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Message from the CHAIRMAN

The South West Development Commission has a strategic vision for the South West region of Western Australia, which is clearly marked out in our Strategic Plan 2021 - 2023. What we do today will shape the region we call home tomorrow, and beyond.

With this in mind, the Commission has endeavoured to develop a Strategic Plan that highlights the critical actions we need to undertake, and be mindful of, in order to create the thriving and prosperous future we envisage for all who live in the South West region of WA. This plan has a three-year horizon and could be viewed as a roadmap we can follow as we journey towards a future we can feel good about.

Despite the turmoil of the COVID-19 pandemic, we have much to look forward to in restoring our economy to a healthy state. However, the path ahead may not always be smooth and there will almost certainly be ongoing challenges along the way.

But I am confident the South West region will rebuild from the economic and social impacts of COVID-19. In fact, the South West will not only be an attractive place to invest, whether it be in mining, tourism or other industries, it will create sustainable jobs and thriving cities and towns.

Creating the right environment for sustained economic growth is a key factor in supporting industry and business to maintain and stimulate on-going jobs creation and the Commission will actively follow this plan to ensure we always aim to fulfill this.

I look forward to continuing to work with our many stakeholders to promote and develop the South West region as a place where people choose to live because of its attractive lifestyle, employment opportunities and a future full of hope.

I am pleased to present our Strategic Plan 2021 - 2023 to you.

Nick Belyea

Chairman



Message from the **CEO**

Today, more than 178,000 people live in the South West region and it is anticipated that by 2031 the region will grow to around 226,000 and potentially to 300,000 by 2050. Maintaining the diversity that our regional cities and rural towns bring to our region's prosperity is critical to growing our economy and preparing for the future needs of our communities.

But there are challenges we face. The impact of COVID-19 has placed significant vulnerability on our people and our economy and has challenged our 'business-as-usual' thinking and the way we interact with each other. Changing technologies, climate change and demographic trends such as an ageing and growing population will influence the way we plan, prioritise and make decisions.

To maintain and build economic resilience in the face of these challenges, the Commission – in partnership with governments, industry and the community – will maximise our regional strengths to unlock opportunities.

The Western Australian Government has made significant investment in our towns and cities. We have seen the ongoing transformation of Bunbury's waterfront, the enhancement of the Busselton foreshore and the revitalisation of our rural towns including Margaret River, Manjimup and Donnybrook. Significant investment has gone into the region's tourism and arts infrastructure including the newly built Margaret River HEART and the Busselton Margaret River Airport.

But continued effort and investment is required to ensure our region delivers on its objectives and builds on the foundations for success. We must ensure our people have fulfilling and sustainable jobs and live in well supported, thriving, diverse and creative communities that are connected and have continued improvement to living standards with access to quality education and healthcare, affordable housing and essential services.

The Strategic Plan 2021 - 2023 is fundamental to the South West Development Commission's work. The Strategy outlines the Commission's objectives and priority initiatives over the next three years with a continued focus on economic development, investment attraction and the protection and growth of businesses and jobs in the South West.

This Strategic Plan builds on previous research, plans and strategies and provides an over-arching framework for the continued development and implementation of sub-regional growth plans.



Chief Executive Officer



Executive **SUMMARY**

The South West Development Commission's core purpose is to drive economic development outcomes across the South West in partnership with public and private sector stakeholders.



This Strategic Plan sets out what SWDC will prioritise over the time period set out in this strategic plan and how we see our partnerships working to realise economic benefits for the South West. The document identifies key priorities such as:

> Helping attract new investment and business activity

Strong economic growth and job creation requires new business entrants to the region and the growth and improved productivity of existing firms. Both will drive job creation and better wages. SWDC will be increasing our focus on investment attraction, business productivity improvement, increased value adding in production-based businesses, and we will continue to prioritise our work supporting exporters as the delivery partner for Austrade's TradeStart program.

> Facilitating a robust pipeline of infrastructure investment to our region

All sectors, from tourism to mining and manufacturing, need robust infrastructure and a ready supply of industrial land. SWDC works across government to ensure that the South West has well-connected and serviced towns

and that business and industry have access to the infrastructure and land they need to grow.

> Providing ongoing support for the revitalisation of Collie

Helping diversify and grow the local economy, attract new business activities, tourism experiences and improve amenities for residents. A key new additional focus will be on attracting investment in developing new industries and infrastructure and providing skills and employment pathways for those workers transitioning away from traditional energy and resources sector industries.

Providing ongoing support towards Bunbury's urban development and expansion

As the State's second city and designated Regional Centre for the Bunbury-Geographe and South West region, it is important that Bunbury develops as a liveable and vibrant second city. SWDC is helping revitalise the waterfront, augment its attractions for visitors and students, and to maximise local content and job opportunities arising from the Bunbury Outer Ring Road project.

Helping businesses remain competitive through support for initiatives that promote innovation and value adding, particularly where there are opportunities to open new export opportunities

The Advanced Manufacturing Hub proposal is one such initiative but there is further work that will be done to help food producers and manufacturing businesses throughout the region, particularly around Collie, Bunbury, Manjimup and the Southern Forests. SWDC will be paying significant attention to industry development, focusing our efforts and investment to help business move up the value chain and to enhance productivity and sustainability.

> Providing ongoing support for producers and industry throughout inland areas

The South West is an internationally recognised centre for wine production, horticulture, timber and quality meats. SWDC will continue to support primary industries and agri-business sectors introduce value adding technologies and processes, particularly in inland areas.

Supporting the South West's growing digital technologies and creative clusters

Leveraging public sector investment into key new assets and the presence of university and other educational facilities to continue to build an attractive ecosystem around businesses in these sectors, including the support of Angel and entrepreneur networks.

Ensuring we maximise opportunities for income from tourism

The South West economy is dominated by small business, with many reliant on income from tourism. SWDC is working with Tourism WA, Australia's South West and across government to continue to introduce new tourism experiences, improve our infrastructure and to integrate our tourism assets and experiences into compelling reasons for people to visit our region. This includes ongoing development of propositions around biking trails, hiking routes, food trails and new tourist attractions from motor sports and family activities through to scenic routes and camping experiences.



To maintain and build economic resilience throughout this COVID-19 period and beyond, we need to take advantage of all opportunities that can provide local jobs and help businesses trade. To achieve success, it is vital that all business associations, local authorities and State agencies work together to coordinate activity, explore new opportunities and put in place practical plans to secure jobs and economic opportunities.

This is why:

- > We are working with State and Federal agencies to bring forward infrastructure and construction projects.
- > We are actively pursuing Local Content opportunities on major projects in the South West particularly for the Bunbury Outer Ring Road under a partnership model with Chambers of Commerce and service providers. We are also leveraging the strengths of the creative and digital sector in the South West to help other sectors learn of digital and e-commerce opportunities.
- We are working closely with Chambers of Commerce, Small Business Development Corporation's service providers and Tourism WA to guide SMEs to support training opportunities.
- > We are working closely with Shires and other business associations to identify where works programs can be accelerated and 'buy local' programs can be promoted.

ABOUT the South West Development Commission

The purpose of SWDC is to catalyse economic development and growth in the South West region. By 2050 we aim to ensure that the South West is an internationally recognised region of excellence for high quality agricultural products, tourism experiences and a centre of excellence for mining and advanced manufacturing technologies. We will protect our environment and quality of life, ensuring equitable living standards for all communities.

The Commission is a values-driven agency, which promotes a positive and inclusive working environment, making it a partner of choice. We promote a culture of excellence and continuous improvement, valuing leadership and creativity within the Commission.

We recognise the First Nations people, the Noongar people, as the Traditional Custodians of the South West region. Noongar people have lived in the South West of Western Australia for more than 45,000 years.

Who we are

We're part of the Western Australian Government, continually striving to make the South West region an even better place to live, work and invest.

We do so by partnering with communities, government, business and industry to identify, support and drive projects that benefit the region. Developing the region's economy and improving our quality of life are our key areas of focus.



The South West Development Commission works across government, with public and private sector organisations to support the economic growth, internationalisation and diversification of the South West economy to stimulate job growth, increase industry innovation and to ensure that our economy remains competitive over the long term.

This means that we focus on ensuring that infrastructure supports the needs of local growing businesses and communities, and that business has the infrastructure it needs to allow it to innovate, and trade nationally and internationally. A more diverse and innovative economy means that we provide more job opportunities for local workers, and that these jobs are sustainable and better paid.

Our Board

In accordance with the Regional Development
Commissions Act 1993, our Board is the governing
body responsible to the Minister for Regional
Development for setting the direction and priorities of
the Commission. It meets regularly to make decisions
on projects, priorities and expenditure.

Board members are selected from community and local government nominations, as well as Ministerial appointments.

Our Staff

The South West region covers 23,970 square kilometres – and we work across all of it. Our staff travel widely throughout the region.

Our purpose is to be the catalyst for economic development and growth in the South West.

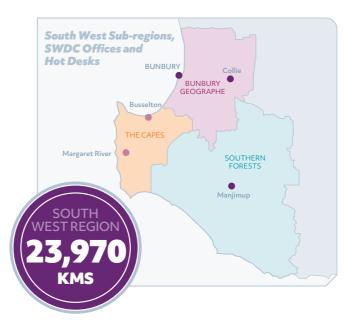


Objectives of SWDC

The statutory objectives of the South West Development Commission are set out in Section 23 of the Regional Development Commissions Act 1993 (WA).

