



CEDA STATE OF THE REGIONS SERIES:

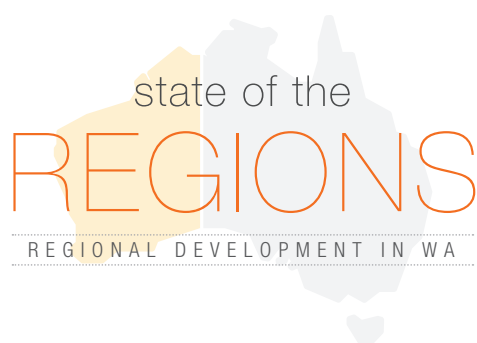
# Regional development in Western Australia

June 2016

CEDA STATE OF THE REGIONS SERIES:

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June 2016



### **About this publication**

CEDA State of the Regions series: regional development in Western Australia

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The views expressed in this document are those identified in the series, and should not be attributed to CEDA. CEDA acknowledges Deloitte Access Economics' support of the series and in drafting this report.

CEDA's objective in publishing this collection is to encourage constructive debate and discussion on matters of national economic importance. Persons who rely upon the material published do so at their own risk.

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### **About CEDA**

CEDA – the Committee for Economic Development of Australia – is a national, independent, member-based organisation providing thought leadership and policy perspectives on the economic and social issues affecting Australia.

We achieve this through a rigorous and evidence-based research agenda, and forums and events that deliver lively debate and critical perspectives.

CEDA's membership includes 700 of Australia's leading businesses and organisations, and leaders from a wide cross-section of industries and academia.

It allows us to reach major decision makers across the private and public sectors.

CEDA is an independent not-for-profit organisation, founded in 1960 by leading Australian economist Sir Douglas Copland. Our funding comes from membership fees, events and sponsorship.

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# Foreword



The CEDA Western Australia State of the Regions series has been a significant success drawing more than 1600 attendees and more than 120 speakers across nine events during the last two years.

Western Australia's regions are vital drivers of the State's economy. CEDA's aim through this series has been to bridge the gap between the city and the regions and to showcase the plans and opportunities for regional Western Australia as drivers of economic and social development for the State and the nation.

In particular, this series sought to improve understanding of how Western Australia's regions were adapting and transitioning for the future through innovation and best practice principles; how they were capitalising on new business opportunities; and what industry profiles were evolving in response to changing circumstances.

The series also provided an opportunity to:

- Showcase the leadership within regional Western Australia and provide thought-leadership to the regions;
- Provide a succinct update on the vision for each region, highlighting strengths and weaknesses to facilitate discussion on the challenges and opportunities that lie ahead; and
- Facilitate new connections and networking across the regions within business, government, academia and not-for-profit sector.

I think these objectives have more than been achieved.

As a consequence, this publication presents the culmination of the event series and provides key insights from the series along with overarching actions to help ensure Western Australia's Regions continue to thrive and prosper.

I would like in particular to thank the series sponsor, the WA Department of Regional Development, along with the 20 other sponsors who have made this series possible.

In addition, I would like to acknowledge Deloitte Access Economics' drafting of this report.

Special mention should also be made of WA Minister for Regional Development, the Hon. Terry Redman MLA who made himself readily available to participate throughout the event series.

Finally, I would like to congratulate and thank the CEDA WA team, and in particular former WA State Director Liz Ritchie, for the vision and tireless work in ensuring this series has been a success.

Professor the Hon. Stephen Martin,  
CEDA Chief Executive

# Foreword



The success of CEDA's Western Australia State of the Regions series reinforces the importance placed on regional development and the commitment and passion that people from across Western Australia have for the Regions.

It has been a great pleasure to attend these regional events and to lead the dialogue on the most important issues and opportunities facing our Regions.

It has been particularly pleasing to see so many Perth-based people getting out to the bush and engaging on regional issues.

Our Regions are vital drivers of the State's economy, contributing more than one third of Western Australia's economic activity and 95 per cent of the State's exports.

Given our natural and comparative advantages, innovative and skilled people and growing export markets, there are significant opportunities for the continued growth of regional economies.

The Royalties for Regions program underpins the State Government's long-term commitment to build vibrant regions with strong economies that are desirable places to live, work and invest.

Royalties for Regions has invested over \$6.9 billion of the State's mining and onshore petroleum royalties into regional communities since 2008.

It will always be easier and more efficient to fund projects in the city but unless we continue to have a government program focused solely on delivering better health, infrastructure, education and community investments into regional Western Australia – it is the Regions which will miss out.

Regional Western Australia is being transformed by this historic investment. The Ord-East Kimberley Expansion Project, Pilbara Cities, expanded Busselton airport and Augusta Boat Harbour are just some examples of strategic projects and infrastructure that will help support regional Western Australia into the future.

At a local level, try telling someone in the Regions that the Aged Pensioner Fuel Card, the new South West Emergency Helicopter, the significant expansion of mobile phone coverage or the support for Patient Assisted Travel Scheme, Royal Flying Doctor Service, St Johns Ambulance and emergency telehealth are not a good use of government funds.

Targeting our regional development effort and investment through robust strategy will deliver the best outcomes.

Regional Investment Blueprints in place in each Region outline growth and development aspirations, priority implementation actions and investment opportunities.

This series has provided a valuable platform for the nine Regional Development Commissions to outline regional priorities.

This series highlights the priorities that are common across the State, including:

- Building the capability of our people
- Enhancing key regional centres
- Investing in economic infrastructure
- Policy and service reform to remove barriers to growth
- Fostering the growth of emerging industries
- Building the resilience of existing industries
- Promoting opportunities for investment

I welcome the independent advice outlined in this report and congratulate CEDA, the Regional Development Commissions, the Department of Regional Development and other key contributors on such a successful series.

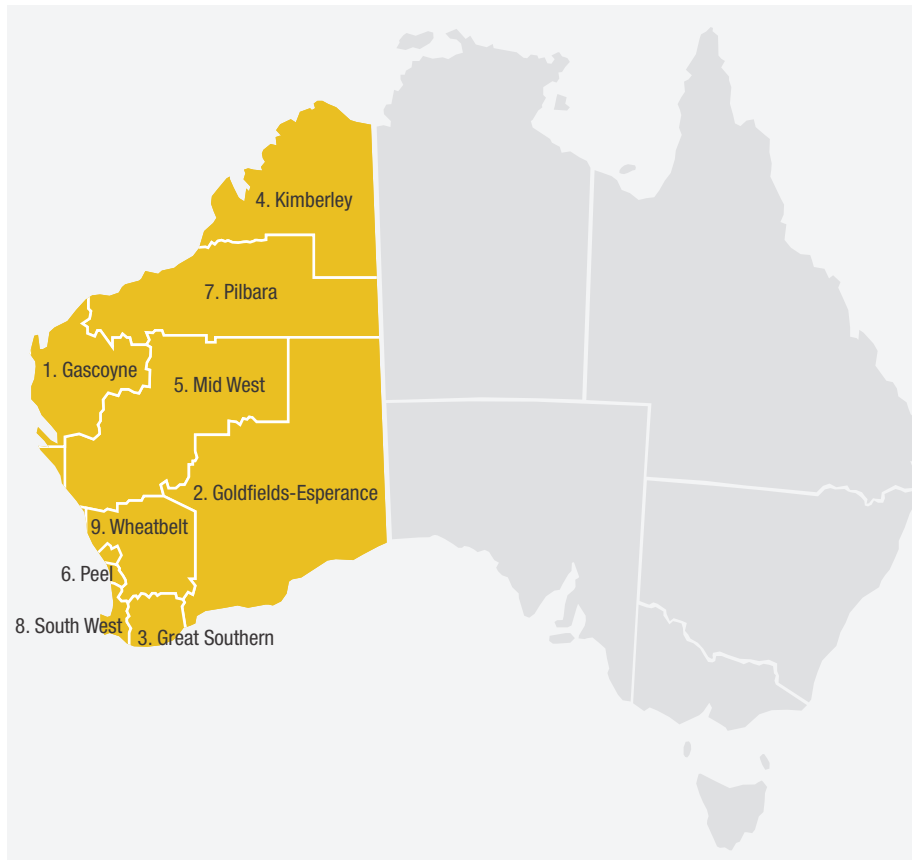
The. Hon Terry Redman MLA  
WA Minister for Regional Development; Lands  
Minister Assisting the Minister for State Development



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## Western Australia's regions

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### Actions to overcome the barriers to growth in the Regions

Five actions have been identified that will help activate the economic potential of regional Western Australia and ensure a sustainable future for regional communities:

1. Encourage strong leadership in the Regions by providing local leaders with the opportunity to make and be accountable for their own decisions.
2. Agree on each region's comparative advantages, with a view to developing region-specific branding within the wider regional development context.
3. Develop a pipeline of large, transformational investment projects that align with State-wide priorities and each region's comparative advantages.
4. Strengthen advice on regional spending by introducing transparent investment prioritisation frameworks and using robust evaluation frameworks to determine funding allocations.
5. Create innovation hubs in each region to connect local communities and businesses with government, industry, innovators and financiers.



# Western Australia's regional economy

1. Overview
2. Regional Western Australia's diversity
3. The Regions' contribution to Western Australia
4. The impact of global megatrends on the Regions
5. Opportunities in Western Australia's Regions
6. Overcoming barriers to growth in the Regions
7. Actions to enhance prosperity in the Regions



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## 1. Overview

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The Committee for Economic Development of Australia (CEDA)'s State of the Regions series (the 'series') provided a platform for robust discussion on economic diversification and growth opportunities within Western Australia's regional economies.

Delivered over a two-year period, concluding in March 2016, the series involved nine regional events, with CEDA inviting business, industry, government, community and academic leaders to provide their views and promote discussion on the opportunities and challenges facing regional Western Australia. It has enabled the Regions to showcase their visions and plans (through the launch of Development Commission Regional Investment Blueprints at a number of the events), and collaborate and learn from one another. It has helped to bridge the gap between Perth and the Regions.

The series brings into focus the unique attributes in each of Western Australia's nine discrete regional areas and has demonstrated the passion and enthusiasm inherent in regional Western Australians.

Through the series, five actions, detailed on page eight, 32 and 33 have been identified that, in aggregate will help activate the economic potential of regional Western Australia and ensure a sustainable future for regional communities.



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## 2. Regional Western Australia's diversity

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With a surface area of over 2.5 million square kilometres and a population of just under 2.6 million people, Western Australia is one of the least densely populated of Australia's states and territories.<sup>1</sup> Only 23 per cent of Western Australians live in a regional area, making the State the most urbanised in Australia despite its vast size. The majority of Western Australians live in coastal areas, while many of those who live away from the coast inhabit some of the least hospitable places on Earth.

Western Australia's nine regions (excluding metropolitan Perth) are the Gascoyne, Goldfields-Esperance, Great Southern, Kimberley, Mid West, Peel, Pilbara, South West and Wheatbelt. Each exhibits distinct and diverse attributes, many of which the series highlights:

- The Gascoyne region has two world heritage listed sites in Shark Bay in the south and Ningaloo Reef in the north.
- Goldfields-Esperance encompasses the Great Western Woodlands, red deserts and beaches of the south.
- The Great Southern's rich and varied history includes Albany's whaling past and wartime service.
- The Kimberley's stunning landscapes are a unique natural asset, and provide ecological and cultural tourism opportunities
- The Mid West is in a globally-recognised biodiversity hotspot, and is a dominant logistics hub for the State and a major gateway to Asia.
- The Peel region is the State's epicentre of 'super boomers', presenting affordable housing and enviable lifestyle options.

Only 23 per cent of Western Australians live in a regional area, making the State the most urbanised in Australia despite its vast size. The majority of Western Australians live in coastal areas, while many of those who live away from the coast inhabit some of the least hospitable places on Earth.

- The Pilbara is an economic powerhouse, producing 95 per cent of Western Australia's total iron ore and servicing the north-west shelf oil and gas fields.
- The South West has a diverse economy, and a natural environment, lifestyle and opportunities that attract people to the region.
- The Wheatbelt is Western Australia's agricultural leader, contributing almost half the State's agricultural output.

Most of Western Australia's regions punch above their weight, with per capita economic output – or gross regional product (GRP) – in all but two regions higher than that in Perth. The Pilbara region alone accounts for 7.45 per cent of Western Australia's annual gross state product (GSP), closely followed by the South West region at 6.4 per cent. However, employment outcomes vary markedly across the Regions, with some regions well above the State average unemployment rate of five per cent (and the national unemployment rate of 6.2 per cent<sup>2</sup>), including the Kimberley (12 per cent) and Gascoyne (8.2 per cent).

Most of Western Australia's regions punch above their weight, with per capita economic output – or gross regional product (GRP) – in all but two regions higher than that in Perth.

Population growth is an important driver of economic development.

