collectively do to grow our region's prosperity.

The combining of Commonwealth and State government resources in the development of this document is a first in Western Australia and promises to set the scene for a much closer alliance for the future promotion of regional development in the South West.

The South West Regional Blueprint provides a comprehensive analysis of the economic and social status of the region. It identifies what is good and

where the gaps are. It shows an economy that is diverse and growing and it shows the challenges faced by many industry sectors, the lag in key areas of social indicators of health, education and Aboriginal advancement, and some clear challenges for the development of infrastructure.

It is a document developed for our regional stakeholders and the take home message is that the South West is performing well but it can perform a lot better. So what is to be done about it?

The first step is to identify the important imperatives for the South West – the things that make the greatest difference. Imperatives come down to infrastructure, industry and business, the needs of people in the place they live and our overall sense of community and community leadership.

The second step is to identify the principles that can inform the business case for projects and actions that will take the region forward. In doing so, the document identifies how we can assess projects from the totality of their economic and social benefits to the region – the ripple effect that can occur from a particular investment that adds value and importantly deals with the region as a whole.

The third step is to identify those projects and actions that can help to take the South West forward to the future. The Blueprint is both analytical and aspirational, imagining a South West with vibrant and thriving cities, growing towns with confident futures, and industry engaged fully with both the local market and the growing markets of Asia providing new opportunities for jobs and professional growth, world-class health and education facilities and communities that are interesting, vibrant and inclusive – a South West that can imagine a strong and vibrant future and translate it into reality.

The South West Development Commission and Regional Development Australia – South West are committed to a future that is far more than 'business as usual'. We will jointly work with the people and businesses of the region and all tiers of government to build a forward thinking South West – a South West that we can be proud of and that leaves an important legacy for the future.



Stuart Hicks AO
Chairman, SWDC



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SOUTH WEST REGIONAL BLUEPRINT

Working on tomorrow, today



EXECUTIVE SUMMARY

This Blueprint aims to take you on a journey, painting a picture of a future where more feet doesn't mean a bigger footprint, where there are jobs, opportunities and services that are the envy of all Australians, and where all residents can safely pursue their dreams.

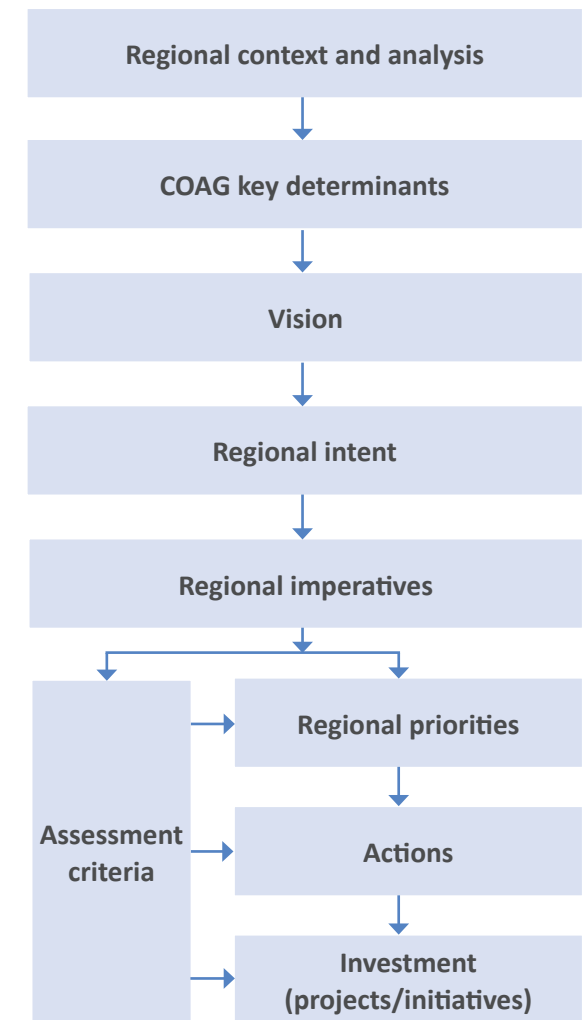
The Blueprint writes a story that begins with a regional context in a global setting and provides a roadmap to create a South West that meets the expectations of its people by growing its coastal regional cities and connecting to key centres of mining, agriculture and tourism through satellite SuperTowns.

Setting out a unique agenda and shared aspirational vision, the Blueprint presents a robust analysis of issues contributing to economic and community development. It employs the Council of Australian Governments' (COAG) principles of human capital, sustainable communities, access to markets, and comparative advantage. That analysis translates to actions and strategies that focus on key transformational opportunities across differing time horizons.

Pursuing the Blueprint will present Western Australia with cities and a region that provide a realistic option to Perth and can ease pressure in the State capital. This will require new aspirational thinking about what is possible linked to practical ways forward.



BLUEPRINT PROCESS



This body of work is incorporated into a single document that provides a consolidated view of the future.

Central themes

The Blueprint makes population, productivity and jobs growth the pivotal drivers. The current population growth rate is significantly higher than Australia's national rate and is one of the fastest growing regional populations in Australia (27.5% between 2001-2011 Census collections). By 2026 the WA Planning Commission forecasts the population to reach 230,000 with major growth around the coastal strip (*Western Australia Tomorrow*, WAPC, 2012).

This document explores the implications of a regional population of 500,000 by 2050, supported by 200,000 additional jobs. There are new demands on our infrastructure, on industry and business, the places we will live and the kind of communities we will share. These four themes address the imperatives for successful growth.

Infrastructure: Emerging from a primary industry-driven economy to a modern and diverse export-oriented business environment with a Gross Regional Product (GRP) of more than \$15b, infrastructure needs are paramount to tackle

the barrier of distance and support growth in a sustainable way. Infrastructure must address potential constraints in transport, broadband and water.

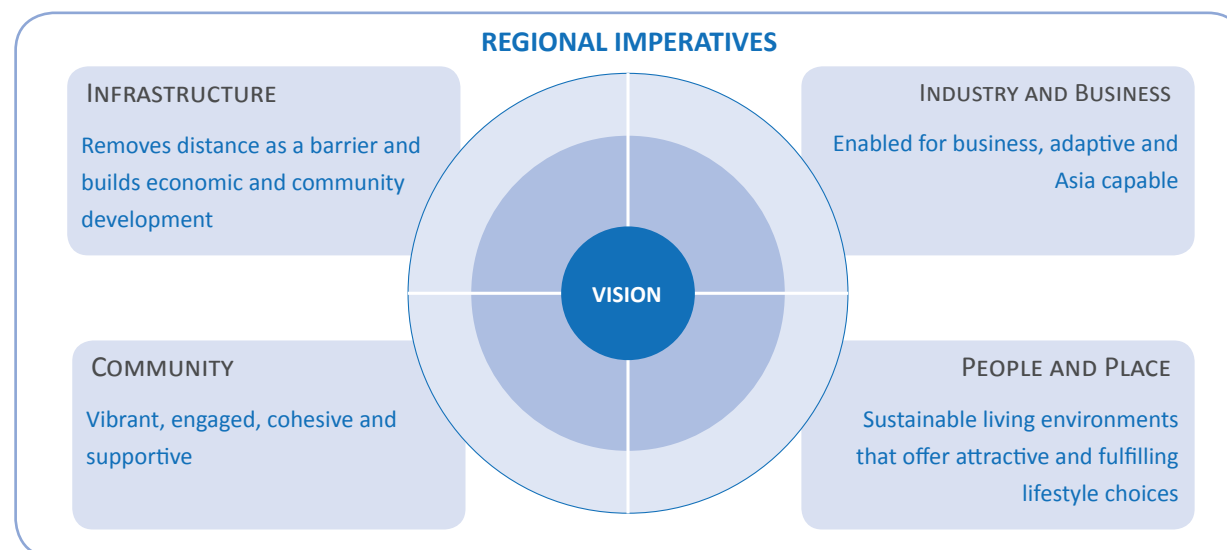
Industry and business: The Blueprint promotes the concept of industry and business that can adapt to changing market conditions, respond effectively to the growth and opportunity of the Asian Century and support the development of new emerging industries. Population growth will require an estimated 200,000 new jobs by 2050 and many of these jobs will require new skills.

People and place: Looking ahead includes people and the places they live, growing the services we

provide, improving accessibility through public transport, ensuring affordable living and generating new opportunities for education and wellbeing. We need to create places that are vibrant, interesting and stimulating that ensure the region remains a region of choice.

Community: The Blueprint speaks of culturally diverse communities that will support and enhance leadership, inclusion, engagement, collaboration and the values the community places on the special South West environment. These values help to build a sense of belonging, self worth and local decision making ability.

While abounding with opportunity, Blueprint



analysis reveals some inconvenient truths regarding education, health challenges, low incomes and job losses. However, positioning Bunbury as the regional capital and port city, Busselton as Western Australia's events capital and the Collie, Manjimup and Margaret River SuperTowns as industry focus points, there is a mass of genuine options for positive change.

The Blueprint integrates these transformational opportunities and establishes a methodology to support future development that adds value to the South West, State and nation while preserving the region's essential environmental values.

Strategic challenges

- ❑ Infrastructure must keep pace with the growth of the South West economy with special reference to transport gateways.
- ❑ High capacity broadband is changing the nature of industry opportunities in the region. Upload capacity is critical.
- ❑ Water is likely to be a constraint to growth without measures to increase water sources and manage water use.
- ❑ Industry is subject to strong competition and competes most effectively in the premium and

high value product sectors.

- ❑ Targeting the growth of Asian markets for export and capital investment in the region.
- ❑ Population growth and changing demographics are driving demand for affordable housing and housing diversity.
- ❑ The growth of fly-in and fly-out and drive-in drive-out employment is changing the nature of work and play in the region.
- ❑ Balancing population and industry growth with significant social and environmental values.
- ❑ Addressing key social indicator deficits including low per capita incomes, primary health and welfare dependency.

Transformational opportunities

In responding to the challenges and building the future, the Blueprint proposes a series of key transformational actions. The actions have a strong evidence base that is explained in the document and seeks to work in harmony with more than 40 planning studies and reports. The actions are summarised overleaf.

KEY OBJECTIVES

- ✓ Infrastructure that removes barriers of distance, links the region to world opportunities and respects the environment
- ✓ Broad internationally engaged industry that is 'business ready' to engage with Asia
- ✓ A region of first choice, building population and improving community
- ✓ Cohesive, vibrant and engaged communities

INFRASTRUCTURE

BLUEPRINT OBJECTIVES

- » Collie-Kemerton water management
- » Irrigation for food production
- » Water conservation plus new resources
- » Wastewater and sewerage

BLUEPRINT PRIORITIES

Water security

Ensure the South West has long-term water security for agriculture, industry and domestic purposes

Ready export/import hubs supported by safe, efficient interconnected transport networks

The South West is connected to national domestic and international road, rail, sea and air routes; Ensure the region's hubs are capable of supporting export and import growth both in the South West and Perth metropolitan area

High capacity digital communications

Ensure the region is capable of communicating and transferring data at world standards

Sustainable energy supply and sustaining environmental qualities

Ensure access to sustainable, affordable energy to support a growing region; Mitigate and adapt to climate change and sustain the environmental qualities intrinsic to the region's character

Land for industry

Create sufficient land to generate employment across industry sectors

- » Expand Bunbury Port and integrated road/rail transport solution
- » Regional road network
- » Expand Busselton Regional Airport
- » Manjimup and Bunbury airports
- » Rail link with Perth

- » High capacity broadband
- » Mobile coverage

- » Energy capacity
- » Renewable energy options
- » Carbon capture and storage
- » Regional waste
- » Biodiversity

- » Set aside land for industry needs to 2050 including; Kemerton, Shotts and Preston

BLUEPRINT MISSION

We will develop distance neutral infrastructure that is linked to world opportunities and respects our environment

By 2050 the South West of Western Australia is internationally recognised as a region of excellence

VISION OF THE BLUEPRINT

INDUSTRY & BUSINESS

BLUEPRINT PRIORITIES

Export opportunities

An industry and business sector with the skills, knowledge and capacity to engage with Asia and India

Agriculture, forestry and timber processing

Pursue opportunities in the agricultural and timber industries by facilitating structural change and encouraging value adding

Tourism

Increase interstate and overseas visitation; develop infrastructure in core South West experiences of wine and food, art and culture, events, Aboriginal Noongar experiences and landscapes

Downstream processing

Pursuing downstream resource processing opportunities by identification of suitable sites, investigation of collocation opportunities and sourcing energy at competitive rates

Creative industries

Support the creative sector to triple its jobs base from 1,000 to 3,000 by 2050

Manufacturing

Expanding the manufacturing sector is a key to adding value to resources and increasing employment opportunity

BLUEPRINT OBJECTIVES

- » Asian and Indian business and cultural training
- » Support export business capability
- » Establish market and brand awareness

- » Broadly develop agri-food value adding and new markets
- » Ensure land is available for a food processing precinct
- » Promote timber industry processing

- » Increase the number of high quality international events; provide high quality, memorable experiences
- » Create vibrancy based on main streets
- » Improve iconic attractions, incorporating nature-based and marine tourism

- » Promote mining and mineral processing opportunities based on coal, energy and land access
- » Utilise waste heat through technologies

- » Exploit opportunities in animation, media, publishing, film, art and music
- » Develop and promote Aboriginal art enterprises

- » Facilitate growth in metal fabrication, food, beverage and related sectors

BLUEPRINT MISSION

We will support a broad internationally engaged industry base that is business ready and Asia capable

By 2050 the South West of Western Australia is internationally recognised as a region of excellence

VISION OF THE BLUEPRINT

BLUEPRINT OBJECTIVES

- » The region's SuperTowns build on their economic comparative advantage
- » Bunbury is a well connected, affordable city of choice with high quality services and amenity and economic opportunity
- » Busselton is a major lifestyle city based on tourism, wine and food, creative and professional industries and events
- » Housing affordability and choice
 - » Address inequity in Aboriginal home ownership
- » Enable people to age in place and transition to higher levels of care as needed
- » Expand health services and hospital capacity and education facilities to meet growing population
 - » Implement Southern Inland Health Initiative
 - » Develop South West Health Campus
 - » Healthy minds
- » Plan for growth setting spaces aside

BLUEPRINT PRIORITIES

SuperTowns

Leverage State Government investment in SuperTowns to generate private sector growth

Regional capital: Greater Bunbury

Strengthen Greater Bunbury as the SW capital, supporting commerce, international trade, arts, culture, education and human services with a population of 300,000 by 2050

Regional city: Busselton

Develop the City of Busselton as a major regional city with a population of 120,000 by 2050

Affordable housing

Enhancing lifestyle choices – to support population growth based on a mix of housing options at a range of settlement scales

Active ageing

Develop infrastructure which supports social capability and ageing in place, Aboriginal engagement and advanced health care, including mental health

Health and education

Ensure regional capacity meets the needs of a growing population delivering quality care and education

Sport and recreation

Ensure the region has adequate recreational space

By 2050 the South West of Western Australia is internationally recognised as a region of excellence

VISION OF THE BLUEPRINT

BLUEPRINT MISSION

We will seek to develop a region of first choice, building population and improved amenity

PEOPLE & PLACE

By 2050 the South West of Western Australia is internationally recognised as a region of excellence

VISION OF THE BLUEPRINT

BLUEPRINT MISSION

We will drive and support agendas that promote cohesive, vibrant and engaged communities

BLUEPRINT PRIORITIES

Leadership and collaboration

Support the development of regional leadership capable of transitioning the region to 2050

Improved regional capacity and engagement

Enhance the capability of the not-for-profit and community sector to deliver community services

Volunteerism

Ensure volunteerism remains a vital ingredient of South West community life

Community enterprise

Provide opportunity for growth in community enterprises that generates employment and training opportunities

BLUEPRINT OBJECTIVES

» The South West has a shared vision for an aspirational future

» Ensure the not-for-profit and community sector is engaged in regional development and has the capacity to grow and develop services with population increase

» Volunteerism is recognised, valued and respected within the region

» Develop community enterprise models for building inclusion in civic and commercial activity by disadvantaged groups

COMMUNITY

IMAGINE.....

An aspirational future for the South West

Let us sketch out an aspirational view of how the future South West might look by 2050.

If we imagine a South West population of 500,000 by 2050 supported by 200,000 new jobs; a South West that has a combination of interesting cities and large towns with the critical mass to drive new transport, social and community services; a South West that technology has brought closer to the world yet retains the elements and environmental values that attract people to live here – then we need to have the imagination to make it happen. That is the essence of this Blueprint.

Imagine Greater Bunbury with the City of Bunbury as the capital of the South West's commercial, manufacturing and service centre for a region of 500,000 people. What would it really look like?

It would be a city that embraces the water on three sides with a mix of high density living, retail and commercial spaces complemented by high quality public open space. The nightscape would be as vibrant as day with a strong retail sector capable of meeting the needs of large numbers of overseas visitors who look for night life and late night shopping.

Greater Bunbury will be a centre for maritime trade once again with a large and expanded port rivaling

Fremantle but well planned freight routes will eliminate congestion problems. Maritime trade will drive new investment in import and export related commercial activity and support new freight logistics for distribution of cargoes nationally.

Supported by three major industrial parks, Greater Bunbury will be a focus for employment generation through various forms of manufacturing as well as service industries.

Affordable housing options throughout the Greater Bunbury area will draw in young families providing the critical mass for a range of human service, health and education facilities while early planning for light rail and other forms of public transport will provide alternatives to cars and associated car parking.

It is not hard to imagine Greater Bunbury as a metropolitan area achieving a population of 300,000 by 2050. Perhaps more exciting though is a prospect of a city that is vibrant, unique, exciting and prosperous that together with Busselton are the cities of choice in Western Australia.

The City of Busselton has the vision and drive to grow to a City of 120,000 by 2050. Imagine a coastal community with a unique relationship to the ocean transitioning to a major desirable

commercial centre supported by rapidly growing tourism, premium wine production, creative industries, the arts and the professional services.

Busselton has a lifestyle comparative advantage that attracts a wide range of skilled professional workers in a range of industry sectors. It is fast developing a brand for events and is an emerging conference destination.

The development of the regional airport at Busselton for national or international routes



supported by a high speed rail link to Bunbury and Perth will be a trigger for new commercial investment as well as freight logistics.

High capacity broadband throughout the region will further drive growth making Busselton a strong, vibrant and growing commercial centre with widespread free Wi-Fi access contributing to its brand as a modern sophisticated city of the 21st century.

We can now begin to see a backbone for growth that incorporates the existing implementation plans for our three SuperTowns – Collie, Manjimup and Margaret River. These towns present a catalyst for growth in each of the region's sub-regional areas and provide a focus for mineral processing, agriculture and tourism. The plans set out a pathway for growth that sees each town's population significantly increase and flow on to neighbouring towns and communities.

Work will continue to develop the inner residential and commercial amenity of the centre of Collie together with further industry development at the Shotts Industrial Park to create an expanded mineral processing and energy based industry. This will complement and support the manufacturing sector of Greater Bunbury and build resilience as well as expand the regional economy.

Collie will continue to support growth towards our 2050 vision. The community will enjoy a new and vibrant town centre complemented by higher density inner city river-front living and supported by quality health and education services. It will become the desirable place for people to live with job opportunities developing through broader retail, tourism and professional service sectors.

The SuperTown of Manjimup will continue to expand markets for its horticultural and general farm sector and solidify its position as the highest value horticultural region in the State through a combination of quality food and wine produce and a strong food manufacturing base.

Manjimup will redevelop its town centre to take advantage of growing international demand for food and wine tourism experiences reinforcing its brand recognition as a supplier of premium quality clean food. The vibrancy of the new town centre, supported by high-value interesting attractions and the prosperity of the retail sector, will be an important measure of success.

Major transformational projects can improve water reliability and supply and transport efficiency whilst modest development of the town's airport will position the town well to exploit fly-in fly-out as well as expanded general aviation opportunities.

IMAGINE...

The South West population grows to 500,000 by 2050

It could mean:

- ☐ 300,000 people living in Greater Bunbury
- ☐ Expanded lifestyle choices including more vibrant and sustainable country towns
- ☐ Passenger rail connecting major regional centres and Perth
- ☐ Growth areas linked with industrial areas and multi-function activity centres
- ☐ Regional airport with direct links to major Australian cities and key Asian hubs
- ☐ New investment in health and education services

Manjimup's timber industry will transition to higher value timber processing and in doing so generate new wealth from a limited resource.

Margaret River will use its market position in tourism, premium wines and foods, and creative sectors of digital media, publishing, music and film to reach its SuperTown potential.

Redevelopment of key tourism assets and the town centre to create an international destination experience are key elements in driving Margaret River's growth to a community of 11,000 by 2025. The unique branding enjoyed by Margaret River can be a driver for growth in the tourism and food and wine sectors throughout the South West and lead the development of international markets on behalf of the rest of the South West.

The three SuperTowns provide a network of regional development that can trigger growth in neighbouring centres of Bridgetown, Nannup, Boyup Brook, Donnybrook, Harvey and Augusta, with surrounding villages providing a variety of lifestyle opportunities.

In a region of excellence, a critical mass of 500,000 people can support comprehensive development in areas of transport, education, health and community and recreation services, and directly

support our smaller towns and hamlets.

We can imagine new styles of university access based on digital access to all of the world's universities, high speed rail links between Busselton, Bunbury and Perth, and an interconnected regional rail system. These are some of the opportunities this Blueprint will explore.

As you journey through this document you will be challenged to imagine different aspects of the future. You will also gain an insight into how the economy and the social systems of the South West work, their strengths and challenges, and the influence world trends will have on our region. You will also learn about some of the key environmental challenges faced by the region including protection of biodiversity, drying climate and water.

Importantly though, you will start to appreciate the risk of 'business as usual', action occurring by chance rather than pursuit of a determined vision, and population growth that is driven by low cost living rather than jobs growth and prosperity. The South West of Western Australia faces challenges about its future economic and social performance unless we can imagine and act on the future.

ASPIRATIONAL POPULATION TARGETS 2050

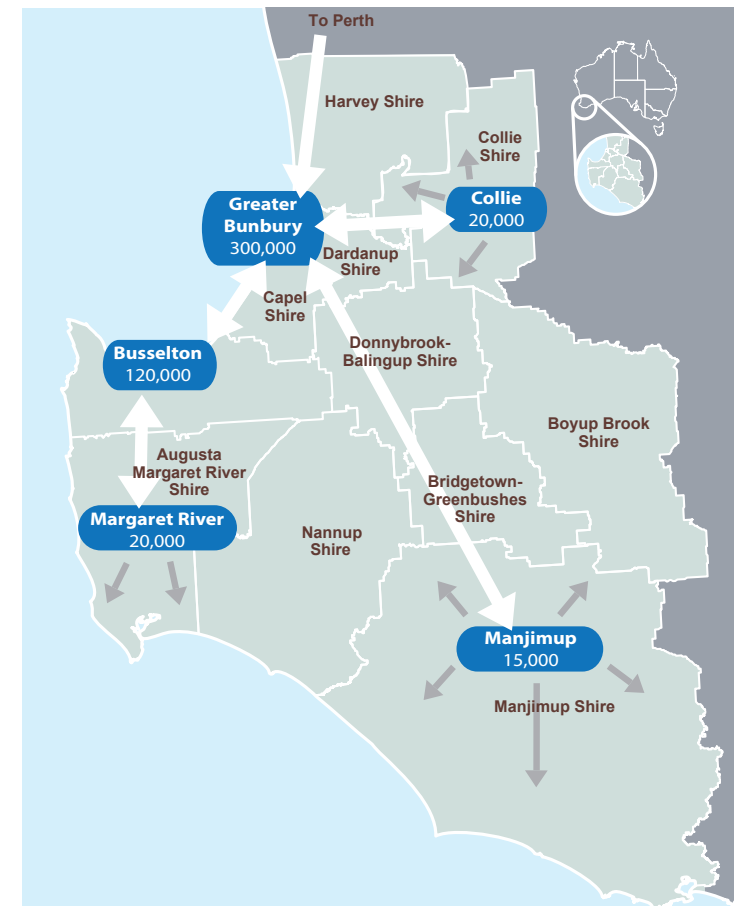


Figure 1: Regional cities and SuperTowns



1. INTRODUCTION

1.1 The South West of Western Australia

The South West is one of Western Australia's nine recognised regions located outside the Perth metropolitan area. Fronting the Indian and Southern Oceans, covering 24,000km² and including 12 local government areas, the South West is the most populous and economically diverse of WA's regions (*Figure 2*).

1.2 Blueprint purpose and content

This Blueprint is an analysis of the factors contributing to the development of the South West corner of Australia leading to an agenda for the economic and social development of the region. It sets out key principles for guiding future investment and decision making. It incorporates the ideas and thinking of the public sector, local government, industry, not-for-profit and community bodies and is based on evidence and consultation. Importantly, the Blueprint presents a road map that is consistent with the objectives of the Western Australian draft State Planning Strategy.

The South West Development Commission (SWDC) and Regional Development Australia – South West (RDASW) have jointly developed the Blueprint to

provide the best possible advice to both State and Commonwealth governments on the strategic imperatives of the region.

Both organisations are united in building the capability of the region beyond conventional forecasts to develop larger and better connected cities and towns; to accelerate growth of a dynamic export-oriented economy with quality produce and high levels of employment; and to enhance the region's reputation for providing lifestyle choices while conserving its unique environment and landscapes.

The strategic framework for the Blueprint includes four overarching imperatives for the South West region (*Figure 3*). These imperatives are:

- ☐ Infrastructure
- ☐ Industry and Business
- ☐ People and Place
- ☐ Community

A key intent of the Blueprint is to present a robust strategic rationale underpinning actions that are achievable over current and future time horizons. The evidence base of the Blueprint is derived from:



Figure 2: Geographical scope of the South West region

- ❑ An understanding and recognition of the region's spaces, economic history and values;
- ❑ Analysis of national and global megatrends that will shape the future in a significant and material way;
- ❑ Analysis of more than 40 planning documents at Commonwealth, state and local level (listed in Appendix 1: Priority Settings; and
- ❑ Analysis of the region's key determinants of long term economic growth within the COAG principles of human capital, sustainable communities, access to markets and comparative advantage.

This analysis leads to actions underscored by identified priority areas that are geared to building employment and prosperity in the region. It is important to note these actions do not represent funding commitments by Government but rather set out a broad direction for consideration of future action.

The Blueprint also provides a methodology for assessing prospective projects against regional imperatives as new ideas, technologies and opportunities emerge. Immediate opportunities for action in the first 15 years that contribute to long-term outcomes to 2050 are presented.

The Blueprint describes three factors influencing the development of the region. The first is consideration of information about the internal characteristics and qualities of the region itself. The second is analysis of external trends at a national and global level, and the third is the planning framework guiding land use and infrastructure development within the South West.

