Shire of Boddington SuperTown Economic Development Strategy

Shire of Boddington
February 2012

Syme Marmion & Co

Level 1, 50 Ord Street, West Perth
Western Australia - 6005

phone: (+61 8) 9485 1766
fax: (+61 8) 9485 1866

email: admin@smco.com.au
web: www.smco.com.au
abn: 13267625066

Version Control

Document History and Status

Status	Issued To	Qty	Date	Reviewed	Approved
Draft V1	Shire of Boddington	1	10/01/12	KH, MA	JS
Draft V2	Shire of Boddington and Hames Sharley	Electronic	16/01/12	KH, MA	JS
Draft V3	Shire of Boddington and Hames Sharley	Electronic	15/02/12	KH, MA	JS
Final	Shire of Boddington	Electronic	28/02/12	KH, MA, LA	JS

Report Details

Author:	Syme Marmion & Co
Client:	Shire of Boddington
Name of Document:	Economic Development Strategy
Document Version:	Version 4
Project Number:	P1153

SMCo

Syme Marmion & Co

Level 1, 50 Ord Street, West Perth
Western Australia - 6005

phone: (+61 8) 9485 1766
fax: (+61 8) 9485 1866

email: admin@smco.com.au
web: www.smco.com.au
abn: 13267625066

Executive Summary

Background

The Regional Centres Development Plan (SuperTowns) is a Royalties for Regions initiative aimed at encouraging selected regional communities located in the southern half of the State to plan and prepare for a predicted doubling of the State's population by 2051. Boddington is one of nine selected towns with the potential to become a SuperTown. The objectives of the initiative are to:

- target sustainable regional economic development to stimulate diverse employment and investment opportunities
- assist in managing the State's projected population expansion in key regional towns
- plan and invest in town development and growth within an integrated strategic planning and implementation framework

The Boddington SuperTowns initiative will have important sub-regional implications for the Shire of Boddington and also for the Shires of Wandering and Williams, including increasing synergies for technology development, business growth and potential to develop the tourism industry. This sub-region is referred to as the Boddington District.

The Boddington District Economic Development Strategy complements the overarching Growth Plan (published under separate cover, to be read in conjunction with this report) and will specifically provide for the future economic development of the Boddington/Ranford townsite and the sub-region to the year 2051. The Economic Development Strategy (EDS) provides an "investment blueprint" to attract State and private sector investment and to guide sustainable economic development outcomes.

The Economic Development Strategy investigates three different growth scenarios in the context of the SuperTowns initiative:

Scenario 1: 'Business as Usual'
- No major new initiatives, incremental change from current
- Population of approximately 4,000 by 2051

Scenario 2: SuperTowns Initiatives
- Growth as a result of SuperTowns initiatives
- Population of approximately 7,000 by 2051

Scenario 3: 'Aspirational'
- Accelerated growth exceeding expectations
- Population of approximately 10,000 by 2051

2051	SuperTowns Initiative	Aspirational
Population	7,000	10,000
Additional Dwellings	1,300	2,300
Additional Jobs	1,000	1,800
Additional hectares of employment land	75	110

The Shire of Boddington has already commenced the business of economic development in the Strategic Plan 2009 and in the Plan for the Future, 2008-2013. The EDS provides support for these ongoing initiatives, context for future requirements associated with the growth scenarios and strategies for the delivery of hard and soft economic development infrastructure for essential education, training, business support and job growth. The prospective task for economic growth and employment creation for the District under a SuperTowns Growth Plan is significant. Given that most local businesses are micro and small in size, this implies a total business creation task of approximately 500 – 1,500 new enterprises over the Growth Plan period. These job growth targets imply an annual average requirement of 30-50 new jobs every year to 2050.

Economic Prospects and Opportunity

Historic long term population growth in the district has historically been very flat, only increasing to around 2% pa from 2006. This reflects the economic base, with majority of employment arising from the agricultural sector, which is stable but with little employment growth. In 2006, 35% of all employment was in the agricultural sector. From 2006 to 2010, growth rates in the Shire of Boddington have averaged 3.4% pa, with some additional growth in Williams and Wandering, reflecting the re-opening of Newmont Boddington Gold Mine (NBGM) and the expansion of Worsley's alumina operations.