These statutory objectives are to:

- a) Maximise job creation and improve career opportunities;
- b) Develop and broaden the economic base of the region;
- c) Identify infrastructure services to promote economic and social development;
- d) Provide information and advice to promote business development;



- e) Seek to ensure that the general standard of government services and access to those services in the region are comparable to that which applies in the metropolitan area; and
- f) Generally, take steps to encourage, promote, facilitate and monitor the economic development of the region.

Functions

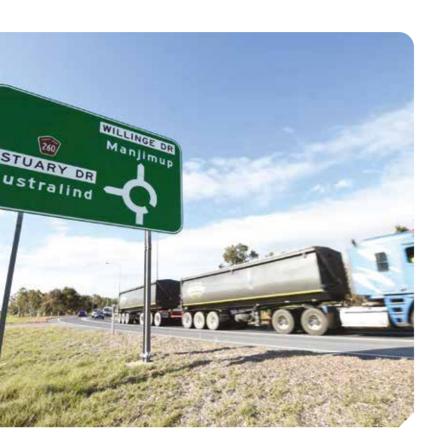
For the purposes of achieving its statutory objectives as per the Regional Development Commissions Act 1993 (WA), the functions of the South West Development Commission are to:

- a) Promote the region;
- b) Facilitate coordination between relevant statutory bodies and State Government agencies;
- c) Cooperate with representatives of industry and commerce, employer and employee organisations, education and training institutions and other sections of the community within the region;
- d) Identify opportunities for investment in the region and encourage that investment;
- e) Identify the infrastructure needs of the region and encourage the provision of that infrastructure in the region; and
- f) Cooperate with: Departments of the State and Commonwealth Public Services, other government agencies, instrumentalities and statutory bodies of the State and the Commonwealth and Local government authorities, in order to promote equitable delivery of services within the region.

Our Vision

By 2050, the South West is an internationally-recognised region of excellence for high quality products and tourism experiences with a reputation for innovation and advanced manufacturing technologies in industry. That quality of life for South West residents is no less than that of metropolitan areas, with comparable employment opportunities, access to services and vibrant communities to achieve an enviable work/life balance.

The South West Development Commission recognises the uniqueness of the South West for its liveability. With a diverse and strong economy, supported by quality infrastructure and services, exceptional natural assets and clean climate, our aim is to continue to improve the region for our residents and visitors alike. As the catalyst for economic development and growth in the South West, we work across the public, private and not for profit sectors to facilitate return for the region. We ensure that locally businesses and industries have opportunities to invest, create jobs and support the region through advocacy and collaboration.



To achieve this vision, we have identified six strategic priority areas:

Priority 1: A region that has fulfilling and sustainable jobs

Priority 2: A region that has industry ready infrastructure and land availability

Priority 3: A region that has a highly skilled and industry ready workforce

Priority 4: A region that supports Aboriginal economic development

Priority 5: A region that has thriving, diverse and creative communities

Priority 6: A region that is well supported by the Government/Commission

Our Values

Our values are:

- > Excellence in all we deliver
- > **Engaged** to be an outwards looking organisation, connected to our community and representing their interests and needs
- > **Integrity** to act ethically, honestly and with transparency
- > **Inclusive** to be positive and supportive, respecting and valuing diversity
- > **Impact** to make a difference in all we undertake

Regional Economic SNAPSHOT

The South West has a growing population of 178,000¹ and a thriving and dynamic economy that generated \$14.7 billion during 2018-19 and supported over 71,000 jobs.

Although much of the region's prosperity is based on its mining industry — in particular alumina and mineral sands — a diverse range of industries provide employment opportunities for people living in the region and substantial export income.

The South West region has sustained growth in its Gross Regional Product (in real terms) of 25.6 per cent over the past decade and is benefitting from ongoing major State and Commonwealth Government investment in roads, rail and port including \$852 million for the Bunbury Outer Ring Road.

The State Government is also investing \$28.8 million over five years into the South West and regional Western Australia through its Regional Economic Development (REDs) grants aimed at driving industry growth, diversification and the creation of jobs in regional priority areas. Over the past three years, the South West Development Commission has supported more than 130 State Government funded projects to boost growth in small to medium enterprises.

Helping local businesses win supplier contracts is important, and the value of State Government contracts locally awarded in 2018/19 is the second highest in the State, outside of Perth.

Comparatively, the region has a generally positive employment profile, with low unemployment and a tight labour market. However, the COVID-19 pandemic is making employment and operating conditions challenging for businesses and workers.

Sector performance

Key sectors are manufacturing, construction, real estate services and mining, accounting for 50% of output value for the region. Half of all jobs are in the retail, health care, construction, education and training, and manufacturing sectors.



Strategic **PLAN**

This Strategic Plan lays out how the Commission will deliver the Western Australian Government's economic growth objectives in our region from 2021 to 2023.

Rationale and purpose for the Plan

It details how we will promote our vision for the South West, deliver on our purpose and achieve outcomes, in accordance with our Act. It brings together the various frameworks under which we operate and the linkages with the growth plans of our Local Governments.

This Strategic Plan also provides a framework for putting our ambitions into action and signalling where we can work with investors and communities. Importantly, it outlines the initiatives, actions and strategies that will contribute to achieving this vision.

Strategic priorities, policies and frameworks underpinning our plan

In line with State economic development frameworks, our strategic priorities are a region that:

- 1: Has fulfilling and sustainable jobs
- 2: Has industry-ready infrastructure and land
- 3: Has a highly skilled and industry ready workforce
- 4: Supports Aboriginal economic development
- 5: Has thriving, diverse and creative communities6: Is well supported by the Government/Commission

SWDC's Strategic Plan is informed by and aligned with two core State regional and economic development Frameworks:

Diversify WA, the State Government's economic development framework

We support the State Government's commitment to protect and grow jobs in regional areas.

Diversify WA provides an economic blueprint for collaboration between government, industry and the community, and supports the WA Government's focus on creating secure, quality jobs, growing and diversifying the economy and attracting investment.

The South West Development Commission Strategic Plan 2021 - 2023 identifies six priority sectors where significant growth and diversification opportunities exist for the South West region.

These include:

- > Energy, including Renewables
- > Technology and Advanced Manufacturing
- > Mining and Mining Equipment, Technology and Services Sector (METS)
- > Primary Industries, including Agriculture, Forestry and Fishing
- > Tourism, Events and Creative industries
- > Trade and Investment

This Strategic Plan addresses these priority sectors and lays out how SWDC plans to develop the region's specific competitive advantages and our opportunities for innovation, export and investment in these sectors.

These themes are an important mechanism for aligning efforts across WA's regions while still allowing for regional prioritisation.

SHARED STRATEGIC THEMES for Regional Development

Regional development in Western Australia in underpinned by five strategic themes

- i. Grow existing, and develop new, non-renewable resources sector industries: growing existing industries while developing new industries.
- ii. Grow existing, and develop new, alternative industries: continuing to grow our existing resources and energy industries, while developing new alternative sector industries.
- iii. Promote Aboriginal economic development: support Noongar and Indigenous businesses and improve community prosperity through increasing

opportunities for self-empowerment.

- iv. Enhance regional living standards: provide South West communities with economic and social opportunities and raise prosperity.
- v. **Organisational excellence:** ensure that SWDC has the resources, capabilities and workplace culture to act as a voice for regional economic development.

SWDC Strategic Priorities

		Priority 1 A region that has fulfilling and sustainable jobs	Priority 2 A regional that has industry-ready infrastructure and land	Priority 3 A region that has a highly skilled and industry ready workforce	Priority 4 A region that supports Aboriginal economic development	Priority 5 A region that has thriving, diverse and creative communities	Priority 6 A region that is well supported by Government/ Commission
Themes	Grow existing, and develop new, non-renewable sector industries						
	Grow existing, and develop new, alternative industries						
Development Strategic	Promote Aboriginal economic development						
	Enhance regional living standards						
Regional	Organisational excellence						



A region that has fulfilling and sustainable jobs

Regional Development Strategic Theme:



Grow existing, and develop new, non-renewable sector industrie



Grow existing, and develop new, alternative industries. The region's well-established agriculture, mining and manufacturing sectors, which have driven large scale investment and exports, offer a number of strategic opportunities to grow existing, and develop new, non-renewable resources and related industries with a focus on supply chain development and value adding.

The South West has an opportunity to further leverage the region's comparative advantages in agriculture, mining and manufacturing to grow and expand new markets through trade and investment.

The region contains many of the State's major attractions, and has a well-established brand reputation for quality food, premium wines and nature-based tourism. The South West is the most popular regional tourism destination in Western Australia. It receives more visitors than any other region outside of Perth and contains a vast array of tourism experiences across a large geographical area. Combined with a growing creative industries sector, opportunities exist to build on the region's strengths to grow existing, and develop new, alternate industries.

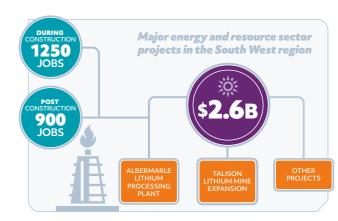
Sector growth strategies

Mining, Mineral Processing and Mining Equipment, Technology & Services Sector (METS)

Mining continues to be a key economic driver of the region, valued at \$2.85 billion in 2019. This represented 9.1 per cent of output and 21.3 per cent of regional exports.