Western Australia experienced 2.16 per cent population growth in 2014, compared with national population growth of 1.41 per cent.<sup>3</sup>

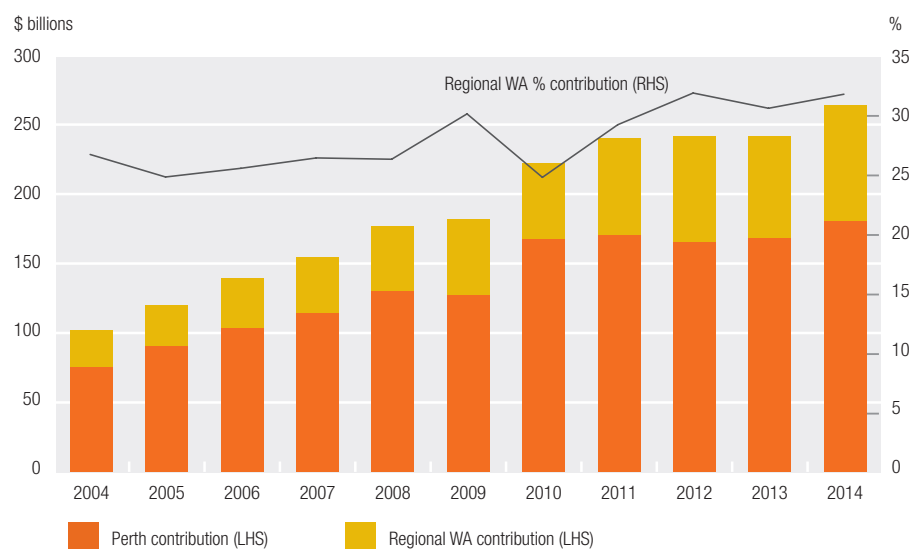
Throughout the State, population trends vary, with large population increases in some regions, and falls in others. The Peel and the South West regions have the highest population growth rates in the State.



### 3. The Regions' contribution to Western Australia

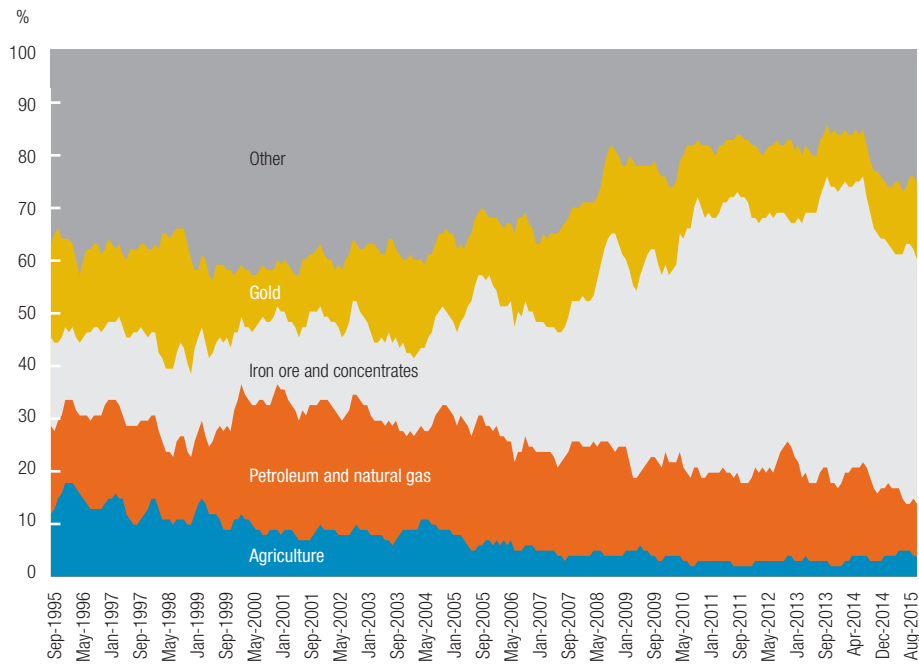
Regional Western Australia is an important source of the State's economic growth. The State experienced remarkable economic growth over the decade to 2014, and totalled over \$260 billion in gross state product (GSP) in 2014 (Figure 1). The Regions' relative combined contribution to State economic output has increased over the last decade. The Regions directly accounted for nearly one third (32 per cent) of Western Australia's total output in 2014, up from 27 per cent in 2004.<sup>4</sup> They also make a significant contribution to Australia's economy, producing five per cent of the nation's gross domestic product (GDP) in 2014–15.<sup>5</sup> This does not account for the likely understatement of the Regions' contribution, since the data attribute economic output to where workers live, rather than where they work.

**FIGURE 1**  
CONTRIBUTION TO GSP, PERTH AND THE REGIONS



Source: Western Australia Department of Regional Development; ABS

**FIGURE 2**  
**SECTORAL CONTRIBUTION TO WESTERN AUSTRALIAN EXPORT VALUES, 1995–2015**



Source: ABS Statistics

Historically, Western Australian economic growth has been driven by exports — primarily resources and agricultural commodities and, increasingly, exports of services such as tourism. In 2015, agriculture, petroleum and natural gas, iron ore and gold accounted for over 75 per cent of the State's total exports (see Figure 2). Over the two decades to 2015, the mix of goods exported changed, with the share of iron ore exports increasing sharply, and agriculture's share falling. This is likely to change again as expansion of iron ore production slows but liquefied natural gas (LNG) and floating liquefied natural gas (FLNG) exports grow and sectors such as agriculture and tourism increase output to meet higher demand from Asia.

While the majority of the State's population resides in Perth, most of the State's major economic drivers are based in the Regions, including key export industries in mining and agriculture. This creates a symbiotic relationship between Perth and the Regions, with codependence between Perth and the economic and trade activity that originates in regional areas. Perth's capacity to service this economic activity is also important to the viability of regional industries and communities. Indeed, resources sector-fuelled population growth from 2006–11 was shared equally between Perth and the Regions.<sup>6</sup> This is because Perth is a regional hub for much of the activity in the Regions. For example, resources sector companies, agricultural producers and government infrastructure and service providers all have head offices in Perth.

While the majority of the State's population resides in Perth, most of the State's major economic drivers are based in the Regions, including key export industries in mining and agriculture.

As noted by Infrastructure Australia in its 2016 *Australian Infrastructure Plan*, for our economy to continue to support our quality of life, our cities and regions both need to be productive sources of growth, jobs and opportunity.

Strong regions deliver social value for the State. At the Peel State of the Regions event, former Mayor of Mandurah, Paddi Creevey emphasised the importance of regional development to reduce inequality. She referred to the work of Professor Richard Wilkinson, social epidemiologist at University College London, whose research in developed countries found the greater the inequality, the greater the negative impact on society.<sup>7</sup>

These views are supported by the Organisation for Economic Co-operation and Development (OECD), which finds that broader-based, inclusive growth brings benefits in terms of equity and resilience, along with better fiscal health.<sup>8</sup>

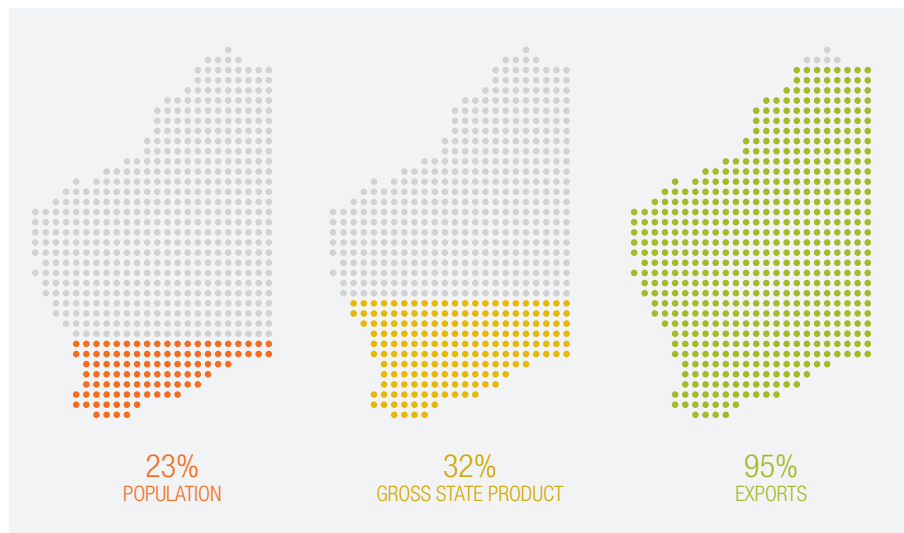
Western Australia's regions and cities are connected through economic, cultural and social ties. Consequently, the opportunities and challenges of a single region can have a significant impact on the State, and nation.

Investing in less-developed regions should not be seen merely as social support, as these regions have a great deal to contribute to growth if their assets are activated.<sup>10</sup> This requires investment in policies aimed at capitalising on the strengths of each region and addressing the barriers they face.

“Developing the Regions is good for all Western Australians.”

WA MINISTER FOR REGIONAL DEVELOPMENT, THE HON. TERRY REDMAN – FUTURE OF THE SOUTH WEST EVENT.<sup>9</sup>

**FIGURE 3**  
**THE REGIONS' CONTRIBUTION TO WESTERN AUSTRALIA**







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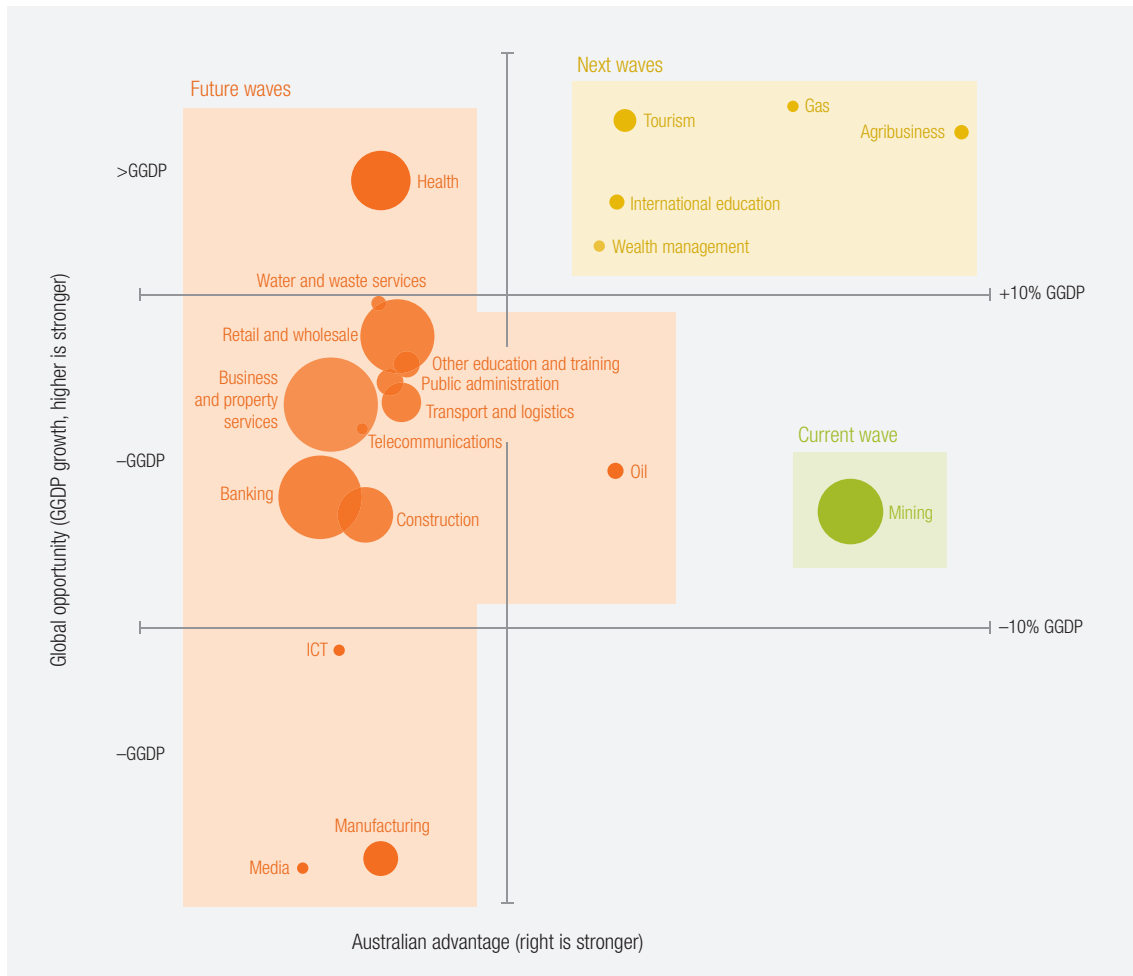
## 4. The impact of global megatrends on the Regions

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The world is changing – global shifts in demographics, economic connectivity, technology and communications are transforming the way we live, work and interact with one another.<sup>11</sup> Western Australia is a small, open economy, with international trade central to wealth creation in the State, and the nation. Consequently, changes in the world economy have a significant impact on the State’s economic growth. The world’s ‘economic centre of gravity’ is continuing to move from Europe and North America to Asia. By 2030 it is forecast to sit between India and China with an increasing focus on emerging economies such as Vietnam and Indonesia.<sup>12</sup> This will result in increased consumption of goods and services, by a growing and influential middle class.