There are three broad causes of population growth:

- Expansion of the economic base
- In-bound migration of people with no direct economic link to the district
- Increase in the number of 'local' mining employees

Expansion of the economic base is possible in several main areas:

- Agriculture intensification and value-add
- Tourism
- Mining services (training, technology) and increased local participation in mining value chain
- Increased local participation and growth of the population and community driven service sector, retail, tourism spin-off etc

An increase in the level of in-bound migration is also feasible if the District has adequate lifestyle opportunities in terms of education, training, facilities and choice of employment and accommodation. These migrants are people who can make a lifestyle choice and have no direct link to the local economy, for example:

- Retirees and pre-retiree 'tree-changers'
- Tele-workers

The opportunity for increasing the mine working resident population is regarded as low. Working patterns are set and little change is expected in scale of mining operations. Workforce turnover is also relatively low. The alternative strategy is to seek growth in the local mining service sector through negotiation with the two major operators NBGM and BHPB Worsley.

Industry and business growth opportunities are realistic and diverse. The research and analysis carried out in the preparation of the EDS has concluded that there are **seven** core industrial/business focus areas:

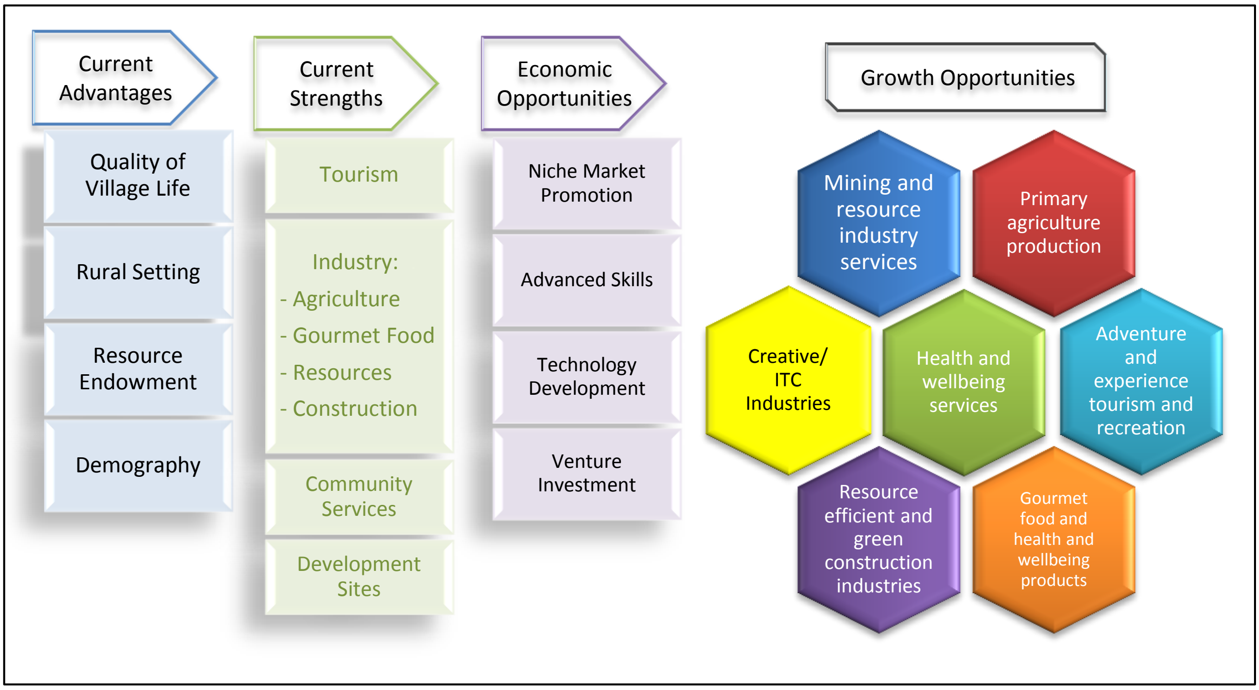
1. Value adding to mining and resource based industries with potential requirement for light and general industrial service land.
2. Primary agriculture production in livestock and cereals/feedstock, with spin off potential to increase agri-service industries, value added processing and venture into emerging agri/organic-sectors with potential requirement for light and general industrial service land.