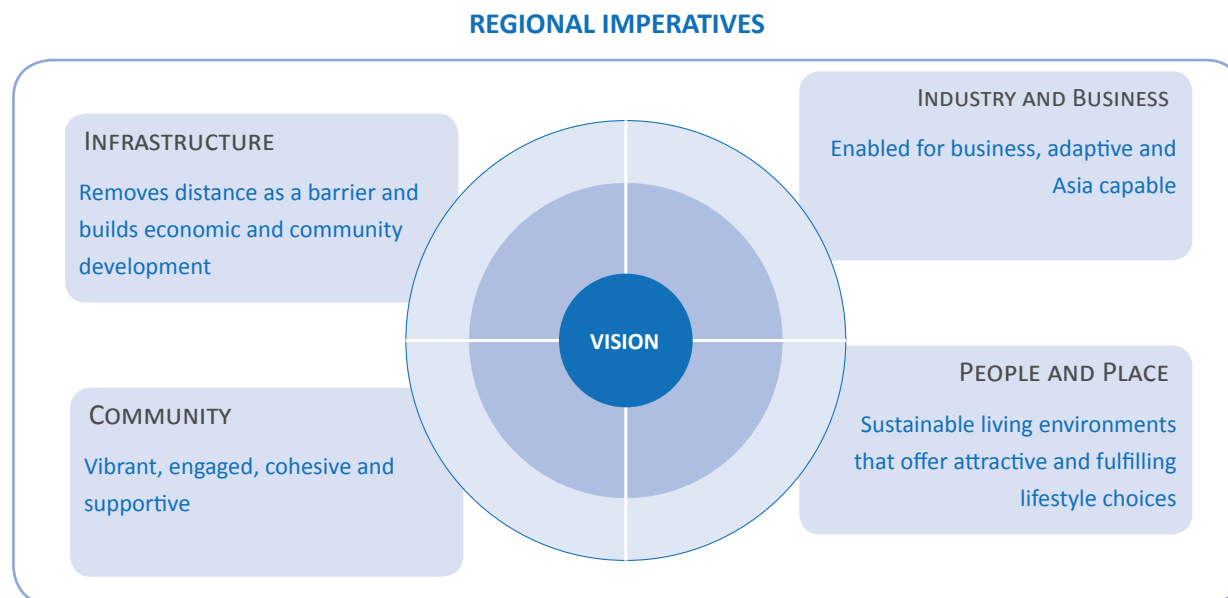


Figure 3: Regional imperatives

2. CONTEXT: SHAPING THE REGION'S DEVELOPMENT

2.1 Regional qualities

The South West region is approximately 24,000km² of which 16,000km² is made up of State forest, national parks and regional parks. Approximately 6,000km² is occupied by agricultural and rural uses; with some 2,000km² used for industrial and urban development.

The Noongar people are the traditional owners and have widespread cultural and heritage links to places in the region. Settlement has widely disrupted traditional culture and many Aboriginal heritage sites are now protected, requiring sensitive planning and development.

The future involvement of Noongar people in the economic and social fabric of the region is likely to be significantly enhanced on settlement of the South West Native Title claim.

As shown in *Figure 2*, the South West has three distinct sub regions.

Bunbury Wellington

The Bunbury Wellington sub region contains the region's capital, Bunbury. The urban area that is Greater Bunbury includes the local governments of Harvey, Dardanup and Capel.

The Bunbury Wellington sub region has substantial alumina, coal and mineral sands production, with strategic assets including the Bunbury Port, and strategic industrial areas at Kemerton, Preston, Worsley and Shotts. The power stations around Collie produce 71% of WA's base load electricity and 34.5% of total electricity production. Collie has been designated by the WA Government as a SuperTown, with related investment to accelerate development and population growth.

Greater Bunbury has a range of higher-order services and facilities, including the South West campus of Edith Cowan University, South West Institute of Technology and the South West Health Campus which includes Bunbury Regional Hospital and St John of God private hospital. Most specialist services within the South West are located in Bunbury.

The Capes (Vasse)

The Capes sub region comprises the City of Busselton and Shire of Augusta-Margaret River. Its economic base includes tourism, creative industries, premium wine and food production and agriculture. The City owns the region's major airport which has the potential to attract tourism based air services to the eastern states and currently operates as a terminal for South West fly-in fly-out workers.

The Margaret River region is an internationally recognised brand which helps attract 86 per cent of overseas tourist visitation to the South West. Margaret River is an identified SuperTown, with additional State Government investment through the Royalties for Regions program expected to accelerate development. Busselton is the principal commercial and administrative centre for the sub region and is a strong tourist destination based on a growing events capability.

Warren Blackwood

The Warren Blackwood sub region has an economy based on agriculture, mining, timber and tourism. Manjimup is the sub regional centre and includes the shires of Manjimup, Boyup Brook, Nannup and Bridgetown Greenbushes.

In 2010-11, the Manjimup shire generated \$126.5m in annual agricultural production, making it the second largest food producing locality in WA. This status has also resulted in Manjimup being designated a SuperTown and now receives significant investment from the State Government in food branding, agriculture, research and education, and urban renewal.

The Warren-Blackwood has the largest number of individual small settlements of the region, mainly a result of the development of small timber mill towns that emerged in the 1930s.

Although access to native forest timber has been reduced and is governed by the Forest Management Plan (2013), timber from native forests and hardwood and softwood plantations remains significant for the sawmill and woodchip industries.

Along with horticulture and viticulture, milk production, beef and sheep production are important economic activities.

Lithium and tantalum minerals are produced at Greenbushes with expansion of world demand for Lithium driving substantial new investment in plant.



REGION HIGHLIGHTS

- Area 24,000 km²
- Mediterranean climate
- Population 164,000
- Economy \$15 billion pa
- 12 LGAs, 3 sub-regions
- Principal urban centres:
 - Greater Bunbury
 - Busselton
 - Manjimup
 - Collie

2.2 Megatrends: the winds of change

Megatrends are global scale shifts that generate waves of human innovation. Megatrends such as those illustrated in *Figure 4* will affect the way we live and work in the future. Six key trends have been identified that are already impacting the South West. *Our future world: Global megatrends that will change the way we live* (CSIRO Futures, 2012 revision) is the most contemporary analysis and is supported by *Australia in the Asian Century* (Australian Government White Paper, 2012), *Imagining Australia in the Asian Century* (The

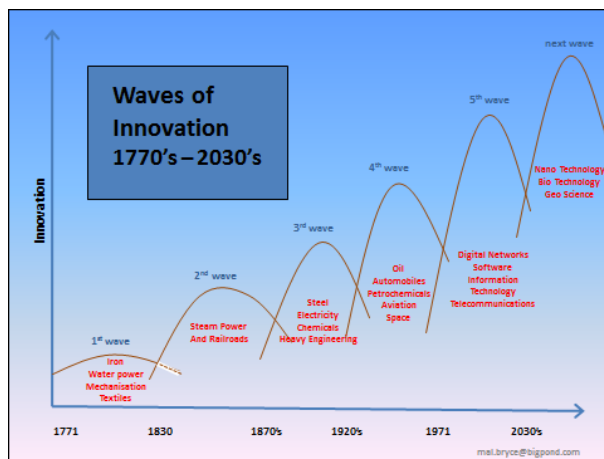


Figure 4: Waves of innovation

Boston Consulting Group, 2012) and *Sustainable Australia Report 2013*. The six megatrends that emerge from this work which will influence future development of the South West are outlined below.

2.2.1 Asian century

The coming decade will see the world economy shift as the 'economic centre of gravity' moves eastward from its European and North American hotspot and by 2030 is forecast to sit firmly between India and China with an increasing focus on emerging economies of Vietnam, Indonesia, Myanmar and Cambodia (Boston Consulting 2012).

This trend will result in increased consumption of goods and services through an increasingly prominent middle class. This will include health and education services, food, tourism and various consumer goods.

The South West is well positioned in relation to Asia. Common time zones, direct flights between China and Perth and a growing interest in food, wine, tourism and minerals are all attractive to the market. Accessing the market will require the ability to meet the level of demand required and efficient logistics between the South West and Asia.



2.2.2 Fiscal uncertainty

The ongoing uncertainty following the 2008 global financial crisis remains in 2014 even though many markets have improved. The gradual shift of focus towards Asia, weak growth outlooks in Europe together with global patterns of unrest is likely to prolong economic uncertainty. This will require South West industry to build resilience in its operations and adapt rapidly to changing market circumstances. Regional business will need to build strong alliances and seek markets that have the potential to support growth.

2.2.3 Ageing population

People are living longer. In 1950, 8% of the world's people were over 65 years old, increasing to 11.2% by 2011 and is forecast to reach 22% by 2050 (CSIRO Futures). By 2011 Australia's 65 years plus population was already 14% and that is predicted to rise to 23-25% by 2056.

The proportion of people older than 65 is expected to increase by the year 2026 from 13.2% to 19.3% of the total South West population – an increase of 6.1%.

The ageing population is an economic and social opportunity as well as a cost. Deloitte (2014) highlight growth in areas of financial wealth management, leisure and retirement services, health, reskilling and aged care as major growth



drivers in the Australian economy. As active ageing gives way to gradual dependency we can expect to see increasing health care and accommodation costs with potential shortfalls in retirement savings to help meet these costs.

In the medium term, a large number of settlements in the South West means a balance has to be achieved in supporting people within their community, access to services and centralising services in key locations. The South West can benefit in the short term from a large pool of active older people but longer range planning needs to include various forms of supported accommodation and health care provision.

2.2.4 Digital age

Digital technology has already transformed the way we communicate and engage. It is now set to fundamentally change the nature of work with many employees no longer having to live in the places they work and many businesses relying on digital technology to improve supply chain logistics, asset utilisation, improved customer service, asset utilisation and innovation.

High capacity broadband access, particularly increased upload capacity, is now a key part of both domestic and business infrastructure.

In the South West, this is relevant to improving the efficiency of the traditional industry base and new emerging industries in areas of media, technology and marketing.

Industry demand has resulted in one gigabyte of capability in the central area of Bunbury but most parts of the region are only able to access ADSL or wireless broadband with much more modest broadband capacity. Improving access to high capacity has the potential to transform opportunities for international engagement.

2.2.5 Environment, climate and water

Climate change and land clearing have three impacts on future development of the South West:

- ❑ Land clearing threatening habitat;
- ❑ Climate change resulting in storm events and potential sea level rise; and
- ❑ Drying climate impacts on water sourcing and forest health.

Land clearing is addressed through the South West Planning and Infrastructure Framework (Department of Planning 2014). There is a general presumption against further clearing of native vegetation outside of planned areas unless clearing

is required for critical infrastructure.

Risk of loss of infrastructure through sea level rise is being addressed through modeling and incorporation of design guidelines into infrastructure planning through the Department of Planning.

A drying climate is affecting the ability to source potable surface water supplies placing increased reliance on ground water. Salt water intrusion is beginning to affect coastal underground sources as bores are drawn down and opportunities for recycling fit for purpose water will emerge.

Climate change can place South West agricultural production at risk. This may drive investment in more efficient irrigation options, together with improved water storage and distribution systems.

A third implication of climate change is the potential for increased bushfire risk. The South West has extensive forest areas which are at risk as a consequence of drying trends. Increased forest fuel presents ongoing risk.

Specific actions to help address the impacts of climate change will be examined in Section 4.

2.2.6 Urbanisation

Urbanisation is a world trend as people move from rural areas towards cities. It is Government policy in China and is becoming increasingly apparent in South East Asia and India. Urbanisation concentrates markets and distribution points for trade and the scale of new city development in Asia represents significant opportunities for international trade.

The South West can capitalise on this through targeting high disposable income areas for premium product sales including wine, food and tourism.

2.3 Planning frameworks: making best use of scarce land

Existing work guiding the governance and development of the South West includes the priority policies, plans, strategies and programs of the three tiers of government. There is a comprehensive suite of planning instruments, both statutory and strategic.

Each of the 12 local governments in the South West has one or more town planning schemes for their municipalities, supported by strategies and policies.

The Greater Bunbury Region Scheme informs the local planning schemes of the City of Bunbury and the shires of Capel, Dardanup and Harvey. The region scheme and regional planning policy documents are prepared and administered by the Western Australian Planning Commission, the South West Region Planning Committee and the Department of Planning.

There is a high degree of alignment between the key regional planning and regional development documents that reflects a high level of consensus around the elements that make up the planning imperatives for the region.

Both SWDC and RDASW contributed to the draft *South West Planning and Infrastructure Framework* document which will provide the overarching framework for future planning in the region.

This work has provided a high level of certainty in land availability, constraints and management of competing values. Land has been identified both for strategic industry purposes and general industry with appropriate infrastructure corridors. The region has an estimated 6,000km² of priority agricultural land identified and protected.

The Blueprint is consistent with the directions

established in the draft *Western Australian State Planning Strategy* and the draft *South West Planning and Infrastructure Framework*. The focus of the Blueprint is aspirational change and economic and social development. Alignment with these key documents will help the Blueprint gain leverage in achieving its objectives and, where required, accelerate growth beyond forecast levels.

The South West's intrinsic qualities, national and world trends and land use values, expressed through effective planning, will shape the region's future and the Blueprint. In the next section there will be an examination of the region's economic and social performance which identifies critical opportunities that, in turn, informs initial actions within the Blueprint.



3. THE SOUTH WEST ECONOMY

Council of Australian Governments' key determinants of growth

The Council of Australian Governments (COAG) has a nationally agreed framework for assessing growth potential in regional economies. This section provides an overview of the South West in accordance with the determinants of economic growth identified by COAG and helps build leverage against national priorities for development.

Consistent themes emerge at State and Australian Government levels that should be a focus of regional development work. These can be summarised as:

- Develop the necessary infrastructure to support industry and communities with a special focus on strategic gateways to market opportunities;
- Build productive capacity by leveraging off comparative advantages, building regional competitiveness and identifying and accessing market opportunities;
- Build social capacity through quality education, health and family support services, supported by quality living environments; and
- Promote strong, vibrant and inclusive communities that are sustainable.

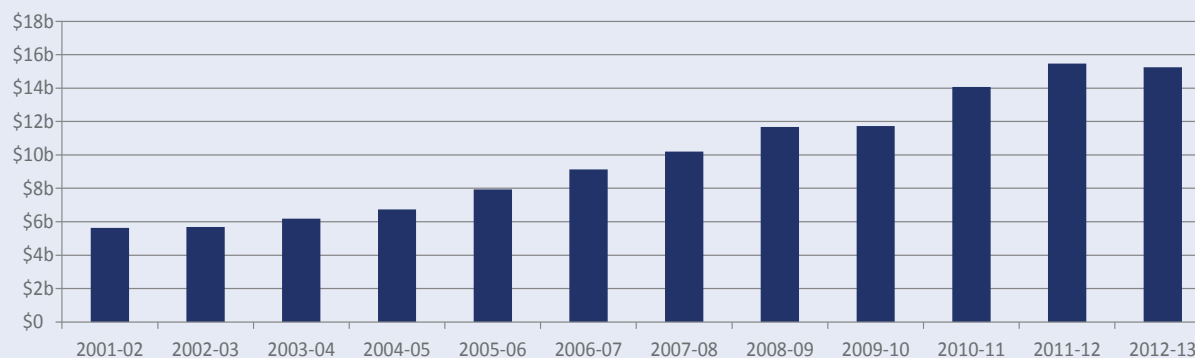
This section of the Blueprint will examine the South West in the context of the COAG Principles. In undertaking this assessment the Blueprint will examine drivers of population growth compared to economic growth and form conclusions about how our economy might support our population in 2050.

The regional economy

In 2012-13, the South West Region's Gross Regional Product exceeded \$15b and accounted for 6.6% of WA's Gross State Product (ABS National Accounts). An average annual estimated GRP growth rate of 10% was achieved in the years up to 2009-10 with some signs of growth slowing in 2012-13 (*Figure 5*).

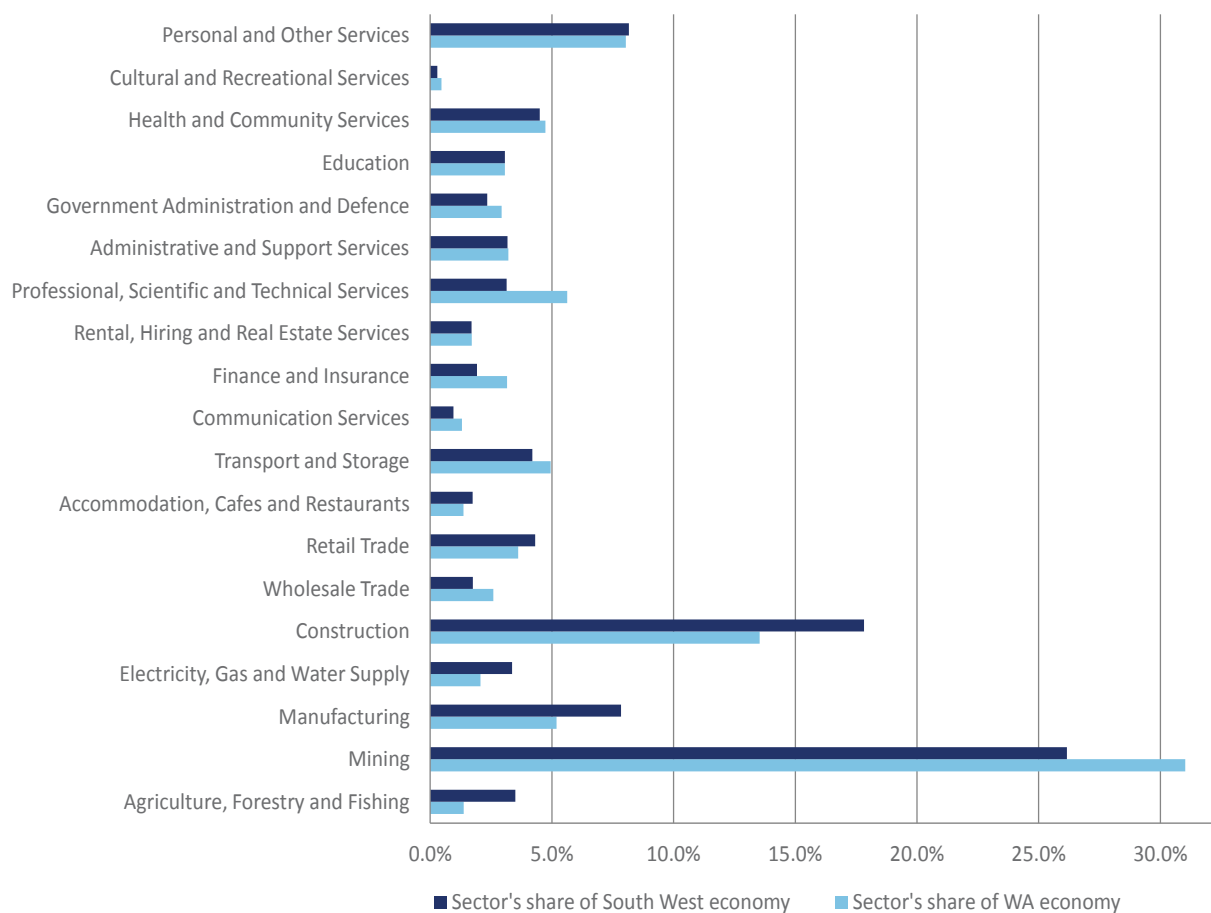
The value of the region's traditional industry sectors is shown in *Figure 7* and provides further indications of a general slow down in the growth.

The region has a broad economic base, with mining, manufacturing, construction, tourism, agriculture and timber processing key elements. There is a strong small business and retail sector with an estimated 15,400 businesses in the South West. The main contributors to economic production in the region are mining (26.2%), construction (17.8%) and manufacturing (7.8%).



Source: Department of Regional Development

Figure 5: South West gross regional product, nominal terms, 2000-01 to 2010-11



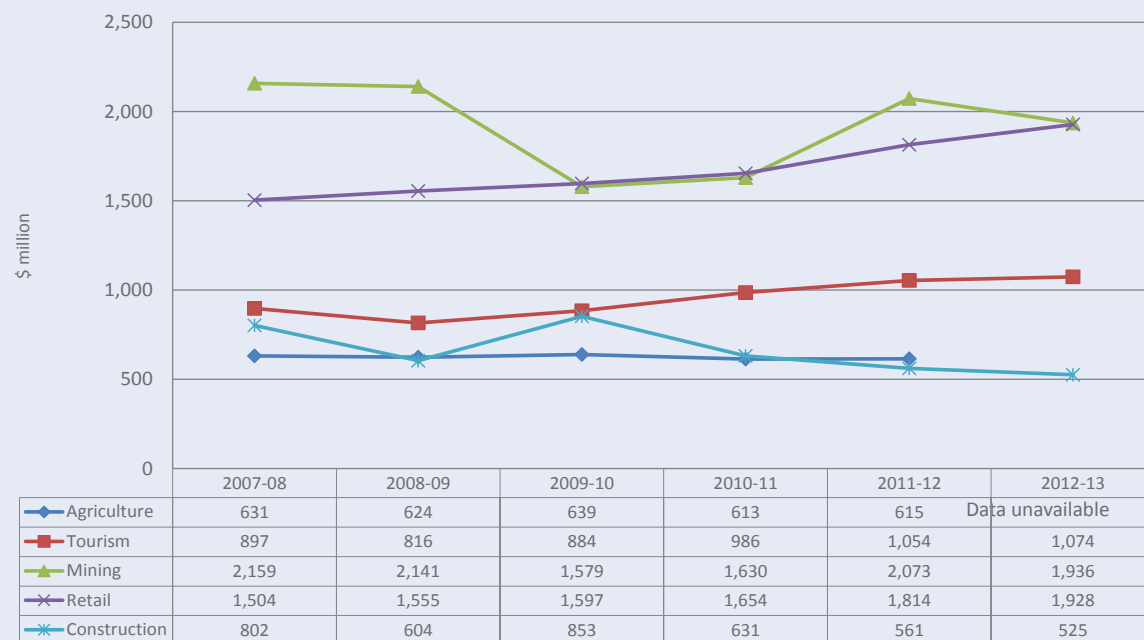
Source: Department of Regional Development and ABS Catalogue 5220.0

Figure 6: Structure of the South West and Western Australian economies, percentage share of output by sector, 2010-11

Small and medium enterprises are the most significant regional employers. The mining sector, mineral processing, transport and earthmoving sectors are characterised by fewer companies employing larger numbers of people. Most production in the region is small scale and relies on premium markets to generate return on investment. Premium quality is the principle characteristic of South West production in order to compete in the market place.

3.1 Comparative advantage

Comparative advantage in the context of this Blueprint is the intersection between global and national opportunity and regional advantage. It is a combination of our business competitiveness, our regional strengths, and our market opportunities. Understanding this intersection provides the basis for growing prosperity. This section of the Blueprint will assess our advantage and use this as a basis to determine how we might maintain and grow prosperity and importantly job and business opportunities as we move towards a population of 500,000 by 2050.



Sources: Australian Bureau of Statistics, Department of Regional Development & Tourism Western Australia

Figure 7: Value of industry – South West

3.1.1 Business competitiveness

In 2012-13 the region's per capita income was \$89,981 which represents growth of 30.3% over the previous five years. Per capita income represents a continuing reduction in labour costs as a proportion of gross output within the region. Investment figures for new capital are not available at a regional level but the past five years has

seen significant investment in capital expansion in the minerals sector and signs of emerging new investment in the farm and creative sectors.

South West regional business competitiveness is based on exploiting niche markets for premium quality goods as the region has insufficient large scale industries to compete in high volume low margin sectors. Focusing on premium quality helps

to overcome the cost disadvantage of geographic isolation and transport logistics and in the case of agriculture, relatively small individual land holdings.

The region is in the same time zone as major overseas markets in South East Asia and China and this improves business efficiency through real time interaction. It provides a singular advantage to doing business with South East Asia and China.

3.1.2 Regional strengths

The South West region's strengths include:

- ☐ Established mining and mineral processing sector with transport and export capability.
- ☐ A natural environment that attracts people to live in and visit the region.
- ☐ A proven ability to produce and market premium quality food and beverage to local and export markets.
- ☐ Planning frameworks and government policies that enable development of the region in a sustainable manner including Royalties for Regions investment program.
- ☐ Established business and education links with Asia.

- A well established workforce supported by significant training and development services.
- Emerging new industries in technology, media and the creative arts.

The 2014 *Living in the Regions* document highlighted the importance of the region's natural assets and lifestyle as an attractor of population. Top ranking reasons for choosing to live in the South West were given as happiness, lifestyle and safety. Perception research undertaken by Patterson in 2011 in Manjimup is consistent with this later finding suggesting that people were trading lifestyle choices for economic opportunity. However, employment prospects and access to training were identified as key concerns in both studies.

There is some evidence to suggest that this choice

is fuelling an increasing trend for fly-in fly-out families to settle in the South West reflected in the growth of FIFO passenger movements at Busselton Airport, which reached just under 15,000 in 2013.

The region's combined strengths provide a basis for growing the region's economy and ability to generate jobs or business opportunities within the region and capitalise on the underlying population growth rate as a driver of local demand for both goods and services.

3.1.3 Opportunities

In this section of the Blueprint, the region's industry performance and opportunities for growth will be examined by industry sector. This will provide the basis for determining job potential and input into the Blueprint's key actions.

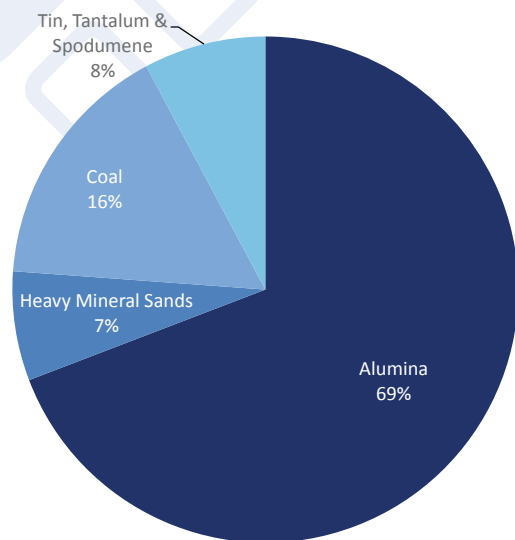
Minerals and processing sector

Mining and mineral processing from the South West was valued at more than \$1.9 billion and employs more than 11,400 people (*WA Mineral*

Petroleum Digest 2012-13). Alumina accounted for 69% of the region's mineral production (see *Figure 8* overleaf), but the region has a variety of other mineral resources and importantly, processing capacity.

South West mining is closely integrated with mining and operations in the neighbouring Peel region. The South West has a rich and diverse resource base in the region which has driven large scale investment in plant, research and innovation capacity and built expertise in environmental management and rehabilitation.





Source: South West Development Commission, 2014

Figure 8: Value of mining – South West

Strategic opportunities relate to further mineral processing. There is continued growth in world demand for lithium, and as solar energy production increases, world demand for silicon is likely to grow. The region has extensive coalfields located next to power generators and is capable of converting coal to other products as well as a source of energy.

The potential of a carbon capture and storage facility in the South West could reduce carbon emissions by 2.4mtpa providing an opportunity for

mineral processing that requires a carbon offset.

Significant opportunity exists for the export of coal and related products through Bunbury Port.

Opportunities to support the resources sector include:

- ❑ Increasing capacity at the Bunbury Port;
- ❑ Identifying and reducing freight bottlenecks;
- ❑ Facilitating access to mineable resources;
- ❑ Continuing to build community acceptance through environmental management;
- ❑ Facilitating access to fit-for-purpose water supply and disposal; and
- ❑ Completion of carbon hub planning and attracting investment to construct.

Manufacturing sector

Manufacturing in the South West is valued at \$2.7 billion and employs 8,616 people (2011 Census).

It is highly diverse dominated by raw material processing – alumina refining, wine-making, meat processing, timber production and basic chemical manufacturing. It also includes a diversity of high tech specialised machinery and equipment, metal

fabrication, engineering, technology and wood products.

The manufacturing sector shows declines in employment related to agricultural and forest products as well as those which are declining generally in Australia such as furniture manufacture. (Syme Marmion, 2013).

Strategic opportunities arise from time-zone proximity to Asia and a focus on premium quality niche production which can generate higher margins and reflects the capability of the manufacturing sector.

Opportunities to support the manufacturing sector include:

- ❑ Improve access to local, state and national supply contracts;
- ❑ Develop new markets in Asia in manufacturing sectors seeking precision and quality in technology;
- ❑ Development of new or expanded gateways to export including special product export capability at the Bunbury Port and possible expansion of Busselton Regional Airport; and
- ❑ Ensure the availability of strategic and general industry land in the region.