These global shifts, or ‘megatrends’, are shaping Western Australia’s economy. The rapid growth in the State’s resources sector was driven by external factors, namely the rise of parts of Asia, and in particular China as it entered its own industrial revolution. These trends will continue to evolve and create opportunities for prosperity through increased demand for, and diversity of, exports. Opportunities include growth in sectors such as tourism, agribusiness and international education (see Figure 3). For the most part, Western Australia and its regions are well positioned to capitalise on these megatrends – but the trends also present challenges, as the playing field is levelled and competitiveness, productivity and agility become further entrenched as drivers of growth.

**FIGURE 4**  
**AUSTRALIA'S AREAS OF OPPORTUNITY**



Source: Deloitte Access Economics (2013) *Building the Lucky Country #3 – Positioning for Prosperity*.  
Note: Global Gross Domestic Product (GGDP)

Global megatrends must be taken into account when considering growth opportunities and creating development plans for the Regions. Of relevance to all Regions in Western Australia are the megatrends of growth in digital technology, and demographic changes such as global population increase, the rise of the middle class, urbanisation and population ageing. In addition, environmental factors such as climate change and water security challenges impact each of the State's Regions.

### The digital age and changing expectations

Digital technology has transformed the way the world communicates and transacts – the tyranny of distance, which for so long afflicted Western Australia and its regions, is now less of a barrier to growth. Many employees no longer have to live close to their workplace, while businesses use digital technology to become more productive and better tailor their products and services to meet customer needs.<sup>13</sup> Access to digital technologies also allows businesses to use scarce resources more efficiently, and reduces their need to locate close to their customers.<sup>14</sup>

Technology and innovation are increasing our international competitiveness across key sectors. For example, resources sector companies are using digital innovations – such as drone technologies, unmanned autonomous vehicles and remote operations hubs – to increase their agility and position themselves for longer-term growth.<sup>15</sup> Also, technologies such as video conferencing can help regional populations, including remote towns and Aboriginal communities, obtain improved access to health and education services, closing the gap between services available in regional and metropolitan communities. Internet-based applications such as e-health records and online health applications for early diagnosis, monitoring and aged care services can reduce demand for doctor visits.<sup>16</sup>

The digital economy also presents challenges. As high-capacity broadband access becomes essential for households and businesses,<sup>17</sup> a lack of access, or high cost of access, to faster communication services can be a barrier to regional residents, businesses and service providers fully engaging with the digital economy. Digital illiteracy can also be an issue.

### **Global population increase and the rise of the middle class**

The global population is projected to continue to grow rapidly for the first half of this century, with Western Australia's neighbours and trading partners, China and India, expected to be responsible for a significant portion of this growth. The United Nations forecasts the population of Asia to grow from 4.3 billion people in 2013 to over 5.1 billion by 2050, with China and India accounting for around 60 per cent of Asia's population by the middle of the century.

Continued industrialisation and modernisation of developing economies will further drive growth in average incomes. The United Nations forecasts the size of Asia's middle class to increase rapidly in the coming decades. Asia's growing middle class is expected to drive demand for Australia's mineral and energy resources, high-quality food, healthcare, education, tourism and financial services. As disposable incomes increase, consumption patterns and preferences are expected to change, with an increased emphasis on purchasing quality goods, services and experiences.

### **Urbanisation**

Urbanisation is a global trend, as people move from rural areas into larger population centres. This has been a key component of government policy in China, and was central to the growth and development of most, if not all, now-advanced Asian economies such as Japan, Singapore and South Korea. Urbanisation allows for the agglomeration of industries and reductions in industry costs, while the scale of development in areas of large population growth creates opportunities for trade in sectors where Western Australia has a comparative advantage.<sup>18</sup> At a domestic level, urbanisation creates an ongoing challenge for Western Australia's regions, with population flows from country areas to population centres.

## Ageing populations

As our understanding of health and wellbeing grows, people will continue to live longer. In 1950, eight per cent of the world's people were over 65 years old; this is forecast to reach 22 per cent by 2050.<sup>19</sup> As people live longer and generally healthier lives, their wants and needs change. This has led to, and will continue to lead to, economic and social changes. The older population will demand more services in areas such as financial wealth management, leisure and retirement services, health, reskilling and aged care.

However, longevity creates challenges.<sup>20</sup> In many sectors, an increasing proportion of the workforce is within 10 years of the official retirement age.<sup>21</sup> As active ageing gives way to gradual dependency, health care and accommodation costs may rise without an increase in the supply of those services. This is compounded by potential shortfalls in retirement savings to help meet these costs,<sup>22</sup> placing pressure on government finances, which are likely to be strained by a smaller share of the population being of working age and able to provide tax revenue. For regional Western Australia, low population density could affect the delivery of quality health and social services to this older demographic.<sup>23</sup>

## Climate change and water security

The average global surface temperature is rising and weather patterns are changing. In Australia, this is likely to involve substantial environmental change, where both natural and agricultural production systems face the combined effects of higher temperatures, and a reduction in rainfall across much of the nation. These shifts also increase the risks from bushfires and other extreme weather events, particularly in coastal and rural regions.<sup>24</sup>

The global environmental changes along with population increases are leading to resource scarcity. Water is one critical current and future constraint. It is estimated that there will be a 40 per cent gap between global water supply and demand by 2030. In Western Australia there is an increasing need for non-climate dependent water supply schemes, such as desalinated water supply, to ensure sufficient water for future household, industry and agricultural requirements.

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## 5. Opportunities in Western Australia's Regions

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It is clear from the series that every region has the potential to take advantage of global megatrends, and is eager to seize these opportunities to ensure long-term growth and sustainability.

In particular, Western Australia's proximity to Asia and abundance of natural resources position the Regions to continue to benefit from the increased demand from Asia's industrialisation and growing middle class, and related emphasis on high-quality goods and services.

This creates opportunities to expand export markets for the sectors driving the State's economy, including minerals and energy, agriculture and tourism. These industries are three of those commonly cited as Australia's, and Western Australia's, comparative advantages.<sup>25</sup>

Focussing on a region's comparative advantages – playing to each region's strengths – is the most effective way to achieve greater prosperity. Opportunities include minerals and energy, agriculture, tourism and innovation and the use of technology.

“Within Australia, Western Australia has been the fastest growing state over the last decade and (Deloitte Access Economics forecasts) for it to be the fastest growing state in the next decade – but the opportunities that are coming from Asia are starting to change.”

DELOITTE ACCESS ECONOMICS PARTNER, CHRIS RICHARDSON – FUTURE OF THE SOUTH WEST EVENT.<sup>26</sup>

## Minerals and energy

Western Australia's abundance of natural resources combined with increasing demand from Asia means that despite the slowdown in investment in the resources sector, minerals and energy will continue to be a significant wealth and employment generator in Western Australia in the decades ahead.

While most of the mining industry's wealth is generated in the Pilbara, each region has some mining production. Regional Western Australia is home to mineral production ranging from construction and industrial materials, to precious metals and gemstones. The mining industry is an important consumer of the products and services of small businesses in regional areas.<sup>27</sup> However, the rapid growth in the mining industry was not positive for all sectors in regional Western Australia. For example, Tourism Council of Western Australia President, Manny Papadoulis noted that the tourism industry in the Goldfields-Esperance region was hit by higher costs and low accommodation availability.<sup>28</sup>

The State's energy sector is set to make a substantial contribution to resource exports and domestic energy supply in the years ahead, as billions of dollars' worth of investment projects translates into booming LNG and natural gas production. Much of this is centred on the Pilbara and Kimberley regions, but there is increasing prospect of unconventional energy field development throughout many parts of Western Australia.

## Agriculture

Regional Western Australia's comparative advantage in agriculture was a theme throughout the series, with agricultural opportunities identified in all regions. Agriculture exports are dominated by wheat, other broadacre cropping and live animals, which collectively account for three quarters of Western Australia's \$5.9 billion in agriculture exports. Aquaculture is also significant, with Western Australia's abundant coastline, ocean assets and reputation for quality aquaculture products resulting in sales of \$1.1 billion in 2015.

There is considerable opportunity for agricultural regions to capitalise on rising food demand, with global food production needing to increase by 60 per cent by 2050 to meet projected demand. Demand is already outpacing supply in international markets.<sup>29</sup> Asian markets generally view Australian products as high-end, clean and safe, and will continue to support demand for foods rich in protein, such as livestock, certain grains and dairy products. Opportunities lie in areas where the State has comparative advantages, as well as established trading relationships (such as the live animal export trade). The Federal Government has signed Free Trade Agreements with China, Japan and Korea, as well as expanded livestock exports to markets such as Egypt, Iran and Thailand.

There are concerns that there may be little or no scope for significant increases in agricultural production capacity in some regions. In light of this, Wellard Group Holdings CEO, Mauro Balzarini noted at the Wheatbelt event that the aim should not be to double the size of production, but rather income and profit. The focus

becomes how best to improve margins rather than volume.<sup>30</sup> This may create increased downstream opportunities for Western Australia's food and beverage industry. These opportunities may be highly profitable, due to their high perceived value and the willingness of consumers to pay a premium for safe, quality food. However, in light of cost and other constraints, the opportunities for Western Australia may be more in line with being a delicatessen to Asia, rather than a supermarket.

## Tourism

Opportunities for tourism growth were also a focus through the series, in every region across the State. The most significant opportunity for regional tourism is increasing the number of international visitors to Western Australia, and specifically the Regions. Research shows that 94 per cent of international tourists spent at least one night in Perth, while the proportion of visitors who spend time in regional Western Australia ranged from five per cent in "Australia's Golden Outback" to 17 per cent in the South West.<sup>31</sup> The global trend of urbanisation, along with the opportunity to market through digital technologies, has the potential to increase the attractiveness of tourism in less built environments like those found in regional Western Australia.

A larger and more affluent population in Asia increases the size of the potential international tourism market.<sup>32</sup> In 30 years' time, nearly half the tourists to Australia will come from Asia. At the South West event, Tourism Western Australia Chairman, Peter Prendiville spoke of the favourable spending patterns of Chinese tourists in Western Australia, where on average a Chinese visitor spends \$5000, compared with \$1700 in Queensland, presenting an opportunity for Western Australia.<sup>33</sup>

Western Australia can offer diversified and varied holiday packages to differentiate itself from other destinations. The State's unique and vast array of pristine landscapes with rich biodiversity and coastal areas, including the World Heritage sites of Ningaloo Reef and Shark Bay in the Gascoyne, are internationally recognised ecotourism assets. In addition, there are opportunities to expand food and wine tourism, and heritage and cultural tourism, including Aboriginal heritage assets.

Holiday experiences targeting retirees are also a growth segment for many regions, with opportunities to increase both interstate and intrastate tourism as population ageing continues. The tourism offerings must be tailored to what tourists from growth markets want, and may differ from Regions' historical offerings.

"The opportunity is enormous. If you find out what it is that will attract foreign tourists to this beautiful part of the world, that industry is going to go off like a rocket."

PROFESSOR IAN HARPER, DELOITTE ACCESS ECONOMICS – FUTURE OF THE KIMBERLEY EVENT.<sup>34</sup>

## Technology and innovation

An opportunity that cuts across all sectors, while also having the potential to generate growth in its own right, is digital technologies and innovation.

Communications technology presents significant opportunities for individuals and businesses in Western Australia's regions to service Perth and other Australian markets, as well as connect and integrate with Asian economies. E-commerce, telecommuting and freelancing allow regional businesses to look to opportunities in the global economy.

Innovation is a key driver of economic growth and improved living standards. Historically, the majority of productivity growth has been derived from innovation.<sup>35</sup> The series highlighted ways innovation is enabling regions to improve their performance in their areas of comparative advantage, helping them remain competitive in globalised markets.

Regions are innovating to develop niche markets, products and services, increasing the diversity and resilience of local economies.

For example, innovation is helping to support the mining industry in the Pilbara, with New Energy aiming to provide baseload renewable energy generated from council waste. Curtin University Director, External Relations, Jane Coole noted that Kalgoorlie's Western Australian School of Mines' world-class research is leading to innovations across the mining industry. Kalgoorlie Consolidated Gold Mines (KCGM), Mine Technical Services Manager, Tim Berryman, spoke of how gold producers are using innovation and efficiency measures to adapt to the current unstable market to remain viable.<sup>36</sup>

Entirely new industries are being created as a result of digitisation. There are examples of publishing and creative industries emerging throughout the State, such as the Vue Group, based in the South West of the State, which has an ongoing relationship with Chinese animated film production company, Shanghai Hippo Animation.





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## 6. Barriers to growth in the Regions

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The opportunities in the Regions are compelling, yet there are significant challenges to overcome for the Regions to realise their visions. In some Regions, the lack of a vision and clear economic development strategy has hampered growth. In addition, small, widely-dispersed populations in many areas mean that there are few economies of scale. This creates other barriers to growth, including high business costs, inadequate infrastructure provision and inefficient value chains. Many regional areas find it difficult to attract and retain a critical mass of population and skilled workforce, which further exacerbates issues related to lack of scale. In addition, social challenges arise from unequal opportunities and outcomes for Indigenous people, a lack of community engagement and partnership in some areas, and a need for stronger leadership.