3. Gourmet food/fine food products and health and wellbeing products derived from the land, with potential to expand the home based business sector and potential requirement for light industrial land and small main street retail hub.
4. Construction industries, with potential to branch out into green technologies and resource efficient technologies with high potential for affordable rural branding with potential requirement for light and general industrial service land.
5. Tourism, taking advantage of the wealth of natural recreation and adventure resources and local rural, heritage and mining visitor attractions; potential to build upon a 'Hotham' brand, potential to increase motel, inn, short stay accommodation base, add to and supplement the event calendar with performance arts, collectors meets etc, requirement to identify and service a semi-permanent 'ground' for markets, events and gatherings, main street tourist office/interpretation centre and tour staging point; opportunity to engage wealth of existing voluntary and not-for-profit organisations and build upon local knowledge base.
6. Population and personal services related to health care, aged care, education, safety, wellbeing, technology training and business support with potential for small main street outlets and essential worker housing.
7. Creative industries drawing upon NBN (although all industry sectors above will also benefit from NBN) with potential to expand the home based business sector and combined technology resource centre. Opportunity to engage youth and retiree population.

Services to these industry and business opportunities are essential and the demand for reliable water, sewerage, power and NBN supply exists and will increase with growth. Failure to meet the service needs of emerging industries and businesses will impede growth and economic sustainability; local business growth could be lost to Mandurah and Bunbury.

Enhancement and engagement of the existing and potential human capital within the district is essential to a sustainable economy and community. Future projects should be developed in an inclusive a manner as possible. The local population is multi-skilled and proud of their settlements. The region is well served with representative groups and networks. The responsibility for the economic and community development of the district can be shared by Local Government through partnerships to generate a broader stewardship and advocacy base.

The diagram below illustrates the economic model upon which the EDS is based.



The Approach to the Economic Development Strategy

A SuperTowns growth scenario of around 7,000 people by 2051 is feasible for District with economic development and strategic collaboration and coordination. This is the preferred scenario. The Boddington District has a substantial number of attributes, attractions, assets, and opportunities. The community has a wealth of associations, clubs and leadership groups for a new community to join. There is a diverse cross section of demographics and strong participation from families and seniors. Some members of the community are involved in more than one community group. These qualities are essential features of community which coordinates, cooperates and volunteers for mutual benefit. The future growth of the Town and District should be built upon these foundations rather than a formulaic or standard approach to economic development.

The Economic Vision is:

To maintain the quality of life and small town character of the Boddington district whilst striving to attract more residents to share in these benefits and achieve greater economic self-sufficiency.

The Economic Development Strategy Principles are:

- A sustainable community
- Maintain economic growth and broader, targeted spectrum of economic development and social investment in the district
- A transparent framework within which priority actions can be assessed
- Assist in long term planning, management and performance monitoring processes

The Economic Development Strategy Objectives are:

1. To articulate a shared public, private, community vision which achieves a triple bottom line outcome
2. To tailor economic development to meet specific needs of Boddington District community
3. To maintain and enhance economic diversity of the district
4. To generate greater opportunity for local jobs, skill matching, community services, entrepreneurial activity, investment and innovation
5. To support opportunities for increased individual and community prosperity
6. To foreshadow emerging economic growth trends and initiatives to support advanced planning and rapid responses to opportunities
7. To interpret infrastructure and development plans to optimise economic benefits to the widest community
8. To open up opportunities to tap into inherent capacity and resources of local residents
9. To support collaborative partnerships, funding applications and development prospectuses
10. To support the development of marketing, branding and promotion

The economic development strategies and actions are aligned with key themes. The themes have been deliberately annexed from the Key Focus Areas of the Super Towns growth plan framework, as they clearly reflect the emerging economic development themes of the Boddington District and can be used to align the high level aspirations of the overarching framework, District growth plan and detailed economic development action list. **The economic development themes are:**

- A sustainable community
- Economic activity and employment opportunities
- Maximisation of the benefits of technology and innovation
- Integrated transport and key infrastructure linkages
- Marketing and strengthening of identity

The Economic Development Strategies and Action Plan

The following table illustrates the immediate short term strategies and actions or a summary of the economic development imperative. Section 5 of the Economic Development Strategy provides a comprehensive list of short, medium and long term initiatives and actions.