As at December 2018, Greenbushes was the world's largest producing spodumene deposit. In 2019 and 2020, Greenbushes Lithium Mine was one of the top 10 biggest lithium mines in the world (based on proven and probable reserves). Opportunities exist to continue to build on the region's significant mineral resources, downstream processing and mining equipment and technology services (METS) capability. For example, WesTrac's autonomous vehicle training facility, supported by the Collie Futures Industry Development Fund, will become a base to train mining technicians in technology innovation and equipment that will drive future productivity growth in the resources sector.

The South West region has a pipeline of major energy and resources sector projects underway totalling around \$2.6 billion contribution to the economy.



These projects include the Talison Lithium mine expansion at Greenbushes and the \$1 billion lithium processing plant being developed by Albemarle at Kemerton. Approximately 1250 jobs are estimated to be created during construction with a further 900 operational jobs post construction.

Global demand for electric vehicles and energy storage is growing rapidly and the region has an abundance of lithium and other minerals used for battery components manufacture. Construction is underway on Albemarle's lithium hydroxide plant in Kemerton and the Western Australian government's Future Battery Industry Strategy Taskforce is supporting research and development of projects in the battery materials area.



- > **Lithium.** Value add products and services. Undertake an economic/ market analysis of value-add products and services in the lithium supply chain
- > Autonomous underground mining vehicles. Investigate opportunities to create, leverage and build upon the WesTrac Technology Training Centre in Collie

Energy

The Collie-Bunbury region is the central hub for the South West Interconnected System (SWIS), with Collie's coal-fired power stations generating close to 50 per cent of SWIS electricity in 2018.

The Western Australian Government's Energy
Transformation Strategy will look to leverage Collie's
existing energy assets. For example, under-utilised
transmission capacity and sites with proximity to
network infrastructure present opportunities for
energy storage and hydrogen projects, as well as
energy-intensive industries.



- > Facilitating pre-feasibility studies to support investment opportunities in battery storage and innovation.
- > Increasing energy generation capability and facilitate the development of green hydrogen projects in the South West region.
- > Supporting a further feasibility study into market opportunities for domestic waste management and value-add products and services including waste to energy (W2E) initiatives.

Advanced manufacturing

Regional manufacturing contributed almost \$6.5 billion to State output in 2019 and accounted for over 20% of the region's total output, and generating over 9% of regional employment.

Manufacturing also leads in regional exports, contributing 40% of the region's value of goods and services, earning more than \$4.5 billion in exports.

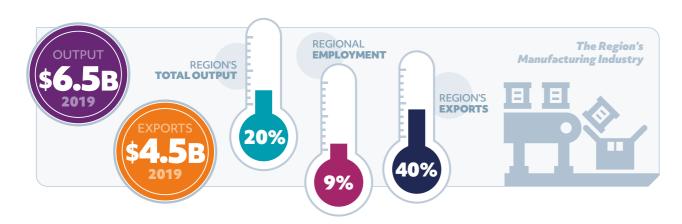
Opportunities exist for advanced manufacturing of products and services with an established and growing network of manufacturing and engineering services businesses in the region. The Commission, local and state government agencies and industry stakeholders are exploring the synergies of these sectors, which may include a Bunbury-based advanced manufacturing industrial and education hub to support infrastructure for small to medium businesses.

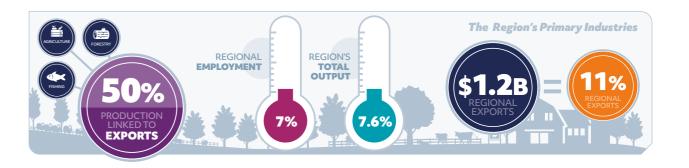
Key priority initiatives over the next three years include:

- > Supporting advanced manufacturing technology, innovation and investment attraction with a feasibility study to establish an Advanced Manufacturing Hub, supporting large-scale fabrication and industry support along with training in the Bunbury-Geographe region.
- > Targeting investment attraction in partnership with the Department of Jobs, Tourism, Science and Innovation and Austrade to attract value adding and innovative manufacturing investments to the South West, particularly to benefit the mining, METS, agricultural and forestry sectors.
- Liaise with research institutions, universities and the private sector to support innovation in public transport, building technologies, food processing, agriculture and wine technologies.

Primary industries

The region's agriculture, forestry and fishing industries are export-oriented with more than 50% of production linked to exports. Overall, the sector contributed around 7.6% of total regional output and 7% of all jobs in 2019. Just under 11% of regional exports are from this sector, equating to around \$1.2 billion.





Fertile soils, high rainfall and proximity to Perth are leading factors in the region's diverse range of agricultural products including beef, dairy, sheep, wool, fruit, vegetables, viticulture and broad acre crops. The region is home to a growing number of timber mills and processing plants including one of the largest integrated softwood milling and processing plants in Australia at Dardanup, with strong timber sector presence also in Nannup and Greenbushes, as well as forecast growth in Manjimup.

Opportunities exist in agriculture and value-adding industries to service growing markets such as the Middle East and Asia. The Western Australian Government is establishing the Myalup Primary Industries Reserve to provide land for irrigated agriculture expansion and is supporting the development of new water infrastructure in Myalup and the Southern Forests to supply industry and horticulture. The State Government's primary industries development initiatives in the region include: enhancing supply chains and market access; expanding the softwood plantation estate; and facilitating R&D and pilot projects looking to use forestry, agriculture and other waste biomass feedstock to produce bioeconomy commodities.

Key priority initiatives over the next three years include:

- > **Support food and wine innovation** and undertake pre-feasibility work in consultation with the food and wine industry to gauge the need for a food and wine innovation processing hub in the region.
- > Support value-adding in the forestry and timber processing sectors, and the establishment of a timber processing hub to respond to value-add timber opportunities across the region.

Tourism

The South West region of Australia is well-known for its natural beauty, with attractions that include world class surfing beaches, dense forest areas, inland lakes, whale and dolphin experiences and established wine regions. In addition to wonderful landscapes, there is also an abundance of built attractions, a strong events calendar, food, heritage and cultural experiences, as well as a good range of quality tourism accommodation. Furthermore, in 2019 Lonely Planet named Margaret River and the South West as the number one tourism destination to visit in the Asia Pacific region.

The South West now attracts more visitors than any other Western Australian tourism region outside of Perth, and importantly leads the regions in terms of intrastate and international visitors. It attracts more than 2.5 million over night visitors per annum, generating more than 8.9 million visitor nights and delivering more than \$1.3 bn in estimated expenditure. The sector is a major tourism employer with an estimated 5,400 employed in 2019.

It is our aim, through the region's strategic links, to continue to build capability in the tourism sector, and create, support and promote high quality products and services, that will deliver increased economic and employment opportunities.

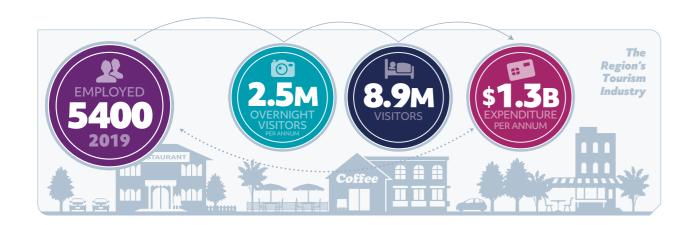
The tourism sector in the South West has an opportunity to connect across other industry sectors, to create and sustain a diverse regional economy. The sector works closely with local, state, and national agencies, as well as regional associations to drive innovation within the industry.

We will take a leadership role in the areas of strategic tourism policy, planning, key events, major infrastructure and targeted investment; and continue to support initiatives such as product development, capacity building and packaging. All of these will be in partnership with our key stakeholders at a local, state and national level.

Key priority initiatives over the next three years include:

- > At a state and national level, champion assistance to business to recover from the COVID-19 and adapt to long-term changes in the tourism sector.
- > Though a Memorandum of Understanding between Australia's South West, the South West Development Commission and the Great Southern Development Commission, work in partnership to improve the overall economic contribution and collaboration in tourism for both the Great Southern and South West regions.
- > Increase the economic value of tourism to the region and state by implementing a Regional Destination Development Plan, in cooperation with tourism associations and local and state government, that includes priority projects for business case development. Within this, work with peak bodies to consider a Tourism Events Strategy, including attraction of new large—scale events.
- > Identify gaps and opportunities for strategic investment in new and existing tourism products, infrastructure and facilities.
- > Linked to this, we will continue to support tourism plans and initiatives such as:
 - Increasing the awareness of Bunbury Geographe as a tourism destination to grow jobs in the tourism and hospitality sector and support the implementation of the Bunbury Tourism Action Plan.
 - ~ Continue to assist the commercial success of the Dolphin Discovery Centre.