### **Lack of vision and strategy**

Historically, some of the Regions have lacked a clear vision supported by strategies that include practical actions to realise the potential of the region. In a step forward the Regional Investment Blueprints present an encompassing vision for each region in the decades ahead. The Regional Development Commissions' Blueprints provide a focus for each individual region's initiatives and investment. In the Blueprints, each region identifies its strengths and areas of comparative advantage, and how to use its natural, human, economic and social capital to benefit from global trends affecting the region.

However, to move beyond the aspirational, each Blueprint now needs to be supported by economic development strategies that outline implementable actions and identify investable propositions to help each region realise its vision.

The series, along with the Regional Blueprints, emphasise that the strategies must include actions to create broader-based regional economies. In particular, this was voiced in regions heavily reliant on a single industry. For example, communities in the Pilbara and other regions with industries closely linked to global commodity prices are highly vulnerable to economic cycles. As a result, residential numbers, the cost of living and employment opportunities can fluctuate, having implications for the sustainability of communities. As Regional Australia Institute CEO, Jack Archer noted, the regions need to adapt their economies to prosper,<sup>37</sup> and for many regions economic diversification is part of this adaptation.

### Limited understanding of the potential

The series highlighted a strong sentiment that policymakers, businesses and communities outside the Regions do not always understand the opportunities and growth potential of the Regions.

Examples of organisations seeing the potential of the Regions and making the most of opportunities include the Australia China Business Council (ACBC). ACBC Western Australia President, Adam Handley highlighted that most Chinese investment in Western Australia is in the Regions. Consequently, the ACBC has established committees in the South West, Mid West, Pilbara and Kimberley to raise awareness of Chinese investment and seek to identify which sectors are ready for Chinese investment or trade. The ACBC's initiatives include hosting regional tours to showcase the Regions to foreign investors.<sup>38</sup>

### Few economies of scale

Western Australia's size, the remoteness of much of the State, and the numerous small, dispersed populations, result in many regions lacking economies of scale. This presents multiple challenges, for example for high business costs, and inadequate infrastructure provision and service delivery. Horizon Power Non Interconnected Systems General Manager, Craig Julian stated that a main challenge in providing high-quality, safe and reliable power across Western Australia is related to economies of scale. Speaking in the Gascoyne, he noted the size and remoteness of communities increased the cost of service provision, as smaller power stations cost more to operate.<sup>39</sup>

Western Australia's size, the remoteness of much of the State, and the numerous small, dispersed populations, result in many regions lacking economies of scale.

In addition, a lack of scale in many industries, combined with Western Australia's size, adds costs along the value chain. As Curtin University International Institute of Agri-Food Security Associate Professor, Dr Brad Stelfox noted in the Kimberley, the region "is remote and so careful attention to supply chain dynamics is critical."

Attracting and retaining people in the Regions will help create economies of scale, and bring benefits from agglomeration. However, the ways to attract and retain residents, for example creating jobs and providing services, to a large extent depends on achieving scale. This creates a complex (and somewhat circular) challenge, highlighting the need for economic development planning and investment to be targeted.

### **High costs of doing business**

A consistent theme highlighted in the series was the high costs of doing business in the Regions hampering growth in each region. For example, speakers in the Kimberley highlighted that investment in infrastructure, including government contributions, to reduce the costs of doing business is needed for the region to make the most of its abundant natural resources.<sup>40</sup> Failure to address business costs will result in regions missing out on the opportunities presented by global trends. A stark example was provided in the Wheatbelt, where Wellard Group Holdings CEO, Mauro Balzarini, noted that high production and transport costs make it difficult to achieve competitive outcomes. Australian Farm Institute Executive Director, Mick Keogh, noted that high transport costs mean the benefit for wheat processors of the growing global demand for food is relatively small. To capitalise on the opportunity, transport costs need to be reduced and logistics improved.<sup>41</sup>

### **Inadequate infrastructure provision**

Throughout the State, concerns about the inadequacy of economic and social infrastructure, including transport, communications, water, health and education infrastructure, were raised. This is adversely affecting economic performance and potential, as well as service quality, in many regions. All regions emphasised the urgent need for improvements to infrastructure, to help overcome the challenges presented by the size and scale of the State.

Many regional industries rely upon freight supply chains to transport their goods to market. However, high transport costs and poor linkages in the Regions are limiting connectivity, including into new export markets. Infrastructure Australia found that oversight of Australia's freight network is fragmented, and the planning, delivery and operation of infrastructure lacks a wider network perspective.<sup>42</sup> Investment is needed in roads, rail, ports and airports to increase capacity. In the Gascoyne, Carnarvon Chamber of Commerce and Industry Vice President, Kristan Pinner highlighted that upgrades of roads and air services are needed to support tourism as well as connect the region's horticulture, fishing and pastoral industries to international markets.<sup>43</sup> In addition, improvements to infrastructure are needed for regions to enter new areas of opportunity.<sup>44</sup>

The lack of telecommunications infrastructure results in comparatively poor mobile coverage and low utilisation of digital technologies, hampering economic growth and improvements to service delivery. As highlighted in the Wheatbelt by Telstra Area General Manager, WA South and Central, Boyd Brown, data demand is growing at 50 per cent per year. Many areas currently have no mobile coverage

and more mobile tower sites are needed; Telstra is working with local government to consider the establishment of Wi-Fi hotspots.<sup>45</sup>

Water security is a key issue for all areas of the State, with investment in infrastructure needed to provide residents, businesses and industries with a sustainable water supply. Climate change and environmental issues add to the challenges presented by the size and scale of the State, and create uncertainty for industry. For example, in the Wheatbelt Australian Farm Institute Executive Director, Mick Keogh highlighted that the amount of water available for food production is declining.<sup>46</sup> To seize opportunities presented by the 'dining boom' this needs to be addressed. The State Government, through the Water for Food Program, is developing 11 irrigation projects, including innovative initiatives, such as the Warrawagine Station irrigated agriculture project.

A key driver of the infrastructure challenges is limited access to financial capital. At the Kimberley event it was noted that capital is the scarcest resource available for development, and a framework is required to attract capital into the region. The community and government must work together on developing this framework. The capital needs to come from multiple sources, public and private, and domestic and overseas. While the role for government to invest in infrastructure was highlighted,<sup>47</sup> to be sustainable communities, the Regions must move towards being self-sustaining. As Regional Australia Institute CEO, Jack Archer highlighted in the Gascoyne, "if the plan for reaching to 2050... is just to continue to go back for further (government) investment, that will not set the region up for the future that we are talking about."<sup>48</sup>

A lack of investment-ready opportunities is a constraint on private sector investment. For example, Horizon Power Managing Director, Frank Tudor, speaking in the Pilbara, stated that the region is not development-ready, which creates frustration for potential investors.<sup>51</sup> Investment projects need to be suited to the buyer.

For example Tourism WA Chairman, Peter Prendiville, highlighted that tourism offerings need to be tailored to the growing markets in Asia.<sup>52</sup> Opportunities to share infrastructure were highlighted, with strong partnerships essential for this to be effective.

"Business needs to do the heavy lifting. What we need from government is those critical pieces of infrastructure and in particular health services ... and secondly around educational choices."

FORTESCUE METALS GROUP CEO, NEV POWER – FUTURE OF THE PILBARA EVENT.<sup>49</sup>

"Together we are working on tomorrow – today."

SOUTH WEST DEVELOPMENT COMMISSION CEO, DON PUNCH – FUTURE OF THE SOUTH WEST EVENT.<sup>50</sup>

## Challenges in attracting and retaining a critical mass of population and skilled workforce

Many regions do not have a critical population mass needed to drive economic activity, attract and retain a skilled workforce and enable the provision of services needed for the community to survive. In regions such as the Pilbara it was noted that it is difficult to attract and retain families, due to the poor provision of educational and health services in the area, and a lack of quality affordable accommodation. In some regions a lack of aged care and relevant health facilities results in aged residents leaving the region, while other regions are experiencing the fiscal and infrastructure challenges of a growing ageing population.

In addition, limited training and employment opportunities, combined with perceived lack of lifestyle and amenity, result in teenagers and young adults leaving regional areas, seeking employment, education and training or adventure elsewhere. The result is often a lack of skills in the Regions, which constrains industry development. This in turn hampers job growth, further exacerbating the lack of employment opportunities. In some regions youth unemployment is a challenging social issue, for example in the Peel region youth unemployment is 25 per cent.

“The key to increasing business activity and sustainability is to increase the population, and by doing so, start to increase activity in all areas.”

CARNARVON CHAMBER OF COMMERCE AND INDUSTRY  
VICE PRESIDENT KRISTAN PINNER – FUTURE OF THE  
GASCOYNE EVENT.<sup>53</sup>

## Sub-optimal land use

Western Australia has an abundance of land, and yet much of it is not used to its full productive potential. Throughout the series numerous examples were given of unrealised opportunities, including growth in agriculture through the expansion of irrigation systems, pastoral stations scaling up to increase beef exports, and farmers diversifying into activities such as tourism. Federal Member for O'Connor, Rick Wilson highlighted that the lack of security of land tenure and land use rules in the current pastoral lease system are impeding growth and diversification.<sup>54</sup> LandCorp CEO, Frank Marra spoke about the challenge of finding a balance between development and the natural environment.<sup>55</sup> Additional issues include water availability and rights, and generally poor infrastructure for agriculture, particularly in the northern and eastern parts of the State.

## Unequal opportunities and outcomes for Indigenous people

In some regions, the most pressing concern for many people is addressing the disparity in conditions and outcomes between Indigenous and non-Indigenous Australians. WA Minister for Regional Development, the Hon. Terry Redman noted the failures in communities such as Roebourne where 63 service providers had

delivered over 200 services to 1400 people at a cost of \$50 million, with limited tangible outcomes for the community. Issues to be addressed include education, child safety, Indigenous people's connection to their culture and Country and a need for more partnerships with the private sector.<sup>56</sup>

Aboriginal unemployment was one challenge highlighted, with unemployment rates for Indigenous Australians higher than the average. For example, the Aboriginal unemployment rate in the Great Southern is about four times that of non-Aboriginal residents. It is a particular issue in the Kimberley, where Indigenous people comprise 45 per cent of the population. The series also highlighted a range of issues with Native Title, including the need for traditional owners and project developers to engage more effectively.<sup>57</sup>

Effective partnerships are essential to the economic development which is needed to help ensure the wellbeing and future of Indigenous people. In the Kimberley, Nyamba Buru Yawuru Community Development Manager – Community Programs, Ninielia Mills noted the concept of Mabu Liyan, and having a good and open heart. She highlighted that, related to this, partnerships are fundamentally important to the way Yawuru people do business. This approach can open opportunities in the region that generate better outcomes for Indigenous people. Ninielia Mills' outlook was one of hope, stating that she saw “our community's journey as a journey from generational trauma to generational transformation”.<sup>58</sup>

### **Inadequate community engagement and partnerships**

Increasing engagement and collaboration between business, government and the community is needed to overcome the challenges facing the Regions. Woodside Chief Operating Officer, Michael Utsler highlighted the need to work together for resilience.<sup>59</sup> This applies across all regions, and in all sectors. WA Minister for Regional Development, the Hon. Terry Redman noted that in regions such as the Pilbara it was important for government to work with the private sector in partnerships to address infrastructure bottlenecks, including affordable housing. Sharing of resources will increasingly be required. An example is the Pilbara Development Commission working with the private sector to use surplus water more productively, including through the \$310 million Bungaroo pipeline project. Rio Tinto constructed a borefield and pipeline to service the water needs of Dampier and Wickham as well as its own industrial needs. Developing common-user infrastructure requires innovative thinking along with strong partnerships between the public and private sectors.

Sharing of resources will increasingly be required.

Developing common-user infrastructure requires innovative thinking along with strong partnerships between the public and private sectors.

## Lack of leadership engagement

Across the Regions, from the Kimberley to the south of the State, it was emphasised that leadership is vital in getting government, community and business working together, and converting potential into opportunity.

In the Peel region, former Mayor of Mandurah, Paddi Creevey noted that community cohesion is critical to ensuring economic development is not fractured, and that leadership is essential to achieve this.

Governance is also important – the Joint Select Committee on Northern Australia Deputy Chair, the Hon. Alannah MacTiernan noted the importance of devolving responsibilities and decision making to the regional and local levels.

This empowers communities and, as Minderoo Foundation CEO, Nicola Forrest pointed out, most communities know their strengths and weaknesses, and their voices need to be heard so they can tackle and resolve issues.<sup>60</sup>



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## 7. Actions to enhance prosperity in the Regions

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The series demonstrated that the Regions of Western Australia have the passion, drive and ideas to become increasingly vibrant and resilient communities. With strong leadership and strategic action, the Regions are well placed to capitalise on their strengths and overcome the challenges inherent in living in a State the size of Western Australia. Harnessing strengths is the key to unlocking the potential of each region. This includes identifying areas of opportunity adjacent to, or combining, current strengths. From the Wheatbelt building on its niche manufacturing experience to innovate in the area of farm machinery, to the South West capitalising on the dining boom by focussing on agri-tourism, the State is full of opportunities to use its assets and expertise to broaden its economic base.