Specific Economic Development Strategy and Actions *(Immediate - High priority - refer section 5 EDS for full strategy)*		Year 1	Year 2	Year 3
Theme 1:A sustainable community				
Adopt District Growth Plan	Align Scheme, policies, targets			
Investigate three year housing land supply options	Match demand, align services			
Prioritise Main Street infill options	Identify sites/capacity, Prospectus/Design guides			
Theme 2: Economic activity and employment opportunities				
Form Strategic Partnership	MOU, Advisory Panel, Executive Taskforce			
Prioritise ED resources	Develop ED Charter			
Investigate 3 year employment land supply options	Match demand, align services			
Facilitate local mine servicing employment	Develop workforce plan, policy provisions			
Support business/employment start-up	Develop Town Centre training/technology hub			
Facilitate training and learning opportunities	Identify local VET,K-12 opportunities, form mentor network			
Support tourism industry development	Develop District Tourism Strategy			
Theme 3: Maximisation of the benefits of technology and innovation				
Increase knowledge/innovation base	Service web based newsletter, innovation promotion			
Be NBN ready	Develop NBN bid, lobby Commonwealth			
Encourage resource/energy efficiency	Develop SMART guide, policy provisions, demonstration projects			
Theme 4: Transport and key infrastructure linkages				
Ensure timely services for Growth Plan	Develop District Infrastructure Strategy			
Theme 5: Marketing and strengthening of identity				
Promote and market tourism	Develop Town Centre Visitor Centre, Develop Hotham Brand			
Retain and enhance character	Develop design guides for new development			
Communication	Update promotional material			

Implementation

A governance structure is proposed with opportunities for greater sharing of responsibility, greater levels of community engagement and enhanced private sector leadership which places the Super Town initiative at the forefront of the three Shires' strategic planning. The governance recommendation is that a Boddington District Strategic Partnership should be formed within government at local level between the three Shires; Boddington, Wandering and Williams (in essence the Super Town initiative has already caused this to happen informally and the three Shires have collaborated on the Economic Development Strategy and Growth Plan):

- The Strategic Partnership would be aligned with the Growth Plan Framework established by the State Government and would prioritise the actions from the Economic Development Strategy and Growth Plan within their organisations.
- The Strategic Partnership would liaise and report to the State on a regular basis (and to Federal levels as the need arises for projects such as NBN). The focus of these collaborations would be forward planning and budget planning, grants/funding strategies, strategic project promotion and priority evaluation.
- The Strategic Partnership would appoint a Super Town Advisory Panel (appointed by the Shire presidents) which would advise the District on major projects, policies and plans as required. This advice may vary in terms of specialist technical, financial, economic, environmental and social detail. The panel is likely to harness the skills of the private sector as consultants and key stakeholders in industry, business and finance.
- The Strategic Partnership would also identify an executive or taskforce made up of appropriately qualified and experienced officers from the three local governments, charged with collaborative day-to-day economic development tasks, SuperTowns project development and assessment and KPI monitoring. KPI monitoring would be closely aligned with the Shires' strategic plans.
- The community would be invited into voluntary engagement and stewardship roles in SuperTowns projects.

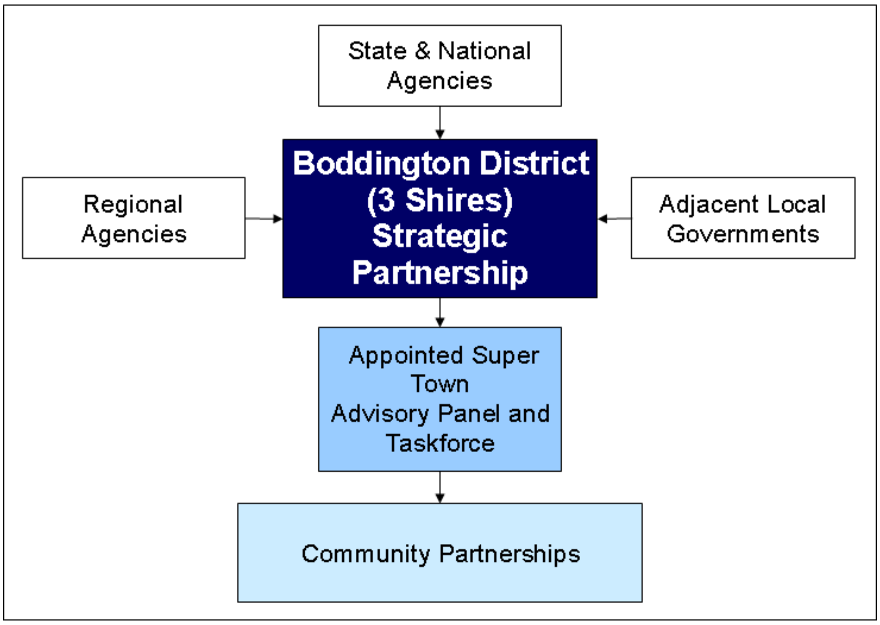


Table of Contents

List of Tables

List of Figures

1. Introduction

1.1. Background – The SuperTowns Concept and Implications for Boddington

The Regional Centres Development Plan (SuperTowns) is a Royalties for Regions initiative aimed at encouraging selected regional communities located in the southern half of the State to plan and prepare for a predicted doubling of the State's population by 2050.