Agriculture

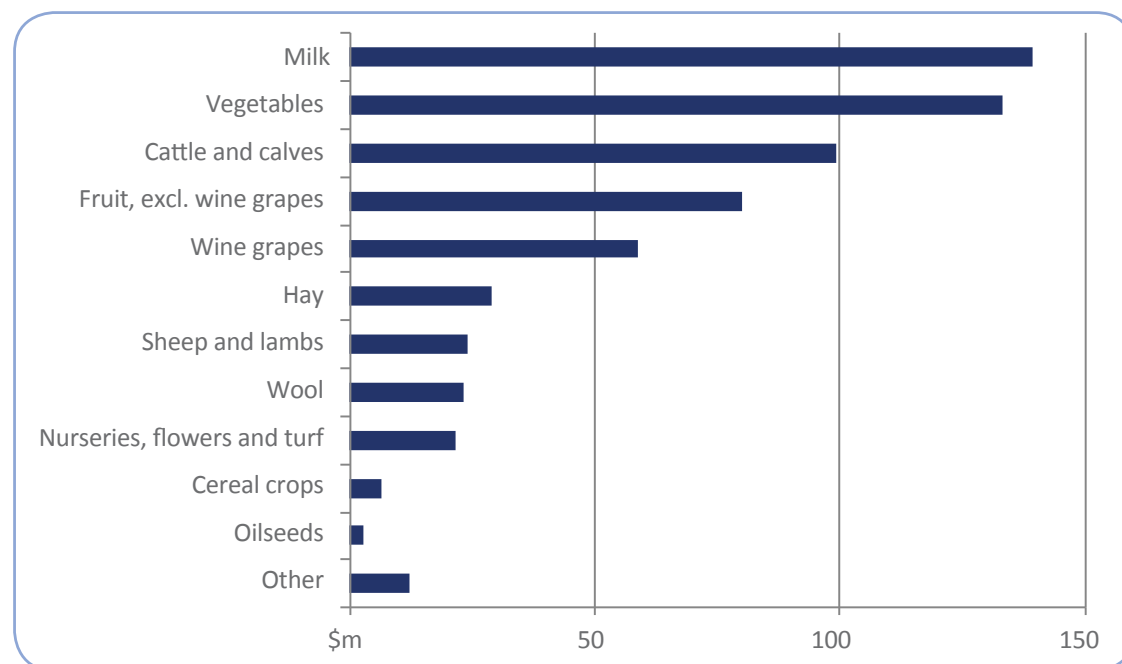
The value of agriculture from the South West is estimated at \$613m (ABARES 2013) and employs 3,569 people. An estimated 6000km² has been set aside as priority agricultural land to inform land use decisions. This reflects the value of the regions' soils for various forms of agricultural production.

The sector includes dairy, beef, sheep, viticulture and horticulture (*Figure 9*). In 2010-11, the region accounted for around 89% of the total value of WA milk production. It also accounted for 91% of the total value of avocado production, 86% of the total value of potatoes, 76% of the total value of apple and pears, and 67% of the total value of wine grapes.

The dairy sector has changed in structure and use of on-farm technology, spurred in part by ongoing adjustment pressures (much of which predated deregulation in 2000). Average farm size (in hectares) has increased 45% between 1988-89 and 2010-11, although growth has slowed in the past decade. Many smaller producers have left the industry. These changes, along with a shift toward greater production mechanisation, have contributed to an increase in farm size and a decline in the use of labour.

A recent report commissioned by Wesfarmers gave an optimistic outlook for the State's dairy industry. The report indicated that markets in South East Asia for products made from fresh, clean and safe milk are in high demand, and so there are potential investment opportunities in fresh and long life milk, fresh cheese and specialty milk powder products. There is some indication this confidence is shared by some in the industry with investment in new plant and equipment but many individual operators are pessimistic with farm gate pricing still close to cost of production.

Viticulture and horticulture are major industry sectors. WA produced about 73,000 tonnes from 12,100ha of grape-producing vines for the 2012 vintage with Margaret River making up 57% of State wine production, followed by Geographe



Source: ABS Agricultural Census, 2011

Figure 9: Value of agricultural production – South West 2010-11

(10%), Pemberton (7%) and Blackwood Valley (2%). WA wine grape production grew from 12,000 tonnes in 1995 to a peak of 84,000 tonnes in 2006. Export markets are dominated by China, Hong Kong, UK, US and Singapore. The economic multiplier for the wine industry is estimated at 3.92 and the employment multiplier at 5.68. In 2010 it was estimated that the state-wide farm gate value of wine was \$91m, with about 69% originating from the South West.

The WA wine industry will continue to make gains in repositioning itself as a producer of premium, high-value wines for the domestic and international markets. WA wines have an excellent reputation for quality, producing only 4% of Australia's wine by volume but nearly 20% by value and accounting for 30% of Australia's high-value wines. The WA wine industry has been quick to respond to



the downward pressures on prices and sales in recent years by focusing on market solutions and restructuring to improve the competitiveness, viability and profitability of vineyard and wine businesses.

The South West horticulture sector remains the primary provider of WA's vegetable and fruit product and is rapidly developing a market driven focus based on concepts of quality, authenticity and genuineness.

Western Australia's and the South West region's horticultural export advantages include:

- ❑ Strong export culture;
- ❑ Short sea and air freight delivery times to many Asian and Middle East markets;
- ❑ Strong market presence in native flower species; producing about 50% of Australia's cut flower exports; and
- ❑ Strong market presence for vegetable exports, including large scale carrot, potato and mixed vegetable farms.

Meat and livestock includes beef, sheep, poultry and pork. Current abattoir capacity is under-utilised with relatively low farm gate prices reducing



production and retail distributors able to draw on production from the total Australian market. China is a significant opportunity but there are difficulties in obtaining licenses from China for export to the country. Expansion of carcass and boxed meat products is an opportunity for the region as point of origin of the animal can be certified.

Strategic opportunities for agriculture are driven by population growth and changing food consumption

patterns in Australia and Asia. Counter-seasonal differences with northern hemisphere markets and a clean and safe food production environment supported by point of origin marketing provide strategic opportunities for growth. Branding linked to place and lifestyle is a rich opportunity and is complemented by the region's growth in major food, wine and marketing events.

There is potential to boost production capacity through new supply chain development subject to markets expanding and returns to growers increasing.

Opportunities to support the agricultural sector include:

- ❑ Target growth in population and emerging markets leading to increased large volume demand;
- ❑ Increase investment in food processing capacity within the region including abattoir capacity;
- ❑ Facilitate access to investment capital to increase scale of production;
- ❑ Improve supply chain logistics to link production to market;

- ❑ Increase farm gate pricing to stimulate investment in production capacity;
- ❑ Identify new water sources and improve irrigation efficiency;
- ❑ Build high capacity broadband to improve process control efficiency;
- ❑ Identify and address regulatory barriers export; and
- ❑ Identify new common user infrastructure requirements such as saleyards.



IMAGINE...

Milk production increased to one billion litres by 2050

It could mean:

- ❑ An export focused dairy industry with a strong presence in Asia
- ❑ An expanded 140,000 dairy herd in the South West
- ❑ Dedicated export facilities at Bunbury Port
- ❑ New and expanded South West processing facilities
- ❑ Streamlined supply chain and regulatory procedures
- ❑ Increased returns to growers

Tourism

The value of the tourism sector was \$800 million in 2012 (Tourism WA) and it is estimated to directly employ 5,600 people. It is a major driver for the retail sector while tourism marketing complements promotion of other core industries such as agriculture. The attraction of the region is in its highly varied travel experience, including old growth forests, whale watching, world-class surfing, fine food and wine and the natural environment.

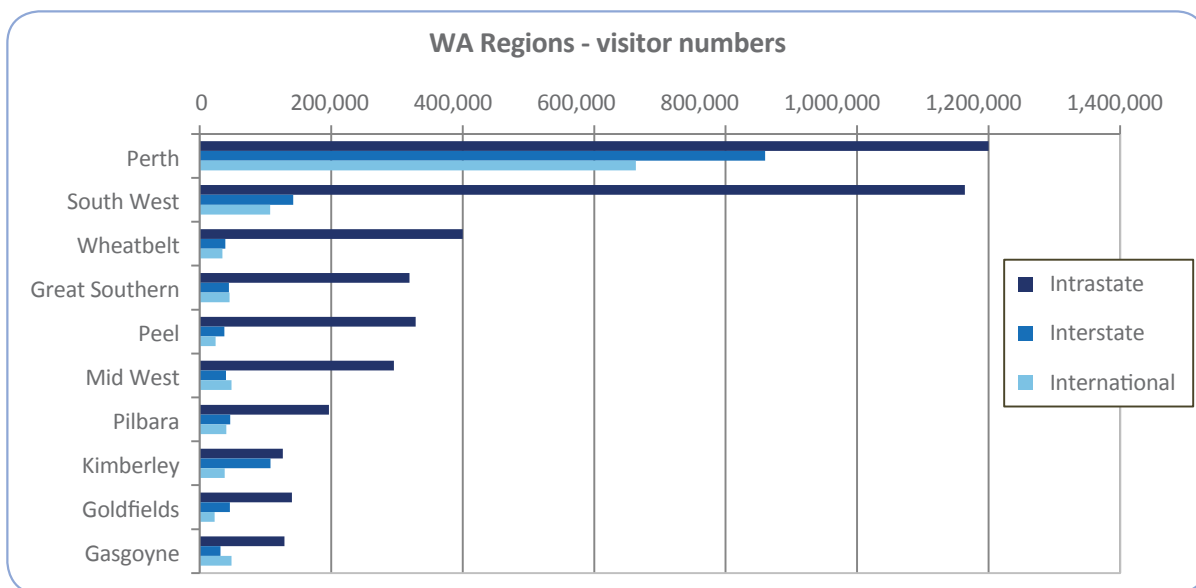
New emerging products include extensive mountain bike trails through forest and coastal regions, walk trail development, cycling and sailing.

The South West is noted as the seventh most tourism-dependent region in Australia across different measures (Tourism Research Australia, *Economic Importance of Tourism in Australia's Regions*, 2011). The sector, and region, is therefore highly vulnerable to market downturns and changes in discretionary spending. Building

resilience to manage future downturns is a key objective of this Blueprint.

Tourism WA estimates that approximately 1.4 million tourists visited the region on average each year in the three years ending 2011. Intrastate visitors accounted for 82% of all visitors to the region in the three years ending 2011, with a further 10% interstate and 8% from overseas (Figure 10). The challenge now is to build the interstate and overseas markets while still providing for the WA market.

The strategic opportunities for the sector are to build on national and intra-state visitation with an expansion into the growing South East Asian markets, India and China and emerging markets from the Middle East.



Source: Tourism WA – three year average 2010-11

Figure 10: WA regions – visitor numbers



Increased visitation will occur through the following key steps:

- ❑ Improvement in iconic tourism infrastructure – things to see and do;
- ❑ Promotion of high quality events; and
- ❑ Development of wholesale tour packaging based on Tourism WA's 'Experience the Extraordinary' campaign.

Tourism investment is an important area for public policy consideration as the benefits of providing tourism infrastructure accrue to a large number of operators rather than a single operator. Coordination failure between operators makes it difficult for operators to substantially contribute to the cost of infrastructure, although exceptions do exist. Margaret River and Busselton have strong visitor centres that operate attraction assets and are able to reinvest in these assets through entry fees.

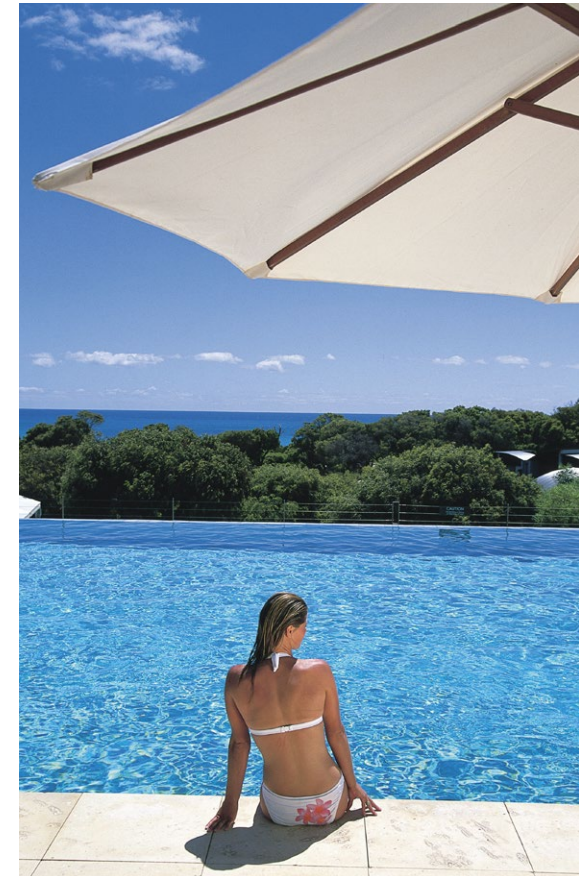
The development of fast train services between Perth and Busselton (via Bunbury) and expansion of Busselton Regional Airport are likely to be major drivers for national and international tourism growth.

Growth in tourism numbers will require new

investment in quality accommodation. Consultation with the industry suggests this should be at levels between 4 and 6 stars to cater for various market segments.

Opportunities to support the tourism sector include:

- ❑ Promote the wholesale market in collaboration with inbound operators;
- ❑ Invest in upgrading major attraction infrastructure including cave and lighthouse attractions, and the Dolphin Discovery Centre in Bunbury;
- ❑ Develop expanded mountain bike, cycling, and walk trails;
- ❑ Develop equestrian and bridle trails;
- ❑ Attract large scale events strategically positioned on an annual calendar to maximise visitation to the region especially on shoulder and low periods;
- ❑ Build labour capacity to meet overseas visitor expectations;
- ❑ Build high capacity broadband to drive market access and interactivity; and
- ❑ Promote investment in 4-6 star accommodation.



Timber processing

The value of timber is \$70 million and estimated employment at 2011 was 258. The industry is divided into plantation based timber, primarily softwoods, and native timbers which provide hardwood resource.

The native timber processing industry is largely governed by resource access determined through a Forest Management Plan. The 2014–2023 plan sets harvesting levels and locations for the various species of native hardwoods. Costs associated with identification and extraction of harvestable areas add significantly to the cost pressures faced by the industry and drive the need to seek higher levels of value adding.

Private plantations are subject to private commercial arrangements and largely exist to support the woodchip export industry. State Agreements are in place to supply softwood for manufacturing which provides approximately 370 jobs.

There are three large scale timber mills operating within the South West. One is a mill that is vertically integrated with a door and window production plant. The other mills supply domestic and overseas markets mostly in structural timbers,

decking and flooring. The amount of native timber available and the short-term nature of the Forest Management Plan discourages significant new investment in plant and improving efficiency. The WA Government has entered into Investment Security Guarantees as a means of addressing bankability problems with the industry associated with supply of resource.

In the medium to long-term the value of local timber could increase as competition from overseas suppliers is mitigated by increased demand for sustainable practice.

Strategic opportunities for the future of the industry lie in improving the cost structures associated with supply of timber and improving distribution of fit-for-purpose logs along with the development of higher value products such as veneers rather than sawn timber. There are opportunities for greater utilisation of third grade logs for peeling and production of ply woods.

Opportunities to support the timber sector:

- ❑ Work to reduce costs between source and processing center including regulatory and transport related costs;
- ❑ Promote higher value processing such as

laminates and ply production using third grade timbers;

- ❑ Assist the craft industry to access appropriate resource for high value craft production;
- ❑ Development of plantation timber resource;



- ❑ Investment in higher value adding such as rotary veneers or spliced veneers with common log landing facilities; and
- ❑ Joint ventures with overseas distributors/ manufacturers of veneers.



Construction

In 2012-13 new building approvals were valued at \$525 million. The construction sector employs an estimated 9,482 workers.

In the period 2006–11, the South West construction sector grew by around 40%, or 1,900 employees. During this time, there was a decline in residential building construction but a substantial increase in heavy and civil engineering construction and building installation services. The majority of this increase relates to major projects in the Shire of Collie, principally the Worsley Alumina expansion and Muja A and B power station upgrades.

The most recent major construction projects in the region are now completed and many workers have taken FIFO options. Local major construction projects will not be the driver of economic growth as it has been in recent years unless another large scale project is initiated. Residential and commercial construction is expected to increase with population demand and replacement of ageing commercial stock.

The strategic opportunities for the sector relate to the attraction of major construction works outside of the region complemented by major commercial and mid-sized industry construction within. As most

heavy construction is now in remote centres, fly-in and fly-out labour hire is likely to increase.

Opportunities to support the sector:

- ❑ Identify new opportunities within the region's cities and major towns for commercial and accommodation development;
- ❑ Promote the region's construction capability in national and international markets; and
- ❑ Explore opportunities for reducing building and approval costs.

Creative industries

The value of the sector is \$306m and employs an estimated 1,095 people. Creative sector employment is growing at around 3.6% with the Capes sub region experiencing substantial sectoral growth to take a 44% share of creative workers. The Bunbury Wellington sub region has 52% of creative workers. Exports in 2011 were estimated at \$70m (SGS Consulting 2013).

Nationally, digital media and entertainment alone are expected to grow by 8% between 2012 and 2016 to a total value of \$24b (Price Waterhouse Cooper 2013).

The creative workforce in the region in 2011 is summarised in *Table 1*.

There is ad hoc evidence indicating the sector has grown in areas of digital media, design, marketing, film, television, animation and gaming technologies. High capacity broadband is expected to accelerate growth in this sector. Events such as CinéfestOZ based in Busselton and Emergence Creative Festival in Margaret River are rapidly evolving as national scale events.

The industry is export-focused with recent co-operation and joint venture agreements signed between animation companies in Bunbury and China.



Strategic opportunities relate to the world shift towards services and experiences rather than products. National estimates indicate this sector is likely to emerge as the fastest growing sector nationally with demand for content coming from entertainment, gaming, media and marketing.

Opportunities to support creative industries:

- ❑ Facilitate the development of a stronger industry identity to promote the region's creative capability;
- ❑ Build high capacity broadband with high upload capacity;
- ❑ Inform a broader understanding of the sector's contribution and growth potential at a policy level; and
- ❑ Use 'buy local' strategies to help incubate the sector through local purchasing of digital media and related content.

	2011
Creative specialists (A)	383
Support workers (B)	444
Total employed in creative industries (A + B)	827
Embedded workers (C)	268
Total employed in creative occupations (A + C)	651
Total creative workforce (A + B + C)	1,095

Source: SGS Economics and Planning calculations based on ABS Census 2011

Table 1: Creative workforce in the South West region, 2011

Recreational industries

The value of this sector in the South West has not been quantified. Ad hoc evidence suggests that there are key employment growth areas in the following:

Racing and pacing

There is substantial investment in racing and pacing infrastructure in the region supporting a range of employment opportunities in training, veterinary, transport and hospitality. Analysis undertaken by the racing industry in 2011 suggested an employment contribution of 122 full time jobs and 283 part time jobs. This does not include pacing or indirect employment in equestrian supplies, veterinary services and transport. Strategic opportunities are linked to the growth of racing in South East Asia and possible expansion into China. Demand for live racing coverage to support the gaming industry is significant and the South West has a time-zone and infrastructure advantage with existing race courses.

Marine

Recent national analysis indicates marine facilities generate 6.1 jobs for each \$1 million in gross revenue. The value of the sector has not been quantified in the South West but there is a significant level of boat ownership supporting

maintenance, hospitality, retail and transport services. Opportunities relate to relatively protected waterways in the northern part of the region compared to the rest of the WA coastline, with the development of marine tours, regattas and related sailing and power boat events.

Cycling

Investment in dual use path networks and major cycling events in the region are supporting the development of cycling as a retail industry with flow on benefits to tourism and hospitality. The value of the industry has not been assessed but with worldwide cycling increasing it is likely to grow in the South West which features the internationally significant Munda Biddi Trail, which is dedicated for off-road cycling for 1,000km between Mundaring and Albany.

Opportunities to support recreational industries:

- ☐ Develop equestrian and bridle trails linked to tourism;
- ☐ Identify options for the racing industry to link to overseas markets in Asia based on time zones;
- ☐ Identify event opportunities associated with industry sectors.



3.2 Access to markets

3.2.1 Roads and rail

Growing industry opportunity involves exports. This means the South West is dependent on a high quality, safe road and rail network, particularly efficient freight logistics to the Bunbury Port, Fremantle Port and the Perth metropolitan area.

The *Roads to Export – Greater Bunbury Infrastructure Investment Plan* (SWDC, 2010) provides a framework for the efficient movement of imports and exports and sets out an overall plan to future-proof road and rail logistics to the Bunbury Port based on forecast trade growth at the Bunbury Port (Figure 12, overleaf). The plan has road, rail and land components. Detailed elements are outlined below.

Rail

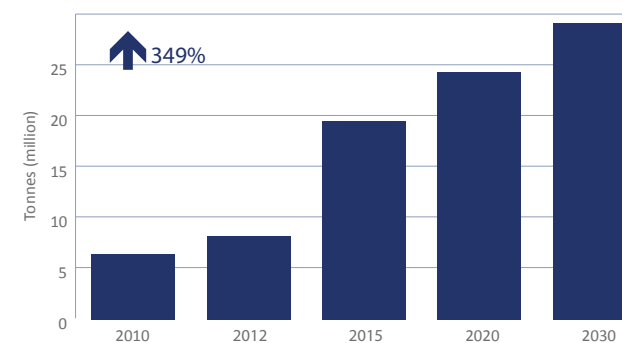
The Claisebrook-Picton (Perth-Bunbury) South West Main Railway line is nearing capacity, especially from Brunswick to Picton where freight trains from Collie and Worsley join the main line, mix in with other freight and The Australind passenger train. The Collie rail line is also heavily used (mainly alumina, coal and caustic soda). This has increased significantly with the Worsley Alumina expansion. It is expected that projects including coal and urea



exports could not be handled without investment.

Figure 11 shows expected freight growth on the Brunswick Junction – Collie/Premier rail line. Upgrade and partial duplication of the rail between Collie/Premier and Picton is required to avoid negative impacts on train movements, particularly with planned major increases in throughput at the port.

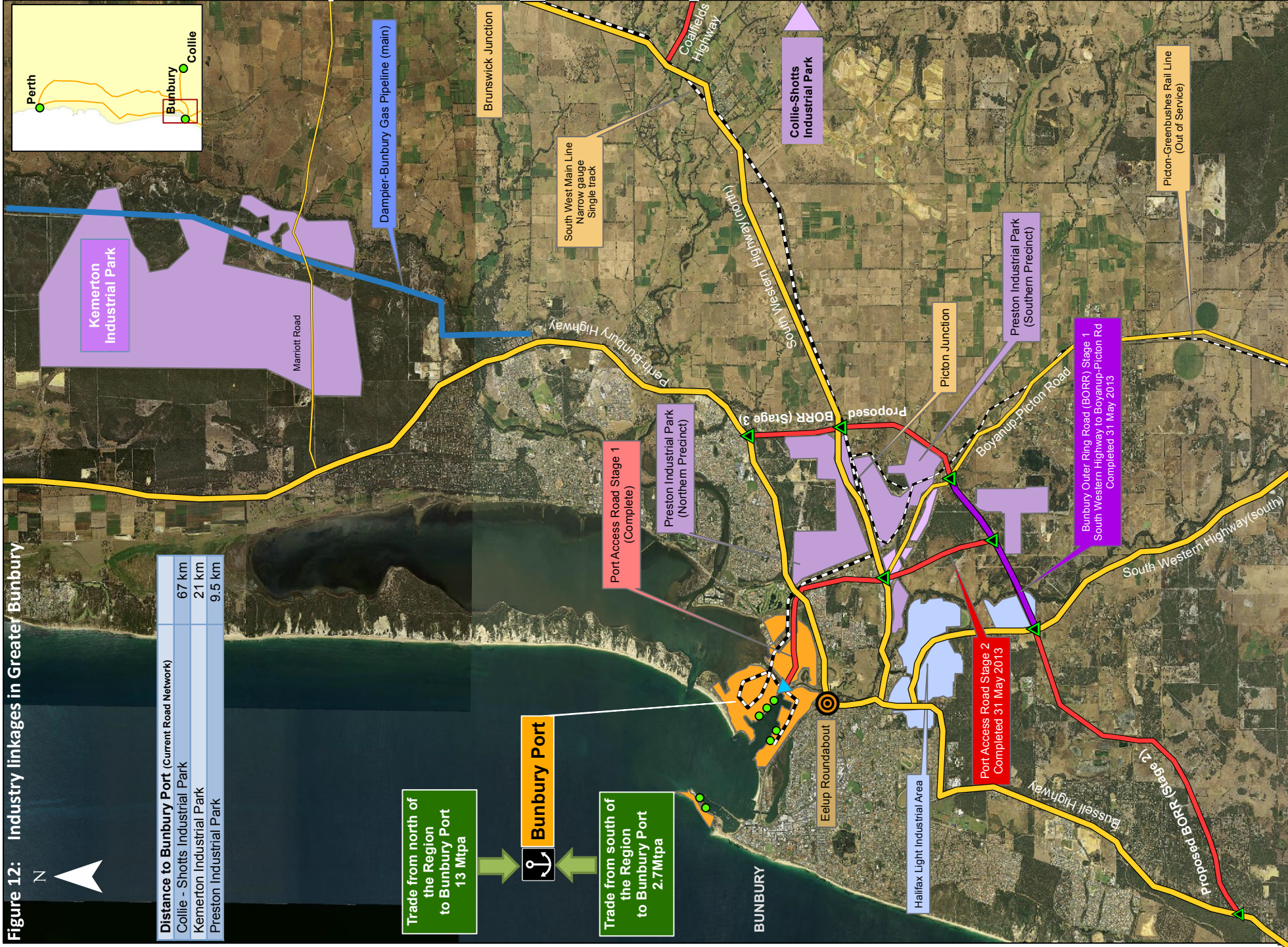
The Picton Lambert line link between Greenbushes and Lambert is currently not in use and is unlikely to have a viable economic use in the life of the Blueprint.



Source: Department of Transport and Hyder Consulting Ltd, 2012

Figure 11: Brunswick Junction-Collie/Premier rail freight growth (2010-2030)

Figure 12: Industry linkages in Greater Bunbury



Fast train links between Perth and Bunbury are currently being planned by the Passenger Transport Authority in conjunction with the Department for Planning. This will link commercial, tourism and retail options in both directions. Expansion of tourism and potentially the Busselton Regional Airport would suggest extension of a high speed rail link to Busselton should be investigated in the future.

Roads

Further stages of the Bunbury Outer Ring Road are required as truck movements between industrial areas and the port increase. The road will also separate regional traffic from Greater Bunbury urban traffic. Stage I of the Bunbury Outer Ring Road is constructed but needs to connect with the Forrest Highway in the north and Bussell Highway in the south to realise its full potential.

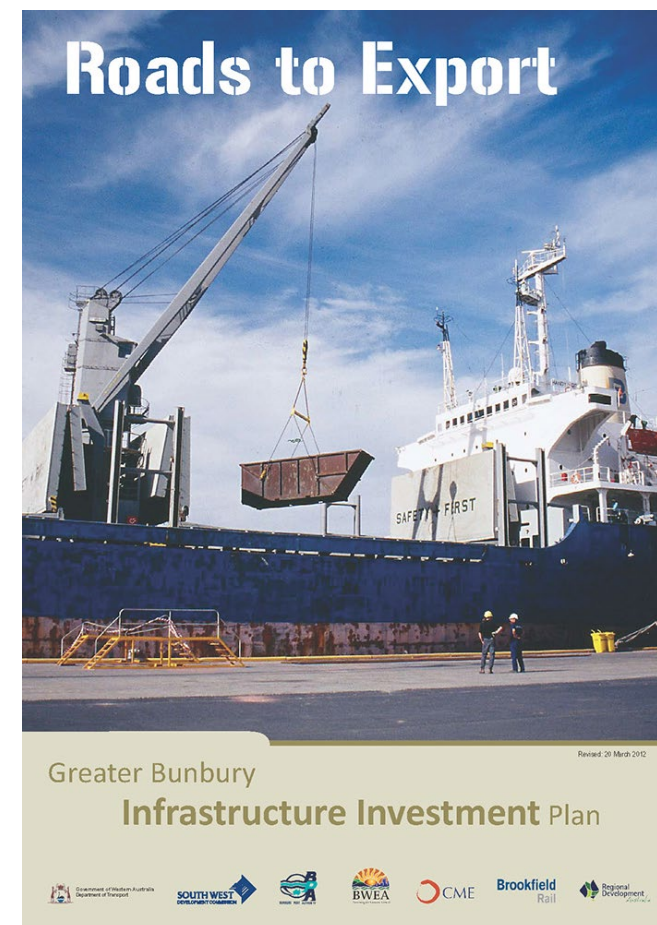
The new Perth to Bunbury Highway has decreased travel time and cost for freight to and from Perth but increased freight on the route will require modification to freeway standard in the future.