- Support the development of iconic tourism attractions and experiences that can attract visitors from the Eastern States and overseas, which will also lead to greater visitor dispersal across the entire region. Examples include: the Australian Underwater Discovery Centre at Busselton Jetty; the 'Unbeaten Tracks' project, with a focus on the Karri Bowl component in and around the Boranup Forest.
- In partnership with key stakeholders, continue to support the new air services into the Busselton Margaret River Airport so that regional opportunities across the South West are optimised.
- > Improve trail coordination across the region by continuing to assist and expand the South West's 'trail' offerings including hiking, biking and horse-riding trails.
- > In partnership with the WA Indigenous
 Tourism Operators Council and local Noongar
 communities, explore opportunities to develop
 Aboriginal tourism products and experiences
 to showcase heritage and cultural assets and
 tourism opportunities.
- Investigate planning and staged development of inland waterways such as Black Diamond Lake (Allanson), Minninup Pool and Stockton Lake for tourism accommodation, day use facilities and cultural engagement opportunities.
- > **Support initiatives that build competitiveness** and business-capability in the tourism and hospitality sector.





The key priorities to support the sector are as follows:

- > Augmenting Busselton and surrounds as a Creative Tech and Screen Hub for investment attraction, linked to the regional airport opportunity and potential to continue to improve high speed digital bandwidth. Busselton was recently identified as an Australian Creative Cultural Hotspot by the Queensland University of Technology in research to quantify the drivers for creative hubs around the country.
- > Supporting the Local Content agenda to encourage the use of local creative and technology developers and promote awareness of, and access to, projects in the region.
- Strengthening cross-sector partnerships and collaboration to ensure that primary industries, tourism and manufacturing access locally developed programs and creative technologies.
- > Exploring options for developing a gaming network linked back to education and wider opportunities.

- > Continuing to work with the education sector to provide study hubs within the region that will build capacity and attract and retain students, focusing on remote digital learning. This will also benefit the continued development of networks across the region.
- Building a year-round program of creative and technology events, focused on developing collaboration across sectors for national and international partnerships.
- > Working with ScreenWest to build screen industry capability with Local Government and regional tourism bodies to attract productions to the region and create economic opportunities from the film impact.
- > **Support proponents** to develop commercially viable and innovative cultural and performing arts hubs in the Bunbury Geographe, Capes and Southern Forests sub regional communities, building on the characteristics and advantages that make each region unique.



Cross Cutting Activities

For our economy to grow and new jobs to be created, we will encourage new business activity whilst supporting our existing businesses to grow with the introduction of new activities, and subsequent market expansion.

Export growth

The South West is already an export-oriented region, whether it is the integration of our economy with international markets through mining, forestry, wine and food or through commercial services and

international tourism. High numbers of regional businesses and jobs are dependent on healthy levels of overseas trade. However we need constant reinvestment to sustain our competitiveness in international markets. For our economy to grow, we will encourage more businesses to enter the export markets and for the South West to diversify our export products and develop new markets in which we trade.

SWDC will continue to prioritise our work supporting exporters as the delivery partner for Austrade's TradeStart program.



Key priority initiatives over the next three years include:

- > **Normalisation of exports** for South West producers post COVID-19, supporting additional investment into export infrastructure while pursuing new export markets and increased export income across all exporting sectors.
- > **Development of a South West Export Strategy** in partnership with the private sector, Austrade, the Department of Jobs, Tourism, Science and Innovation, Local Governments, Chambers of Commerce and Industry and service providers including freight forwarders and infrastructure owners. This will include an increased focus on TradeStart's outreach and capacity building.
- > Contribute to the State's Asian Engagement Strategy and support programs that are aligned with the Asian Engagement Strategy, including focused effort to grow markets within our time zone.

Investment attraction

Our existing businesses and sectors offer strong opportunities for growth, but we are operating in a competitive environment where the South West is competing internationally for business investment.

This is why SWDC will be investing heavily in investment attraction and facilitation activities. SWDC will support 'Invest in South West' with Regional Development Australia - South West and is partnering with the Department for Jobs, Tourism, Science and Innovation for investment business case development for new technology attraction in green energy. We will also partner with the agricultural sector to assess the options for attracting investment in processing facilities for the South West.

In terms of foreign investment, our focus is on those investors able to bring technology, innovation and sustainable long-term jobs to the region. We will prioritise investments that bring new technologies, support export-oriented growth and commercial activities which would not otherwise occur. We will also focus on investments which have the potential to create supply chain opportunities for businesses already located in the region and WA.

SWDC will proactively target infrastructure investment in supply chains of existing internationally competitive sectors, mining, energy, forestry and timber technologies and digital and ICT investments.



- > Launch of 'Invest South West' investment attraction portal in collaboration with Regional Development Australia - South West, local authorities, chambers and other partners.
- > **An audit** of the South West's competitive advantages, sub sector analysis and business cost comparators in order to develop compelling, niche investment propositions that can help guide and support Austrade's efforts offshore.
- > **Promotion of 'South West Angels'** a grouping of early-stage 'angel' investors to help local start-ups and growth-oriented firms. Introduce linkages with international tech hubs and start up communities.

Events

The South West hosts many iconic events, with the tourism sector being the driving force behind most major events. Specific sector events also offer broader impacts, linkages and opportunities. For example, wine sector events attract tourists and business events drive income opportunities for a wide range of business operators and communities. Likewise, creative sector events add to tourism appeal but also support innovation and learning for other business sectors.

Within an incredibly vibrant events space, SWDC recognises the value of local and regional events to drive tourism and business visitors and income into our towns.

While the event space is necessarily fluid, SWDC will continue to demonstrate the importance of events as key economic drivers throughout the region.

- > Promote iconic events; and
- > Support new events that substantially enhance our reputation as a tourism, business and lifestyle destination.





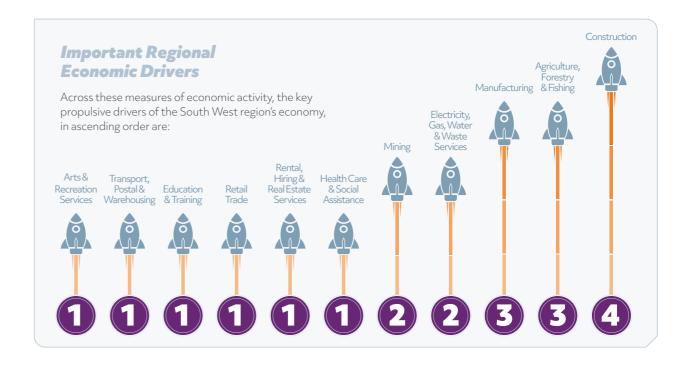


Economic Data

Key propulsive sectors of the economy

The industry sectors which are the key drivers of the South West region's economy in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages) are detailed below.

Industry sectors	Backward Linkages	Exports	Employment	Value-Added	TOTAL
Agriculture, Forestry & Fishing	lacksquare	lacksquare		 ✓	3
Mining		$lue{ extstyle d}$		oxdot	2
Manufacturing		$lue{ extstyle oldsymbol{arphi}}$	$oldsymbol{arDelta}$	oxdot	3
Electricity, Gas, Water & Waste Services	lacksquare	lacksquare			2
Construction	lacksquare	$lue{oldsymbol{arphi}}$	$oldsymbol{ olimits}$	$oldsymbol{arDelta}$	4
Wholesale Trade					0
Retail Trade			\checkmark		1
Accommodation & Food Services					0
Transport, Postal & Warehousing	\square				1
Information Media & Telecommunications					0
Financial & Insurance Services					0
Rental, Hiring & Real Estate Services				lacksquare	1
Professional, Scientific & Technical Services					0
Administrative & Support Services					0
Public Administration & Safety					0
Education & Training			\checkmark		1
Health Care & Social Assistance			<u> </u>		1
Arts & Recreation Services	lacksquare				1
Other Services					0



Value Added Report (2019)

Value-Added data represents the marginal economic value that is added by each industry sector in a defined region.

Industry sectors in the South West ranked by Value-Added		South West	Western Australia	
	\$M	%	\$M	%
Rental, Hiring & Real Estate Services	\$1,998.309	14.72%	\$30,686.946	11.39%
Mining	\$1,364.100	10.05%	\$68,066.575	25.26%
Construction	\$1,317.807	9.71%	\$22,818.671	8.47%
Agriculture, Forestry & Fishing	\$1,123.962	8.28%	\$6,404.291	2.38%
Manufacturing	\$1,095.204	8.07%	\$11,884.171	4.41%
Health Care & Social Assistance	\$967.204	7.13%	\$15,855.093	5.88%
Education & Training	\$803.440	5.92%	\$13,590.097	5.04%
Retail Trade	\$771.410	5.68%	\$10,270.423	3.81%
Public Administration & Safety	\$545.767	4.02%	\$12,511.969	4.64%
Financial & Insurance Services	\$544.974	4.02%	\$14,917.329	5.54%
Electricity, Gas, Water & Waste Services	\$544.154	4.01%	\$6,304.160	2.34%
Accommodation & Food Services	\$476.281	3.51%	\$5,910.254	2.19%
Administrative & Support Services	\$430.182	3.17%	\$7,834.010	2.91%
Professional, Scientific & Technical Services	\$407.423	3.00%	\$13,126.531	4.87%
Transport, Postal & Warehousing	\$405.539	2.99%	\$10,829.783	4.02%
Wholesale Trade	\$299.311	2.21%	\$8,039.980	2.98%
Other Services	\$267.239	1.97%	\$4,565.740	1.69%
Information Media & Telecommunications	\$130.025	0.96%	\$3,774.992	1.40%
Arts & Recreation Services	\$79.300	0.58%	\$2,052.923	0.76%
TOTAL	\$13,571.634		\$269,443.936	

Tourism Sector (2019)

The total value of tourism related output for the South West is estimated at \$1,338.291. In the South West economy, it is estimated that the following percentages (Table 3) relate to industry sectors' output that is generated to service demand from tourists.