Looking for opportunities to create economic diversity, while playing to regional strengths, was a theme throughout the series. Economic diversity ensures regional economies do not suffer disproportionately during adverse external shocks and do not experience exacerbated effects on employment, income and living standards.<sup>61</sup> Diverse economies can respond rapidly to emerging opportunities and challenges, ultimately enhancing their competitiveness and prosperity.

It was clear from the series that each region must be strategic and focus on areas of strength and genuine comparative advantage. For example, global drivers of future economic growth, such as increasing demand for food, may be more relevant to some regions than others. Action plans for each region need to recognise this reality and focus on opportunities that will provide the greatest growth potential.

An example of where the State Government is helping to diversify regional economies is its program of reform to pastoral lease arrangements, known as Rangelands Reforms. This involves legislative change to enable a more diverse use of land and promote a range of industries across the State.



Another example is the State Government’s Regional Centres Development Plan which encourages population growth in regional cities. This supports services being provided effectively and efficiently to the majority of the population, reducing the cost of doing business and enabling infrastructure to be provided more affordably. It will assist in retaining a critical population mass and skilled workforce in the regions. In addition, the State Government’s long-term regional services reform plan aims to enable better education, health, social wellbeing and employment outcomes for Aboriginal and at-risk people in regional and remote areas.

However, further action is required to address barriers to growth and realise the potential of the Regions. The actions below are largely drawn from the discussion at the series and themes in the Regional Development Commissions’ Blueprints. The actions recognise that the role of government is to facilitate economic development by de-risking strategic investment opportunities. By doing this, the government provides the conditions required for the private for-profit and not-for-profit sectors to innovate and provide the financial and human capital to make the most of growth opportunities.

“It is a moment in time to diversify and strengthen our State’s economy.”

WA MINISTER FOR WATER; SPORT AND RECREATION; FORESTRY, THE HON. MIA DAVIES – FUTURE OF THE KIMBERLEY EVENT.<sup>62</sup>

**TABLE 2**  
**ACTIONS TO OVERCOME THE BARRIERS TO GROWTH IN THE REGIONS**

| Action   |
|--|
| 1. Encourage strong leadership in the Regions by providing local leaders with the opportunity to make and be accountable for their own decisions.                                  |
| 2. Agree on each region's comparative advantages, with a view to developing region-specific branding within the wider regional development context.                                |
| 3. Develop a pipeline of large, transformational investment projects that align with State-wide priorities and each region's comparative advantages.                               |
| 4. Strengthen advice on regional spending by introducing transparent investment prioritisation frameworks and using robust evaluation frameworks to determine funding allocations. |
| 5. Create innovation hubs in each region to connect local communities and businesses with government, industry, innovators and financiers.   |

## Actions to activate change

### 1. Encourage strong leadership in the Regions by providing local leaders with the opportunity to make and be accountable for their own decisions

Strong leadership in the Regions is essential for each region to achieve its potential. Regional leaders are best placed to advocate for and respond to the specific opportunities and challenges of each region. Effective regional leadership will help foster the collaboration required to take collective action to overcome barriers to growth, minimising tendencies to take a competitive or siloed approach to regional development. It will enable innovative ideas and entrepreneurship and help decrease the reliance on government assistance in the Regions.

To develop high-performing leaders, regions must have the opportunity to make and be accountable for their own decisions. The State Government's devolution of economic development decision-making to Regional Development Commissions must be supported with mentoring and coaching to develop the leadership skills needed in the years ahead.

This will create career paths for the next generation of regional leaders, equipped with the entrepreneurial, risk-taking mindset that is necessary to seize the opportunities in each region. It is important to ensure that current governance structures do not limit scope for younger people to be involved and develop their leadership potential. Mapping current governance structures and identifying and removing overlap in responsibilities could help with achieving this.

### 2. Agree on each region's comparative advantages, with a view to developing region-specific branding within the wider regional development context.

Harnessing the potential of the Regions requires each region to have a distinctive brand that provides a clear message to the rest of the State, the nation and internationally about what is unique about the region. Using this brand to help market each region's opportunities will help in harnessing interest from businesses, researchers and community groups locally, nationally and internationally, providing the human and financial capital needed for the Regions to grow.

### 3. Develop a pipeline of large, transformational investment projects that align with State-wide priorities and each region's comparative advantages

Making the most of the opportunities in each region requires governments in the Regions to work collaboratively to determine which sectors to pursue. Each region needs to focus on attracting the investment required for their sectors of comparative strength to grow to full potential. Creating clear economic development plans for each region will assist with this. It will give clarity to investors, and form the basis for dialogue between government and private sector, in order to identify a transparent pipeline of projects for investors, and investment-ready proposals.

#### **4. Strengthen regional investment decisions by introducing a transparent investment prioritisation framework and robust evaluation framework for funding proposals**

Investment must be directed to areas of the greatest priority and opportunity for each region. This requires prioritisation of investment opportunities according to clear criteria. Government funding should only be allocated to initiatives that will have a measureable impact on economic activity. Rather than 'filling gaps', government funding should focus on activating strategic opportunities for growth and de-risking investment to be undertaken by the private sector where the commercial rationale exists. In addition, the allocation of funds should look to encourage innovative partnerships and leverage capital from non-government sources, with private sector multiplier an important evaluation consideration.

A reform for consideration is development and implementation of a robust, transparent evaluation framework for Royalties for Regions projects, to be conducted prior to allocating funding. This would ensure that each project which receives funding is the best available option, and tied to the objectives of the region's blueprint.

#### **5. Create innovation hubs in each region to connect local communities and businesses with government, industry, innovators and financiers**

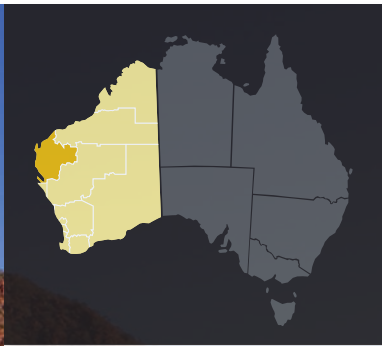
Innovation hubs are government-sponsored forums that seek to support innovators from the public and private sectors to solve specific problems. They can be used to match businesses with financiers and consumers, and bring communities together to develop innovative solutions to the issues or opportunities they face. Hubs can be adopted to develop solutions to any problem that requires an innovative solution. They could help build a more innovative culture in the Regions by connecting local communities and businesses with innovators outside of the region, as well as facilitating collaboration between groups in the region (e.g. between small businesses and big businesses).<sup>63</sup>

Innovation hubs could be used to help ensure the Regions have the critical infrastructure they need to grow. The series highlighted the range of needs across the State, including transport, communications, water and energy infrastructure. Innovation, along with collaboration between the public and private sectors, is needed to overcome the challenges presented by Western Australia's size and scale. Hubs could discover ways of using technology and leveraging creative funding sources to help maximise the use of existing infrastructure, and deliver the new infrastructure required. They could also enable collaboration that would help information flows along the value chain from producers to consumers, overcoming inefficiencies.



# Regional overviews

1. Gascoyne
2. Goldfields-Esperance
3. Great Southern
4. Kimberley
5. Mid West
6. Peel
7. Pilbara
8. South West
9. Wheatbelt



- 0.37 per cent of GSP
- \$98,000 GRP per capita
- 8.2 per cent unemployment
- 9959 resident population
- 0.63 per cent annual population growth

# 1. Gascoyne

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The Gascoyne region includes Western Australia's beautiful Coral Coast and boasts two World Heritage Areas: Shark Bay and Ningaloo Reef; as well as spectacular natural inland highlights including the Kennedy Ranges and Mount Augustus. It is an internationally-recognised tourism destination, a global provider of quality food products and a maritime hub for energy project supply chains.<sup>64</sup>

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The economy is growing, with gross regional product increasing from \$454 million in 2003–04 to \$978 million in 2013–14.<sup>65</sup> It has a diverse base, including tourism, agriculture, fishing, horticulture, pastoral industry and mining, with all these sectors supported by local small businesses.

Tourism is the region's leading industry by value<sup>66</sup> and presents growth opportunities, for example in international eco-tourism, tourist drives and high-end tourism. The Aboriginal community's knowledge of the land and culture can also be used to promote tourism. Yamatji Marlpa Aboriginal Corporation Co-Chairman, Ben Roberts highlighted that businesses and government need to establish good relationships with the Aboriginal community to help grow local businesses and tourism.<sup>67</sup>

The agriculture and fishing sectors are the region's largest employer, and well placed to expand with the growing global demand for food. The region is known for horticultural crops including bananas and tomatoes. Projects underway to expand the industry include the Gascoyne Food Bowl Initiative and the Water for Food initiative.<sup>68</sup> Innovation to trial new crops and extend growing seasons is needed to realise the sector's potential. Aquaculture also represents a significant opportunity.<sup>69</sup>

Pastoralism contributes \$35 million to the economy and, if managed carefully, more value could be derived from the pastoral estate while maintaining conservation values. Pastoral stations are diversifying from meat and wool production to take advantage of opportunities in goats, horticulture, inland aquaculture and outback tourism, but are restricted due to limitations of the pastoral lease system. Legislative changes are proposed to allow for greater diversification in land use.<sup>70</sup>

Further opportunities for the Gascoyne include leveraging its location adjacent to expanding oil and gas fields by becoming a service hub for the resource sector. In addition, the defence presence in the Gascoyne, including the communication station at Exmouth and RAAF Learmonth base, provides strategic support service opportunities. From tourism, to agriculture and defence, seizing these opportunities requires investment in infrastructure in the region.<sup>72</sup>

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## Case study:

### Sweeter Banana Co-operative

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Carnarvon in the Gascoyne region was the first place in Australia to grow bananas, back in the 1840s. The industry expanded, and 16,000 tonnes of bananas were produced annually in Carnarvon by 1993. The Sweeter Banana Co-operative was formed that year by a group of 25 growers to develop a brand that would be easily recognisable to consumers and boost sales.

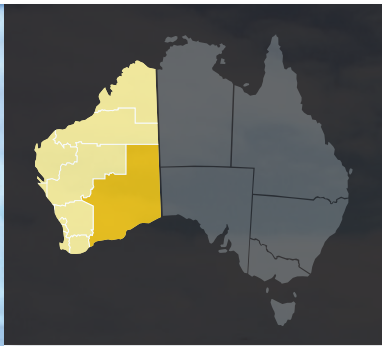
At the time, Carnarvon bananas were being sold 20 per cent cheaper than their Far North Queensland (FNQ) rivals due to their smaller size and paler colour. Yet, university tests had proven that consumers preferred the sweeter, creamier taste of the Carnarvon fruit.

However as FNQ's banana production expanded and began to dominate the market, Carnarvon's industry, constrained by its reliance on irrigation from the Gascoyne River, could not keep up. Production fell from a high of 16,000 tonnes in 1993 to less than 4000 tonnes in 2004.

Sweeter Banana began leveraging the WA Department of Agriculture and Food Buy West Eat Best brand to grow its market share in Western Australia, and was able to fill the gaps in the market left by FNQ growers when Cyclone Yasi devastated their crop in February 2011. By 2012, Carnarvon's banana production had bounced back to 7000 tonnes (10–20 per cent of Perth's market share), of which Sweeter Banana represented 60 per cent.

As a business, Sweeter Banana has been innovative. Initially launched as a basic co-operative, Sweeter Banana's structure has evolved to align the benefits and costs for each member to the profits they contribute to the organisation. Sweeter Banana ensures transparency through an intranet where members can view weekly costs, production volumes and how well their fruit packed compared with other growers.

Sweeter Banana also produced a range of products to utilise less-marketable fruit. The top-range fruit are sold under the brand of Lunchbox Bananas. The blemished outer fruit are sold as Smoothies, ideal for baking and smoothies. The smaller, sweeter winter bananas are sold as Sweeties. Finally, Sweeter Banana Bread was launched in 2013 to utilise bananas that were unsuitable for market.



- 4.09 per cent of GSP
- \$176,000 GRP per capita
- 4.9 per cent unemployment
- 61,333 resident population
- -0.86 per cent annual population growth

## 2. Goldfields-Esperance

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The Goldfields-Esperance region is the largest in Western Australia, covering an area three times the size of Victoria. The region's diverse landscapes include the magnificent Great Western Woodlands, red deserts and white sandy beaches.<sup>73</sup> It is an export hub, with globally-focussed industries exporting across the world, and an abundance of natural resources.<sup>74</sup>

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The region's two largest urban centres, Kalgoorlie-Boulder and Esperance, account for close to 80 per cent of the population, and provide a critical mass that supports the type of lifestyle and job opportunities that are attractive to workers.

The region has the second highest gross regional product per capita, surpassed only by the Pilbara. Mining activity provides 75 per cent of the value added for the region. Employment is more diverse, with significant employers including mining, retail, manufacturing and construction.<sup>75</sup> While the mining sector will continue to drive the region's economy, diversification will ensure the sustainability of employment opportunities and local communities throughout cycles in the mining industry. Responding to the increasing world demand for food, there are opportunities to improve farm productivity and expand fisheries and aquaculture. Attracting and retaining skilled labour and ensuring security of land tenure are vital to harness the region's agricultural potential.