The Coalfields Highway requires additional upgrades including additional passing lanes and safety improvements. Already heavily used by industrial, general and agricultural traffic, this

road will be used for grain exports of up to 2mtpa through Bunbury Port from 2014. Without major upgrades, the road will become an impediment to developing energy, mineral and agricultural opportunities in the Collie Basin and hinterland. Main Roads WA has a funded upgrade schedule for the highway.

Serving the southern part of the region, the South Western Highway requires additional passing lanes and safety improvements. This road carries a mix of heavy vehicles servicing the timber industry (logs, woodchips, sawn timber); Greenbushes mines (lithium, tantalum, spodumene, tin); agricultural product (including major horticulture freight to Perth and export markets); general freight; tourist traffic (including caravans); and general traffic. Planning is being finalised for a ring road at Boyanup to reduce freight flows through the town.

To the north and from the Capes sub region, the Bussell Highway carries a mix of log trucks (mainly plantation hardwoods); mineral sands (pre and post processed); tourist traffic; agricultural traffic; and general traffic. The Capes subregion has the region's major share of tourist visitation. Upgrades to the Bussell Highway and a heavy haulage route to divert heavy traffic from Margaret River's CBD are considered necessary to boost market access for business, and trigger CBD investment which will



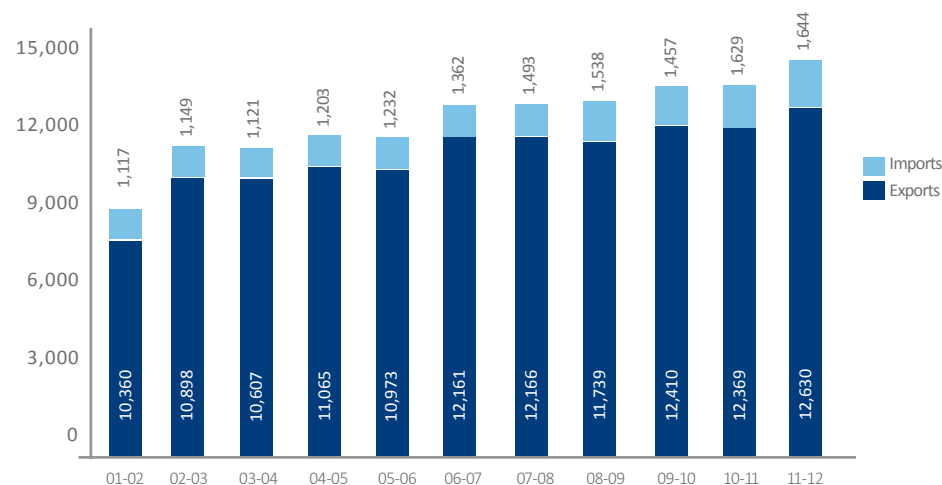
improve the amenity of the popular town centre for the benefit of tourists and residents alike.

Planning is underway for the Busselton Outer Bypass to improve traffic flows to Margaret River. Passing lanes are required on the Vasse Highway to Nannup.

3.2.2 Ports and airports

Bunbury Port

Figure 13 shows Bunbury Port throughput from



Source: Bunbury Port Authority 'Cargoes & Trade'

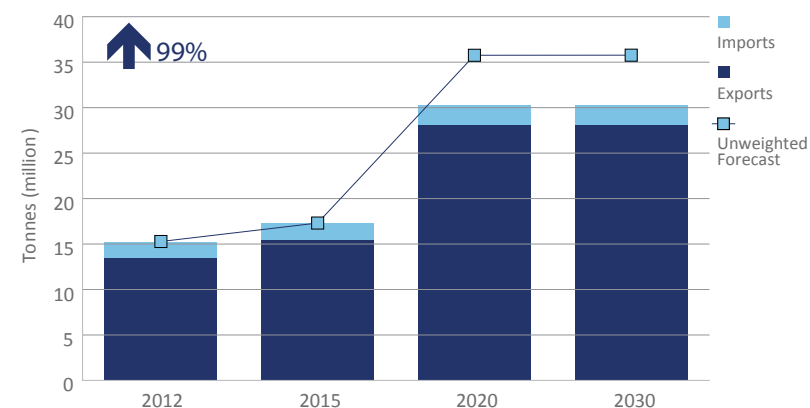
Figure 13: Bunbury Port throughput ('000 tonnes), 2001-02 to 2011-12

2001-02 to 2011-12, which rose from 11.48mtpa to 14.27mtpa over that period. Figure 14 shows expected throughput from 2012 to 2030 based on forecasts and industry projections provided by the port. Over this period, it is expected that tonnages will virtually double to 30mtpa.

The expected surge in shipping requires future expansion of the inner harbour and consolidation of port land holdings which can be achieved through realignment of the Preston River. Together with adjacent industry parks, port expansion

can provide a trigger for roll-on roll-off cargoes, container service, warehousing logistics and manufacturing for export.

The Southern Ports Authority at Bunbury has one of the largest land portfolios in the State specifically for port buffers and port-related tasks. It is strategically placed for expansion and has considerable potential for containerisation as Fremantle and Kwinana are nearing capacity. Bunbury is ideally located to meet future development of these cargoes.



Source: Department of Transport and Hyder Consulting Ltd, 2012

Figure 14: Total throughput – Bunbury Port (2012-2030)

Airports

Bunbury Airport has the highest number of light aircraft movements after Jandakot in Perth. However its physical constraints and proximity to Perth renders regular passenger transit (RPT) flights unviable in the foreseeable future.

Busselton Regional Airport is the South West's principal airport being well located to service the needs of the expanding Capes urban population, tourism, FIFO workers and potential air freight, such as specialist agricultural exports.

FIFO throughput in Busselton was 9,566 passengers in 2011-12, rising to 14,914 in 2012-13 and prompting a terminal expansion. Virgin presently operates direct flights for FIFO workers and planning is well underway to assess the feasibility to national and international carriers operating at the airport. Its proximity to Perth also makes Busselton a useful alternative should Perth Airport traffic be diverted. Expansion of the airport has the potential to trigger investment in aviation, transport and tourism.

Manjimup aerodrome has a small number of FIFO flights. The size of aircraft is limited by the width of the existing runway. The Shire of Manjimup is seeking to widen the existing runway or to relocate

to a new site between Manjimup and Bridgetown. Expansion at Busselton is expected to deflect some services to Manjimup.

Broadband and telecommunications

Broadband is increasingly seen as a market access resource by the agricultural, tourism, creative and commercial sectors. Broadband upload speeds are ad hoc and dependant on existing copper infrastructure in most locations. The resolution of current uncertainty (2014) in relation to broadband roll-out may limit investment in these sectors.

In order for the South West to compete effectively, the Blueprint has adopted an aspirational standard of 10–100 megabytes for domestic use, 1-10 gigabytes for business use and wireless in all towns. One gigabyte of access is available to businesses in the Perth CBD.

Access to energy

Planning is underway for the extension of the Dampier to Bunbury gas pipe line to Albany via Manjimup. This will increase opportunity for food, mineral and timber processing in the Warren Blackwood. Extension of gas to Collie could provide alternative fuel sources.

The region's extensive energy capacity at Collie

and the adjacent Shotts strategic industrial park provide an opportunity for possible waste heat use by industry.

Opportunities to support access to markets:

- ☐ Complete road and rail freight linkages to the port;
- ☐ Complete the Preston River and subsequent consolidation of port land based on business outcomes;
- ☐ Develop opportunities for integrated transport facilities within Greater Bunbury;
- ☐ Expand Busselton Regional Airport to stimulate tourism and other industry sectors;
- ☐ Complete the Margaret River Perimeter Road;
- ☐ Increase capacity at Manjimup Airport;
- ☐ Develop Forrest Highway to freeway standard; and
- ☐ Provide high capacity broadband to increase upload capacity.

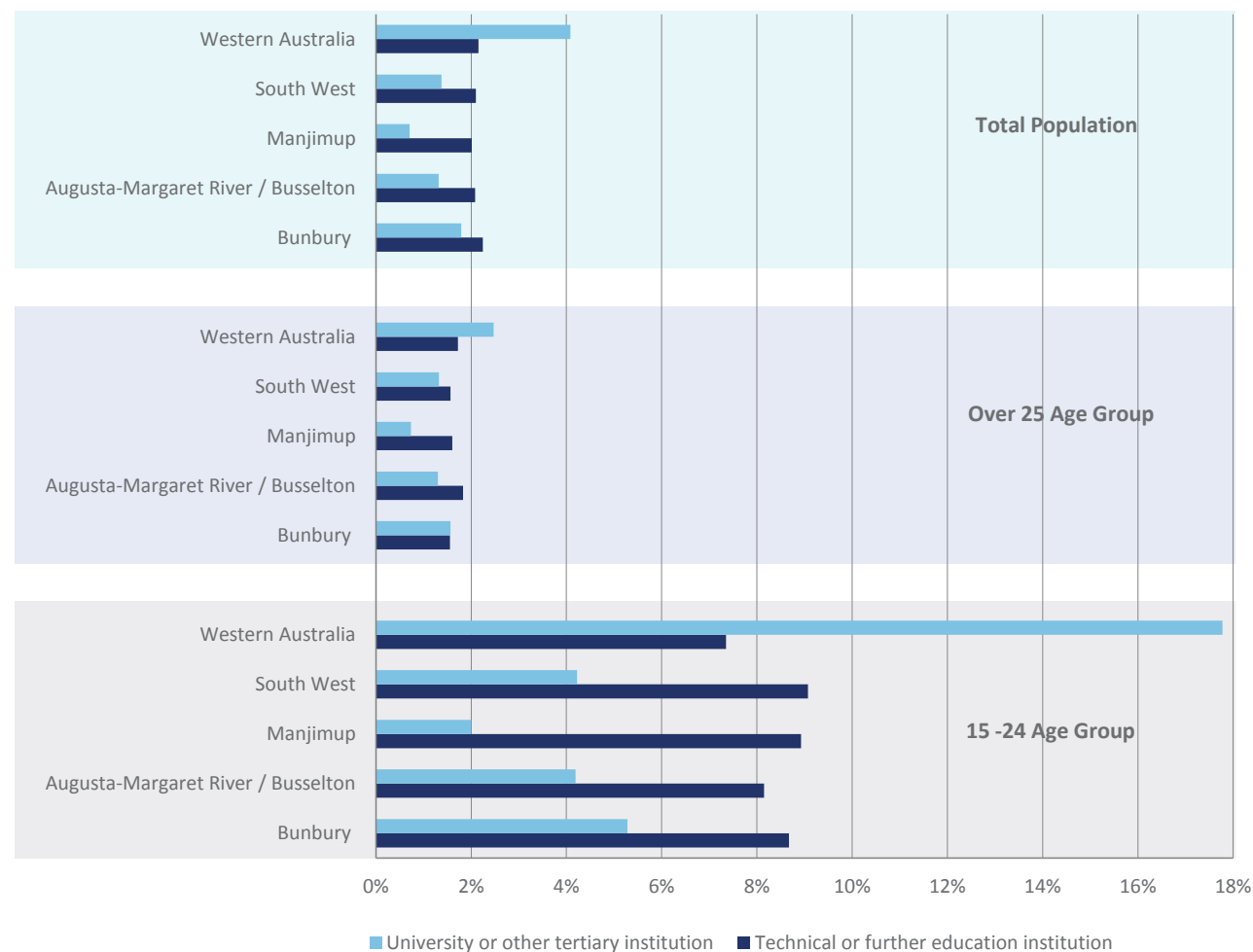
3.3 Human capital

Human capacity in the regions is seen by COAG as a major input into regional development. This section of the Blueprint examines the human capacity of the South West and opportunities to strengthen the region's capability as an input to business competitiveness and overall quality of regional life.

3.3.1 Education, training and skills

There are 29 high schools (public and private) in the South West region with the majority in the Bunbury-Wellington area. Australian Government-funded Trade Training Centres have been created in five lead schools: Collie Senior High School (SHS), Manjimup SHS, WA College of Agriculture in Harvey, Busselton SHS, and Manea College in Bunbury.

The South West Institute of Technology (SWIT) in Bunbury is the largest public registered training organisation in the region. It has five regional campuses located at Manjimup, Collie, Harvey, Margaret River and Busselton. Educating more than 9,000 students each year the SWIT offers over 200 national qualifications covering a range of vocational occupations from automotive and commercial cookery to nursing and viticulture. It is a specialist in trade skills delivery and is forming



Source: ABS 2011, *Census Community Profiles*

Figure 15: Proportion of population aged 15 years and over attending university or technical education

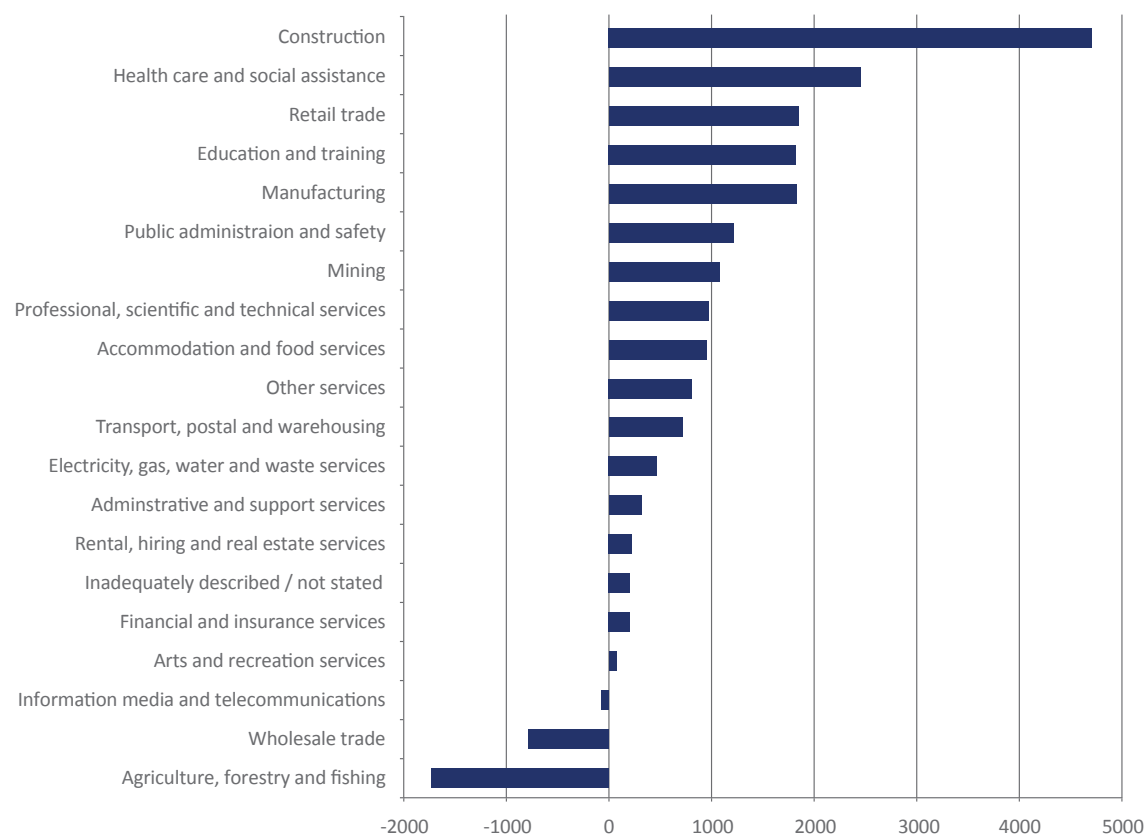
strategic alliances with institutes outside of the region to increase training availability in emerging areas such as the creative sector.

There are indications of growth in private training providers operating in the highly populated Greater Bunbury area.

Edith Cowan University (ECU) has a regional campus situated in Bunbury with more than 1,000 students enrolled. Together with SWIT and Manea Senior College, and the Bunbury Health Campus, ECU is part of the large educational precinct. The Rural Clinical School has a facility at ECU and provides opportunities for medical students from the University of WA and Notre Dame University to be tutored by specialist health staff while completing university qualifications.

The Margaret River Education Campus is a joint initiative of the Margaret River SHS, Department of Education, the Department of Training and Workforce Development, SWIT, ECU and Curtin University. Curtin and SWIT are partners in the Centre for Wine Excellence, which comprises a teaching winery, laboratories, classrooms and resource centre. A review of course options is currently being undertaken.

Figure 15 shows that the proportion of the

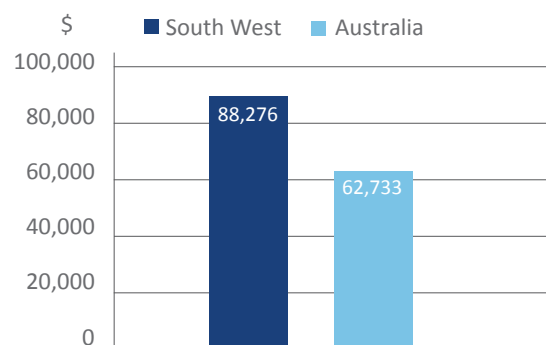


Source: ABS Census 2001 and 2011

Figure 16: Changes in employment by industry, South West region, 2001-2011 (persons)

population aged 15 years and over attending university in 2011 was lower in the South West region than WA as a whole. Proportionally, more students attended technical training than WA as a whole (ABS).

This statistic is supported by the *Year 12 Destinations Survey, 2011* which found that only 16% of Year 12 students at the seven largest public schools in the region indicated they would undertake further study with the preference for



Sources: ABS; Department of Regional Development

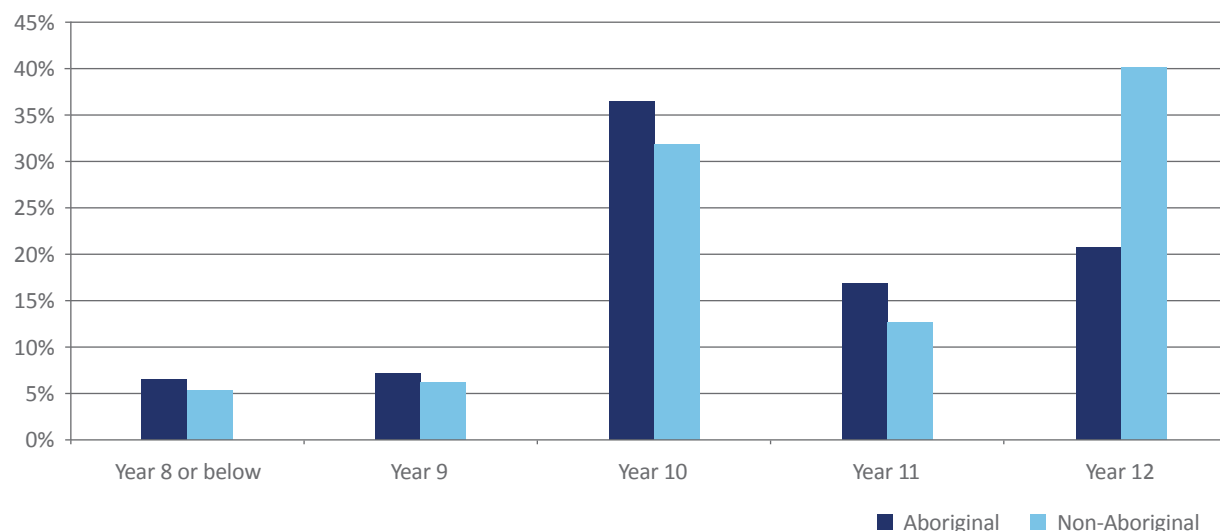
Figure 17: Economic product per capita – Australia and South West region, 2010-11

technical education. This is in contrast to around 50% of metropolitan-based students heading to university at the completion of Year 12.

Nonetheless, the relatively low proportion of students seeking higher education in the South West presents an opportunity. Strategies for both vocational and tertiary education, combined with innovative solutions to address access, are areas of potential investment.

Workforce development

Figure 16 shows changes in employment by industry in the South West between 2001 and 2011. The largest change was in construction, due to major industry expansion and power station upgrades. Other significant increases were in health care and social assistance; retail trade; education and training; and manufacturing. The most significant decline was in agriculture, forestry and fishing.



Sources: ABS 2011, *Census Community Profiles*. Excludes persons whose Aboriginal status was 'not stated'. Percentage is of persons aged 15 years and over no longer attending primary or secondary school

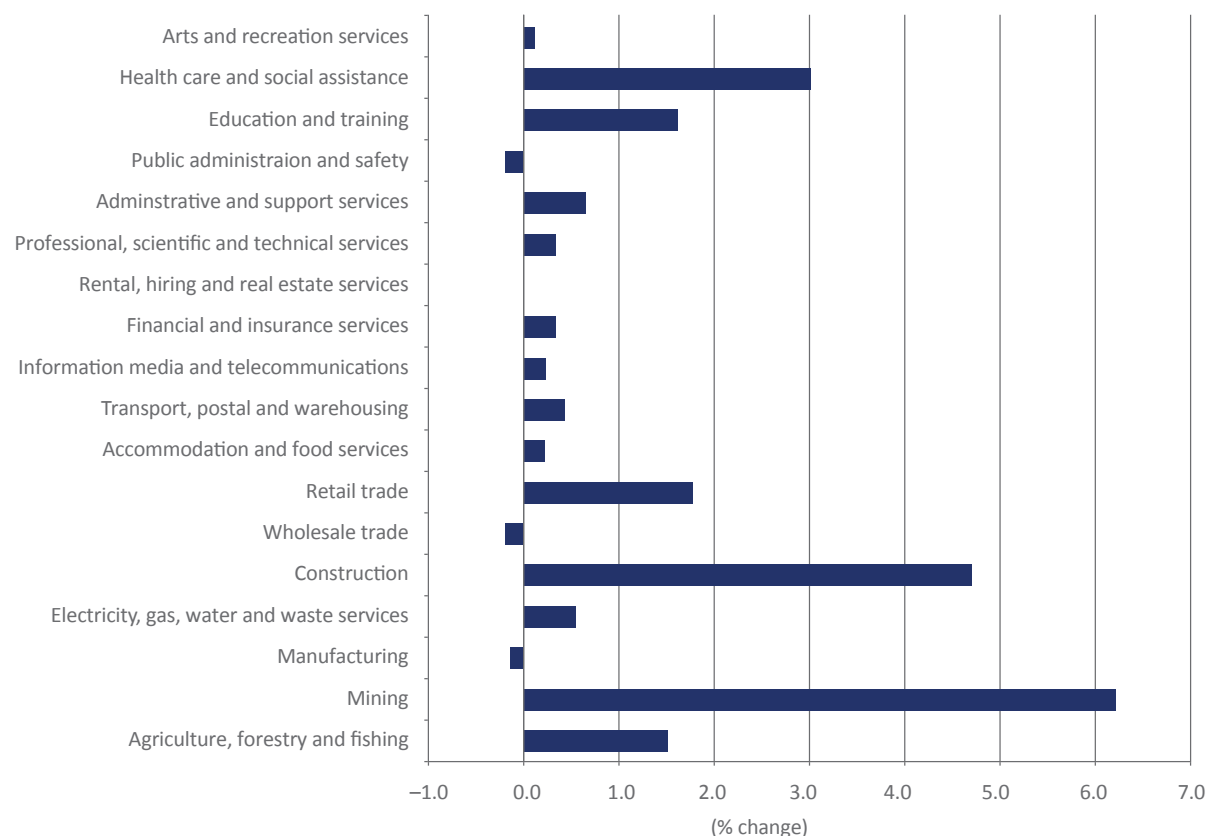
Figure 18: Highest year of school completed, Aboriginal and non-Aboriginal person, South West, 2011

There is ad hoc evidence that as a consequence of restructuring in the timber sectors and possible slowdowns in manufacturing there has been a significant growth in FIFO and drive-in drive-out working arrangements. This reflects a trend to settle in the South West and export labour to other locations. Increasing employment opportunities within the region is a more desirable outcome but world trends suggest people are far more flexible in choice of work and choice of residence.

The *Workforce Development Plan* (Department of Training, 2013) for the South West indicates an emerging shortfall in affordable housing affecting access to labour in lower paid sectors such as hospitality. This is location specific to areas along the coast south of Bunbury.

Per capita economic product shows the South West outperforms national benchmarks indicating high levels of labour productivity (*Figure 17*). However, mean taxable income varies across localities with areas such as Manjimup and Margaret River among the lowest. This reflects predominance of hospitality, farm and manual work.

Figure 18 shows the highest year of school completed for Aboriginal and non-Aboriginal persons in the South West in 2011. As well as showing a relatively high number of students



Source: Department of Education, Employment and Workplace Relations 2012

Figure 19: Projected employment growth by industry, lower Western Australia, five years to 2016-17

only completing Year 10 (both Aboriginal and non-Aboriginal), the figure also reveals the low proportion of Aboriginal students completing Year 12. Unemployment in the Aboriginal community is estimated at 16.5% and represents an urgent area for action especially through provision of community and workplace mentoring programs.

Amenity and workforce mobility

Urban amenity and related services of health, education, training and family services are key considerations determining the mobility of workers in understanding developments in regional labour markets. Higher wages on offer in urban centres is one factor, but regional amenities influencing a worker's migration decisions are the cost, availability and quality of housing and of services such as health and education, with the latter being particularly critical for families with children. Other relevant amenities include quality of the environment, cultural and recreational services and sense of community. These factors are driving policy underpinning the State Government's Pilbara Cities program.

Regional amenity needs to be considered directly as a policy tool in shaping workforce futures. Workforce regional growth will depend largely on the 'liveability' of areas and the planning decisions

regarding infrastructure – including infrastructure that promotes regional access, such as airports, telecommunications and housing and service availability.

Employment growth sectors

As shown in *Figure 19*, DEEWR's projected employment by industry indicates that construction, health care and social assistance, retail trade, education and training and agriculture, forestry and fishing will all grow significantly in the next five years. It is important to note that this data is based on the lower Western Australia statistical region, which includes (but is not limited to) the South West.

Notably, significant demand is forecast for health related workers and health professionals at 3.7% and 3.5% respectively.

Continued demand in construction is reflected in the need for trades and design professionals, as well as mining and construction labourers. In terms of the number employed, construction trades workers are projected to show an increase with more than 500 additional jobs forecast in this occupation despite a resources slowdown.

A number of occupations relating to information technology also feature, including ICT

professionals, engineering and ICT technicians and telecommunications trades workers. Industry development in the region also suggests a growth in the number of people who are self-employed in small high-value business particularly the creative sectors including design, media, marketing and digital media.

In particular, these salient developments are generating demand pressures within the region:

- Demand for health and education workers is increasing due to the growth in the population generally and particularly the ageing of the population;
- A strong and ongoing shift in demand towards higher level, professional skills;
- The WA mining sector is attracting workers away from other industries, leading to high demand for construction trades workers and engineering-related trade workers and technicians;
- Growth in tourism and hospitality as labour intensive industries; and
- Addressing skills development in the small business sector as workers are displaced from large manufacturing and other industries.

3.3.2 Socio-economic profile

Age structure

Table 2 shows the age structure of the South West population relative to WA as at three Census points – 2001, 2006 and 2011. The latest Census reveals a significant under-representation in the South West age structure for the 20–34 age group, a slight over-representation in the 0–14 age cohort, and

an over-representation beginning in the 45-64 age group, which is 1.5% more than in the rest of WA leading to future growth in the 65s and over.

The under-representation in the South West 20-34 years group (17% of the region's population in 2011 compared to 22% across the State) is likely to be associated with people seeking employment and higher education or training opportunities

elsewhere.

Meanwhile, the region's lifestyle attraction is likely to explain the slight above average representation of the retirement age group. Notably, a slightly higher proportion of the South West population (12.4%) will also reach retirement age in the next decade compared to 11.5% across Western Australia.