Boddington is one of nine selected towns with the potential to become a SuperTown. Boddington was selected based upon:

- potential for population expansion
- potential for economic expansion and diversification
- strong local governance capabilities
- potential for net benefits to the State

The SuperTowns vision is to have balanced communities, with lifestyle options and access to services. They will have affordable, quality housing and a diverse range of job opportunities. The towns will offer more choices for people to live in regional areas and an attractive alternative to living in the metropolitan area.

The objectives of the SuperTowns initiative are to:

- target sustainable regional economic development to stimulate diverse employment and investment opportunities
- assist in managing the State's projected population expansion in key regional towns
- plan and invest in town development and growth within an integrated strategic planning and implementation framework

The Boddington townsite is situated 130km south east of Perth, an hour's drive from Mandurah and a 1.5 hour drive from central Perth, and has an estimated population of 1,000 people. The Shire of Boddington has a population of approximately 1,600 people, with a further 1,991 permanent employees and contractors living on-site at the Newmont Boddington Gold (NBG) mine camp.

Industry is dominated by mining, with the NBG mine and the BHP Billiton Worsley (BHPBW) bauxite mine operations in the area. Other industry includes agriculture, jarrah forest harvesting, blue gum and pine plantations and orchards.

The population of the Shire of Boddington has been growing steadily, due to the re-opening of the NBG mine and the expansion of the BHPBW bauxite mine in the past five years. The gold mine has recently announced a life-of-mine out to 2060 for processing of ore. In 2009-2010, the Shire population grew by 5.6%; the Peel regional growth rate was 3.5%, compared to a National and State average of 2.1% and 2.2%, respectively. In the 2006-2010 period population growth for the Shire averaged 3.4% per annum.

A significant component of this population growth has occurred in the main town of Boddington. The Shire of Boddington is anticipating continued steady growth over many decades. The Boddington-Ranford Townsite Strategy (2010) anticipates Boddington and the adjoining townsite of Ranford will have a population of over 3,000 people by the year 2030. This rate of growth may accelerate due to being designated a SuperTown. The SuperTown initiative will also have important sub-regional implications on the Shires of Wandering and Williams, including increasing synergies for the tourism industry development potential. This sub-region is referred to in this report as the Boddington District.

1.2. Purpose of Economic Development Strategy

The achievement of the SuperTown objectives will be guided by the over-arching Boddington Growth Plan; the Boddington SuperTown Economic Development Strategy will complement the Growth Plan and will specifically provide for the future economic development of the Boddington townsite and the sub-region to the year 2051.

The Economic Development Strategy will provide an "investment blueprint" to attract State and private sector investment and direct sustainable economic development. The Boddington Economic Development Strategy:

- identifies the assets of the community
- identifies economic opportunities arising from the current Boddington economy
- identifies any synergies and opportunities that exist in the sub-region of Boddington, Wandering and Williams
- determines the extent to which existing local and sub-regional opportunities have been taken up, and if not, why not; recommends mechanisms to develop any such opportunities
- identifies future economic growth opportunities and recommendations on further investigation required to develop the identified opportunities
- recommends a mechanism for the recognition and prioritisation of economic development opportunities
- recommends what resources are required to take advantage of any economic opportunities that are identified
- identifies economic development targets and how to measure the achievement of them
- complements the Boddington Growth Plan

The following report is structured as follows:

- Section 2 sets the global and regional economic context for the economic development strategy
- Section 3 presents a local economic development model and lists the assets, strengths and opportunities used to inform the growth scenarios and formulate the Strategies and Action Plan
- Section 4 shows the various forecasts and growth scenarios for the population of the Boddington District
- Section 5 provides the Economic Development Strategies and Action Plan to be implemented by the Shire of Boddington and local stakeholders including State Government, business and the wider community
- Section 6 provides an implementation plan and outline governance structure for the strategies and actions
- Appendix 1 provides an outline of the historic and current Boddington District economy
- Appendix 2 summarises perceptions, feedback and comments received from stakeholders
- Appendix 3 is a copy of the Business Perceptions Survey
- Appendix 4 expands upon short term and high priority strategy and action implementation