Tourism opportunities stem from the region's unique natural assets and rich history, culture and heritage. Tourism Council of Western Australia President, Manny Papadoulis highlighted opportunities to attract retirees and travellers with a motorhome or caravan, people seeking Aboriginal cultural and environmental experiences, and international tourists.<sup>76</sup>

The Goldfields-Esperance region is a significant generator of innovation. The presence of major mining and agriculture activity, as well as organisations such as the Grains Research Development Centre and the Western Australian School of Mines, supports high levels of innovation. Also, with access to natural energy sources the region can invest in alternative energy to create sustainable and affordable energy supplies for industry and households in the region.

The region is home to numerous small and isolated communities, which puts additional pressure on service and infrastructure providers, particularly for essential services such as health. Investment in technology, including telecommunications infrastructure, would improve service delivery in areas such as health and education, including to the more isolated communities.

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## Case study:

### Harlsan Industries Australia

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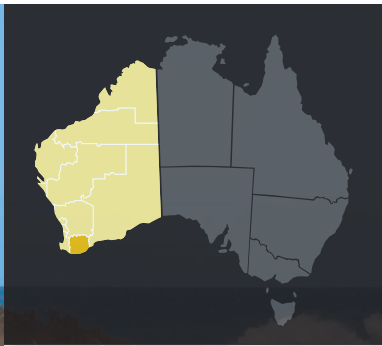
The Goldfields-Esperance region is renowned for its gold industry after which it is named. A large number of the region's biggest success stories are suppliers of products and/or services to the mining sector. Harlsan Industries Australia is one such example, having grown from its inception in 1992 to now service clients in over 30 countries worldwide from their base in Kalgoorlie.

Harlsan was founded to design, manufacture and supply drilling equipment for the local mining industry. From the outset, the company embraced an ethos of focussing on high-quality products, customer service and innovation. Being located in a dynamic mining region enabled Harlsan to personally engage with their clients and seek feedback to enable further improvement.

Harlsan focussed on supplying reverse circulation (RC) drilling consumables and solutions. Developing specialised expertise and products allowed Harlsan to deliver advice and solutions to their clients quickly, minimising expenses and lost production resulting from on-site equipment failures. Their reputation for customer service saw Harlsan's client base expand to countries including Ghana, Canada, Mongolia and Mexico.

Harlsan's focus on innovation has been critical to their success. They have an ongoing research and development program where they actively engage with mining and drilling companies to pursue improved drilling methods and technologies. This knowledge gained in the field is fed back to the engineering team, who, equipped with advanced technologies including robotic machining systems, robotic welding cells, CAD/CAM computer systems and materials testing facilities, set about developing new and improved products.

In Australia, where the manufacturing industry has declined due to an inability to compete on cost at an international level, Harlsan is testament to the opportunities for highly-specialised advanced manufacturing in any region.



- 1.93 per cent of GSP
- \$85,000 GRP per capita
- 3 per cent unemployment
- 59,935 resident population
- 1.2 per cent annual population growth

## 3. Great Southern

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The Great Southern extends some 250 kilometres along the southern coast of Western Australia and encompasses productive rural lands and communities approximately 200 kilometres inland. The natural environment and coastal orientation of the region's major population centres are key factors in defining the quality of life of the region.

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Its natural beauty includes the Stirling and Porongorup ranges, Walpole Wilderness Area, farming districts and coastline, while its rich history includes the enduring contribution of Noongar people, pioneering agricultural expansion and Albany's whaling and wartime heritage.

Economic growth in the Great Southern is strong. In 2014–15, the gross regional product was estimated at \$4.8 billion.<sup>78</sup> Primary production is the backbone of the economy, including grain and livestock, which is the region's main industry and largest employer. The Great Southern is the second largest agricultural region in the State by production value.<sup>79</sup>

Other significant primary industries in the region include plantation blue gum timber, fishing, aquaculture, viticulture and horticulture. The region can further capitalise on opportunities in free range meat production, dairy, horticulture and the production and processing of grains and plantation timber. Mining also has potential with a magnetite mining project near Wellstead and a gold mining project near Katanning awaiting investment decisions.

The region has one of the most dynamic small business sectors in the State<sup>80</sup> which brings diversity and contributes to the region's economic resilience.

The number and quality of tertiary education institutions in the region is unique in regional Western Australia, providing locally-educated workers and scope for a critical mass of research and development to support industry.<sup>81</sup> The region has the potential to expand its high quality education offering through the digitally-connected world, and by attracting more international students.

Attracting skills to the region is also essential for increased growth. A focus on Indigenous education, training and employment is vital to address a significantly higher overall level of disadvantage in terms of socioeconomic status.<sup>82</sup>

Tourism is another growth opportunity for the region. The region's natural environment and heritage-based tourism attractions include national parks, Aboriginal cultural assets, sites of early European settlement, and a nationally-recognised Anzac connection.

Growth in export markets and tourism will require further investment in transport infrastructure, while upgrading the telecommunications network will support higher productivity, innovation and the provision of essential services.

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## Case study:

### Butterfield Beef

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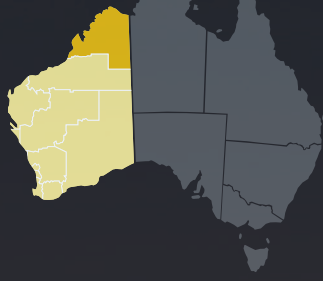
With high rainfall and a temperate climate, the Great Southern is ideal for agriculture. The region's main industries include broadacre crops, viticulture and wine-making, aquaculture and seafood, sandalwood production, horticulture, dairy and free-range meat production.

Butterfield Beef is a boutique operation that is leading the way in the production of sustainable, ethical, high-quality Angus beef on their farm at Daniel's Well, at the foot of the Great Southern's iconic Stirling Ranges.

Western Australia's culinary scene has experienced a renaissance as the population and average salary rose during the mining boom of 2006–2012. High quality restaurants began appearing, eager to capitalise on increasing demand from cashed-up consumers looking for premium food. It became fashionable for steaks to 'have an address', so to speak, referring to the trend of promoting the steak's farm of origin on the menu.

Butterfield Beef capitalised on this 'luxury steak' movement. Their cattle are exclusively Angus or Angus cross – one of the most revered breeds by steak-lovers due to their advanced genetics and superior fat marbling and tenderness. The cattle are reared on grass before being finished off on a specially-devised diet of white grains, lupins and fibre in the feedlot, producing a superior final product.

Being a boutique producer, Butterfield Beef have ensured their entire supply chain is based in Western Australia. Once the cattle leave the farm, they are processed in Bunbury before being transported to Butterfield's master butcher and distributor, Ryan's Quality Meats in Jandakot; also a fully Western Australia-owned and operated family business. Great Southern locals are able to source Butterfield Beef locally through a distributor in Albany.



- 1.32 per cent of GSP
- \$90,000 GRP per capita
- 12 per cent unemployment
- 39,099 resident population
- -0.98 per cent annual population growth



## 4. Kimberley

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The Kimberley region is remote and sparsely populated, with an estimated 39,000 residents in 2014. As one of the world's last great wilderness areas, the natural environment is a prime asset of the region, recognised for its intrinsic value and economic, social and cultural opportunities. About 46 per cent of its residents are Aboriginal Australians, the highest representation in the State.<sup>83</sup>

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The economy is broad-based relative to some other regions in Western Australia.<sup>84</sup> Mining is the largest contributor to gross product, while jobs are primarily in the health care, social assistance, education and training, public administration and safety sectors. The region has the highest unemployment rate and second-lowest gross regional product per capita in the State.<sup>85</sup>

The region is positioned to capitalise on its proximity to South East Asia.<sup>86</sup> However, realising the opportunities in sectors such as agriculture, resources and tourism requires improved transport infrastructure.

The Kimberley's abundance of natural resources provides for a strong agriculture and food industry. Challenges include access to skilled labour, and capital for investment in land and water infrastructure. In addition, for the region's rangeland industries to grow more pastoral land needs to be brought into sustainable production.<sup>87</sup>

Minerals and energy resources in the region are considered to be highly prospective yet under-explored. The Kimberley also has great potential in cleaner and renewable energy generation including solar, tidal and hydropower, and the natural gas of the Browse and Canning Basins.<sup>88</sup>

Kimberley tourism has a global reputation for being a sustainable industry, based around cultural and ecological tourism, with iconic landscapes and adventure options. The region must pursue development in ways that maintain the region's high environmental quality.<sup>89</sup>

KRED Enterprises CEO Wayne Bergmann believes that the principal challenge for the Kimberley sits with the wellbeing and future of Aboriginal people.<sup>90</sup> Workforce strategies need to address barriers to Aboriginal employment and disparity in education outcomes for Aboriginal and non-Aboriginal Australians. Partnerships and collaboration with local communities are particularly important in Indigenous policy, along with regional leadership.<sup>91</sup>

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## Case study:

### KRED Enterprises

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A common theme that emerged from the State of the Regions events in the northern regions was a need to facilitate better outcomes for Aboriginals. KRED Enterprises – operating in Western Australia's Kimberley region, where 46 per cent of the residents are Aboriginal – is a wonderful example of an initiative run by Aboriginal people, for Aboriginal people, which assists in achieving this goal.

Western Australia's mining boom saw an unprecedented rise in resource extraction in the Kimberley and Pilbara regions. Companies seeking the rights to develop resources projects were required under the Native Title Act to negotiate with the traditional land owners, often resulting in compensatory agreements for the Indigenous communities.

KRED Enterprises was formed in 2010 to support Traditional Land Owners to make informed decisions about what happens on their Country, allowing them to take advantage of opportunities and secure long-term economic independence. KRED is part of the Ambooriny Burru Charitable Foundation owned by eight Native Title groups who work together to achieve optimal outcomes.

KRED owns and operates two subsidiary companies: Environmental Heritage Social Impact Services (EHSIS) and KRED Legal. EHSIS provides staff and logistics for heritage surveys, cultural heritage monitoring and cultural awareness training, while KRED Legal works on commercial agreements, Native Title law, litigation and governance. KRED also drove the establishment of the Kimberley Aboriginal Pastoral Company, a co-op of 10 of Australia's largest Aboriginal-run pastoral stations. The project was backed by a Chinese consortium, and aims to increase station productivity and boost remote Indigenous employment.

KRED's mandate is to create Aboriginal economic development opportunities, drive social change and create meaningful employment and training opportunities. Mr Bergman is recognised as one of Australia's leading advocates for Indigenous self-determination through the provision of opportunities for economic empowerment. Mr Bergmann believes that any reliance by Aboriginal communities upon governments and companies for income only perpetuates dependency, and Aboriginal people need to take their destiny into their own hands through enterprise development.

At KRED's launch, Mr Bergmann said: "KRED Enterprises provides us with the opportunity for economic independence, meaning our people will no longer have to rely on government and business hand-outs. This is about Kimberley Aboriginal people doing something for ourselves. The successes we have had in the Kimberley have always come from our people working together and that will not change. The profits KRED Enterprises generates will be channelled into the Foundation and used for purposes that support our law and culture, land management and economic development. We want to improve the lives of Aboriginal people and create strong communities in the Kimberley."

KRED continues to innovate to ensure its long-term sustainability. In 2013, KRED members became shareholders in the business, which led to 50 per cent growth in membership in two years.





- 2.55 per cent of GSP
- \$116,000 GRP per capita
- 6.4 per cent unemployment
- 58,183 resident population
- 0.63 per cent annual population growth

## 5. Mid West

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The Mid West region is vast, covering around 478,000 square kilometres – or one fifth of the Western Australia landmass. It has 17 local governments shared across three subregions (the Batavia Coast, Murchison and North Midlands) and is one of only five areas in the world with both marine and terrestrial biodiversity hotspots of international significance.<sup>92</sup>

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The region is home to approximately 58,000 people. Around 12 per cent of the population identifies as being Aboriginal (representing seven discrete language groups) and 14 per cent were born outside Australia.

The Mid West is a dominant logistics hub for Western Australia and a major gateway to Asia. Its strategic infrastructure portfolio includes Western Australia's most diverse regional port and extensive road, rail and airport networks. Geraldton was Western Australia's first regional location to receive National Broadband Network Fibre to the Premises (FttP) rollout and will be one of a few regional centres to receive full FttP services.

As the Mid West regional capital, Geraldton is a key regional centre for Western Australia that is currently engaged in the State's Regional Centres Development Plan. This will help strengthen Geraldton's capability to grow business, investment and jobs. As the regional centre, growth in Geraldton drives positive change for the rest of the region.

The gross regional product of the Mid West grew to around \$6.2 billion in 2014–15.<sup>93</sup> The region's economy is the most diversified in Western Australia, with mining, agriculture (including fishing and aquaculture), construction, logistics, tourism, retail, health and education all making valuable contributions.<sup>94</sup>

The Mid West Regional Investment Blueprint was finalised in 2015 and outlines the region's growth and development focus to 2050. It was developed through extensive regional engagement and consultation with key stakeholders over a two year period. The Blueprint is evidence based and enjoys strong buy in and leadership from Mid West business and community sectors.