Industry Sectors' Output Related to Tourism			South West	Weste	ern Australia
		\$M	%	\$M	%
Accommodation & Food Services		\$688.652	51.46%	\$4,912.613	34.23%
Manufacturing		\$149.803	11.19%	\$970.398	6.76%
Retail Trade		\$106.383	7.95%	\$1,449.402	10.10%
Ownership of Dwellings		\$99.976	7.47%	\$665.601	4.64%
Transport, Postal & Warehousing		\$83.577	6.25%	\$2,627.477	18.31%
Administrative & Support Services		\$73.497	5.49%	\$914.731	6.37%
Arts & Recreation Services		\$43.451	3.25%	\$812.596	5.66%
Education & Training		\$30.269	2.26%	\$1,051.456	7.33%
Agriculture, Forestry & Fishing		\$17.526	1.31%	\$72.530	0.51%
Rental, Hiring & Real Estate Services		\$16.588	1.24%	\$258.053	1.80%
Wholesale Trade		\$11.359	0.85%	\$317.648	2.21%
Other Services		\$7.894	0.59%	\$106.883	0.74%
Health Care & Social Assistance		\$4.930	0.37%	\$87.786	0.61%
Information Media & Telecommunications		\$4.386	0.33%	\$106.575	0.74%
Mining		\$0.000	0.00%	\$0.000	0.00%
Electricity, Gas, Water & Waste Services		\$0.000	0.00%	\$0.000	0.00%
Construction		\$0.000	0.00%	\$0.000	0.00%
Financial & Insurance Services		\$0.000	0.00%	\$0.000	0.00%
Professional, Scientific & Technical Services		\$0.000	0.00%	\$0.000	0.00%
Public Administration & Safety		\$0.000	0.00%	\$0.000	0.00%
Т	OTAL	\$1,338.291		\$14,353.749	

The industry sector in the South West that is most supported by visitor demand is Accommodation & Food Services. It is estimated that visitor demand supports 60.8% of total output for this sector.

Trade (2019)

Regional Exports

The total regional export estimate for the South West is \$11,319.043, Western Australia is \$152,309,963. The South West accounts for 7.43% of the entire of West Australia's Exports.

Industry sectors in the South West ranked by Regional Exports		South West	Weste	ern Australia
	\$M	%	\$M	%
Manufacturing	\$4,525.756	39.98%	\$20,297.470	13.33%
Mining	\$2,413.667	21.32%	\$101,740.768	66.80%
Agriculture, Forestry & Fishing	\$1,226.677	10.84%	\$4,639.191	3.05%
Construction	\$857.092	7.57%	\$6,571.266	4.31%
Electricity, Gas, Water & Waste Services	\$686.866	6.07%	\$896.490	0.59%
Accommodation & Food Services	\$421.751	3.73%	\$1,730.479	1.14%
Education & Training	\$317.528	2.81%	\$4,245.359	2.79%
Rental, Hiring & Real Estate Services	\$194.510	1.72%	\$1,080.416	0.71%
Retail Trade	\$171.541	1.52%	\$664.981	0.44%
Transport, Postal & Warehousing	\$153.973	1.36%	\$3,522.747	2.31%
Wholesale Trade	\$74.151	0.66%	\$1,991.803	1.31%
Administrative & Support Services	\$73.206	0.65%	\$846.615	0.56%
Arts & Recreation Services	\$45.737	0.40%	\$1,090.226	0.72%
Other Services	\$36.959	0.33%	\$65.773	0.04%
Professional, Scientific & Technical Services	\$32.177	0.28%	\$1,021.616	0.67%
Health Care & Social Assistance	\$28.883	0.26%	\$175.828	0.12%
Information Media & Telecommunications	\$23.429	0.21%	\$913.040	0.60%
Public Administration & Safety	\$18.517	0.16%	\$363.440	0.24%
Financial & Insurance Services	\$16.624	0.15%	\$452.457	0.30%
TOTAL	\$11,319.043		\$152,309.963	

Regional Imports

The total regional import estimate for Western Australia is \$91,654,675, the South West is \$8,498,794 or 9.27% of the total Regional Imports for Western Australia.

Industry sectors in the South West ranked by Re	gional Imports		South West	Weste	ern Australia
		\$M	%	\$M	%
Manufacturing		\$3,428.739	40.34%	\$28,727.043	31.34%
Construction		\$933.943	10.99%	\$11,329.410	12.36%
Mining		\$812.728	9.56%	\$19,094.018	20.83%
Agriculture, Forestry & Fishing		\$494.517	5.82%	\$1,528.012	1.67%
Electricity, Gas, Water & Waste Services		\$459.784	5.41%	\$1,910.436	2.08%
Rental, Hiring & Real Estate Services		\$392.680	4.62%	\$4,210.510	4.59%
Accommodation & Food Services		\$377.685	4.44%	\$3,101.983	3.38%
Transport, Postal & Warehousing		\$216.172	2.54%	\$4,317.365	4.71%
Retail Trade		\$172.265	2.03%	\$1,155.962	1.26%
Professional, Scientific & Technical Services		\$169.703	2.00%	\$3,096.992	3.38%
Health Care & Social Assistance		\$167.379	1.97%	\$1,636.181	1.79%
Financial & Insurance Services		\$140.718	1.66%	\$2,306.647	2.52%
Other Services		\$129.098	1.52%	\$1,186.894	1.29%
Public Administration & Safety		\$116.647	1.37%	\$1,411.423	1.54%
Education & Training		\$112.848	1.33%	\$1,085.209	1.18%
Wholesale Trade		\$111.189	1.31%	\$1,315.305	1.44%
Administrative & Support Services		\$109.359	1.29%	\$1,147.415	1.25%
Information Media & Telecommunications		\$103.137	1.21%	\$2,133.236	2.33%
Arts & Recreation Services		\$50.203	0.59%	\$960.632	1.05%
	TOTAL	\$8,498.794		\$91,654.675	



A region that has industryready infrastructure and land

Regional Development Strategic Theme:



Grow existing, and develop new, non-renewable sector industries.



Grow existing, and develop new, alternative industries.

Ensuring that business and industry have access to world class infrastructure is critical for growth and ongoing productivity gains across the region. SWDC leverages public and private sector investments othat infrastructure is maintained, and that business and industry get access to new industry-ready infrastructure for growth.

The infrastructure that improves economic efficiency and strengthens delivery networks is vital for the continued growth of the region's economy. It is important that infrastructure decisions support and protect our areas of competitive advantage, both locally and globally.

Core industrial infrastructure elements of the South West include roads, transport, land, utilities, Bunbury Port and digital technology.

Industry-ready infrastructure and land

Road infrastructure

A focus on road infrastructure that improves efficiency and strengthens regional delivery networks for freight while also providing 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. Efficient road linkages to the port and key industrial parks are an important element to ensure the congestion problems experienced at Fremantle are not duplicated in Bunbury. The Bunbury Outer Ring Road will be the largest road construction project in the region's history.

Key priority initiatives over the next three years include:

- > **Deliver the Bunbury Outer Ring Road project**, the largest construction project in the South West, through the identification of leverage opportunities and support for local contractor participation.
- > Support investment into regional arterial freight and transport routes via support for the upgrade of strategic haulage/tourism and interface roads across the South West that unlock economic opportunities for the region.

Rail networks

In a regional context, rail is an important part of a supply chain connecting industry with export markets via the Bunbury Port. The Brunswick-Port section of the South West main line is nearing capacity, with minimal opportunities to add additional new large industry users.



- > To promote higher volumes of passengers on public transport and to reduce carbon emissions and deliver better planning outcomes, we will support pre-feasibility work on the development of transport options to support the movement of students, workers and tourists within Bunbury and between Bunbury and Busselton.
- > Investigate options to improve the speed and reliability of the Australind Perth-Bunbury train service and review previous work and studies into the proposal for a fast rail service between Perth and Bunbury (Western Australia's second city).

Bunbury Port and Waterfront

The Bunbury Port plans to consolidate its landholdings and expand the inner harbour basin to improve overall efficiency as part of its soon to be released structure plan. This will provide opportunities for the staged delivery of new berths and for future 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.



- > Support expansion of the Bunbury Port through the identification of diversification options which value-add to the region's exporters and industries. This may include capacity upgrades, new logistics infrastructure and/or new trade opportunities.
- > As part of our ongoing support for Transforming Bunbury's Waterfront
 - We will lead the establishment of infrastructure (breakwaters, marine hardstand and associated services) that supports the establishment of a marine services industry on the Bunbury Waterfront.
 - We will also complete Transforming Bunbury's Waterfront' Stage 2 works, including Jetty Road and Casuarina Drive.

South West Aviation

The Busselton Margaret River Airport (BMRA) has been developed as the key regional airport for the South West, connecting the region to Melbourne. The Commission will continue to work with the City of Busselton to explore the expansion of domestic services to other east coast ports and to assess the market potential for international passenger/freight services to Asian destinations. This will include an assessment of airport infrastructure (primarily freight infrastructure) and services required to establish a service.