1.3. Economic Development and the Role of Local Government

1.3.1. Economic Development Defined

The Shire of Boddington has commenced the business of economic development in the Strategic Plan 2009, which has four goals:

- Sustainable Boddington
- Building the community
- Prosperous Boddington
- Delivering amenities, services and infrastructure

These goals, together with the growth management responsibility, are the foundation of economic development. Similar terminology and principle is set out in the Growth Plan Framework established by the State Government.

Forward planning for key catalyst capital works projects such as aged care accommodation, recreation centre, youth centre and main street upgrade has already commenced and is described in the Shire's Plan for the Future, 2008-2013.

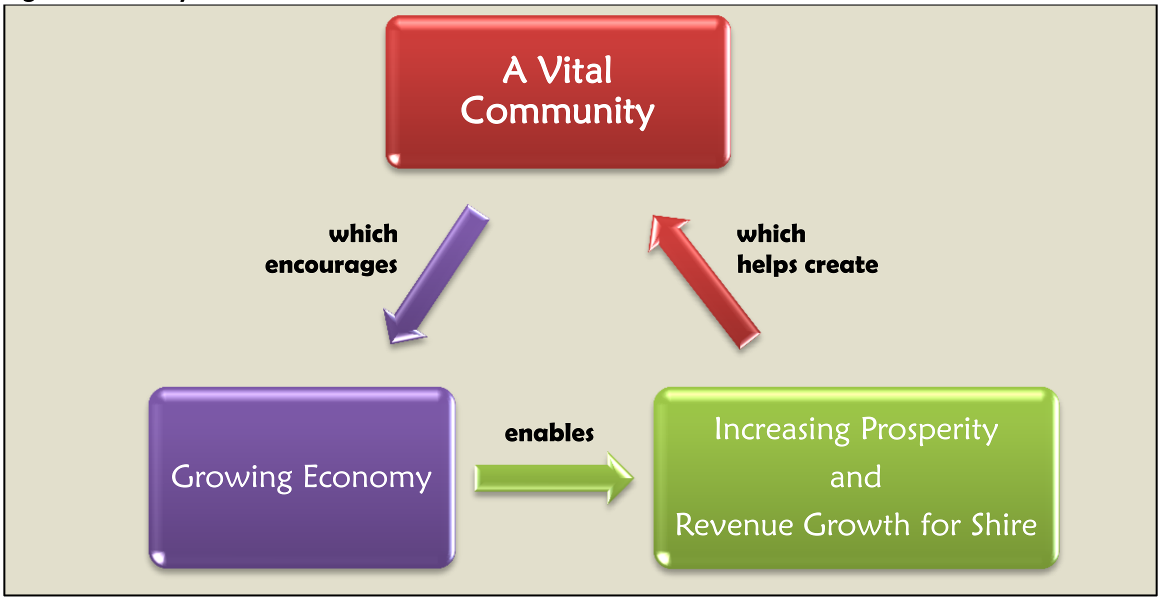
The local and strategic levels of project planning and economic development in the Boddington District are therefore aligned. The Boddington District Economic Development Strategy will provide context to the current program of projects to ensure that they are targeting need and future requirements and determine the level of economic development required to optimise value from the current economic base of the District. The Economic Development Strategy will cement this baseline with the economic development strategies required to support the SuperTown growth scenario and to add sufficient detail to them to ensure clear roles, responsibilities and timeframes. The Economic Development Strategy will provide the medium term context for business case development.