	Census 2001		Census 2006		Census 2011		WAPC 2026^	
Age bracket	South West	Western Australia	South West	Western Australia	South West	Western Australia	South West	Western Australia
0-4 years	7.2%	6.7%	6.6%	6.3%	7.1%	6.7%	6.0%	6.2%
5-14 years	16.7%	14.7%	15.7%	13.7%	14.5%	12.7%	13.3%	12.3%
15-19 years	7.3%	7.5%	7.2%	7.1%	6.6%	6.6%	6.3%	6.0%
20-24 years	5.5%	6.9%	5.3%	7.0%	5.2%	7.2%	4.6%	5.7%
25-34 years	13.5%	14.6%	11.7%	13.4%	12.1%	14.5%	11.0%	13.1%
35-44 years	16.2%	15.5%	15.2%	15.1%	14.5%	14.6%	14.4%	14.8%
45-54 years	14.0%	14.0%	14.9%	14.3%	14.5%	13.9%	12.8%	12.7%
55-64 years	8.8%	9.1%	11.1%	11.0%	12.4%	11.5%	12.4%	11.6%
65-74 years	6.1%	6.2%	6.7%	6.5%	7.5%	6.9%	10.7%	9.5%
75-84 years	3.6%	3.7%	4.3%	4.1%	4.2%	3.9%	6.4%	5.9%
85 years and over	1.2%	1.2%	1.4%	1.4%	1.5%	1.5%	2.2%	2.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Local Government Area	Mean taxable income \$
Bunbury (City)	61,958
Busselton (City)	56,431
Harvey (Shire)	61,968
Capel (Shire)	60,428
Dardanup (Shire)	61,280
Augusta-Margaret River (Shire)	52,187
Manjimup (Shire)	49,557
Collie (Shire)	68,798
Donnybrook-Balingup (Shire)	54,545
Bridgetown-Greenbushes (Shire)	53,944
Boyup Brook (Shire)	52,751
Nannup (Shire)	50,058
Average South West	58,747

Sources: ATO; Department of Regional Development

Table 3: South West mean taxable income, 2009-10

Source: ABS Census 2011 and WAPC *Western Australia Tomorrow* 2012. ^Mid Case Projections (Band C).

Note: Census figures are based on place of enumeration and are not adjusted for usual residence.

Table 2: Age structure of the South West region relative to Western Australia – 2001, 2006, 2011 and 2026

Income

Table 3 shows the mean taxable incomes for individuals by local governments across the South West region in 2009-10. The regional average is \$58,747, however, there is a sizeable variation between local governments, ranging from \$68,798 in Collie to \$49,557 in Manjimup.

Aboriginal population

The 2011 Census recorded just under 3,500 persons of Aboriginal and Torres Strait Islander origin in the South West region. Although a small proportion of the population, this represents a 30% increase on

the figure recorded at the 2006 Census. A marked difference between the Aboriginal and non-Aboriginal population across Western Australia and nationally is the much higher proportion of Aboriginal people within the younger age groups, and lower proportion within the older age groups. This is attributable to both higher fertility rates among the Aboriginal population and higher mortality rates at all ages. This provides an opportunity for early education and health support to young families.

3.3.3 Community and culture

The South West is culturally diverse with a long history of settlement from Europe and more recently Africa and Asia. Traditional ownership values by the Noongar people are strong and Noongar culture is being rediscovered throughout the region.

There is a strong not-for-profit and community sector that is very active in identification and development of new services and projects. Local leadership is also strong throughout the region both in the volunteer sector and in civic leadership. There are active volunteer networks in areas of

Comparators of labour force status	Aboriginal	Non-Aboriginal
Persons 15 years +	2,050	113,172
Labour force status		
Unemployment rate	16.5%	4.4%
Labour force participation rate	51.5%	64.8%
Sector of employment		
Government	17.8%	12.5%
Private	79.1%	86.6%
Self-employed	4.5%	9.0%

Source: ABS 2011, *Census Community Profiles*. Excludes persons whose Aboriginal status was 'not stated'

Note: This data has also been adjusted to exclude Waroona, which is normally included in the Bunbury Statistical Area 3, as Waroona is in Peel region for the purposes of workforce development plans

Table 4: Labour force status, Aboriginal and non-Aboriginal working age population, South West, 2011



disaster management and recovery, culture and the arts, natural resource management, aged support, health, youth, Aboriginal, and festivals and events.

Opportunities to develop human capacity:

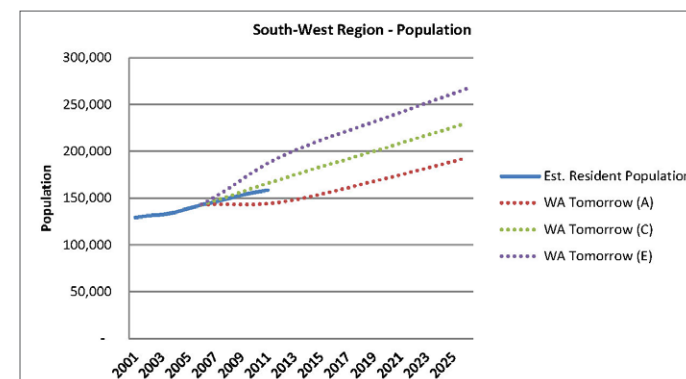
- Promote and improve access to further training and education including strategic alliances with institutions outside the region;
- Improve access to education, training and research innovation through development of multipurpose learning hubs at strategic locations within the region;
- Identify potential skill requirements of emerging industry sectors and encourage rapid adoption by education and training institutions;
- Promote the development of Asian language centres to position the region's future labour pool effectively for Asian business development;
- Promote small business education and skills in small business market development;
- Address Aboriginal unemployment through improved on-the-job support and mentoring;
- Pursue options for low cost workers accommodation and housing in the region; and

- Celebrate and promote volunteerism including access to training and development.

3.4 Sustainable communities

Population and demographics

In 2011, the estimated regional population was 158,615. In the period 2006-2011, the region grew by 22.1% compared to 14.3% for WA as a whole, and 8.3% for Australia over the same period. It has one of the fastest growing regional populations in the whole country. *Table 5* provides an overview of population trends from 2001 to 2011.



Source: *Western Australia Tomorrow* (WAPC, 2012)

Figure 20: Population of the South West region, actual and forecast

	Est. Resident population 2011	Change 2001-2011		Average annual growth rate 2001-2011
		%	No.	%
Bunbury (City)	32,440	6.4	1,947	0.6
Busselton (City)	31,211	35.1	8,112	3.1
Harvey (Shire)	23,685	28.4	5,233	2.5
Capel (Shire)	14,906	109.7	7,799	7.7
Dardanup (Shire)	12,679	41.6	3,724	3.5
Augusta-Margaret River (Shire)	12,219	19.9	2,032	1.8
Manjimup (Shire)	9,428	-8.5	-881	-0.9
Collie (Shire)	9,315	2.7	243	0.3
Donnybrook-Balingup (Shire)	5,406	15.2	715	1.4
Bridgetown-Greenbushes (Shire)	4,411	5.3	223	0.5
Boyup Brook (Shire)	1,614	-1.7	-28	-0.2
Nannup (Shire)	1,301	6.8	83	0.7
Total	158,615			

Source: ABS (2011) Regional Population Growth Australia Cat 3218.0

Table 5: Change in the region's population from 2001-2011 by LGA

WA Tomorrow (WAPC, 2012) forecasts that by 2026 the population is expected to reach between 193,000 and 267,000 (*Figure 20*). Current trajectories indicate a population of 230,000 by 2026 (*Table 7, overleaf*). In the past two decades, most of the population growth has occurred along the coastal areas. The WAPC expects this trend to continue.

These trends have been extrapolated out to 2050 based on historical and forecast growth rates using low, medium and high growth scenarios.

This analysis shows a range in expected population between 290,000 and 630,000. If historical

growth rates were maintained, population in 2050 would be in the order of 490,000. This Blueprint has adopted an aspirational increase of 0.17% average annual growth rate to arrive at a possible population figure of 500,000.

ABS age profiles for 2011 show that while the South West as a whole has a median age similar to the national average (37 years), there are significant variations between the sub regions and between some local government areas. *Table 6* is a summary of age distribution by local government area.

Overall, Bunbury Wellington reflects Australian

averages with Capel having a relatively young population (34 years), and Donnybrook-Balingup (44 years) an older population mainly due to fewer people in the 15-34 year age group and more over 55 years. Younger families tend to reside in the newer suburbs making up Greater Bunbury, with Dalyellup, Millbridge, Treendale and Kingston being influential.

The Capes (Vasse) sub region trends reveal lower numbers in the 15-24 year age groups but higher numbers of 0-4 and 5-14 year age groups than the national average, indicating the presence of young families. Busselton has a higher proportion of residents aged 65+, reflecting its attraction as a retirement location.

Warren Blackwood has a median age significantly higher than Australia, with Manjimup the lowest (42 years), followed by Boyup Brook (44 years), Bridgetown-Greenbushes (46 years) and Nannup (49 years). All four local governments comprising this sub region have relatively low proportions of young people in the 15-24 and 25-34 years age groups, while having higher proportions of people aged 55 years and over. In part, these figures reflect the rural lifestyle 'tree change' attractions of the inland, small town and southern forest areas but they also reflect limited opportunities for younger people.

	Median age of persons	People aged 0–14 years	People aged 15–64 years	People aged 65 years and over
		%	%	%
Bunbury (City)	38.7	17.3	67.7	15.0
Busselton (City)	39.7	21.1	62.9	16.0
Harvey (Shire)	36.9	22.5	66.5	11.1
Capel (Shire)	34.5	26.6	65.7	7.7
Dardanup (Shire)	35.5	22.4	65.9	11.8
Augusta-Margaret River (Shire)	39.3	20.3	67.1	12.6
Manjimup (Shire)	41.6	21.1	63.5	15.4
Collie (Shire)	39.7	19.1	67.8	13.1
Donnybrook-Balingup (Shire)	44.5	19.1	65.1	15.8
Bridgetown-Greenbushes (Shire)	45.9	20.5	61.6	17.9
Boyup Brook (Shire)	43.8	20.3	60.8	18.8
Nannup (Shire)	49.4	16.9	63.8	19.3

Source: ABS (2011) Population by Age and Sex, Regions of Australia Cat 3235.0

Table 6: Summary of age distribution by LGA

Within the overall growth figures, analysis indicates the significant growth in the above 60+ years and young family brackets. Growth planning will need to incorporate strategies for young families especially in FIFO environments. Services for older people will need to focus on strategies

which keep people active and provide increased support services in the home as well as supported accommodation options.

Value shifts within the younger population ARE likely to drive higher density living, increased

	Census 2001	Census 2006	Census 2011	WAPC 2026^	LGA's % of total regional population			
					2001	2006	2011	2026^
Bunbury	28,682	29,434	31,277	39,100	23.5%	22.2%	20.5%	17.0%
Donnybrook-Balingup	4,305	4,484	5,192	6,300	3.5%	3.4%	3.4%	2.7%
Harvey	17,272	18,926	22,556	34,400	14.1%	14.3%	14.8%	15.0%
Capel	6,533	9,878	14,131	25,900	5.3%	7.4%	9.2%	11.3%
Collie	8,400	8,369	9,882	9,300	6.9%	6.3%	6.5%	4.0%
Dardanup	8,350	10,040	11,962	23,000	6.8%	7.6%	7.8%	10.0%
Augusta-Margaret River	9,851	10,674	11,849	17,200	8.1%	8.0%	7.7%	7.5%
Busselton	22,060	25,068	29,831	55,300	18.1%	18.9%	19.5%	24.0%
Boyup Brook	1,558	1,422	1,515	1,900	1.3%	1.1%	1.0%	0.8%
Bridgetown-Greenbushes	3,935	3,867	4,278	5,600	3.2%	2.9%	2.8%	2.4%
Manjimup	10,030	9,386	9,155	10,900	8.2%	7.1%	6.0%	4.7%
Nannup	1,183	1,197	1,284	1,100	1.1%	0.9%	0.8%	0.5%
Total South West	122,159	132,745	152,912	230,000	100%	100%	100%	100%

Source: ABS Census 2011 and WAPC *Western Australia Tomorrow* 2012. ^Mid Case Projections (Band C)

Table 7: Population of the South West by LGA, actual and forecast

POPULATION BY NUMBERS

164,000

The number of people who currently call the South West home

500,000

The number of people who could possibly live in the region in 2050

3,200

The number of Aboriginal Australians who live in the region

5.4%

The unemployment rate for the region at the June 2013 quarter

91,693

The estimates labour force for the region for the June 2013 quarter

demand for one and two bedroom units/ apartments and increased demand for high capacity broadband. Compact city living is a key objective of the draft *Greater Bunbury Strategy* published by the Department of Planning.

Aboriginal people represent 2.1% of the South West population, compared to 3.1% State-wide. All sub regions have a similar young age profile with almost 60% of the Aboriginal population under 25 years of age. By comparison, a third of the non-Aboriginal population is less than 25 years of age. The greatest proportion of the Aboriginal population in the region resides in Bunbury and Collie (3.1% each).

With a young median age, family support, early education and child care support will be required to help young people take full advantage of the opportunities presented under the proposed settlement of the South West claim for traditional ownership.

3.4.1 Health and recreation

Health

Consistent with the rest of Australia, delivery of health services in the South West is a major part of the economy and a significant component of government and private expenditure. In 2011,

6,137 people were employed in health care and social assistance in the region, an increase of 1,151 (23%) since 2006 (ABS).

The South West health sector is made up of public and private hospitals, private practices, government-funded health professionals and workers, visiting medical officers and a wide range of not-for-profit health providers. There are 12 public hospitals, including Bunbury Regional Hospital which is co-located with the St John of God private hospital at the South West Health Campus. The health campus has a mental health unit, a cancer unit and Western Australia's first



regional coronary care unit. These services are a reflection of innovative public-private partnerships in health care delivery.

The regional health model is based on a service hierarchy. It recognises Bunbury as the regional centre, with the South West Health Campus providing the highest level of acute care and specialist services to the region. Services include intensive care, emergency care and associated short stay and diagnostic services, cancer and radiation oncology services, coronary care, and sub-acute services. This reduces the need for regional patients to travel to Perth for such services but still requires intra-regional travel to Bunbury.

An important focus for the Blueprint is to increase the number of specialist services in the South West especially in mental health and geriatrics with increased outreach capacity across the region utilising existing local hospital infrastructure. This needs to be complemented by continual monitoring of GP and primary health care service provision especially in inland areas.

District hospitals provide a range of medical services including emergency, general care, aged care and outpatient. Five district hospitals provide maternity services. A proportion of district hospital beds are taken up by permanent care patients.

This reflects the lack of appropriate facilities for the elderly and is not a suitable form of care. The Blueprint recognises this in planning for psycho geriatric services and development of appropriate high care services in aged care facilities.

Mental health services are in high demand. Coroners' reports indicate a rise in suicide over the period from 2009 to 2011 from 13 to 29 and triage referrals for mental health related matters increasing by 16.3% for adults and 28.6% for children and adolescents in the period 2009-2013 and 1646% in referrals for older people.

The South West has a high incidence of chronic disease and the associated lifestyle risk factors for these conditions (obesity, alcohol abuse, smoking, inadequate exercise and poor diet). This places people at health risk and increases demand for acute health services. The Blueprint incorporates planning for expanded primary health services across the region in conjunction with the Commonwealth.

Opportunities to support healthy living:

- Further development of specialist health care in the South West reducing dependence on Perth;

- Increased outreach of specialist services to inland areas;
- Development of appropriate high care and psycho-geriatric services for elderly high need patients;
- Identify further opportunities for innovative public/private partnerships in health care delivery;



HEALTH BY NUMBERS

20.9

The percentage of the South West's population made up of children 0 to 14 years, compared to the state average of 19.2 per cent

14

The percentage of the South West's population made up of over 65s, compared to the WA average of 12.4 per cent

2/3

The fraction of attendances to hospitals within the South West in 2010/11 which were for semi-urgent and non-urgent cases

1 in 10

Approximate number of adults in the region who reported a current mental health problem, according to South West Health Profile, April 2012

1 in 18

The number of adults who reported to having used a mental health care service (eg. psychologist or counsellor)

- ❑ Develop child and adolescent mental health programs in the region;
- ❑ High capacity broadband to capitalise on eHealth opportunities, particularly referrals to metropolitan-based specialists;
- ❑ Increase mental health recovery, carer and employment services;
- ❑ Address the social causes of health that contribute to chronic disease; and
- ❑ Ensure adequate access to GP and after hours services across the region.

Recreation

Sport and recreation programs are almost entirely volunteer based in the South West. Growth in population and increased fly-in fly-out arrangements are impacting on the capacity of sporting associations. In addition, expansion of urban development has required strong partnerships between local government and developers to ensure adequate land is made available for recreational purposes. In turn, this places pressure on water sources and general costs of maintenance.

Management of recreation and sporting capability will be required to meet growth in future demand



as well as changing patterns of recreation. There will need to be a focus on both supporting clubs and volunteers in their capacity as well as the delivery of quality infrastructure through private sector, community and government.

The region has a history of investment in recreation

centres and support of sporting associations. However, the sector is very diverse due to its volunteer base and large number of organisations with differing structures.

There is a regional academy of sport which provides specific programs to talented young people who have the potential to represent Western Australia or compete at a national level.

The Department of Sport and Recreation's (DSR) regional strategic priorities and outcomes include:

- ❑ Participation – a more physically active society in which sport and active recreation contributes significantly to community wellbeing.
- ❑ Capacity building – well organised and sustainable organisations with skilled people who are supported and recognised.
- ❑ Places and spaces – well planned and designed environments and facilities that are sustainable and enable access to sport and recreation opportunities.

Opportunities to support recreation:

- ❑ Promoting early childhood physical activity;
- ❑ Providing organised sports activities for all, especially disadvantaged children;

- ❑ Population growth (matching demand);
- ❑ Developing water catchments as recreational opportunities;
- ❑ FIFO/DIDO (sport and recreational implications of the fly-in fly-out and drive-in drive-out workforce on families, communities and individuals);
- ❑ Supporting and building sporting association capacity;
- ❑ Adequate provision of recreation for older people;
- ❑ Managing increased demand and increasing private sector involvement in sports facility development; and
- ❑ Supporting the development of international capacity to hold major sporting events in the region.

3.4.2 Environmental values

The South West of Western Australia has an extraordinary combination of landscapes based on extensive forests and rolling hills, climate including rainfall patterns and biodiversity. This gives the region a comparative advantage in regional Western Australia as an attractive place to live and to visit. Successive surveys have indicated the

region's environmental values as a major reason for people choosing to live here (*Living in the Regions* 2013, *Manjimup Futures* 2011).

The South West Catchments Council Natural Resource Management (NRM) area covers more than five million hectares and incorporates 33 local governments. This NRM region forms part of the South West Botanical Province and is the only Australian representative in the list of 34 recognised biodiversity 'hotspots' in the world (Conservation Council). This reflects the rich

diversity of its flora, which represents 'one of the richest and most threatened reservoirs of plant and animal life on earth'. Two-thirds of the South West is designated parks or forest but some areas have been substantially cleared, including extensive parts of the Swan Coastal Plain.

The South West NRM region has four wetland systems of international significance recognised under the Ramsar Convention. These are the Vasse-Wonnerup (near Busselton) and a portion of the Peel-Harvey Lakes. There are various estuarine



systems, wetlands, rivers and streams of ecological significance. These features are also central to the landscape and lifestyle character of the region. Most remaining wetlands have been classified by the Department of Parks and Wildlife as Conservation Category, Resource Enhancement or Multiple Use. These classifications and associated regulations, policies and guidelines are important to land use management, conservation and development decision-making.

Changing rainfall patterns have decreased the reliability of surface water catchments for drinking and irrigation while excessive past clearing in the upper Collie catchment has led to increasing salinity in the region's largest reservoir, Wellington Dam.

The *South West Water Plan* released by the Department of Water in 2010 highlights future strategic issues for both ground and surface water use.

Investment in new water sources as a consequence of the drying climate together with improved efficiency of water use and recycling will be required by 2030 as regional demand grows.

Additional expansion of urban and industrial areas are also likely to require increased investment in

arterial drainage systems especially on the Swan Coastal Plain.

Opportunities to improve environmental outcomes:

- ❑ Preservation and enhancement of the region's multiple waterways including management of nutrients;
- ❑ Biodiversity recognition and protection;
- ❑ Maintaining the region's 'clean green' image;
- ❑ Governance for fire risk and fuel load management in forests;
- ❑ Weed and pest management in private and public lands;
- ❑ Developing strategies for sea level rise and storm events;
- ❑ Identification and development of new water sources including water recycling; and
- ❑ Expansion and renewal of drainage assets in key urban and industrial areas.

3.5 Summary

The COAG determinants applied to the South West describe a region in transition; a region which is a popular lifestyle destination due to the quality of

its environment, Mediterranean-style climate and proximity to the coast but which faces challenges in relation to health and wellbeing and human capacity. It has the strength of a diverse economic base close to a regional port but industry has had to deal with enormous change in traditional markets, regulatory access to resource and cost pressures in relation to labour.

It is a region which does not have the benefit of economies of scale and so specialises in premium quality niche products. It has developed a brand for premium quality but the benefits do not flow uniformly across the region.

A core objective for the region must be to grow population to provide the critical mass for services, the regional economy and infrastructure development but to achieve this in a manner that is sustainable, grows employment and limits impact on the region's highly sensitive environment including its unique biodiversity.

Transforming the region into the future must take into account the important complexities and opportunities identified from this analysis.

4. TRANSFORMATIONAL IMPERATIVES

4.1 Context for transformation

Under a model of 'business as usual' the region is likely to grow to 230,000 by 2026 and require the generation of a further 40,000 jobs. With effective growth planning and investment, the region is capable of making a significantly greater contribution to Western Australia. The aspirational vision, set out in the introduction to the Blueprint, for a population of 500,000 by 2050 supported by 200,000 new jobs, highlights the opportunity of the South West as Western Australia's major centre for regional population growth.

Blueprint population targets are based on extrapolation of the existing historical growth rate of the region to 2050. Scenarios for population growth are represented in *Figure 21*. This highlights the sensitivity of population growth to growth rates (AAGR). Based on the historical trend of 2007-12, the population would be in the order of 490,000 by 2050. The Blueprint aims to increase the growth rate by 0.17% to 2050 to bring the regional population to 500,000.

Reaching this figure will be dependent on the region's ability to create jobs and to promote well serviced quality lifestyle opportunities.

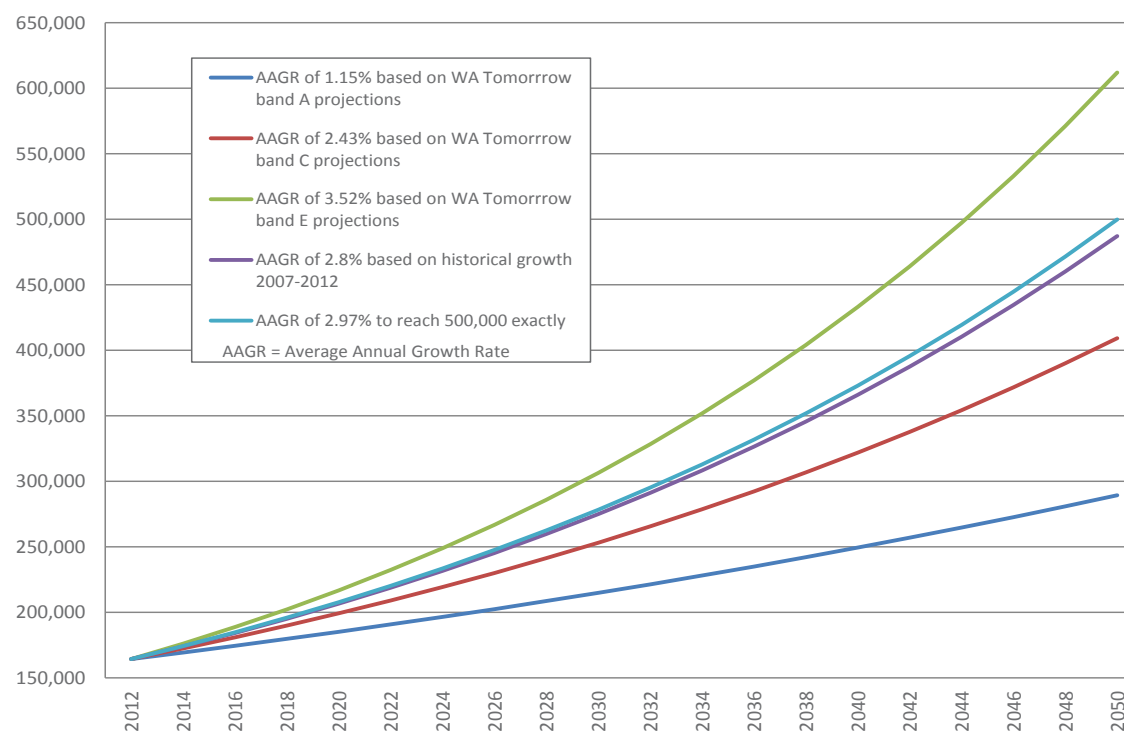
To maintain the existing proportion of jobs to

population will require in the order of 200,000 jobs over the period to 2050.

If the region does not achieve this jobs growth then it is likely prosperity will fall as people move on to various forms of income support or fixed incomes. In addition, per capita income as a measure of

regional productivity may fall.

While there may be some growth in traditional industries the region will have to look to new forms of industry for employment growth, especially in knowledge, technology, innovation and service economies.



Source: *Western Australia Tomorrow* (WAPC, 2012)

Figure 21: Population estimates to 2050

The Blueprint aspiration is in the context of a national and global picture that is undergoing rapid change. To maintain regional prosperity and lifestyle, the region will need to expand employment opportunities. This is the challenge for regional development in the South West.

4.2 Regional vision and intent of the Blueprint

The intent of the South West Regional Blueprint is to identify how jobs can be created by helping industry to grow. Improving national and international market access, improving competitiveness through productivity and skills development and reducing the costs of doing business in the South West through infrastructure that overcomes the barrier of distance are key elements. The region's market brand should be premium quality goods attracting higher rates of return in prestige and niche markets.

In achieving jobs growth it is important that the region provides high quality lifestyle opportunities, collaborative and engaged communities and recognise the important environmental values that encourage people to choose to live here. If the region can successfully balance its growth with protection and enhancement of the environment it can become a region of excellence.

4.3 Regional imperatives

To achieve excellence and an aspirational growth outcome, opportunities for action within this Blueprint are grouped into four key imperatives. The imperatives are Infrastructure, Industry and Business, People and Place and Community. The four imperatives form the basis for an assessment tool that can be used to evaluate opportunities for delivering regional growth.



BLUEPRINT VISION

By 2050 the South West of Western Australia is recognised internationally as a region of excellence.

BLUEPRINT MISSION

Our mission is to achieve excellence by:

- ☐ Supporting a broad, internationally engaged industry base
- ☐ Building population and skills to a critical mass necessary to support new investment and improved amenity
- ☐ Developing infrastructure linked to world opportunities that respects and enhances the environment
- ☐ Driving and supporting agendas that promote cohesive, vibrant and engaged communities

4.3.1 Step 1: Infrastructure – Removing distance as a barrier

Infrastructure requirements

Infrastructure that improves economic efficiency and strengthens delivery networks are vital.

In addition, it is important that infrastructure decisions support and protect our areas of competitive advantage. The elements of the South West infrastructure network are:

Water

Ensuring access to potable supplies for communities and fit-for-purpose supply for industry, business and recreational irrigation will support regional growth. This will require less reliance on surface water runoff in a drying climate and greater use of recharge aquifers, recycling and distribution systems.

Wastewater reuse is an important part of the future. Current disposal systems through ocean outfalls provide an opportunity for recycling for industry and irrigation purposes reducing reliance on potable sources. Distribution of both potable and wastewater from source to use is a key element of future planning.

In order to meet affordable housing outcomes and

reduce suburban footprints, infill sewerage will be a key requirement in a number of locations with the ability to recycle water for other purposes.