Bunbury and Manjimup general aviation airports support general aviation and charter aircraft movements and offer no landing fees, attractive ground rents and non-congested airspace.





- > A review into the feasibility of the Busselton Margaret River Airport, to support an international freight/passenger service and road/transport linkages to Bunbury Geographe and sub-regional towns and communities.
- > Supporting the delayed commencement of the Jetstar Melbourne – Busselton service, disrupted by COVID-19, and work with the City of Busselton to assess additional services to other east coast capitals.
- As a growing regional city and capital of the South West, Bunbury airport is attractive for corporate services, pilot training, fire and emergency support and a fleet of water bombers. We will support pre-feasibility work on Bunbury Airport developing as a high-quality, general aviation airport providing a range of essential aviation services and pilot training.
- As part of our investment attraction efforts, the South West (Busselton, Margaret River, Bunbury, Collie and Manjimup airports) could be promoted for aviation training, including international pilots.

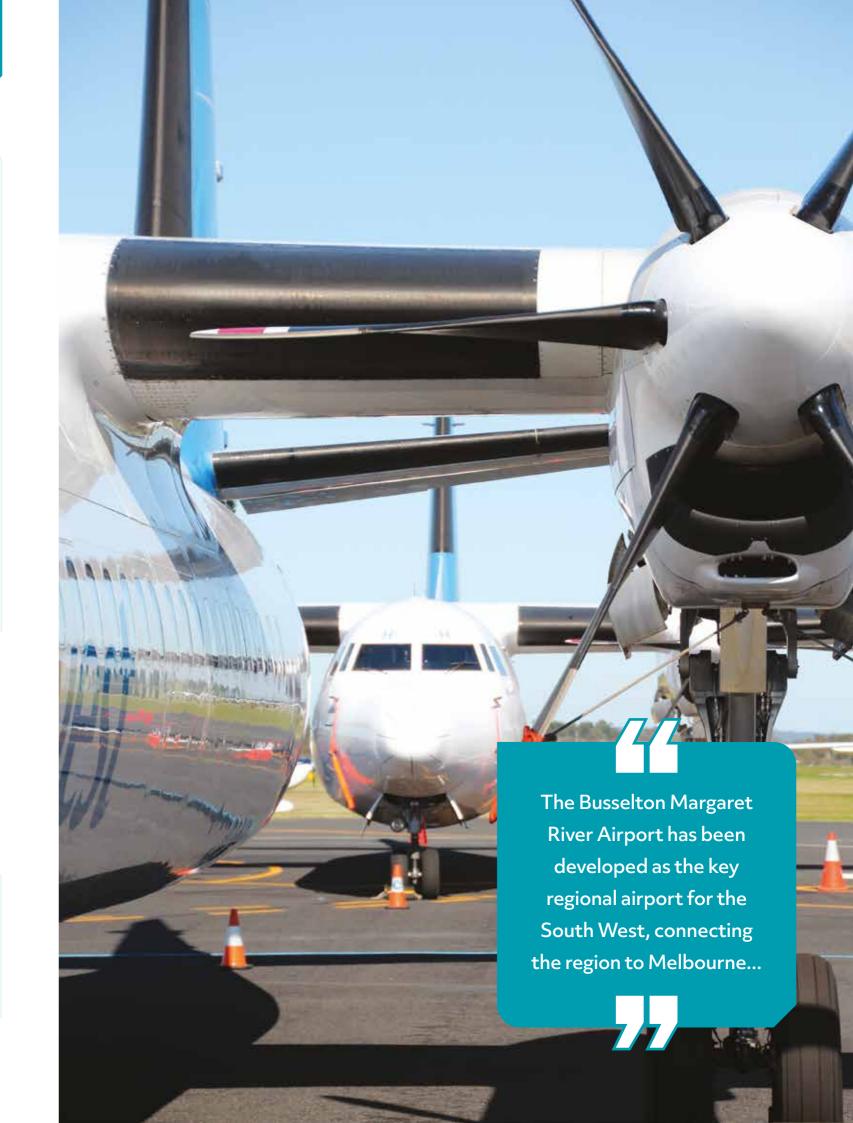
Energy

The South West and Greater Bunbury have been identified as key areas of (electricity) load growth in the South West Interconnected System. Western Power is planning new substation capacity to manage this growth.

New and emerging opportunities are also developing in the renewable energy sector in the areas of wind, solar, hydrogen and battery storage that will create new options for distributed generation.



> To support sustainable energy supply and innovation, we will partner in regional and/ or sub-regional studies into innovative energy generation and distribution networks, including in biomass, wind, solar and hydrogen.



Digital ready

Broadband is considered critical infrastructure and the backbone of the modern internationally connected and competitive economy. The South West must continue to ensure that high capacity bandwidth is available in key centres and industry hubs to attract and retain emerging industry.



- > To support high capacity digital communications, we aim to have NBN and wireless services in all town sites and will undertake analysis to identify gaps in NBN wireless and fibre to node in all regional towns and fringe area town sites/settlements.
- > We will undertake analysis to identify and address communication blackspots in communities, along major transport linkages and at tourism hotspots to ensure enhanced connectivity and/or support for emergency services.
- > We will support increased bandwidth and broadband capacity up to 10GW and endeavour to attract industry and high technology related industries to the region by facilitating the development of a feasibility study into the economic/market benefits of a dedicated backhaul data link (with redundancy) to support advanced manufacturing opportunities that require enhanced connectivity.

Water and waste

Ensuring access to potable supplies for communities and fit-for-purpose supply for industry, business and recreational irrigation is essential to 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.

Increased focus and support is required to find sustainable solutions to emerging waste issues — in accordance with the State's Waste Strategy — such as the reduction of available land for landfills, increasing technology capability to divert waste and a growing social desire to use waste products more effectively.



- > Supporting the development of regional or sub-regional waste facilities capable of recycling and optimising management of waste.
- > Improving water use efficiency and promoting sustainability in our irrigation system. We will work with DPIRD to continue to provide support for the establishment of efficient systems for the distribution of fit-for-purpose irrigation water, including Myalup and the Southern Forests Irrigation Scheme
- > **Supporting industrial areas** with water supply options where water pressure infrastructure is unavailable or insufficient.

Land for industry

The availability of appropriately zoned and serviced land for industry is critical if the region is to maximise the opportunities that come from its many competitive advantages.

The South West has major industry land at Kemerton (Shire of Harvey) and Shotts (Collie), plus emerging opportunities at Coolangatta (Collie).



- Attracting new industry and facilitating the expansion of established capacity through improved access to industry-ready strategic and general industrial land.
- Sustaining the environmental qualities of land, by supporting the development of regional or sub-regional waste facilities capable of recycling and optimising waste management.
- > Working with DPIRD to ensure there is a balance between the competing needs of an expanding forestry industry and high value food production land users.



STRATEGIC PRIORITIES over the next three years

A region that has a highly skilled and industry ready workforce



The Western Australian Government's commitment to protecting and growing jobs in regional Western Australia means a focus for us on strengthening our economy and supporting business growth and investment in the South West.

A skilled workforce to take up the jobs of the future

To ensure the local workforce gets the opportunity to take up new jobs as they are created, they must be given the opportunity to develop the required skills and qualifications to be competitive in the labour market.

The South West has a relatively diverse labour force compared to other regional economies in WA and is well positioned to take advantage of the expected growth trends across a range of industries into the future.

The region already has significant densities of deep skills in a number of industries with health care, retail trade, education, mining, manufacturing and construction and other services including the hospitality and tourism sectors. Together, these industries also make up approximately two thirds of the SWDC workforce. Other industries with a specialised workforce in the region are agriculture and public administration.

Health care, education, accommodation and food, construction and beverage manufacturing are key industries that are expected to grow between 9-15 per cent³ across the Australian economy by 2023⁴. An opportunity exists to work closely with these industries to identify and address any barriers or limitations to growth to secure future jobs.

Education and training pathways for young people, upskilling for existing workers and targeting areas of jobs growth and industry skills requirements, must be well planned and implemented. By monitoring economic trends and changes in technologies, we will be able to identify the future needs of our industries and communities, to forward plan the educational offering and training needs to support the future workforce.

3 & 4 Note: beverage manufacturing comprises almost 20 per cent of the South West's manufacturing workforce (REMPLAN Economy, South West Region – Employment Report, 2018).

Department of Jobs and Small Business, Industry Projectionsfive years to May 2023, https://linip.gov.au/default.aspx?LMIP/EmploymentProjections-September 2018.

SWDC has identified key sub themes to direct our activities:

- > Supporting education and training pathways for young people and prioritising STEM.
- > Upskilling the existing workforce and addressing structural transformation and transition in key occupations and industry sectors.
- > Promoting industry partnerships between schools, TAFE colleges and universities to link students with employers and the latest skills and technologies.

Young people and prioritising STEM

There is evidence to suggest that the impacts of COVID-19 will continue to have an impact on young people's education and their employment opportunities throughout the 2021 - 2023 period. Importantly we are keen to ensure that apprenticeship placements continue and that the South West has a strong supply of our young people entering and graduating from apprenticeship schemes.