1.3.2. Local Government – An Important Player in Economic Development

The Boddington Shire is in an extremely influential position to implement economic development and current strategic planning aims to be inclusive and expansionary. The Shire and its residents recognise the values and special characteristics which are the foundation of long term planning. The Shire can play the following economic development Governance role:

- Shape the qualities of the community
- Provide assistance and support to business
- Determine how land use and facilities are developed
- Support the development of a local workforce
- Communicate the District's assets, advantages and aspirations
- Establish policies to align business and community goals
- Allocate funds to key projects and services
- Provide leadership for long term economic success
- Form strategic partnerships with the public and private sector to maximise the value of the strategy and share implementation responsibility

Figure 1: Vital Cycle of Success



Source: City of San Jose, Economic Strategy 2010-2015

The diagram above symbolises the successful economic development cycle; this cycle is self-supporting. Growth in terms of economy is the essential factor; it supports prosperity, vitality and innovation. Growth in population is also an enabling factor as it supports revenue and vitality; the vital and diverse community which increases its capacity and resources encourages innovation, local businesses and employment which in turn facilitate economic growth. The cycle falters when the economy fails to grow and diversify. Economic and societal growth, rather than population or infrastructure growth, are at the core of economic development.

2. Global and Regional Economic Context

Summary of Global and Regional Economic Implications

- The Global Financial Crisis (GFC) may reduce investment and tighten access to finance in the near term, but locations such as Peel are still regarded as growth economies and a strong alliance with this region will be beneficial to the Boddington district.
- Expenditure on capital works and infrastructure alone will not support population and economic growth in regional locations. Investment in economic development should match that on infrastructure development.
- A key driver of change will be the development of Information and Communications Technology (ICT - Australia's NBN program) which is set to accelerate the level of competition within markets.
- Supply chain efficiencies are being driven by the application of ICT and RFI technology (radio frequency identification) in distribution, green supply chains, and industrial symbiosis to reduce waste or exchange by products.
- Cost reduction in labour, transportation and energy use will be a major focus for existing and emerging industries and businesses, and smarter, energy efficient technologies will need to be introduced. The statutory planning system must be flexible enough to allow this transition.
- WA is a major player in Australia's international trade profile - accounting for 38% of all national merchandise exports in 2007/08, with the Middle East, China and S E Asia import trading hubs. It is important for any district engaged in some export activity to tap into the regional and national trade links.
- The growth of the Peel Region, South West Region, and the advantages of proximity to Mandurah and Bunbury should be viewed as an opportunity rather than a threat. Links beyond and the Boddington District to business and industry support services will be beneficial and must be actively fostered, particularly in Peel.
- The collective package of investment in human and physical capital and new and emerging industries and technologies has been seen to deliver the most benefit and sustainable growth, as in the 'smart strategies' of Queensland.
- As a rule of thumb demand for land will be driven by economic growth. If growth moves at 3-4% then land demand would grow by 3-4% or a lesser rate.
- For rural areas to compete with urban locations for development, an area equivalent to a short term supply or the equivalent of three years demand should be identified and made available as project ready land in a relatively short timeframe.
- Ideally, the equivalent of 30% of the identified demand area should also be kept in reserve and protected to provide a future land bank.
- Core employment growth resulting from economic development stimulus is most likely to be achieved in the short to medium term in:
    - value added services to mining
    - gourmet agri-food production
    - health care and social assistance
    - waste and renewable technologies
    - construction
    - professional, scientific, technical and creative services
    - education and training
    - personal and maintenance services
- There is a medium to longer term requirement for the workforce to have green skills associated with environmental sustainability practices

2.1. Global and Regional Context

A major aspect of economic change is globalisation. Rural businesses now compete on global markets with worldwide exchange of information and capital. Global linkages are being driven by a revolution in telecommunications and information technology, the Internet, a gradual move towards free trade, increased participation in financial markets. For rural Australia, globalisation provides both advantages and drawbacks. Rural products can potentially gain access to a much wider market, rural businesses can be exposed to a wider range of investors, and business information and market intelligence from around the globe can be more rapidly shared. However, rural businesses also face greater competition in existing and new markets. Consumers can bypass local supplies and obtain goods and services direct from national or international suppliers. It is important therefore to consider the future of the Boddington economy in the context of the wider global and regional market.

The wider market is highly competitive, volatile and increasingly influenced by various national policies on environmental and trade practices. WA's economic fortunes, particularly export markets, are related to the growth markets of China, India and the rest of Asia. Whilst demand for resources and agricultural product will remain relatively strong, the global market share for WA is likely to remain constant rather than increase through to 2051, as competition emerges with exports from China, India, rest of Asia, South America and Central Africa. Even within WA there will be competition for investment by Government and private sector from other regions, particularly the North West and Mid West.