Road infrastructure

A focus on road infrastructure that improves efficiency and strengthens regional delivery networks for freight yet provides safe passenger vehicle movement is vital to growth. The road network needs to be responsive and integrated with other transport networks including airports, rail and ports. Road linkages to the port are an important element to ensure the congestion problems experienced at Fremantle are not duplicated in Bunbury. Additionally, the growth of various forms of agriculture and tourism in the lower South West requires further improvement to the South Western Highway including extensive development of passing lanes and four lane sections.

The Forrest Highway link between Bunbury and the Kwinana Freeway will require upgrading to freeway standard in the medium future.

Rail networks

In a regional context, the two main rail links to the port lack capacity to meet forecast demand in the short-term. There is also an opportunity to connect

IMAGINE

The South West was capable of directly exporting and importing all forms of cargo for distribution throughout Australia.

It could mean:

- ☐ A much larger and more diverse Bunbury Port with an expanded inner harbour and more general purpose berths
- ☐ Dedicated container handling facilities to food grade standard
- ☐ Increase capacity of road and rail infrastructure to the port
- ☐ A link to the national standard gauge rail network
- ☐ An intermodal (road/rail) terminal and container park in Greater Bunbury with distribution facilities linked to regional and national distribution networks
- ☐ An associated warehousing and distribution industry
- ☐ A wide range of maritime and customs support services
- ☐ Air freight terminal at the Busselton Regional Airport

the port to national freight distribution systems through connection of standard gauge rail.

High speed passenger rail should be developed to replace the ageing Australind passenger rail service with an extension of the route to Busselton.

The rail link between Bunbury and Greenbushes should be retained on a care and maintenance basis however there appears little economic justification for retaining a rail link south to Bridgetown and Manjimup.

Sea freight

The Bunbury Port needs to consolidate its landholdings and expand the inner harbour basin to improve overall efficiency as the port expands. This will provide facilities for roll-on roll-off cargoes and container storage. Setting aside land in the Waterloo area will provide for additional warehousing and freight logistics infrastructure for distribution of freight beyond the South West.

Aviation

Busselton Regional Airport is developing as the key airport for the South West and should ultimately accommodate international flights carrying goods and people in addition to regional and interstate flights for tourists and FIFO workers.

The Bunbury and Manjimup airports provide the opportunity for expansion of general aviation and charter air craft movements and have a comparative advantages of relatively low landing fees and ground rents together with non-congested airspace. Both can expand FIFO, freight and air training operations and provide a similar level of service to Jandakot.

Energy

The region has some constraints on growth in relation to supply capacity in the Vasse area and extensive need for power pole replacement. Opportunities for network augmentation in remote areas through renewable energy projects are a medium term option especially wind generation on the South West coast that can provide the basis for feeder lines into areas such as Windy Harbour and Scott River.

The development of the Bunbury to Albany gas pipeline via Manjimup will open up new opportunities for energy intensive industries in food, timber and minerals processing.

Digital ready

High capacity broadband is scheduled along the coastal strip but further work is required to accelerate the rollout into inland areas and provide

access to wireless and satellite services. Broadband is critical to the emerging creative sector but is also playing an increasingly significant role in retail, professional services and all forms of industry. An internationally engaged region will require high capability in data transfer.

Sustainability and climate change

Drying climate conditions and a rising sea level require careful consideration for growth planning. There is evidence of a trend towards reduced rainfall necessitating infrastructure investment in water security and careful assessment of implications for biodiversity, agricultural production and farm forestry. Proactive support and protection of the region's environmental values is critical to the region's future health and amenity. There will need to be a review of the protection requirements of coastal infrastructure at risk of storm events and sea level rise.

4.3.2 Step 2: Industry and Business – Adaptive and Asia capable

Supporting new business and building resilience

South West industry needs to be capable of responding to market signals for change and the development of new markets both domestic and international. While the region has many comparative advantages, it is best able to compete in areas of high-value premium quality product as a basis for overcoming distance to markets and overseas competition. Employment growth will also require the South West to be responsive to new emerging industries and work patterns that will develop between now and 2050.

Industry diversification

Downstream processing and diversification of products should be pursued to build resilience against demand and economic fluctuations that may affect any one product or sector. New business and industry opportunities need to be nurtured by creating the right business environment for growth including business incubators and buy local as a start-up strategy. Targets can include food, timber, minerals and tourism.

Market diversification

The South West has significant potential to

diversify into new markets in the emerging sectors of digital technology, media, animation and gaming. Development of high technology sectors based on innovation, especially in engineering, manufacturing and environmental management, are important new market opportunities.

Workforce development

The education system, both secondary and vocational, has the capacity to build strategic alliances to develop broader skill sets within the South West workforce and adapt to changing requirements. Online learning provides greater opportunity for collaboration on a world scale while there are significant opportunities to accelerate the development of educational service delivery through attraction of overseas fee paying students.

Gaining international recognition

Geographic recognition and positioning

Gaining international recognition requires the South West of Western Australia to be recognised as a geographic region synonymous with its attractive environment, friendly and resourceful people, and high quality goods and trustworthy services. Development of key international relationships with buyers in key markets, chambers

of commerce and related business associations and civic engagement at local government levels all assist with the positioning of the South West as an internationally-engaged region. Quality industry networks based on performance are a foundation for trade and inward bound capital investment.

Inward bound investment

The South West needs to build a profile as a region where sound business investment adds to the region's capacity and is encouraged and facilitated by government and the broader business and community sectors. Investment in supply chain expansion to meet overseas demand is an important aspect of growing value in agriculture, timber, manufacturing and tourism. Strategy can be developed to support inward bound investment in each of the region's industry sectors.

Expansion of capacity

With the exception of mining and energy, which have seen substantial capital investment, there is potential to grow key sectors of agriculture, including food and wine production; tourism (including culinary and wine related tourism); manufacturing and timber; through a combination of infrastructure investment including industrial land and tourism attraction assets, new market development and supply chain investment.

Strategic review of each industry sector leads to specific opportunities for expansion or increasing production value based on new capital investment. Strategic investment through Commonwealth, State and Local governments can create the environment for further investment from private sector and overseas sources.

Engaging with Asia

Establishing long-term relationships

Expanding markets in Asia are a growing opportunity. The proximity of Western Australia provides a geographical competitive advantage and makes it a logical focus for long-term strategic alliances. Existing civic and business mechanisms to support trade, food, tourism education and cultural links with Asia need to be enhanced including



the role of the Bunbury Jiaying Business Relations Office.

Foreign student education

The education of overseas students has the benefit of bringing in foreign exchange and introducing the local community to wider cultural influences and understanding. The opportunity for the development of lifetime friendships is also significant. Foreign student education does need to be seen as more than just a place at university. Networks to support students and the opportunity for active participation in the community need to be encouraged. Education must include a strong element of social inclusion. Options for scholarships and incentives need to be explored to provide lead entry into the overseas student market.

Foreign student intakes are strongly related to increased visitation.

Understanding Asian business and culture

A strategic approach to Asian market and cultural familiarisation is required not only for China but for the emerging markets of South East Asia generally and Indonesia, Vietnam and Cambodia and in the medium term, India and the Middle East. Opportunities to enhance local understanding of Asian business and culture need to be pursued and

short courses aimed at local businesses, integrated with foreign student education are an opportunity. Cultural exchanges in the arts facilitated by local governments and supported by the State are an important foundation for building trade relationships.

A key element of overseas business culture is a background of strong friendly relations. Sister City relationships, chamber of commerce tours, arts exchanges and investment facilitation trips should all be part of a wider plan to engage with Asia and develop healthy, economic and cultural exchanges of mutual benefit.

Export and tourist ready

Programs, which assist both our local businesses and international tourist sectors to be export ready, require a transfer of knowledge to companies and operators moving into the export market for the first time. Programs such as 'Export Ready' focused on this outcome should be pursued. A focus on our areas of competitive advantage should be the starting point for export industry.

4.3.3 Step 3: People and Place – A region of first choice

Access to housing, quality amenity and public spaces, services including health, education and family support and a safe environment are important aspects of a region of excellence that will influence the choices people make about where they live.

Housing and place

Affordable housing

The number of houses and units are likely to triple if the population reaches 500,000 by 2050. Whilst housing trends will see greater inner city living there will be continuing demand for larger homes for young families. Town planning schemes typically forecast development over a 15 year timeframe. There will need to be a continuing effort to ensure land is available for development and avoid development bottlenecks.

Ensuring a diverse range of affordable housing options is a key part of a region of excellence. Affordability can be based on compact housing design, infill of existing suburban areas facilitated by expanded sewer networks and release of equity in under-utilised suburban land areas.

There is a need to target appropriate

accommodation for seniors including independent living through to high care as well as housing developed to meet the needs of Aboriginal extended family structures.

There is greater scope for various forms of shared equity and 'key start' programs and in particular development of worker housing options in emerging high-value tourism and agricultural sectors.

Active ageing

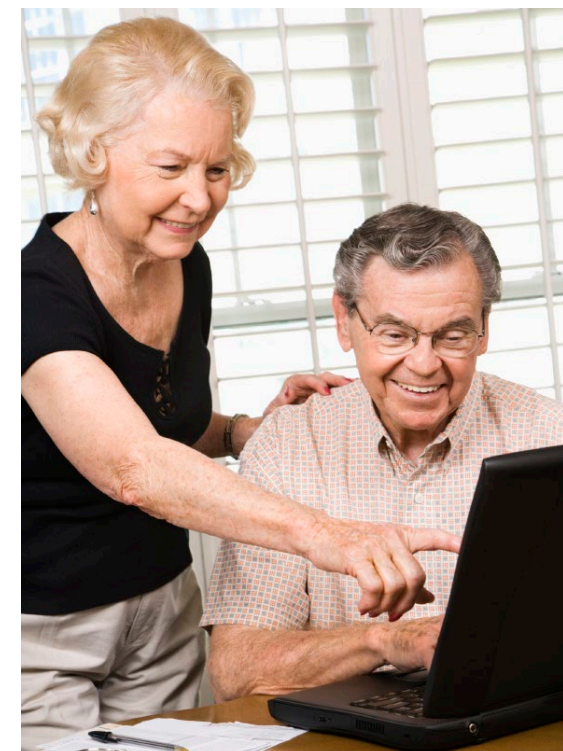
Population demographics indicate people are living and staying active much longer. With a forecast 30% increase in the older population demographic (65 years and over, 2013-2026), urban design, recreation, work and community infrastructure need to recognise changing requirements.

A region of excellence will ensure older people can retain independence through access to transport, pedestrian-based town centres, access to medical and health services and active recreation spaces. Broadband technology can play a role in keeping older people connected both with health and support services as well as family and community. Demographic analysis indicates older people are settling in smaller inland towns which typically do not have access to appropriate services. As such, a

special focus on accommodation and care needs in these areas is required.

Urban renewal

A region of excellence would include town and city centres and urban spaces that are interesting, intriguing, provide a variety of uses and include



well planned and utilised public open space.

Waterfront renewal at Bunbury including provision for new mixed use and marine development will be a catalyst for linking the CBD to the waterfront and driving inner city living. This will reinforce Bunbury's role as the regional capital and allow for the further development of cultural and artistic design to further reinforce Bunbury as a modern internationally engaged sophisticated city. *Figure 22* shows a cross section of how a street within the Bunbury CBD may function in 2050.

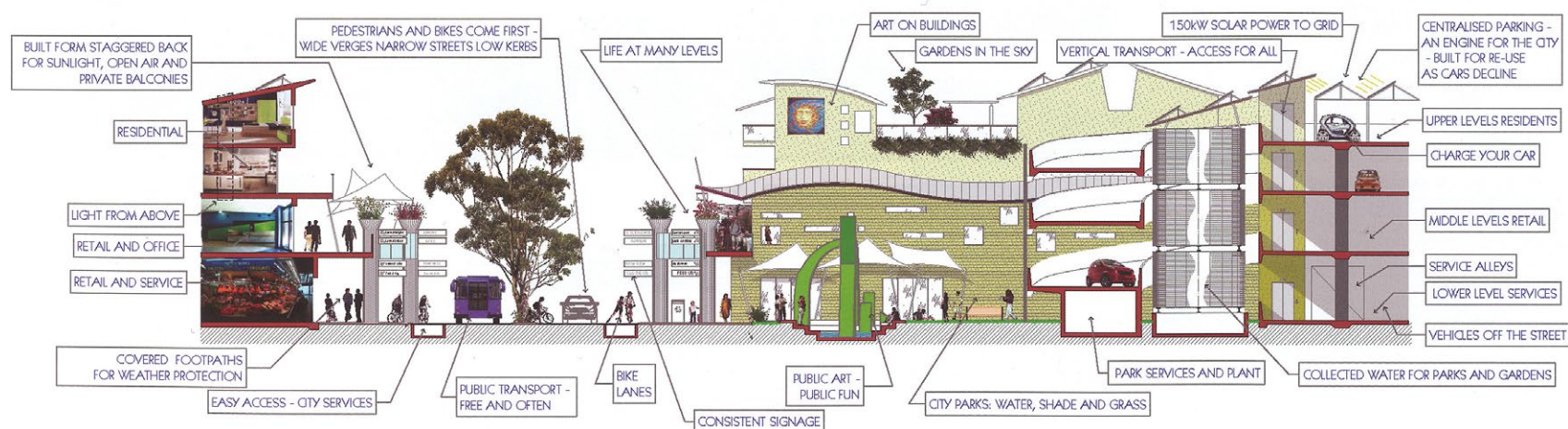
Similarly the redevelopment of Busselton's foreshore and linkage back to the town centre will drive new high quality tourism investment in the city centre and help build the brand of the Capes for quality and excellence in wine and food tourism.

Inland renewal will provide higher amenity living areas, retail and public open space capitalising on tree change population movement. Regional towns including Boyup Brook, Bridgetown, Nannup and Augusta provide varied lifestyle opportunities.

Community services

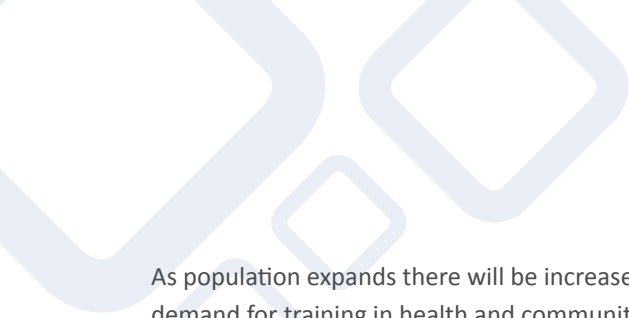
Education and training

Existing synergies between the South West Health Campus and collocated Edith Cowan University, Manea College and the South West Institute of Technology will enable Bunbury as the regional capital to brand itself as an education city with potential to attract overseas students. New forms of online delivery will allow Bunbury's education infrastructure to tap into courses offered on a worldwide basis.



Source: Draft Greater Bunbury Strategy, WAPC and Department of Planning, June 2011

Figure 22: Cross-section of how a street within the Bunbury CBD may function in 2050



As population expands there will be increased demand for training in health and community services and business management together with expansion into science, engineering and technology.

The Capes sub region will also require expanded tertiary and technical training facilities that can be developed at both Busselton and Margaret River campuses.

The Manjimup agricultural research station together with education facilities developed at the Manjimup Senior High School can provide a basis for postgraduate research programs in horticulture, NRM and water management.

A population of 500,000 will increase demand for primary and high school education. Planning within the region has set aside sites for future schools.

The *South West Workforce Development Plan 2013-2016* (DTWD, 2013) sets out 25 recommendations for skill development within the region. As new patterns of work emerge based on technology and innovation the workforce plan will require ongoing review.

Childcare and early education services will need to meet emerging demand, especially in those

areas with a high concentration of young families reflecting changing patterns of work.

Safety

The environment of the South West carries intrinsic hazards including bush fire, storm events and hazardous coast lines. A network of volunteer and professional emergency service crews currently provide combat and recovery programs to major events. As the population expands, emergency service provision will require consistent review. Key aspects will be access to infrastructure including communications, transport, and response equipment. Prevention programs will include expanded winter burning programs and maintenance of overhead power lines and associated poles.

Flood relief management needs to be incorporated into planning for the expansion of the Bunbury Port and diversion of the Preston River whilst climate change factors may require review of response to flood risk in the Blackwood, Warren and Collie River catchments.

Effective maintenance of communication infrastructure remains a risk in isolated areas, especially fire risk which destroys power and mobile phone infrastructure.

Health and wellbeing

The region is well-served by a network of regional hospitals and health facilities supported by specialist services located at Bunbury. There will be a need to increase capacity of hospital services within the region as population expands as well as support further development of Aboriginal services and general practice in outlying areas. There is a need to monitor and expand specialist and GP service provision to inland towns.

Social determinants of health need to be improved through wide access to primary health care principally delivered through Commonwealth funding programs.

Mental health service provision is a key gap and early development of new services for children, adolescents and older people are urgently required.

It is expected that the number of hospital beds and allied health services will need to double towards 2050 in order to meet aspirational growth and older demographics in the population.

Provision of recreation spaces will be required as urban areas redevelop. These spaces relate to outdoor team sports as well as indoor sports and recreation centre development. It is likely current

indoor centres can be expanded as population grows. There are limited facilities for major international or national sporting events. Planning for an international standard venue for cricket, soccer, football and similar activities needs to occur.

An important consideration is building the capacity of sporting and recreational organisations particularly for young people. Fly-in fly-out models of work are likely to reduce the level of volunteerism into the future.

4.3.4 Step 4: Community – Cohesive, vibrant and engaged

Enabling people to participate in the economic and social fabric of the region in a manner that reflects the diversity of the population is a key ingredient in creating a region of excellence.

Leadership and inclusion

Inclusion

Generating communities that are engaged, inclusive of minority groups and collaborative in developing outcomes is also central to a region of excellence. This increases available human capacity and contributes to diversity of thinking, social and educational capacity and is vital to achieving effective international collaboration.

Leadership

Civic and community leadership supporting the non-government and local government sectors is an important part of growing the planning and decision-making capacity of the region. Achieving collaboration through agreement on priority focus areas and coordinating policies, strategies and actions between the three tiers of government, business and community will help minimise duplication, encourage complementary initiatives and achieve more cost-effective outcomes from public and private investment.

An important part of the leadership task is to understand the region's role in Australasia and what it can contribute. Working as a collaborative whole is the most effective way of gaining national and international recognition. Building regional teamwork around a shared vision is an important leadership objective.

Enterprise and engagement

Community enterprise

Developing a civil society requires acknowledgement and action to address social inequity. Important areas include mental health, nutrition, alcohol, drug and obesity issues need to be pursued. In addition, attention needs to be given

to Aboriginal health, employment and cultural recognition. An ageing population also requires improved access to aged and health services, not-for-profit bodies and community organisations.

Engagement

Volunteerism and participation in community life helps to build opportunity as well as address social determinants of health including mental health. Facilitating and supporting voluntary networks through information, funding, technical and training support and recognition are all opportunities to build community engagement.

4.3.5 Summary of regional imperatives

A summary of regional imperatives is provided in *Figure 23*.

<p>Infrastructure – Removing distance as a barrier</p> <p>Infrastructure requirements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Water <input type="checkbox"/> Road infrastructure <input type="checkbox"/> Rail networks <input type="checkbox"/> Sea freight <input type="checkbox"/> Aviation <input type="checkbox"/> Energy <input type="checkbox"/> Digital ready <input type="checkbox"/> Sustainability and climate change 	<p>Industry and Business – Adaptive and Asia capable</p> <p>Supporting new business and building resilience</p> <ul style="list-style-type: none"> <input type="checkbox"/> Industry diversification <input type="checkbox"/> Market diversification <input type="checkbox"/> Workforce development <p>Gaining international recognition</p> <ul style="list-style-type: none"> <input type="checkbox"/> Geographic recognition and positioning <input type="checkbox"/> Inward bound investment <input type="checkbox"/> Expansion of capacity <p>Engaging with Asia</p> <ul style="list-style-type: none"> <input type="checkbox"/> Establishing long term relationships <input type="checkbox"/> Foreign student education <input type="checkbox"/> Understanding Asian business and culture <input type="checkbox"/> Export and tourist ready 	<p>People and Place – A region of first choice</p> <p>Housing and place</p> <ul style="list-style-type: none"> <input type="checkbox"/> Affordable housing <input type="checkbox"/> Active ageing <input type="checkbox"/> Urban renewal <p>Community services</p> <ul style="list-style-type: none"> <input type="checkbox"/> Education and training <input type="checkbox"/> Safety <input type="checkbox"/> Health and wellbeing 	<p>Community – Cohesive, vibrant and engaged</p> <p>Leadership and inclusion</p> <ul style="list-style-type: none"> <input type="checkbox"/> Inclusion <input type="checkbox"/> Leadership and collaboration <p>Enterprise and engagement</p> <ul style="list-style-type: none"> <input type="checkbox"/> Community enterprise <input type="checkbox"/> Engagement
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Figure 23: Summary of regional imperatives

4.4 Transformational opportunities

The four imperatives combine to form an operational framework for regional development in the South West.

Table 8 takes the four imperatives to the next level by identifying specific actions allocated to a three and fifteen year timeframe with outcomes delivered up to 2050. These actions and investment initiatives have been identified from stakeholder consultation, existing planning and industry development strategies. Specific reference is made to the *South West Planning and Infrastructure Framework* (2014) *South West Investment Plan* (unpublished 2009) and *RDA South West Regional Plan* (2013). Relevant actions from these plans have been uplifted into *Table 8*.



IMAGINE...

by 2050 the South West is supporting a further 200,000 jobs

It could mean:

- ☐ Well developed industry parks exist at Shotts, Kemerton, Davenport, Picton, Busselton, Greenbushes and Manjimup
- ☐ The agricultural sector is supplying major new export markets in dairy, livestock and horticulture, especially in Asia
- ☐ Enhanced international recognition and demand for South West wine and food
- ☐ Agri-industry precincts processing high quality food, fibre and bio- technology products
- ☐ Digital media, technology and communications industries are well established
- ☐ The South West is a popular international tourist destination; especially from Asia
- ☐ Greater Bunbury has become a major commercial and business centre
- ☐ Health, education and community services are a major exporter and employer
- ☐ For those who no longer need to live close to where they work because of enhanced communications technologies, the South West has become a region of first choice for lifestyle and telecommuting

Table 8: South West transformational opportunities

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Infrastructure – ‘removing distance as a barrier’					
Water security Ensure the South West has long term water security for agriculture, industry and domestic purposes	Collie-Kemerton water management Distribute surplus saline water from the upper Collie to industrial centres including Worsley and Kemerton	Government and industry	Construct the Collie to Kemerton ocean saline water pipe and holding dam		The region has access to fit-for-purpose industrial water supplies to meet growth in manufacturing and agriculture Wellington Dam salt levels reduce
	Irrigation for food production Establish efficient systems for the distribution of fit-for-purpose irrigation water	Government and industry	Construct an initial irrigation network at Manjimup to facilitate distribution and water trading Identify alternative sources of irrigation water for horticulture at Myalup Identify options for irrigation using alternative water supplies such as brackish water	Complete piped irrigation of major agricultural production areas of Manjimup Complete piped irrigation of major northern horticultural areas	The Manjimup growing district has better protection against climate change and drought Myalup and Harvey irrigated areas are proofed against salinity intrusion
	Water conservation Transfer public open space and recreational space irrigation from potable supplies to treated wastewater	Government and local government	Build a pipeline from Dalyellup waste site to Bunbury for distribution within Dalyellup and Bunbury Extend wastewater treatment at Margaret River and examine options for water recycling	Connect all large scale recreational and public open space areas to sources of treated water through an arterial distribution pipe network	Potable water supplies are safeguarded and fit-for-purpose water is used for public irrigation
	New or expanded water sources Ensure existing water sources for potable use are not compromised Identify new potable water supply options to meet regional growth	Government	Construct additional monitoring to assess salt water intrusion into coastal aquifers Construct telemetry-based bore monitoring across South West bore fields to monitor and flexibly manage freshwater extraction to optimise aquifer management	Expand Binningup desalination plant to secure the Greater Bunbury area Responsibly accessing the Yarragadee to meet the growth needs of the Capes region	The South West has adequate sources of potable water supply to support population growth and agriculture
	Wastewater management/ sewerage Existing septic sewer systems in urban areas are replaced by sewer systems	Government and private sector	Complete sewer in Bunbury and Busselton	Complete sewer in Bridgetown, Manjimup, Northcliffe, Boyup Brook, Collie, Donnybrook, Capel, Harvey and Margaret River	Management of wastewater is based on full recycling of water to appropriate alternative uses All South West towns have sewerage as a standard feature

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
<p>Ready export/import hubs supported by safe, efficient interconnected transport networks</p> <p>The South West is connected to national domestic and international road, rail, sea and air routes</p> <p>Ensure the region's hubs are capable of supporting export and import growth both in the South West and Perth metropolitan area</p>	<p>Bunbury Port</p> <p>Expand Bunbury Port to meet South West and State export/import needs for bulk cargoes, container cargoes and roll-on roll-off cargo including refrigerated and food grade cargo</p> <p>Construct road and rail linkages to the Bunbury Port capable of meeting export growth and distributing on a national scale</p>	Government and private sector	<p><i>Roads</i></p> <p>Complete the Coalfields Highway upgrades</p> <p><i>Rail</i></p> <p>Complete dualling and grade separation of South West Main Railway Line – Brunswick to Bunbury Port</p> <p>Upgrade the Collie/Shotts to Brunswick railway line</p> <p>Improve South West Main Railway Line to increase axle loads and crossing loop extensions</p>	<p><i>Port</i></p> <p>Construct the realignment of the Preston River</p> <p>Complete Berths 14a, 7 and land-back Berth 3</p> <p><i>Roads</i></p> <p>Complete construction for the second and third stages of the Bunbury Outer Ring Road</p> <p>Complete the South Western Highway upgrades from Donnybrook to Walpole</p> <p>Complete construction of Forrest Highway to freeway standard</p> <p>Construct a freight centre at Waterloo</p> <p>Complete Busselton-Bunbury highway to four lanes</p> <p>Build the Margaret River Perimeter Road</p> <p>Build Pinjarra bypass and Tonkin Highway extension to support the freight network to Bunbury Port</p> <p><i>Rail</i></p> <p>Construct standard gauge from Perth to Bunbury Port</p> <p>Build Kemerton rail freight link to Bunbury Port</p>	<p>Bunbury is a maritime centre supporting freight logistics connected to a national distribution network and major industry parks</p> <p>The South West has an interconnected, safe and efficient main road network</p>

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Ready export/import hubs supported by safe, efficient interconnected transport networks The South West is connected to national domestic and international road, rail, sea and air routes Ensure the region's hubs are capable of supporting export and import growth both in the South West and Perth metropolitan area (Continued)	Regional road network Regional road network supports effective tourism routes through the region Freight routes from Scott River, Warren Blackwood and other agricultural sectors meet requirements for export of food	Local and State Government	Pile-Mungilup Road is sealed Old Vasse Road is sealed Complete sealing of Mowen Road Upgrade Bussell Highway passing points	Complete Busselton Outer Ring Road Construct Vasse – Dunsborough link Upgrade passing lanes on Brockman Highway between Nannup and Augusta Complete Boyanup bypass Upgrade Forrest Highway to freeway standard	The region has the capacity to meet all forecast road usage requirements The South Western Highway is of a standard with minimal conflicts between freight and passenger transport Bunbury-Perth road links can meet freight and passenger requirements
	Busselton Regional Airport Implement viable routes between Busselton and the Eastern States and Busselton and key South East Asian air hubs	Local, State and Commonwealth governments, and private sector	Complete design and construction of runway to support Code 4C aircraft Construct initial terminal building and fuel delivery system Expand as a South West emergency, fire and rescue hub Implement a route marketing and branding campaign	Construct freight and logistics warehousing facilities at Busselton airport	The South West has viable and growing passenger movements based on Eastern States and international visitation and business Busselton airport is used for both national and international air services
	Manjimup Airport Airport is capable of supporting 50 seat aircraft for fly-in fly-out and emergency service provision	Local and State Government	Widen existing runway seal to 30 metres	Build additional terminal space and refuelling facilities	The South West has a general aviation transport network supporting commercial, emergency and recreational aviation sectors
	Bunbury Airport Airport provides a high capacity general aviation service for fly-in fly-out, emergency management and flight training	Local and State Government	Develop rescue helicopter base (in conjunction with Department of Fire and Emergency Services) Develop 28 hangar sites on former Clay Target Gun Club	Reseal runway with asphalt Develop additional aircraft parking	
	Interconnected rail link with Perth metropolitan area Link Bunbury and Busselton to the Perth metropolitan area to improve passenger transfer flows	Government and private sector	Complete route acquisition for a Perth-Bunbury-Busselton fast train	Construct a fast train link from Perth to Bunbury Construct a fast train link between Busselton, Busselton airport and Bunbury	The cities of Perth, Busselton and Bunbury are connected via high speed rail