The Blueprint now guides the strategic and operational direction of the Mid West Development Commission (MWDC) and is already helping deliver key strategic regional outcomes. Detailed development strategies have been prepared for key portfolio areas including tourism, business / industry and health, which have imperatives around regional job growth and a strong focus on driving projects that will achieve transformational change in the region. Strategy work continues for energy, digital communications, agriculture, education, transport infrastructure and innovation, which will help define regional priorities and identify key investments needed to drive, or remove barriers to, regional growth and development.

The Blueprint aligns extremely well with the State's new Regional Development Strategy (RDS) and the emerging unified regional development portfolio approach. The portfolio approach represents a new paradigm for regional development that requires the nine regions and WA Department of Regional Development to work collaboratively to identify, develop and submit programs for funding that will deliver the best high impact outcomes for Western Australia.

The Mid West Blueprint emphasises the regional advantage and highlights where its strengths and assets can help drive State economic growth. The Mid West is ideally placed to lead transformational change and innovation in fields such as aquaculture, horticulture, radio astronomy, renewable energy, marine services and pastoral sector revitalisation. The MWDC will continue to advocate strongly in the new regional development paradigm for investment that leverages off its regional strengths and drive growth in areas of emerging transformational opportunity.

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## Case study:

### Pollinators Inc.

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Founded in Geraldton in 2010, Pollinators Inc. was Australia's first member-based social enterprise (an organisation that applies commercial strategies to improving social well-being) supporting entrepreneurs and innovators. It was designed to meet the needs of local innovators and entrepreneurs, and provide a forum for the local community to contribute towards a dynamic, thriving town.

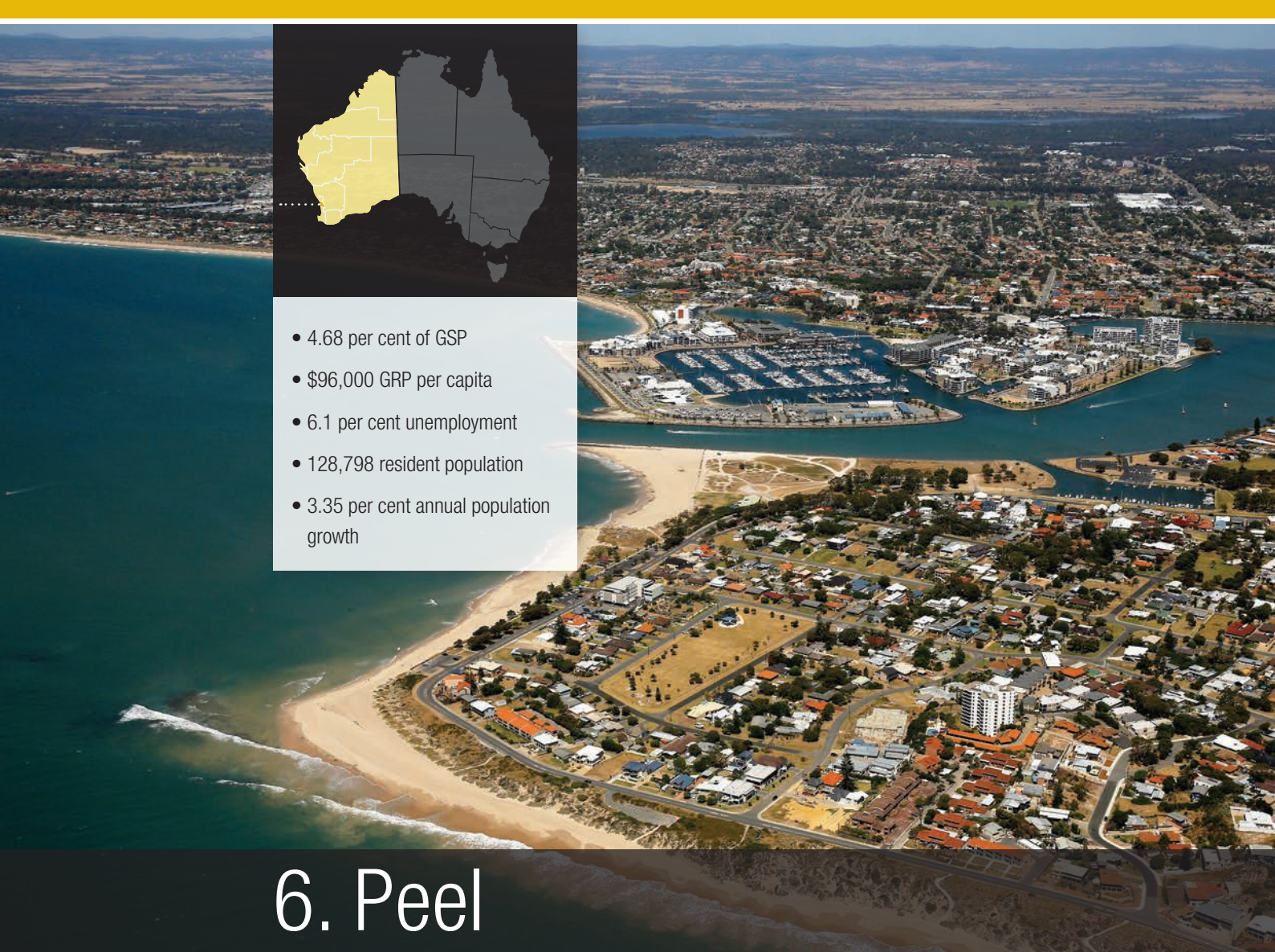
Pollinators is a membership organisation that provides a diverse set of benefits including co-working spaces, digital training programs, urban regeneration projects, venture accelerators, innovation festivals and support for networks and spaces in other cities. Guided by the organisation's mission to "nurture people and innovations that enable healthy, resilient communities", Pollinators drives disruptive and creative activities, seeking out initiatives that will benefit the wider community and contribute to Greater Geraldton being globally recognised as a model for sustainable communities by 2020.

Pollinators initially launched with a free membership base, and the community was quick to embrace the concept. Pollinators swiftly secured enough members, grants, sponsorship and crowd-funding to launch a pilot of its CityHive co-working space in 2011, involving more than 20 local designers, builders and architects, and 40 potential tenants. Soon after, in March 2012, Pollinators' first 'swarm' event was held, attracting 45 participants and demonstrating the local community's appetite for initiatives of this nature.

With membership growing, in 2013 Pollinators leased and renovated a building on Marine Terrace in Geraldton that had previously been empty for a decade, transforming it into regional Australia's largest co-working space. By reactivating an unused space, Pollinators also helped to inject new dynamism into the area.

An independent evaluation of Pollinators published in 2014 showed more than 80 per cent of respondents agreed Pollinators had contributed to a range of positive community outcomes. Social impacts included: "increasing vibrancy"; "new projects and ventures starting"; and "increased understanding of alternative strategies and models for social change". Deeper case studies showed changes included: "creating space for a group of highly engaged, highly articulate, highly skilled, highly motivated people to participate in the community"; "legitimised taking risks and proven that they can work"; and "innovative and creative use of space".

One of Pollinators key successes was the Catalyst program, which raised more than \$10,000 for creative projects through philanthropy, signing deals with commercial investors met at pitch nights, and crowd funding. Pollinators has also delivered important training and support to 115 local organisations on how to optimise digital technology. Overall, it has facilitated the growth of science, sustainability and innovation networks, and festivals in the Mid West region.



- 4.68 per cent of GSP
- \$96,000 GRP per capita
- 6.1 per cent unemployment
- 128,798 resident population
- 3.35 per cent annual population growth

## 6. Peel

Western Australia's Peel region is located 75 kilometres south of Perth, with an area of about 5500 square kilometres. The region benefits from good transport and communication links, diverse natural resources, access to relatively affordable housing and comprehensive community, retail and commercial facilities and services.

With a population of 130,000 the Peel is the second most populous region after the South West.<sup>95</sup> Close to 80 per cent of residents live in Greater Mandurah. The region has a fast growing population, with an influx of people seeking affordable housing and lifestyle change, as well as super boomers arriving at a rate faster than anywhere else in Australia.<sup>96</sup> It is estimated that by 2031 the Peel will rival the South West as the most populous region outside Perth.<sup>97</sup>

The gross product for the Peel region was \$11.1 billion in 2012–13. Mining is the ‘strong base’ of the economy, producing alumina, gold and copper. The Peel is the third largest mineral producing region in the State, by value.<sup>98</sup> Employment is highest in construction, manufacturing and retail trade.

Agriculture and food are key strengths for the region, with extensive feedstock production and land suitable for food production. The Peel Food Zone is Western Australia’s first zone designated for intensive food production and processing.<sup>99</sup> Innovation in production technologies, niche sustainable food manufacturing, high-quality food products and water and energy supplies are helping position the Peel in a globally competitive environment.

The Peel’s proximity to the Perth metropolitan region and good transport connectivity present opportunities to expand domestic and international tourism. Renowned for its agricultural tourism, the Peel is recognised for its ‘paddock to plate’ philosophy, and seasonal festivals celebrating the produce of the region, including seafood, olives and wine.<sup>100</sup>

The proximity also means the Peel’s challenges differ to those of many other regions. While it does not struggle to attract workers, it needs to focus on upskilling residents. Supported by a major business and technology park, industry-focused skills training will help tackle unemployment, including youth unemployment of around 25 per cent.<sup>101</sup>

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## Case study:

### Forest Edge Recreation Camp

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The Peel region's location close to Perth makes it ideally positioned to take advantage of metropolitan day-trippers or those looking for a regional mini-break close to Perth. Forest Edge Recreation Camp has capitalised on this opportunity, setting up a unique, high-quality recreational facility in Waroona, only one and a half hours' drive from the Perth CBD.

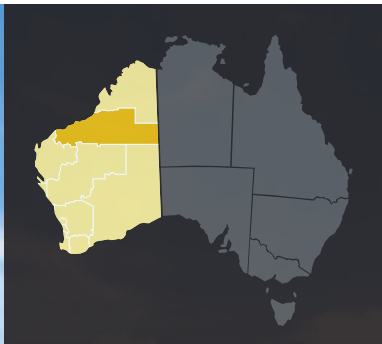
Forest Edge Recreation Camp was founded in 1983 on 105 acres of picturesque land near Waroona Dam and Drakesbrook Weir. The camp offers a wide array of recreational activities such as abseiling, a 230 metre-long flying fox, kayaking, rock climbing, a ropes course, orienteering, and target shooting. Low-key activities such as screen-printing and boomerang-making are also available.

Yet it was Forest Edge's decision to take the unique and innovative step of building Western Australia's first artificial dry ski slope that made headlines in November 2015, after finally being approved by the Waroona Shire Council following three and a half years of planning. The artificial ski field will comprise approximately 3500sqm of slopes that will be made from Proslope, a synthetic fibre which is placed over mats and can be sprayed with a mist featuring the same characteristics as snow.

The ski slopes had been scheduled to commence construction in 2016. However, a bushfire significantly damaged the property in January 2016, causing Forest Edge to close for repairs. Timelines for the construction of the ski slope have now been pushed back.

Prior to this setback, Forest Edge had been recognised for its innovation and nous when it was judged a category winner at the Peel Chamber of Commerce and Industry's Business Excellence Awards 2015. Forest Edge was a stand-out performer across a number of key assessment criteria including marketing, business practices, innovation, recruitment, competitive advantage, attracting and retaining customers and growth plans.

This local success provided the opportunity for Forest Edge to enter into the 2015 Western Australian Regional Small Business Awards, along with other category winners from across the state. Impressing the judges with their vision, attention to detail and commitment to customers, Forest Edge was announced as the winner of their category and the overall Western Australia Regional Small Business of the Year 2015.



- 7.45 per cent of GSP
- \$292,000 GRP per capita
- 3 per cent unemployment
- 67,503 resident population
- 1.83 per cent annual population growth



## 7. Pilbara

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The Pilbara is a globally significant mining and energy region with a wealth of resources, rich Aboriginal culture and stunning natural landscapes. For a region with a population of 65,000 people, the Pilbara punches above its weight in terms of economic importance.

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The Pilbara's gross regional product was \$28.87 billion in 2013–14, accounting for 7.2 per cent of the State's output. Mining, primarily of iron ore, contributed 76 per cent of the Pilbara's gross product.<sup>102</sup> The mining and construction sectors contribute over half of the region's jobs. The region has the highest gross regional product per capita and average income, and the lowest unemployment rate in the State.

Further expansion potential for the resources sector includes harvesting the Pilbara's extensive energy deposits, particularly natural gas and uranium. There is also scope for investment in traditional and innovative renewable energy production.<sup>103</sup>

Over the last decade, the rapid expansion of the resources sector brought challenges to the region, including high operating and living costs, exposure to fluctuations in volatile commodity prices, and income inequality. The transient and fly-in fly-out nature of the mining and construction workforce also means that resources growth does not necessarily increase the local workforce. Broadening the economy so it is not reliant on one sector will reduce risk and attract more workers to the region.