Key priority initiatives and investments

over the next three years include:

- > Ensure that the South West maintains
 a significant pool of apprentices and
 apprenticeship providers. We will be actively
 monitoring the situation and will seek additional
 resources where required.
- Support partnerships between TAFE/VET providers and industry to enable apprentices and trainees' access to industry led centres of research and advanced technologies as part of their training.
- > **Promote awareness** of, and access to, graduate programs for graduating VET and higher education students by supporting career development, and job opportunities in industry, government and the not for profit sector.

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Education and training pathways for young people, upskilling for existing workers and targeting areas of jobs growth and industry skills requirements, must be well planned and implemented.

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- > Place a stronger focus on underpinning skills needed to capitalise on the use of new technologies. These include higher level language, literacy and numeracy (LLN) skills, digital literacy, Science, Technology, Engineering and Maths (STEM) skills and skills in creativity, critical and analytical thinking and complex problem solving. We will support schools and education providers in programs that provide improved pathways for students in STEM and language, literacy and numeracy programs.
- > Develop a workforce development, training and employment plan for the region to identify current and emerging skills requirements including future skills shortages to meet industry requirements.

Upskilling the existing workforce and addressing structural transformation in key communities



- > Improving access to advanced skills
 development to meet industry's changing
 skills requirements. We will support the
 development of partnerships between
 researchers, industry and education institutions
 to upskill or retrain existing workers in the use of
 advanced technologies in industries.
- > Working with communities facing structural economic transformation. It is imperative that workers are provided opportunities to develop new skills and to ensure that they have good, sustainable careers. The Collie Bunbury Economic Development Plan is injecting substantial investment to support the transformation of Collie, but other communities are also affected and we will work with local governments and State and Federal Agencies to support job creation opportunities.

Industry partnerships

Continued effort is required to develop an ongoing understanding of industry trends and future workforce needs through consultation and research, to shape the South West region's local workforce and its skills for the future. Close partnerships with industry are required.



Key priority initiatives

over the next three years include:

Facilitating industry roundtables with representatives from local manufacturing businesses and related sectors, Federal and State government representatives, leading education providers, peak bodies, unions and industry leaders. Two previous successful roundtables identified the skills challenges local business are experiencing, including the imperative to work in partnership with industry and government to strengthen the effectiveness and impact of the VET and higher education systems to train, upskill and reskill workforces.

Attraction and retention of skilled workers and their families

Building, maintaining and promoting liveable communities in the South West is essential to the ongoing attraction and retention of highly skilled workers. With global demand for advanced skilled labour, the South West region will need to compete in attracting those workers with bespoke skills for our developing industries. Without a skilled and competitive workforce, the region's economic growth plans will be significantly constrained.

Attracting skilled workers is a consequence of robust economic growth and job creation.



> Ensuring sector development, export and investment strategies include workforce profiling to identify jobs gaps and opportunities for skilled domestic and international migration to the South West.

Employment Data

Full Time Equivalent

The total full-time equivalent jobs estimate for the South West is 71,633 jobs. The top five industry sectors account for 52.8% of all employment in the South West.

Industry sectors in the South West ranked by FTE Employment		5	South West
		Jobs	%
Retail Trade		8,686	12.13%
Health Care & Social Assistance		8,649	12.07%
Construction		7,569	10.57%
Education & Training		6,635	9.26%
Manufacturing		6,624	9.25%
Accommodation & Food Services		5,881	8.21%
Agriculture, Forestry & Fishing		4,991	6.97%
Public Administration & Safety		3,560	4.97%
Other Services		2,971	4.15%
Transport, Postal & Warehousing		2,624	3.66%
Administrative & Support Services		2,505	3.50%
Professional, Scientific & Technical Services		2,466	3.44%
Mining		2,248	3.14%
Electricity, Gas, Water & Waste Services		1,312	1.83%
Rental, Hiring & Real Estate Services		1,242	1.73%
Wholesale Trade		1,149	1.60%
Arts & Recreation Services		1,039	1.45%
Financial & Insurance Services		997	1.39%
Information Media & Telecommunications		485	0.68%
	TOTAL	71,633	

Wages and salaries

The total wages and salaries estimate for the South West is \$6,482,907.

Industry sectors in the South West ranked by V	Vages and Salaries		South West	Western Australia	
		\$M	%	\$M	%
Health Care & Social Assistance		\$825.259	12.73%	\$13,430.613	11.32%
Education & Training		\$711.506	10.98%	\$12,020.699	10.13%
Construction		\$670.460	10.34%	\$11,607.944	9.78%
Manufacturing		\$638.201	9.84%	\$7,211.214	6.08%
Retail Trade		\$501.846	7.74%	\$6,681.496	5.63%
Public Administration & Safety		\$454.936	7.02%	\$10,176.694	8.58%
Administrative & Support Services		\$355.675	5.49%	\$6,577.164	5.54%
Mining		\$332.300	5.13%	\$11,681.099	9.85%
Accommodation & Food Services		\$302.782	4.67%	\$3,916.976	3.30%
Professional, Scientific & Technical Services		\$292.975	4.52%	\$9,444.785	7.96%
Agriculture, Forestry & Fishing		\$235.621	3.63%	\$1,218.647	1.03%
Transport, Postal & Warehousing		\$218.526	3.37%	\$5,143.947	4.34%
Wholesale Trade		\$186.489	2.88%	\$5,009.384	4.22%
Other Services		\$185.901	2.87%	\$3,209.650	2.71%
Electricity, Gas, Water & Waste Services		\$164.712	2.54%	\$1,764.011	1.49%
Financial & Insurance Services		\$155.033	2.39%	\$4,357.062	3.67%
Rental, Hiring & Real Estate Services		\$152.112	2.35%	\$2,508.762	2.11%
Information Media & Telecommunications		\$54.920	0.85%	\$1,515.809	1.28%
Arts & Recreation Services		\$43.653	0.67%	\$1,155.018	0.97%
	TOTAL	\$6,482.907		\$118,630.974	



A region that supports Aboriginal economic development

Regional Development Strategic Theme:



Promote Aboriginal economic development

A key theme of this Strategic Plan is Aboriginal economic development. The focus is on building positive relationships between the Traditional Owners of the land—the Noongar people—and the Commission, as well as leaders of industry, government and the wider community to leverage opportunities for the Aboriginal community. Our priority in terms of Aboriginal economic development is partnering and building relationships with the Noongar people to deliver positive economic outcomes.

Promoting opportunities for Indigenous economic development

The South West is home to many Noongar businesses and non-profit enterprises. They make an important contribution to job creation, particularly for Noongar and Indigenous community members. SWDC seeks to build on the strengths of the Noongar community to foster and grow employment in Noongar owned businesses and Noongar/non-Noongar joint ventures.

The guiding principles of engagement and partnership with the Noongar people is recognition that Noongar people and businesses are a valued part of the local and regional economy in the South West, and to ensure that channels of communication are open regarding Local Content and State Government tendering opportunities.

Major projects, including the Bunbury Outer Ring Road, are committed to Aboriginal participation. On this infrastructure construction project, targets for Aboriginal participation have been mandated and put in place for both Aboriginal employment and engagement of Aboriginal businesses.

Building robust communities requires partnership and collaboration. State Government involvement through Regional Economic Development (RED) grants and the Collie Futures Fund provide opportunities to unlock Aboriginal economic development opportunities.

Many of the South West region's iconic tourist assets are recognised as significant cultural and heritage sites of the Noongar people. SWDC will continue to ensure that these sites are respected and protected, and that Noongar and other Indigenous-owned enterprises are well represented in tourism and events marketing to encourage interstate and international visitors to engage with Noongar cultural and educational experiences.

Tourists will be encouraged to say "kaya" to the region as they visit to share in unique and authentic Noongar

tourism experiences. These experiences will support understanding of culture, customs and history while enriching the cultural fabric of local communities.

There are mechanisms to maximise opportunities for Aboriginal employment across the economy, including through providing pathways aimed at job-readiness.

Our support for economic development has resulted in opportunities, including the transformation of Roelands Village, indigenous art in global markets, and culinary training.



Key priority initiatives over the next three years include:

- > Work in collaboration with local Indigenous businesses and corporations to develop and support **Indigenous capacity building** initiatives that will increase participation rates and maximise local content outcomes.
- > Work with Indigenous businesses and the SWDC Tradestart Team to **link to new markets** and investors including in the tourism and agribusiness sectors.
- > Work in collaboration with the Local Content Advisory Network and lead contractors to ensure local Indigenous businesses have **direct links to lead contractors** in the delivery of the Bunbury Outer Ring Road.
- > Recognise the South West's **Indigenous** heritage, culture and businesses are reflected in regional and economic development plans and initiatives including in major tourism development and infrastructure projects.







A region that has thriving, diverse and creative communities

Regional Development Strategic Theme:



Enhance regional living standards

Today, more than 178,000 people live in the South West region and it is anticipated that by 2031 the region will grow to around 226,000 people and potentially to 300,000 by 2050.

The importance of regional Western Australia to our State's economy is critical to securing future prosperity for all Western Australians. Maximising and taking advantage of the inherent strengths of our communities will be an important part of securing the future prosperity of the State.

Maintaining the diversity that our regional centres and rural towns bring to the region's economic picture is also important. But there are challenges we face. The vulnerability of our economy and our labour markets means that realising this potential is far from guaranteed.