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
High capacity digital communications Ensure the region is capable of communicating and transferring data at world standards	High capacity broadband The region is able to expand its economic base and social amenity through high capacity broadband delivering 10-100 megabits per second for domestic use, 1-10 gigabits per second for specialist business use, and wireless throughout the region	Commonwealth Government and private sector	NBN or equivalent rollout of high capacity broadband Free WiFi access is available to support tourism in town and city centres	Construct data warehouse capacity at Picton	The South West has adapted to digital technology and it is applied widely in business, education, health and community activity Digital media is used widely for education and community connectivity The region has a significant economic return from broadband investment The critical mass of telecommunications demand is sufficient to drive investment in new and emerging technologies The South West is a recognised technology region capable of meeting the requirements of technology industry sectors as well as education and social connectivity
	Mobile coverage Mobile phone access is available throughout the entire region to support economic growth and improved social amenity	State Government and private sector		Complete construction of phone towers as required	Access throughout the region is enabled

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Sustainable energy supply Ensure there is access to sustainable, affordable energy supplies to support a growing region	The region is able to expand its economic and population base through the provision of adequate energy supplies and reliable distribution networks, and makes best possible use of renewable energy and provides an alternative source of fuel to coal as coal stocks deplete	Government and private sector	<i>Electricity</i> Identify and replace all high risk power poles in the region and replace where possible with underground routing Identify suitable locations for commercial wind power Identify sources of biomass waste for energy production Identify technologies to promote increased efficiency and cleaner burning of coal Identify options to provide gas as an alternate fuel to Collie power stations	<i>Gas</i> Construct the Bunbury-Albany Gas Pipeline to Manjimup Expand reticulation access for regional towns and cities including Collie generation network <i>Electricity</i> Upgrade the Busselton to Margaret River high voltage line	The South West has secure and sustainable energy supplies for a population of 500,000 New industry is developing on the basis of access to energy in the lower South West including food and timber processing All waste is recycled into energy production or alternative
Sustaining environmental qualities Acting to mitigate and adapt to climate change and sustain the environmental qualities which are intrinsic to the character of the South West	Maintaining environmental values Ensure the region maintains its environmental and economic values and meets aspirational growth targets in a drying climate and sea level rise	Mixed government and private sector	Support the Peron Naturaliste partnership to identify and mitigate sea level rise between Rockingham and Naturaliste Complete the Ocean to Preston Regional Park and incorporate environmentally sensitive infrastructure to enable public access Reduce eutrophication in high risk waterways including Vasse-Wonnerup Estuary; Vasse, Blackwood, Harvey and Collie rivers; and diversion drain systems Undertake a weed management strategy for the South West region	Retro fit existing stormwater management systems with water sensitive urban design Address nutrient inflows into the Leschenault Estuary and replace degraded fish and crab habitat Implement a healthy river systems program to reduce nutrient inflow Rehabilitate coastal nodes at Meelup Beach and Meelup Park Rehabilitate Geegelup Brook, Bridgetown	Population and industry growth has occurred without materially compromising South West environmental values leaving a positive legacy for the future
	Carbon capture storage		Build a carbon capture project to offset regional CO ₂ emissions		The Collie Hub sequestration project is operating and encouraging further energy intensive investment

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
	Regional waste		Build sub-regional waste facilities capable of recycling and managing waste to a forecast regional population of 500,000		All waste is recycled into energy production or alternative
Land for industry Create sufficient land to generate employment across industry sectors	Sufficient land is set aside for industry needs to 2050	Government	Complete structure planning for Kemerton, Shotts and Preston industrial land areas Ensure major towns have a supply of light industrial lots to support small business	Provide a rail link to the Kemerton Industrial Park Provide reticulated industrial water supply and waste water treatment to Kemerton	The South West has sufficient land for industry set aside to meet future demand and eliminate land use conflicts
Industry and Business – ‘adaptive and Asia capable’					
Export opportunities An industry and business sector with the skills, knowledge and capacity to engage with Asia and India	Skill local business and industry in Asian and Indian business culture, language, finance and export procedures Establish market and brand awareness in key markets	Government, business peak bodies and local government	Support South West cities and each South West SuperTown to develop a strategic alliance with emerging cities in the China/South East Asia region in markets compatible with the South West Increase the development of formal links with targeted overseas chambers of commerce and Western Australian peak bodies Establish a South West opportunities prospectus for distribution through selected overseas trade desks Facilitate small business training for doing business in Asia and India Resource the Bunbury-Jiaxing Business Office to be more effective in the development of trade relationships at an investor and business level		The South West has a fully engaged, well developed international market presence

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Manufacturing Expanding the manufacturing sector is a key to adding value to resources and increasing employment opportunity	Facilitate growth in the metal fabrication, food, beverage and related sectors	Government and private sector	Develop and make available information about South West manufacturing and warehousing capability Develop and make available information on the region's major industrial parks focusing on comparative advantage Enhance the 'Buy Local' scheme including options for supplier alliances to meet major contracting works within the region and improvements to regional preference weighting Identify opportunities to attract new capital investment facilitated by Government where appropriate to stimulate investment in new plant and equipment	Identify additional areas suitable for mineral exploration and mining activity in the South West which avoid environmentally sensitive	Manufacturing has increased its productivity and is contributing to significant new jobs growth
Downstream processing Pursuing downstream resource processing opportunities by identification of suitable sites, investigation of collocation opportunities and sourcing energy at competitive rates	Mining and mineral processing Promote opportunities for mining and mineral processing within the South West based on access to coal, energy and suitable land sites	State Government and private sector	Develop and make available information on mining in the South West for prospective miners and processors Work with major mineral producers in the silicone, lithium and titanium areas to build downstream manufacturing opportunity	Develop and promote opportunities for downstream processing of coal	Downstream resource processing in the region has expanded, capitalising on international export and investment opportunities
	Power plant heat transfer Utilise waste heat from existing power plants for mineral and/or food processing operations	State Government	Provide engineering options for heat take off and related industry opportunities		Compatible industry clusters have developed around power generation plants

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Creative industries Support the creative sector to triple its employment base from 1,000 to 3,000 jobs by 2050	Exploit the opportunity of high-value digital animation, media, publishing, film, art and music in the South West Develop and promote a unique South West Aboriginal art industry with a focus on market development and art investment	Mixed government and private sector	Promote awareness of the value of the creative sector through quantitative analysis of the industries contribution and growth in employment and regional product Build a creative business hub in the Margaret River area Expand CinéfestOZ to an international standard film festival Implement a regulatory response framework that facilitates movie production within the South West Develop an Aboriginal visual arts hub and associated gallery in Bunbury Expand the Bunbury Regional Art Gallery to provide a regional exhibition and art education centre	Build an industry warehouse space for use by film and digital media within a 60km radius of the Busselton airport for use by film production and animation crews Build a regional performing arts academy complemented by a performing arts venue Support the development of an investment market in South West Aboriginal art through developed networks with auction houses and galleries	The South West has significantly grown its film, digital media, music and related creative capacity and is recognised as a major international contributor earning export income leading to new opportunities for education and training The South West is a recognised region for creative industries, culture and performing arts South West Noongar art is identified as a valued Aboriginal art industry
Agriculture, forestry and timber processing Pursue opportunities in the agricultural and timber industries by facilitating structural change and encouraging value adding	Agriculture and food Ensure agriculture and food production is a profitable industry generating new capital investment with the region well positioned to meet growing domestic and overseas demand for high quality food products. This will include identifying and developing business relationships with emerging Asian markets Develop traditional/native foods and spices	Government and private sector	Explore options for Government assistance towards new capital investment within the agricultural sector with special attention to headworks and processing infrastructure Complete the repositioning and branding of the Southern Forests Food initiative linked to food and wine-related tourism Conduct major inbound buyer events to the region focused on wine, dairy, livestock and high-value horticulture Conduct major food events in the region currently focused on Gourmet Escape, Truffle Kerfuffle and Geographe Crush or similar events linked to inbound trade missions Target overseas restaurant and hotel chains in the Asia Pacific region and establish collaborative business networks to support recognition of South West brands and create demand in prestige markets Build a food processing business incubator at Manjimup Develop a centre for agricultural excellence based on postgraduate research and study programs at Manjimup	Develop wine education centres in key emerging markets within South East Asia, China and India	South West product value has increased beyond growth predictions as it takes advantage of high-value niche markets domestically and overseas

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Agriculture, forestry and timber processing Pursue opportunities in the agricultural and timber industries by facilitating structural change and encouraging value adding (Continued)	Agricultural food processing Ensure land is available for large scale food processing to address growing South West agricultural output	Government and private sector	Identify and assemble land within the South West for a major food processing site	Ensure headworks are provided to an assembled food processing site as a basis for attracting private sector investment	The South West has sufficient food processing capacity to support growth in demand for food products
	Dairy industry Identify options for dairy value adding and export including identifying and promoting options for expansion of dairy based on value added processing and potential linkages to other industry sectors such as tourism	Government and private sector	Implement a capital investment strategy as a basis for expanding capacity and building fresh milk supply capability Implement an industry review of supply chain opportunities to improve output and export potential including various forms of manufactured milk product Provide an export assistance service to assist producers access overseas markets and meet regulatory requirements removing unnecessary barriers Support research and funding for expansion and innovation into value added product and related revenue generating options in prestige based 'Super Premium' product	Facilitate market distribution opportunities in emerging South East Asian countries Facilitate access to Chinese milk distributors	Milk production has expanded to 700 million litres by 2022 and 1 billion litres by 2050 Commercially based strategic partnerships exist across South East Asia and China Milk is exported direct from the Bunbury Port to hubs in South East Asia
	Livestock Develop new market demand for beef and lamb and work with industry to create the incentive for year round beef production at levels required by overseas markets	Mixed government and private sector	Identify and action supply chain bottlenecks for export of beef and lamb product including South West growing capacity and abattoir capacity Undertake dedicated inbound buyer missions to support beef, pork and lamb export demand Identify and construct new South West sale yard facility		Export markets have driven significant expansion in boxed meat export based on increased grower confidence in pricing
	Horticulture Expand horticultural production into high-value domestic and international markets and increase price competition through a combination of prestige branding and new market development	Mixed government and private sector	Position the South West as a major horticultural opportunity in terms of production capacity and food safety Assist industry to identify new markets for processed horticultural product both domestic and international through a dedicated TradeStart strategy and expansion of overseas trade facilitation		The South West has achieved a globally competitive horticultural industry that is known for safe, high quality product

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Agriculture, forestry and timber processing Pursue opportunities in the agricultural and timber industries by facilitating structural change and encouraging value adding (Continued)	Wine Reverse current contractions in the wine sector and create long-term demand through access to South East Asian markets	Mixed government and private sector	Conduct inbound wine buyer visits to the region, major wine magazine media promotions and overseas and/or domestic restaurant and hotel chain promotions annually Establish a food and wine education facility in South East China to promote food and wine export supported by monthly wine education classes Implement wine quality development programs for the Geographe, Manjimup and Pemberton regions		South West wine regions are recognised in the top tier of premium wine regions emerging from within the New World
	Timber Increase long-term sustainability of the timber industry as an employer through transitioning to higher value technology based processing including manufactured structural timber, veneer and plywood manufacture	State Government	Support inbound capital investment visits from overseas buyers to assist the industry transition to higher value engineered product	Construction of a common log landing and manufacturing precinct for timber manufacturing based on shared economies of scale	The timber industry is actively engaged in the engineered wood products and veneer sector generating new investment and jobs growth
	Agricultural education and innovation Increase access to higher education agricultural programs	State Government and industry	Promote innovation and research excellence at Manjimup Agricultural Research Station through public / private partnerships		

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Tourism Increase tourism's economic contribution through increased visitation from interstate and overseas markets Develop tourism infrastructure in core South West experiences of wine and food, art and culture, events, Aboriginal Noongar experiences and landscapes	Increase the number of high quality international events in the region Improve the quality of visitor experiences by providing a range of high quality and memorable experiences Create vibrancy and activation in the region's main tourism centres focused on main streets Improve the quality of iconic attractions within the South West to support both local and international visitation incorporating nature-based and marine tourism	Mixed government and private sector	Complete a series of wholesale package strategies that are used to support inbound operations Attract foreign investment in inbound travel tours and tourism accommodation based in the region Complete the refurbishment of the Dolphin Discovery Centre as Bunbury's principal tourism attraction Develop a brand strategy for the Capes region recognising the value and investment in the existing Margaret River brand Build convention facilities at Margaret River and Busselton and incorporate into an international convention marketing strategy Develop a 5 star hotel site as part of redevelopment of the Busselton foreshore Attract a new 5 star hotel at Bunbury Complete infrastructure requirements for resort development at Cowaramup Design and implement an overseas visitor-ready program for the South West tourism sector which includes appropriate signage, language materials and mapping Promote culinary tourism linked to origin brands such as Southern Forests	Complete the Margaret River Perimeter Road Complete the reconstruction of Margaret River's main street as the major brand centre for the region Complete the build out of the Busselton foreshore and integrate into a revamped main street Complete the redevelopment of Ngilgi Cave Adventure Park Complete development of Collie Motorplex Complete upgrade of Timber Heritage Park at Manjimup Complete cruise ship facilities at Bunbury, Busselton and Augusta Complete mountain bike trails in accordance with the South West Mountain Bike Plan Build a new mega fauna centre reflecting the history of Mammoth Cave	The South West's international visitation rate matches intra and interstate rates leading to new investment in accommodation, things to do and jobs growth

Regional Priorities	Objectives	Delivery	Actions		
			1-3 years	3-15 years	Outcomes 2050
People and Place – ‘a region of first choice’					
Regional capital: Greater Bunbury Strengthen the role of Greater Bunbury as the South West capital supporting regional commerce, international trade, arts, culture, education and human services with a population of 300,000 by 2050	Position Greater Bunbury as a well connected city of choice through access to high quality services, affordable housing, economic opportunity and high quality amenity in both recreational and public open space areas	Mixed government and private sector	Complete Bunbury Waterfront Development Stage 1 Commence Bunbury Waterfront Development Stage 2 including expanded marina facilities in Casuarina Harbour and Koombana Bay Undertake an infrastructure review of the Bunbury CBD and an acceleration strategy for commercial development in the CBD Reinvigorate under-utilised public open space surrounding the Leschenault Inlet Construct the Treendale-Millbridge bridge to improve connectivity in north Greater Bunbury Complete expansion of Bunbury Airport	Construct new mixed-use development opportunities at Casuarina Harbour following decommissioning of port related industrial infrastructure	Greater Bunbury is a regional capital location based on its vibrancy, growth and commercial investment. It is recognised nationally as a maritime trade and commercial centre
Regional city: Busselton Develop the City of Busselton as a major Western Australian regional city with a population of 120,000 by 2050	Busselton Establish Busselton as a major lifestyle city based on tourism, wine and food, creative industries, events and high-value professional services	Government	Complete Busselton foreshore development incorporating major hotel and short stay accommodation development Construct a performing arts academy/venue in the cultural precinct Ensure Busselton is a central node for high capacity high speed broadband with Wi-Fi access in major tourism nodes	Redevelop Ngilgi cave and complete reconstruction of the Cape Naturaliste Lighthouse precinct as major tourism attractors Complete the Port Geographe development Redevelop technical training facilities at Busselton and incorporate a digital learning support centre to access global online university access	Busselton is a nationally recognised city for high-value industries in the creative sector, professional services and tourism and is an international gateway for business and tourism visitation to the region

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
SuperTowns Leverage existing State Government investment in SuperTowns to generate private sector growth and renewal	Manjimup Position Manjimup as a regional centre that is responsive to increased food production and tourism in the district	Government, local government, and community	Rebuild the town entrance to direct passing visitor traffic into the town centre Pedestrianise the town centre through improved dual use path linkages Remove the non-operational rail line from the town centre Increase access points between the town's centre and the main bypass – Mottram St, to improve visibility and accessibility Complete expansion of Manjimup airport Identify and implement options for overhead power cable bundling	Build a town centre square providing alfresco food experiences and events space Build new business visitor accommodation in the town centre Improve visitor amenity in the heritage park through interesting and interactive displays and children's facilities	The region's SuperTowns have become vibrant regional centres supporting growth in surrounding towns and communities across the South West Risk profiles for financing development proposals have been reduced by the finance sector and population growth is driving new investment in community services including the non-government sector
	Margaret River Position Margaret River as a regional centre for expanded premium wine production and tourism based on landscape, sea and surf, wine, food and prestige experiences	Government, local government, and community	Divert heavy goods traffic from the town centre via a new perimeter road Rebuild the main street to incorporate vibrant precinct style development based on Margaret River's economic themes of wine, surf and tourism Complete Gas Bay to Cape Mentelle foreshore works Complete pedestrian linkages between Cape Leeuwin, Augusta and Cape to Cape walk trails	Build a multipurpose cultural events and conference facility venue in the town centre to support South West international conference visitation Complete the relocation of industry from the town centre to the new industry park creating a new mixed-use development front to the CBD Build Stage 2 of the Augusta small boat harbour expanding to 50 pens	
	Collie Position Collie as an expanded centre for industry and manufacturing offering high amenity and diverse job opportunities	Government, local government, and community	Complete the rebuild of the town centre Complete river restoration to improve environmental water flows through the town centre Complete the redevelopment of Lake Kepwari as a recreational water body and Collie Motorplex as a motor sports venue Identify and promote new industry opportunities based on waste heat including dairy processing, minerals processing and related manufacturing industry	Construct improvement works at Wilson Park to increase density, affordability and amenity	

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Affordable housing Enhancing lifestyle choices – to support population growth based on a mix of housing options at a range of settlement scales	Housing affordability and choice Ensure there is a mix of affordable housing options providing choice in terms of city or hamlet scale living Address the current inequity in Aboriginal home ownership	Mixed government and private sector	Implement a promotional strategy for ‘Shared Start’ and ‘Aboriginal Home Ownership’ schemes Develop a community housing model for the region Implement an annual affordable housing design competition to promote innovation Incorporate affordable housing targets in new development proposals Construct accommodation to meet specific needs including homelessness, family violence protection and supported housing for those with mental health needs	Amend planning and development regulations to incorporate affordable housing targets in new development proposals	Affordability is no longer a major housing social issue in the South West All regional communities are self-sufficient with a range of housing options that enable people to stay in their local communities
Active ageing Developing infrastructure which supports social capability and specifically ageing in place, Aboriginal engagement and advanced health care, including mental health	Ageing in place Enable people to age in place and transition to appropriate high and permanent care as required	Government, private sector and local government	Build supported seniors accommodation to meet forecast demand Ensure high care services are expanded both in high care accommodation and services to the home Build culturally specific Aboriginal high and permanent care facilities for Aboriginal seniors	Private investment (including public private partnerships) in aged care facilities Leverage private sector involvement to build additional high and permanent care beds to meet longer-term forecast demand Establish a psycho geriatric facility in Bunbury to support older people with dementia and related mental health diseases	The region’s higher proportion of older people have access to quality services delivered by a strong non-government sector

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Education A region of excellence requires the capacity to deliver high quality primary, high school and higher education across a range of sectors	Ensure primary and high schools meet forecast population growth Improve the opportunity for young people to remain in higher education post formal schooling Training is based on innovative models of service delivery that can rapidly adapt to changing industry needs	Government, private sector and education institutions	Expand the 'Trade Training in Schools' program to nominated regional high schools Build digital learning capacity centred at the regional capital integrating the South West Institute of Technology (SWIT), other colleges and partner universities Develop a South West health academy at the South West health and education precinct Construct shared student accommodation at the Bunbury education precinct for SWIT and ECU students Develop parent and child centres in the South West	Build a 'Curriculum and Re-engagement' School to provide training to youth at risk Ensure capacity of primary and high school education is maintained as population grows Integrate online learning centres in each of the region's major towns to extend higher education close to centres of population and industry Expand a student accommodation facility in Bunbury to support overseas student enrolment at ECU and SWIT	Young people no longer have to leave the South West The region has well developed overseas student capacity Sufficient educational opportunities exist for people to participate in education at any stage of life Bunbury is recognised as an education city The South West is established and recognised as an education region
Health Ensuring hospital, GP and Primary Health care services have the capacity to meet demand from a population of 500,000 Expansion of health care capacity to meet demand from a population of 500,000	General practice Ensure health facilities grow proportionally with the population	Government and private sector	Implement plans for future health services delivery in the towns of Bridgetown, Manjimup and Collie	Attract new private sector health services to increase acute capacity	An integrated network of towns to provide long-term, appropriate health care to residents and those in surrounding smaller towns
		Public private partnership	Develop an intensive care unit and expand the emergency department and associated short stay and diagnostic services at Bunbury Regional Hospital (South West Health Campus) Develop business plans for future servicing specific to older people's needs especially dementia, stroke, geriatric mental health, palliative care respite options and community care in the South West Identify and promote public – private partnerships to attract specialists to the region	Develop a sub-acute and rehabilitation centre at Bunbury Regional Hospital Implement plans for future servicing specific to older people's needs in the South West	South West acute care services have the capacity to meet population demand by 2050

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Health Ensuring hospital, GP and Primary Health care services have the capacity to meet demand from a population of 500,000 Expansion of health care capacity to meet demand from a population of 500,000 (Continued)	Primary health care: social determinants of health Ensure the region has access to primary health care programs that address drug and alcohol abuse, mental health and obesity	Mixed government and private sector, South West Medicare Local	Implement a broad-based South West healthy living program to prevent increased obesity and drug and alcohol dependency	Improve focus on the management of chronic disease (diabetes, asthma, mental health, and arthritis for example) and the associated lifestyle risk factors for these conditions (obesity, alcohol use, smoking, inadequate exercise and poor diet)	High incidences of health morbidity have been addressed and self awareness of health increased
	Healthy minds Ensure the needs of people with mental illness are addressed as far as possible within the region	Government	Develop the business case for a child and adolescent mental health facility in the South West Provide integrated mental health services to support people in the community and assist with recovery Develop an increased range of regional recovery and carer programs	Construct a mental health facility for children and adolescents in Bunbury Plan for improving the range of dual diagnosis services, housing and infrastructure for those people experiencing issues relating to alcohol and other drugs and mental illness	The South West has the government and non-government capacity to address mental health needs within the region
Sport and recreation Ensure the region has adequate well planned sports and recreational spaces across the region	Ensure adequate land area is developed to provide an expansion of team based sports facilities	Local Government/ Government	Redevelop Hay Park regional facilities at Bunbury and plan for new emerging recreational needs across the region	Increase capacity of South West Sports Centre, Bunbury Increase capacity of Rendezvous Road Sporting Complex, Busselton Develop sub-regional recreation spaces in accordance with the South West Sports Master Plan	A strategic spread of recreational space exists to support both population growth and the requirements of specific population demographics

Regional Priorities	Objectives	Delivery	Actions		
			1-3 years	3-15 years	Outcomes 2050
Community – ‘cohesive, vibrant and engaged’					
Improved regional capacity and engagement Enhance the capability of the not-for-profit and community sector to deliver community services	Ensure the not-for-profit and community sector is engaged in regional development and has the capacity to grow and develop services with population increase	Government, private sector and community groups	Establish a South West capability register for key non-government agencies in areas of health, education and community service Undertake specific workforce development planning for the non-government community service sector Build purpose-built, collocated facilities to support smaller non-government services		A strong and vibrant non-government and community service sector capable of meeting the service needs of a growing population
Leadership and collaboration Support the development of regional leadership capable of transitioning the region to 2050	Shared vision Facilitate a regional consensus on regional vision and objectives	Government, local government, private sector and community	Undertake a region-wide leadership/ mentoring program to enhance leadership skills and understanding of regional development as a determinant of the region’s future growth Undertake an Aboriginal leadership program targeting youth and emerging elders focused on understanding regional development in an Aboriginal context Continue to support the South West Academy of Sport as a major regional leadership and talent development program	Build industry and community leadership programs into primary and high school curriculum and extend to higher education Build an iconic cultural and community centre in Bunbury that celebrates Aboriginal and non Aboriginal culture together similar to New Zealand’s Ta Pepe centre	Leadership within the South West is based on collaborative models of engagement that support aspirational growth in a value framework that respects the environment and demographic diversity
Volunteerism Ensure volunteerism remains a vital ingredient of South West community life	Volunteerism is recognised, valued and respected within the region	Government, local government, private sector and community	Assess and develop strategies to promote volunteerism in key sectors of health, emergency management and aged care through more effective resourcing of the volunteer network in the South West		

Regional Priorities	Objectives	Delivery	Actions		Outcomes 2050
			1-3 years	3-15 years	
Community safety Ensure the region has the capacity to deal with natural events including storm, fire and flood	Combat and recovery capacity exceeds modelled events	State and local government, industry and community	Expand communications system to reduce reliance on mobile phone and SMS technology Develop risk mitigation strategies for key industries of tourism and agriculture Identify volunteer and career service provider needs	Develop an emergency management training facility at Nannup	
Community enterprise Provide opportunity for growth in community enterprises that provide employment and training opportunities	Develop community enterprise models for building inclusion in civic and commercial activity by disadvantaged groups	Government, Aboriginal and community sector peak bodies	Promote the development of Aboriginal community resources and enterprises in the South West through: <ul style="list-style-type: none"> • Completing the development of the Woolkabunning Kiaka Outback Academy and Red Dust Healing Centre as a centre for Aboriginal education, learning and leadership • Expanding the Ngalang Boodja integrated aquaculture enterprise to a sustainable scale of operation in marron and freshwater fish species farming • Expanding the Wardan Centre's cultural tourism programs Expand and support community enterprise opportunities for people with disabilities and other forms of disadvantage	Develop models for Aboriginal management of land and heritage sites	Aboriginal people have a strong and aspirational role within the South West, fully engaged in all aspects of industry, civic and community life

4.5 Evaluating future regional opportunities

The proposals detailed in *Table 8* represent major transformational opportunities to help the region grow to 500,000 people and generate 200,000 jobs. The development of these opportunities will require well developed strategic execution to make them a reality based on sound business case development.

Many of these proposals will require rigorous business justification and it is recognised some proposals may give way to new and emerging ideas about the future. In this section, the Blueprint details the pathways for industry, the community, local governments and peak bodies to contribute to future ideas and opportunities for project development.

4.5.1 Model for assessing prospective regional development opportunities

The criteria used for prioritising investment at a South West regional level should reflect the regional imperatives within the Blueprint. Accessing regional funding is generally through the South West Development Commission and/or Regional Development Australia – South West.

New projects not identified in this Blueprint will be assessed on the basis of the contribution they can make to the overall objectives of the Blueprint. The assessment will be consistent with the regional priorities established by the Blueprint and include a two-stage process:

- Preliminary assessment against the regional priorities described in figure 23 to determine the merits of an investment initiative; and
- Business case analysis applying techniques such as cost-benefit analysis and discounted cash flow, which allow projects to be objectively compared by way of a recognised, robust and transparent economic model.

All proposals will be required to have a business case.



4.5.2 Assessment criteria

Figure 24 (overleaf) is a summary of proposed assessment process. This process has been agreed by the South West Development Commission and Regional Development Australia – South West as a basis to inform recommendations to the State and Australian Government respectively.

Implementation of the Blueprint falls within two broad categories:

- Investments forming part of the current table of transformational opportunities (Section 4.4); and
- Prospective investments yet to be put forward by proponents.

Who can be a proponent?

A proponent may be an individual, community group, company, local government, government agency or a combination of these.

Preliminary submission

A proponent should contact either the SWDC or RDA South West in the first instance to discuss the proposal and the merits of proceeding.