Agriculture and aquaculture present opportunities for diversification, and the region can use existing export infrastructure to capture demand for safe, quality food. Pastoralists and Graziers Association of Western Australia President, Tony Seabrook indicated that there is opportunity to redevelop the pastoral industry<sup>104</sup> while WA Minister for Water, Sport and Recreation, and Forestry, the Hon. Mia Davies spoke of the vision for farming in the Pilbara – saying rich soils and water together with long sunlight hours provide an ideal environment.<sup>105</sup>

With unique environmental and cultural assets including Karijini and Murujuga National Parks, the Pilbara can capitalise on its proximity to Asia's growing middle class to increase education and leisure visitation, including with nature-based, heritage and Aboriginal tourism.<sup>106</sup>

Continuing investment in land access and infrastructure such as energy, water, communications and transport is required.<sup>107</sup> Attracting investment and people to live in the region permanently are key challenges. Also, steps are needed to promote Indigenous training and employment and address challenging social issues, particularly as Aboriginal Australians represent 16 per cent of the population.



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## Case study:

### New Energy

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New Energy demonstrates how the unique operating conditions of the Pilbara can drive innovation. Established in Western Australia in 2009, New Energy have become global leaders in waste-to-energy technology, which involves everyday waste being diverted from landfill and undergoing a patented low-temperature gasification process (developed in Australia) to generate energy.

Significant energy resources are trapped in the world's rubbish. For example, there are enough petroleum products used in the making of one plastic bag to drive a car 11 metres. In 2007, Australia used 2.9 billion plastic bags – enough to power a car for 42.9 million kilometres, or 1,070 times around the world.

New Energy's low temperature gasification technology involves feeding waste products into units where it is cooked for 16–24 hours in an oxygen-starved environment. A synthetic gas consisting of carbon monoxide, methane and hydrocarbon rises out of the material and is ignited by a secondary gas burner to generate energy.

Australia generates an average of two tonnes of waste per person, which is the second-highest amount per person globally. Western Australia generates 2.5 tonnes per person, while the Pilbara generates 9.3 tonnes per person. During New Energy's study at the height of the resources construction boom in 2013, 630,000 tonnes of waste was generated in the Pilbara. This placed a significant burden on local councils' waste infrastructure, which were designed for a fraction of the waste they were receiving. Most of the waste was non-compostable or recyclable, such as packaging, pallets, timber and tyres – but ideal for a waste-to-energy plant.

While low temperature gasification has been utilised in over 42 projects worldwide since 1990, Australia has been slow to adopt this technology; the Port Hedland waste-to-energy plant, under development since 2011, will be Australia's first. It will be licensed to process up to 225,000 tonnes annually, producing around 15.5 megawatts, enough to power 21,000 homes. It will be the first large-scale renewable energy project of any kind to feed into north-west Western Australia's interconnecting grid, and the Town of Port Hedland will be Australia's first council to power its assets off its own rubbish.

The Clean Energy Finance Corporation estimates that waste-to-energy will become a \$2–\$3 billion industry in Australia over the next 10 years. Being home to the first project of its kind, the Pilbara is now a case study for the rest of Australia and offers an opportunity to diversify the local economy through providing expertise to other councils considering this technology.

New Energy's Port Hedland plant is on target to open in late 2017. They are also now developing a second project in East Rockingham.



- 6.37 per cent of GSP
- \$97,000 GRP per capita
- 4 per cent unemployment
- 174,052 resident population
- 2.59 per cent annual population growth

## 8. South West

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Surrounded by the Indian and Southern Oceans and covering 24,000 square kilometres, the South West is the State's most populated region outside of Perth, with a natural environment, lifestyle and opportunities that attract people to live in and visit the region. With its relative proximity to Perth and access to good transport links, the region is well placed to continue to grow.

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The region's gross product was \$17.1 billion in 2014.<sup>108</sup> The retail sector contributed \$2 billion in 2014, while the region's mining and mineral processing sector provides \$1.9 billion value. The largest employers are the construction, manufacturing and retail trade sectors.

The area has a buoyant tourism sector, in large part thanks to Margaret River, food and wine tourism, the coastal areas and temperate weather. The international events of Margaret River Surf Pro, Gourmet Escape and CinéfestOZ are just some of the many events that generate opportunities and branding for the South West.<sup>109</sup> Opportunities to expand include recreational industries such as racing, marine and cycling.

The South West produces premium food and beverages for local and export markets. It has an excellent foundation for growth in agribusiness and food processing (especially meat, dairy and horticulture products),<sup>110</sup> capitalising on rising overseas demand for quality produce. Asia's growing middle class is also expected to drive demand for international education. The South West is well placed, with a strong educational services industry and established business and education links with Asia.<sup>111</sup>

Taking advantage of opportunities to tap into Asia's rising demand for higher quality food, tourism, and education will require the South West economy to increase its supply chain capability.<sup>112</sup> There is room to improve infrastructure through improving access to high capacity broadband important for traditional industries, as well as the emerging sectors of technology, media, marketing, and the arts and expand air and sea links to national and overseas opportunities.<sup>113</sup>

The ageing population has implications for the region. The South West can benefit in the short term from a large pool of active older people, while longer term planning needs to include adequate health care provision. While remoteness is a challenge for health services, the South West has attracted health professionals through setting up specialist units, such as oncology, in the region.

As a percentage, marginally fewer people have higher education qualifications in the South West than the national average, and while there is an above-average representation of those holding VET qualifications, skilling the workforce for the 'jobs of tomorrow' remains a challenge for the region.

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## Case study:

### Creative Industries

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The South West region has launched a series of initiatives to grow the region's creative sector, generating lively, dynamic communities in the process of attracting and retaining more young people and families.

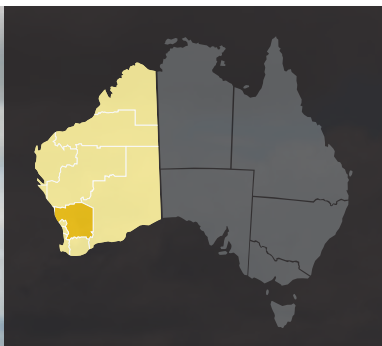
The 2011 Census recorded 1095 employees in the South West's creative economy, contributing \$306 million to the region. The sector adds almost \$150 million to the South West's gross regional product and generates exports of up to \$70 million annually. Growth in the creative workforce outpaced employment growth in traditional industries such as agriculture, mining and manufacturing, retail trade, accommodation and food services from 2006 to 2011, at 3.6 per cent annually.

To nurture and expand this sector, in 2012 the South West Development Commission launched Creative Corner, a group that brings creative professionals together and links them with business opportunities. Creative Corner provides a service to help promote the South West's creative industries, as well as identify and fill short-comings to assist the sector's growth. Creative Corner also lobbies for support for improved infrastructure, assistance and education for the creative sector; promotes the sector and the creative work done within the region; and aims to attract further creative industries to the region.

Another initiative is CinéfestOZ. Launched in 2008 and held in Busselton, Bunbury, Dunsborough and Margaret River, CinéfestOZ is a five-day festival that premieres feature films and events in the region's renowned wineries, small bars, cinemas and galleries. It has stamped itself as a leading destination film festival in Australia, featuring 150 ticketed screenings of feature films, documentaries and short films, with a further 160 free community screenings. In 2012, CinéfestOZ directly injected \$1.7 million into the local economy.

The four-day Emergence Creative Festival launched in 2013 is another initiative that attracts professionals from music, film, advertising, digital and visual arts to Margaret River. This event encourages participants to look beyond their own specialisation to broaden their thinking and generate new ideas.

Through these programs, the South West Development Commission is looking to triple jobs in the creative sector from 1000 to 3000 by 2050, while supporting its vision of vibrant, engaged and lively communities.



- 3.04 per cent of GSP
- \$108,000 GRP per capita
- 3.1 per cent unemployment
- 74,774 resident population
- 0.01 per cent annual population growth



## 9. Wheatbelt

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The Wheatbelt's diverse productive landscapes, strong economic base, proximity to domestic and international markets, and people are all pillars of growth in the region. It has a population of 75,000 and is viewed as one of the safest and most community-minded regions in Western Australia.<sup>114</sup>

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The Wheatbelt's estimated gross regional product was \$6.4 billion in 2012–13, growing 34 per cent faster than the State average. As the State's largest agriculture producer, and with a growing mining sector, the Wheatbelt has an export-oriented economy.<sup>115</sup> The region's attributes see it well placed to seize opportunities from global drivers, including the growing affluence of Asia and associated demand for food, and the application of new knowledge and technology across global networks.<sup>116</sup>

Agriculture is the largest employer in the region, with broadacre cropping, livestock, fodder and horticultural activity. In 2011–12, agriculture production was valued at approximately \$3.5 billion, accounting for 46 per cent of the State's agricultural output.<sup>117</sup> Wellard Group Holdings CEO Mauro Balzarini stated that the challenge for agribusinesses is how best to improve margins rather than volume.<sup>118</sup> Securing sustainable water supply is also important. Niche manufacturing in agriculture is a growth area, with local innovation resulting in farm Technology that is improving yields.

As the second most visited region in the State after the South West, the Wheatbelt's tourism industry is significant, attracting both domestic and international visitors. Landscape, heritage, events and recreational tourism are driving a growth in visitor numbers.

The region produces a variety of minerals, including iron ore, mineral sands, nickel, copper, gold and silver. Mineral production expanded considerably over the decade to 2012–13, from a value of \$452 million to \$2.5 billion. The region produces more than 60 per cent of the State's renewable energy and has growth opportunities in renewable energy generation and local distribution, as well as areas such as aviation, education and training, and population services for an ageing population.<sup>119</sup>

To realise its export potential, transport logistics and digital capacity in the region need further investment. Growth could also be generated through the Wheatbelt creating partnerships and cross collaborations, such as producers and manufacturers collaborating to market their products domestically and internationally.

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## Case study:

### Co-Operative Bulk Handling Group

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Co-Operative Bulk Handling (CBH) Group is a farmers' co-operative that was established in Western Australia during the Great Depression when farmers in the Wheatbelt realised that a bulk handling system would reduce costs and strengthen the State's then-struggling wheat industry. The trustees of the Wheat Pool of Western Australia and Wesfarmers Ltd jointly registered the co-operative on 5 April 1933.

CBH Group has grown to become Australia's largest co-operative and a leader in the Australian grain industry. CBH is now owned and controlled by around 4200 Western Australia grain growers and plays a significant role in the State's economy. CBH went from processing 42,565 tonnes of wheat in 1933, to a record 15.9 million tonnes in 2013–14.

Innovation has been at the core of CBH from the outset. After launching with only five receival bins in 1933, their network had expanded to over 300 receival bins by the 1960s. CBH then consolidated the network to improve efficiency, dismantling some silos and upgrading others, allowing them to take larger tonnages at faster rates. Currently, CBH's storage and handling system receives and exports around 90 per cent of the total Western Australian grain harvest and is regarded as one of the best in the world.

CBH also invested in expanding its asset base along the value chain. In 1955, CBH was granted control over Western Australia's grain port facilities, and in 1961 a railway from the eastern Wheatbelt to the coast was introduced. CBH now owns a state-of-the-art rail fleet dedicated to the most efficient transfer of grain from Wheatbelt receival points to its four port terminals.

In 2002, CBH moved into grain marketing by merging with Grain Pool of Western Australia, another grower-controlled organisation. This marked CBH's transformation into an integrated business focused on delivering a greater share of the grain value chain to growers. The co-operative's marketing and trading arm has since expanded its operations to include eastern Australia, as well as offices in Hong Kong, Tokyo and Portland, Oregon.

In 2004, CBH partnered with the Salim Group to take a 50 per cent stake in Pacific Agrifoods, now Interflour, which operates seven flour mills in Indonesia, Vietnam, Malaysia and Turkey, and a grain port terminal in Vietnam.

CBH now has total assets valued at more than \$2 billion and employs approximately 1100 permanent employees and up to 1800 casual employees during the harvest season. It has 197 receival bins throughout Western Australia, four ports and investments in trains, flour mills and shipping. It exports to more than 20 countries.

# State of the Regions series

This report is based on the State of the Regions series of events held in Western Australia from 2014–2016:

- Future of the South West – 7 August 2014, Bunbury
- Future of the Wheatbelt – 2 September 2014, Northam
- Future of the Peel Region – 12 November 2014, Mandurah
- Future of the Kimberley – 29 May 2015, Broome
- Future of the Goldfields-Esperance – 7 July 2015, Kalgoorlie
- Future of the Pilbara – 7 October 2015, Karratha
- Future of the Gascoyne – 5 November 2015, Carnarvon
- Future of the Great Southern – 16 February 2016, Albany
- Future of the Mid West – 3 March 2016, Geraldton

The final event, Regional development in Western Australia was held on 8 June 2016 in Perth to coincide with the release of this publication.



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## Endnotes

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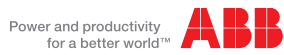
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