Promoting the economic diversity of our regional towns and increasing the stability of our regional labour markets is important, but not the only driver. We must continue to promote and invest in creating thriving, diverse and creative communities for the South West to grow and prosper.

For our population to grow and our economy and labour markets to remain diverse, we must ensure there is continued focus on improved living standards such as quality education, accessible health care, affordable housing and essential services. This, along with sustainable employment, is what attracts people to our region and retains them.

The State Government has made significant investment in our towns and cities including the transformation of Bunbury's waterfront, as well as the revitalisation of our rural towns including Margaret River and Manjimup, and investment in tourism and

arts infrastructure including the newly built Margaret River HEART and the Busselton Margaret River Airport.

The design and revitalisation of our towns and cities is more than infrastructure and economic development and as much about people and their livelihoods. It is important we celebrate the historical and cultural identity of our region and encourage population growth in a way that is sustainable, while managing impact on the South West's highly sensitive environment and iconic appeal.

Our understanding of regional and local assets, latent potential, as well as what inspires and unites our communities, is key to the development of attractive, active places whose distinctive character presents significant competitive advantage.

While SWDC continues to support towns and Shires realise their visions, SWDC is also focussed on several regionally significant opportunities and challenges.

Providing strategic support to placemaking visions and delivery visions

SWDC will be a partner with community and regional local governments in the planning, design and revitalisation of our regional townsites. We aim to support communities in the achievement of their vision and to create built environments that promote people's health, happiness, and well-being.



Helping to strengthen Bunbury as WA's second city

The population of WA's South West is set to expand by over 48,000 people in the next 10 years, and approximately 122,000 by 2050. Bunbury lies at the core of, and is the designated Regional Centre for, the Bunbury-Geographe and South West regions respectively.

As the State's second city, Bunbury is strategically positioned to take advantage of its location relative to Perth and proximity to important local, regional and international transport corridors, including port, rail, road and air. Bunbury has long been recognised as the next major urban centre, or second city, in Western Australia, while Busselton, Margaret River, Collie and Manjimup have been in steady growth and transition.

The SWDC actively supports the promotion and revitalisation of Bunbury's central business district as crucial to strengthening the position of Bunbury as the State's second city. A major regional city will have a significant impact on the attraction of industry and investment into the South West region.

The vision for the City Centre, as identified in the Bunbury City Action Plan, is that the CBD will be:

- > Renowned as an attractive place to work, live, study, holiday, play and invest in.
- > The heart of Greater Bunbury: healthy, strong and vibrant. and
- > The regional capital embodying all the South West has to offer.

SWDC will support the implementation of the Bunbury City Centre Action Plan and will actively support revitalisation of the City Centre through the implementation of projects and programs that sustainably support the region's growing community and changing economy.

In terms of urban regeneration in Bunbury, the SWDC is supporting the Withers Urban Renewal and Revitalisation project to deliver a range of positive community outcomes, including improvements to community infrastructure and local amenity for its residents. The SWDC will continue to play an important role in this transformational project assisting the City of Bunbury to help revive Withers as a vibrant, safe and attractive suburb.

Develop a strategy to firmly position Bunbury as WA's Second City through collaboration with key state agencies and Bunbury-Geographe local government.

The SWDC, in conjunction with the City of Bunbury, will **develop a strategy to position Bunbury as WA's Second City** through collaboration with key state agencies and Bunbury-Geographe local government.

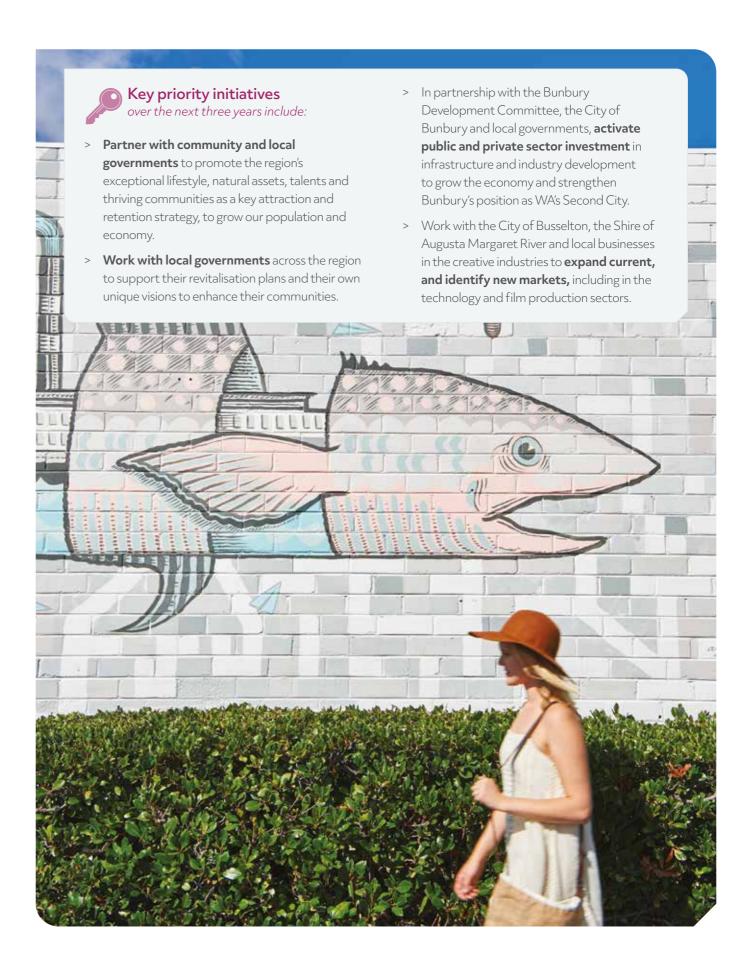
Augmenting Busselton as the creative industries hub of the South West

Busselton is rapidly growing and its reputation as a regional creative hub is building. Leveraging this opportunity will benefit the South West as Busselton has the capacity to act as an attractor of highly valuable knowledge economy activity, which will strengthen the wider region's appeal for tech sector investment and education sector investment. The SWDC will continue to support activities which encourage this clustering.

Promoting vibrant and diverse rural and hinterland townships.

We want to participate in the development of vibrant and unique townships that capture the diversity and retain the lifestyle attractors which characterise the cities, towns and settlements of the South West, building upon a sense of place and connection. We also recognise the vital role volunteers play, reinforcing the social and economic fabric of our region and contributing to safe and welcoming communities.

SWDC will continue to work closely with all the region's local governments and community groups to identify investment needs into hard and soft infrastructure, while helping proponents to secure funding and technical support to deliver better built environment and social outcomes. We will also help proponents realise their plans for delivering sporting and recreation facilities, including developing strategically located sports precincts and natural recreation spaces that reflect the preferences and needs of a diverse community.





A region that is well supported by the State Government/Commission

Regional Development Strategic Theme:



Building on our organisational values, the Commission is working on embedding a culture of excellence and continuous improvement, valuing leadership and creativity within the agency.

Delivering excellence within SWDC

Our corporate strategy is focussed on:

Organisational excellence

At the core of the Commission is a dedicated, capable and passionate team. Our people are considered the backbone of our organisation and that is because no matter what their role is, they play a crucial role in assisting with the delivery of our strategic priorities to deliver positive outcomes for the South West. Our people are on the ground, brokering partnerships, leveraging networks and being the catalysts for change.

Leadership and collaboration

Leadership and collaboration are central to our success. Our commitment to the people of the South West region is to provide leadership that is motivating, inspiring and relevant and seek to genuinely collaborate to maximise outcomes for our people and our communities.

Innovation and responsiveness

We aim to be global leaders in regional development, with valued and advanced skilled workers who are innovative and responsive. We seek to be well connected to peak bodies of government, industry and community and to be at the forefront in national and international research and to be well informed of the latest industry trends and developments.





High performance and improvement culture

We will continue to build a culture of high performance and improvement and provide our people with the necessary tools and resources to ensure decision-making is informed by evidence-based data and research.

Integrity and professionalism

The Commission will act with honesty, integrity and professionalism, recognising the importance of being open and accountable for our actions. We will continue to promote a culture that has clear expectations for behaviour in the public sector and ensure we have robust systems of governance and codes of conduct.

Supporting excellence and innovation across the region and with our partners

Throughout the period of this Strategic Plan, we will be taking action in the following areas:

- > We will create and support leadership programs within the region to build capacity and collaboration.
- We will create and support innovation and startup programs across the sectors to connect with national and international Chambers, government agencies and to work on joint innovation projects.
- We will develop cross industry sector collaboration programs.
- **We will promote** export-readiness and investment-readiness to increase international competitiveness across organisations.



Broker partnerships and networks across industry and the community to catalyse investment and growth.

over the next three years include:

- **Provide leadership**, collaboration and commitment to maximise outcomes for our people and our communities.
- > Build awareness and **recognition of** local Indigenous heritage and culture.
- > Take a lead role in the facilitation of regional development opportunities and support to stakeholders in the preparation of business cases and grants to advance innovation and economic development.
- > Build a **culture of high performance** and improvement to ensure decision making is informed by evidence-based data and
- > Continue to build on the **professionalism** and integrity of the Commission recognising the importance of being open and accountable for our actions.
- Continue to create and support leadership programs within the region to build **excellence and innovation** and build cross sector collaboration.









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