Subject to a non-binding agreement a proponent

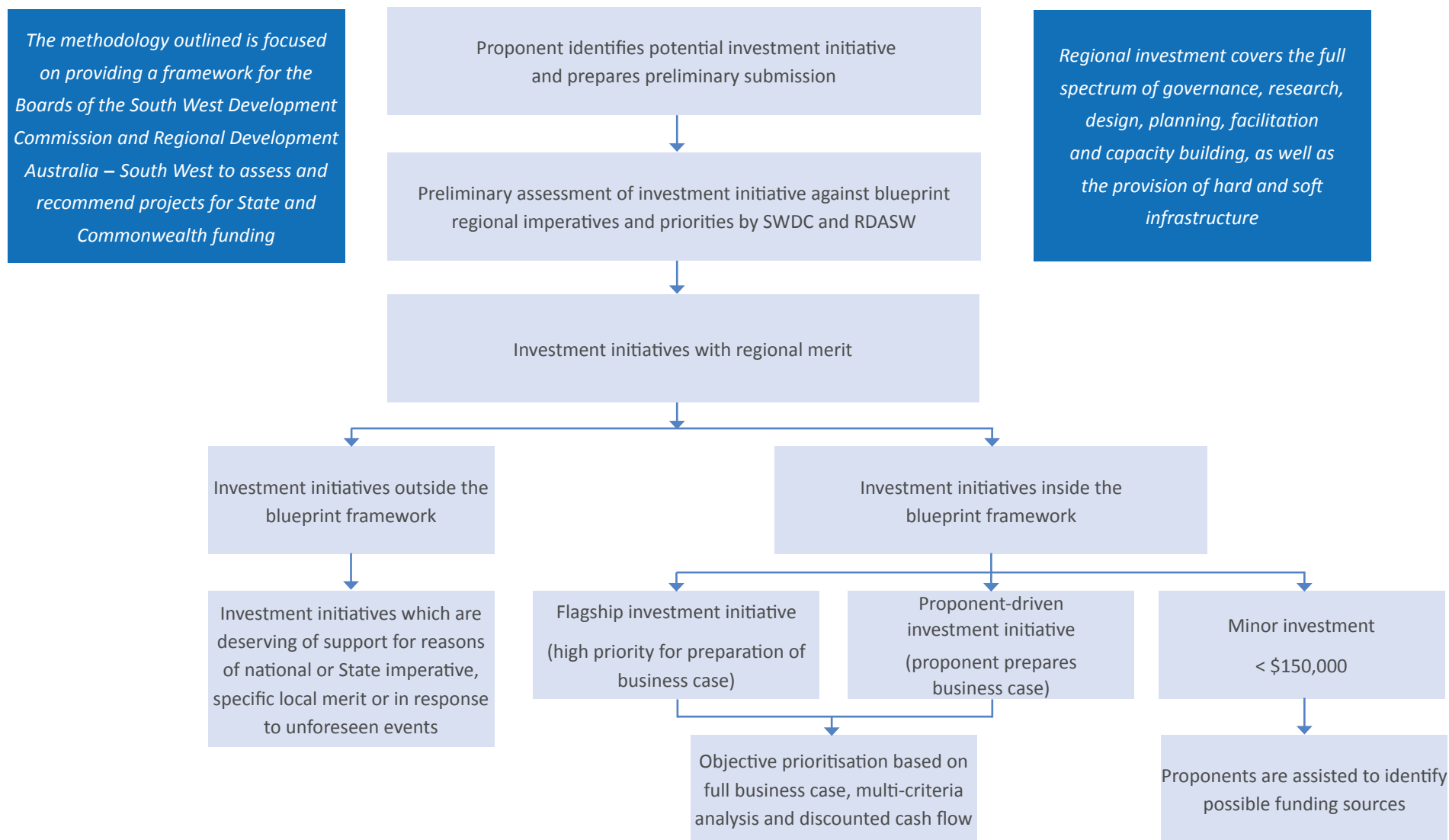


Figure 24: Methodology for assessing prospective investments

will prepare a preliminary submission describing the investment initiative. The scope of the preliminary submission should cover the following matters as a minimum: investment objectives; cost; approvals required; timeframes for implementation; staging; stakeholder support; management; ongoing costs and management; project benefits; risks and benefits. The submission should focus on demonstrating how the investment responds to the regional imperatives and priorities.

Preliminary assessment

A preliminary assessment of each prospective investment initiative will be undertaken by the South West Development Commission and/or Regional Development Australia – South West with a view to establishing the merit of the investment in the context of the Blueprint.

The outcome of the preliminary assessment will be the identification of ‘investment initiatives with regional merit’. These investments will generally fall within three categories of the Blueprint framework.

Flagship investment

Flagship investments are those that have clear and substantive regional benefit and are considered essential for the region to achieve the aspirations outlined in the Blueprint. Prospective investments falling within this category will be regarded as a high priority for business case development.

Proponent-driven investment

Proponent-driven investments are those which are identified as having regional merit but are unlikely to fulfil the criteria of being a flagship project. In the case of proponent-driven projects, proponents may choose to prepare a business case to support the investment initiative and these will be evaluated alongside flagship projects for objective prioritisation and consideration of support.

Minor investment

In the case of minor investments, it may not be necessary to prepare a business case. An assessment of priority will be made based on an assessment of the preliminary submission and proponents will be assisted to identify possible funding sources.



5. IMPLEMENTATION

5.1 Implementation framework

The responsibility for monitoring the Blueprint rests jointly with the South West Development Commission and Regional Development Australia – South West. Key stakeholders include local government, industry peak bodies and community and non-government organisations. On release of the Blueprint it is proposed that a consultation framework be established to guide the future development of the Blueprint and actions flowing from it including specific industry development strategies and infrastructure and place planning.

A key performance indicator framework is provided in *Figure 25*. This sets out a set of indicators that aggregate up into higher level measures of regional performance that are monitored using standard statistical performance reports. A red and green light framework can be adopted such that if any of the key performance indicators show negative movement further investigation to determine cause and corrective action can be applied.

In addition, the SWDC has commissioned a metrics assessment of the current capacity of regional infrastructure and will use this as a benchmark to measure progress of development against forecast demand.

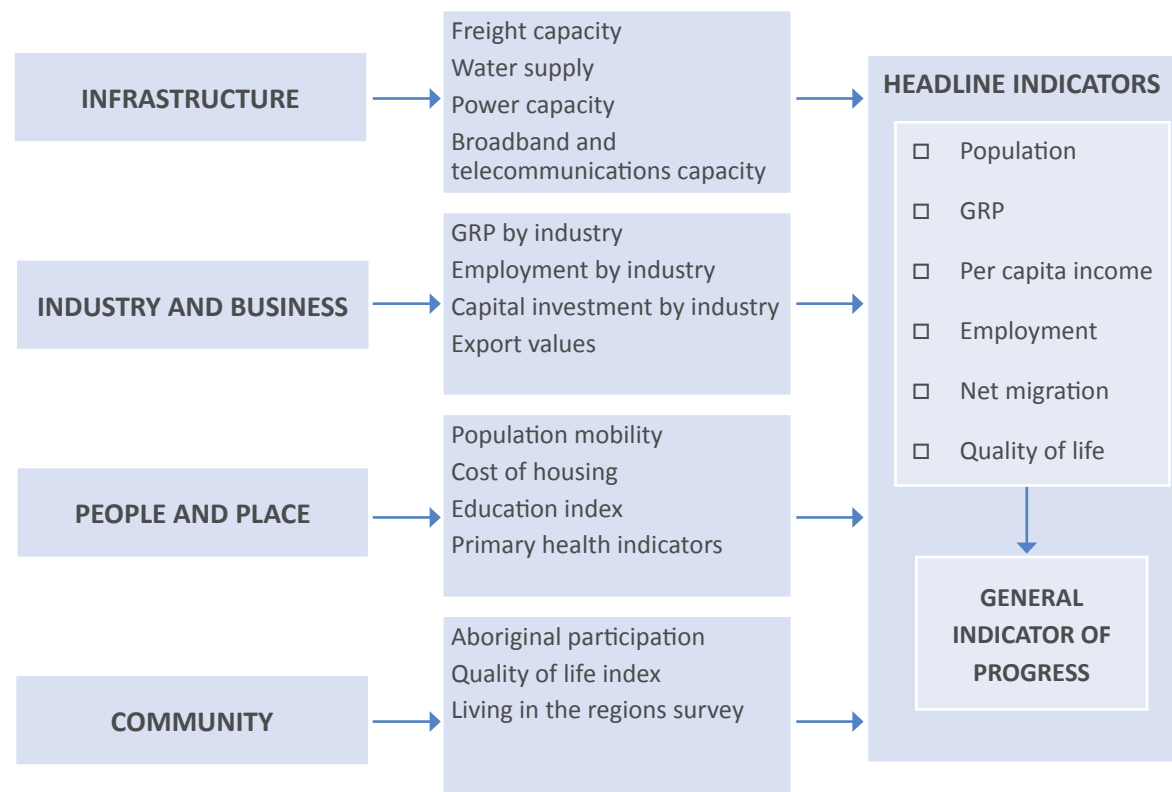



Figure 25: Key performance indicator framework



Development of strategies within each of the core imperatives involves distinct stakeholder groups. The region has at various times generated stakeholder forums for infrastructure, human services and individual business and industry sectors. In implementing the Blueprint the following actions are proposed:

1. Establish a social capability leadership group to focus on initiatives relating to People and Place and Community. This group consists of key State Government agencies and collaboration with private and not for profit organisations.
2. Establish an infrastructure coordination group. Terms of reference would involve shared planning and priority setting for key infrastructure projects. Key membership would include State agencies responsible for infrastructure provision. This will also include environmental management as a key part of the region's infrastructure base.
3. Development of industry strategies in consultation with industry leaders for each of the core industries within the region, detailing specific steps to promote growth in prosperity and employment. Each strategy will determine targets for growth based on a 2050 scenario which are measurable.

4. Engage local government through the South West Local Governments Forum in strategic planning and development of the Blueprint's objectives with a view to setting targets for improving business opportunity in the region.
5. The SWDC and RDA will work with key stakeholders to develop business cases for major transformational projects together with forecast project cash flows to provide certainty to funding decision-makers. The initial round of business case development will focus on infrastructure that improves access to new markets.
6. Support combat and recovery agencies in the assessment and management of safety risk from natural events.

5.1.1 Implementation

Implementing the vision of this Blueprint will require a systemic approach. Individual actions need to be considered not only in terms of their direct contribution to the vision but also the broader contribution made to the region's potential growth. Strong industry creates a strong workforce which in turn can contribute to strong communities.

Vibrant interesting towns can contribute to a

climate for new capital investment. Strong healthy communities generate strong leadership in which people are engaged in civic life. Similarly, quality infrastructure provides a catalyst for desirable communities and industry investment.

The diagram overleaf highlights the implementation framework for the Blueprint based on a balanced approach to investment in industry capacity, infrastructure and social capacity. It highlights the role the Blueprint can play in leveraging resources to optimise outcomes and influence decision making in the region towards consistent and agreed outcomes.

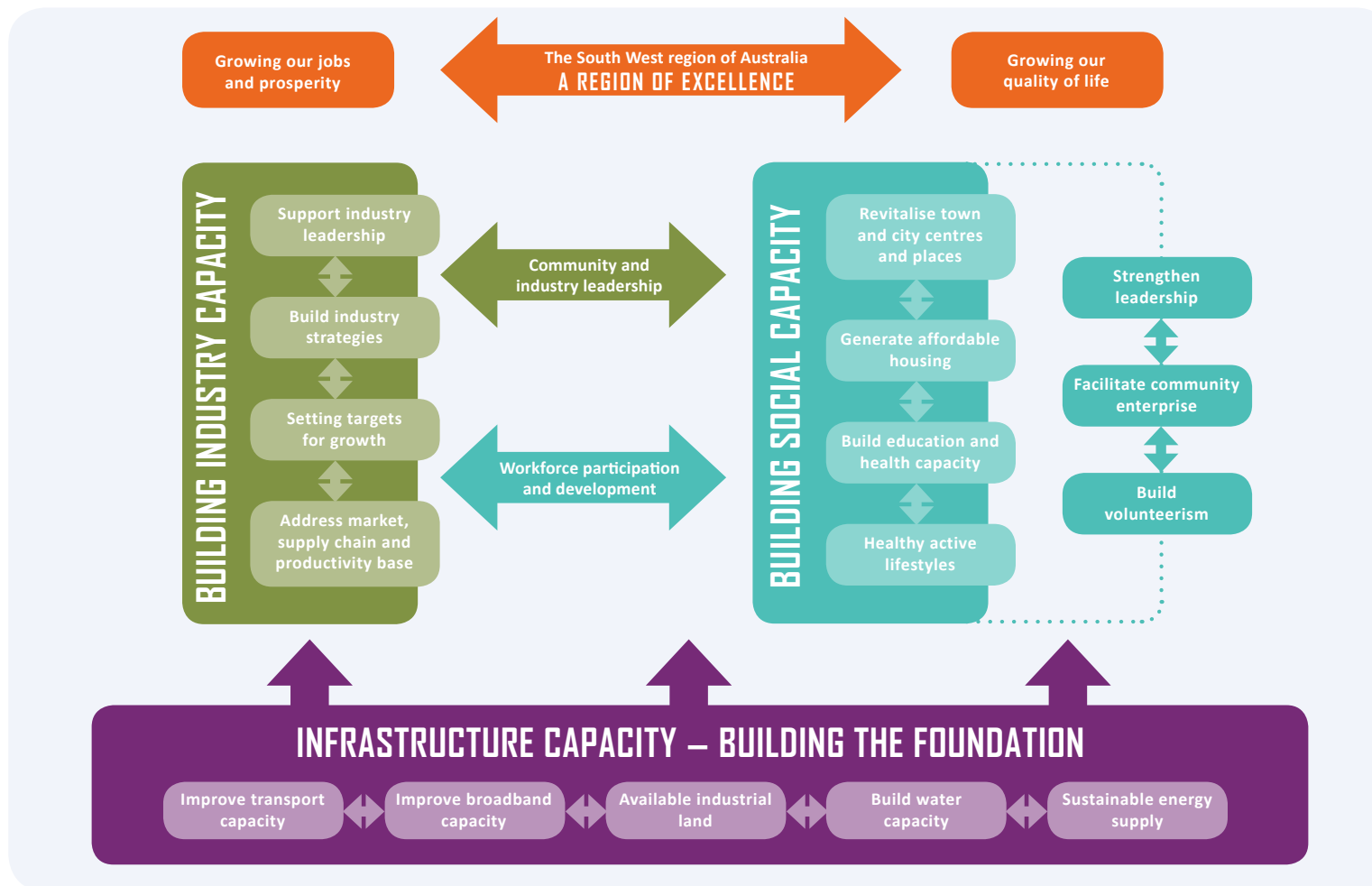
5.2 Monitoring and review

The South West Regional Blueprint will be reviewed each year and a work program developed for business case development on an annual basis supported by the resources of the SWDC and RDA-South West. The Blueprint will also be reviewed to maintain its currency as new circumstances arise.

It is intended that the objectives of the Blueprint be circulated widely and community feedback mechanisms developed that will inform progress. These mechanisms can include an annual survey of stakeholders and a review questionnaire targeting key aspects of the Blueprint.

SOUTH WEST REGIONAL BLUEPRINT

implementation objective



6. CONCLUDING COMMENTS

The Blueprint sets out a jointly agreed pathway between the South West Development Commission and Regional Development Australia – South West. It is an aspirational plan for the future based on collaboration and goodwill. Providing quality advice to both the State and Commonwealth governments is a primary obligation of both agencies. This document will ensure that the advice is based on considered development of strategy, agreement on high level goals and a clear set of actions that will help the region to achieve the challenges of the future.



We're working on tomorrow, today

APPENDIX 1: PRIORITY SETTINGS

Commonwealth priorities

Australian Government documents relevant to the South West Regional Blueprint include the following:

- ☐ *Australia in the Asian Century: White Paper* – Australian Government, October 2012
- ☐ *South West Regional Plan 2011-12* – Regional Development Australia – South West
- ☐ *Tourism 2020* – Department of Resources, Energy and Tourism and Tourism Australia, December 2011
- ☐ *National Food Plan: Green Paper* – Department of Agriculture, Fisheries and Forestry, July 2012
- ☐ *National Waste Policy: Less Waste, More Resources* – Department of the Environment, Water, Heritage and the Arts and Environmental Protection and Heritage Council, November 2009
- ☐ *Housing Supply and Affordability Issues 2012-13* – National Housing Supply Council, 2013
- ☐ *Sustainable Australia Report 2013: Conversations with the Future* – National Sustainability Council, Australian Government, 2013
- ☐ *National Infrastructure Plan* – Infrastructure Australia, Australian Government, June 2013

State priorities

The **Western Australian Government priority settings** most relevant to the South West Regional Blueprint include the following policy and strategy documents:

- ☐ *South-West Framework* – Western Australian Planning Commission, October 2009
- ☐ *Western Australia Tomorrow: Population Report No. 7, 2006 to 2026* – Western Australian Planning Commission, February 2012
- ☐ *State Planning Strategy: draft for public comment* – Western Australian Planning Commission, December 2012
- ☐ *South West Planning and Infrastructure Framework* (draft in progress) – Western Australian Planning Commission
- ☐ *Hope for the Future: The Western Australian State Sustainability Strategy* – Government of Western Australia, September 2003
- ☐ *Regional Development Policy Framework: An Action Agenda for Regional Development* – Regional Development Council, January 2011
- ☐ *The Western Australian Regional Development Framework: Draft* – Government of Western Australia, December 2012
- ☐ *WA Health Clinical Services Framework 2010-2020* – Department of Health, 2009
- ☐ *Mental Health 2020: Making it personal and everybody's business* – Mental Health Commission
- ☐ *Count Me In: Disability Future Directions* – Government of Western Australia: Disability Services Commission, 2010

- ❑ *Mapping and Gap Analysis of Human Services for Aboriginal People in the South West Region* – prepared for South West Development Commission and Department of Aboriginal Affairs, April 2009
- ❑ *South West Active Ageing Research Report* – South West Development Commission and Department for Communities, 2010
- ❑ *An Age-friendly WA: The Seniors Strategic Planning Framework 2012-2017* – Department for Communities: Seniors and Volunteering, 2012
- ❑ *Affordable Housing Strategy 2010-2020: Opening Doors to Affordable Housing* – Department of Housing, December 2010
- ❑ *South West workforce development plan 2013-2016* – Department of Training and Workforce Development and South West Workforce Development Alliance, 2013
- ❑ *Roads to Export: Greater Bunbury Infrastructure Investment Plan* – South West Development Commission, Bunbury Wellington Economic Alliance, Bunbury Port Authority, The Chamber of Minerals and Energy of WA, October 2010
- ❑ *Western Australian Regional Freight Transport Network Plan* – Department of Transport, 2013
- ❑ *State Government Strategy for Tourism in Western Australia 2010: Detailed Strategy* – Tourism Western Australia, December 2012
- ❑ *Tourism Futures South West: Tourism Action Plan 2013-2018* – South West Development Commission, March 2013
- ❑ *State Water Plan 2007* – Government of Western Australia: Department of Premier and Cabinet, 2007
- ❑ *South West Regional water plan 2010-2030: Strategic directions and actions* – Department of Water, May 2010
- ❑ *Collie-Kemerton Industrial Water Supply Strategy* (under development) – Department of Water in partnership with South West Development Commission
- ❑ *Priority Plan for Agriculture and Food: Driving a progressive and profitable Agriculture and Food sector in Western Australia* – Department of Agriculture and Food, 2011
- ❑ *Agrifood 2025+: the future Way* – Department of Agriculture and Food, February 2012
- ❑ *South West Agriculture Futures Industry Strategy* (draft in progress) – South West Development Commission, Regional Development Australia – South West and Department of Agriculture and Food
- ❑ *Strategic Energy Initiative: Energy 2031* – Department of Finance, Public Utilities Office, August 2012
- ❑ *South West Digital Economy Strategy* (under development) – South West Development Commission and Regional Development Australia – South West
- ❑ *Economic Opportunities for Creative Industries in Western Australia's South West Region: Draft Final Report* – SGS Economics & Planning, May 2013
- ❑ *Cultural Infrastructure Directions 2012-2014* – Department of Culture and the Arts, 2012
- ❑ *Collie SuperTown: Townsite Growth Plan* – Government of Western Australia, 2012
- ❑ *Manjimup SuperTown: Townsite Growth Plan* – Government of Western Australia, 2012
- ❑ *Margaret River SuperTown: Townsite Growth Plan* – Government of Western Australia, 2012

Local government priorities

The 12 local governments of the South West have put forward their respective priority projects for consideration as part of various regional, State and Commonwealth plans and programs. In recent times this has included submissions made during the review of the WAPC's *South-West Framework* (in progress) which is expected to result in a South West planning and infrastructure framework.

Increasingly, however, the local governments have shown a preparedness to acknowledge and support priorities and projects that will benefit the South West generally or other parts of the region apart from their own local government area. An example of this was a list of priority projects put forward by the Bunbury Wellington Group of Councils. Although lists of projects from each local government are provided, the local governments also met for a group priority-setting workshop and prepared a consolidated list of regional projects.

Regional Projects listed by the Bunbury Wellington Group of Councils:

1. Roads to Export:
 - a. Bunbury Outer Ring Road
 - b. Eelup Round About Overpass
 - c. Bunbury Port Expansion
 - d. Preston River Diversion
 - e. Duplication of rail line to Port (Collie and Brunswick to Port)
2. Regional Airport at Busselton
3. Millbridge Bridge, Treendale
4. Regional Waste Facility
5. Greater Bunbury Regional Bike Master Plan
6. Tourism/Regional Marketing (including regional visitor centre)
7. Fast train/line upgrades
8. Regional saleyards
9. High speed broadband
10. Infill sewerage
11. Collie motorplex
12. Lake Kepwari

Other priority projects put forward by Local Governments include:

- ☐ Bunbury-Albany gas pipeline
- ☐ Upgrade (re-open) of the Picton-Greenbushes or Picton-Lambert railway line
- ☐ South Western Highway passing lane and safety upgrades
- ☐ Infill sewerage
- ☐ Salinity strategy for upper Collie River
- ☐ Wastewater recycling opportunities
- ☐ Manjimup airfield expansion
- ☐ Aged persons accommodation – independent living
- ☐ Adaption strategies for coastal hazards arising from sea level rise
- ☐ South West Sports Centre expansion
- ☐ Implementation of Harvey Dam Recreation and Tourism Plan
- ☐ Additional mobile phone towers throughout Warren Blackwood sub region (identified black spots)
- ☐ Agriculture integrated water network (Manjimup SuperTown)
- ☐ Upgrade Warren District Hospital
- ☐ Busselton Foreshore redevelopment
- ☐ Margaret River Perimeter Road
- ☐ Mega Fauna Centre at Mammoth Cave
- ☐ Institute of Local Industry/Environment – e.g. WA Emergency Management Centre of Excellence
- ☐ Age-friendly communities plan

Mobile phone priorities

State telecommunications needs assessment

Service: Mobile coverage

The South West Development Commission has provided a list of proposed mobile site locations to the Department of Commerce who have undertaken a telecommunications needs assessment on the mobile coverage across the South West region of Western Australia. This assessment has identified locations where there is a significant lack of mobile coverage and sites are included on the following list. *Please note, there may be additional sites that are not included on this list.

Location	Local Government Area
Recommendations for the South West region:	
Gracetown	Augusta-Margaret River
Molloy Island	Augusta-Margaret River
Ferguson Valley (Wellington Mill)	Dardanup
Rosa Glen	Augusta-Margaret River
Nyamup	Manjimup
Wilyabrup	Augusta-Margaret River
Walpole West	Manjimup
South Western Highway Site 1	Manjimup
Jalbaragup	Nannup
Dinninup	Boyup Brook
Mt Burnside	Manjimup
Mount Pingerup	Manjimup
Mt Franklin West	Manjimup

Additional supplementary recommendations:	
South West Highway to Vasse Highway, Manjimup to Pemberton Site 2	Manjimup
Augusta Small Boat Harbour (near Flat Rock, 4 km from Augusta)	Augusta-Margaret River
Sue's Road North East (Vasse to Brockman Highway)	Augusta-Margaret River
Windy Harbour	Manjimup
Nannup East	Nannup
Mowen Road, East, Barrabup	Nannup
Barrabup	Nannup
Beedelup East	Manjimup
Hamelin Bay	Augusta-Margaret River
Stewart Road, West, Scott River	Nannup
Yallingup East	Busselton
Boyup Brook East	Manjimup
Deepdene	Augusta-Margaret River
Jangardup	Nannup
Manjimup West	Manjimup
Maranup	Bridgetown-Greenbushes
Reids Road Intersection	Bridgetown-Greenbushes
Rainoli road Intersection, Donnybrook-Boyup Brook Road	Boyup Brook
Seven Hills Road, Roelands	Harvey
Strickland Road	Nannup
Sues Road Central	Augusta-Margaret River
Sues Road South	Nannup
Whicher Range	Busselton
Wellington Dam Road	Collie

APPENDIX 2: CONSULTATION

The South West Regional Blueprint has been developed through consultation with key stakeholders and examination of existing plans and strategies.

Existing strategy documents include the draft investment plan for the South West (SWDC, 2009), the *South West Action Statement* (SWDC and RDASW, 2010) and *South West Regional Plan* (RDASW, annual).

Significant consultation in relation to priority projects has also occurred in recent times as part of the State's Country Local Government Fund Regional Groups process, preparation of the SuperTowns growth plans (Margaret River, Collie and Manjimup) and development of the draft *South West Planning and Infrastructure Framework* by the Department of Planning.

The development of this Blueprint has drawn on:

- ☐ A wealth of existing data, plans and strategies of local, State and Commonwealth governments;
- ☐ Studies that were already under development by the South West Development Commission (encompassing creative industries, tourism futures, digital economy strategy); and
- ☐ Studies specifically commissioned by SWDC for the purpose of the Blueprint (including an economic overview/industry sector analysis of the region and consultation with not-for-profit human services organisations).

In the early stages of preparing the draft Blueprint, State government agencies and South West local governments were given a further opportunity to provide input to the document.

Local governments in the South West traditionally work in three sub-regional groupings covering Bunbury Wellington, Warren Blackwood and the Capes. SWDC and RDASW met with the three groupings in December 2012 to discuss the Blueprint and seek feedback on regional priority projects. Input from the local governments was finalised in May 2013.

Correspondence regarding the Blueprint was issued to relevant State government agencies in April 2013. In May 2013, on the basis that a significant amount of information is already available through agency, strategic and statutory planning over recent years, just over 30 agencies were invited to highlight any strategic imperatives that affect the direction and priorities of their agency in the region or related highest priority projects, for consideration in developing the draft Blueprint.

The initial draft of the Blueprint was released in January 2014 and a total of 40 submissions were received. All of the responses were considered in the final drafting of the Blueprint.

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In addition to the documents listed in Appendix 1, the following references assisted in developing the draft Blueprint:

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ABBREVIATIONS

%	Per cent
ABARES	Australian Bureau of Agricultural and Resource Economics and Sciences
ABS	Australian Bureau of Statistics
b	Billion
CBD	Central business district
COAG	Council of Australian Governments
CSIRO	Commonwealth Scientific and Industrial Research Organisation
DEEWR	Department of Education, Employment and Workplace Relations
DIDO	Drive-in drive-out
DSR	Department of Sport and Recreation
DTWD	Department of Training and Workforce Development
ECU	Edith Cowan University
FIFO	Fly-in fly-out
GDP	Gross domestic product
GRP	Gross regional product
ha	Hectare
IMF	International Monetary Fund
km	Kilometre
kVA	Kilovolt-ampere
m	Million
mtpa	Million tonnes per annum
OECD	Organisation for Economic Co-operation and Development
pa	Per annum
RDASW	Regional Development Australia – South West
SHS	Senior high school
SWDC	South West Development Commission
SWIT	South West Institute of Technology
WA	Western Australia
WAPC	Western Australian Planning Commission

South West Regional Blueprint



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