Economic forecasts for WA and the Peel are optimistic in the short term with a slowdown in the medium to long term. In the short run the general consensus is for a 4-5% average growth rate per annum over the next 3-5 years. Over the medium to long run, projections become less certain and more complex. The question is whether the recent higher economic growth rates of 4-5% can be sustained over a longer period say, 20, 30, 40 years. Some perspective on this can be gained from recent long run analyses in Australia. The Australian Government Intergenerational Report 2050 has estimated that the growth in GDP will average 2.7%pa to 2050 compared to 3.3% over the past 40 years. Average annual population growth is projected to be 1.2% to 2050. Allied to this is a projection that average growth in GDP per person will decrease from 1.9% to 1.5%pa. Underpinning these models are some key assumptions including an expected fall in the labour force participation rate, largely due to ageing, a constant fertility rate (1.9 persons per household) and a constant net migration rate (0.6%pa). Whilst many of these assumptions are open to debate, especially net immigration assumptions, the general picture is consistent with the pattern of growth for developed economies over longer periods of time. Typically in this thinking, growth is driven by productivity improvements and population.

However, because of the particular structure of the WA economy, achieving higher than average growth for a longer period of time may be possible based on the growth prospects in China and India. Primarily such a conclusion is based on a continuation of China's growth, the push for urbanisation and WA's advantageous position as a supplier of key raw materials, especially iron ore, gas and high quality agriculture and food products. It is primarily these considerations that led to the assessment in the recent Technology Industry Advisory Council (TIAC) report on the long term WA outlook that maintaining higher growth was possible going forward. However, as the report notes, although mining and energy investment will remain high, considerable volatility might be expected as minerals and energy are particularly influenced by volatility in global markets. Taking the long run economic growth projections for WA at 3-4%pa and population growth projection of 1.2%pa (ABS series B), implies productivity growth of around 1.8% to 2.8%pa. Since 1990, GDP per head has grown at 2.6%pa suggesting a 4%pa economic growth rate may be feasible. However, the period since 1990 has been notable for the major uplift in investment in the capital intensive resource extraction industries, especially gas and iron ore. Maintaining this growth and investment rate over the long run is perhaps unlikely as major resource expansion winds down and output stabilises. The overall output per head growth rate for Australia has been 2%pa. If this reflects a more reasonable long run projection for WA then economic growth of 3.2% to 3.4% is a better estimate of future economic growth. This is consistent with ABARE and the WA Treasury long run projections. Even so this level of growth will require substantial Government investment in productivity improvements and multiple new employment initiatives.

This medium to long run expectation of growth is also supported by the Department of Training and Workplace Development which forecasts that there is a positive outlook for job growth to the period 2015 with some labour market tightening thereafter. The risk in this scenario is a significant skill shortage, higher wages and crowding out of emerging and embryonic industries. The Department also recognises the longer term potential of projects being delayed or not implemented at all as a result of global economic uncertainty and global growth prospects (China's restraint in particular). If the global scenario continues or worsens then lower levels of economic growth and job development are more likely. It should be noted, however, that the Department has flagged an existing skill shortage in the Peel Region in terms of the service industry and construction sectors. The Department has also identified the need to attract and retain the 15-39 age cohort and for intra-regional transport improvements. The Department makes certain assumptions about the impact of regional industries on population and job growth; the industries with the lowest impact on population are Mining, Agriculture and Manufacturing and the industries with the highest impact on population are Construction, Communications, Accommodation/Cafes, Retail, Business, Community and Personal Services. Clearly this is not suggesting that this type of industry automatically generates population but that given the right economic circumstances and economic development support that there is a higher probability of population growth. The Department has developed a Peel Workforce Development Strategy which could align to Boddington District's needs. The key will be for the Boddington District to align its emerging population base and labour force to the skill requirements of existing and emerging industries. This must be an ongoing role for Local Government and the Peel Development Commission in partnership with industry. This sentiment has been reflected by the General Manager of the Caterpillar Institute (Perth) who said in 2009 that in recessions, training is often abandoned and Australia has suffered as a result. There is not a shortage of people willing to become apprentices; there is a shortage of employers willing to train them on the job.

Regional differentiation and development of regional specialisms or competitive advantages (servicing niche markets) provides the most sustainable means of deriving export growth and local wealth rather than aiming to solely attract inward investment (footloose or Trans National Companies). This approach is also beneficial to minimising risk and extreme impact from the economic cycles. The current competitive advantages of the Peel Region are diverse: a large labour pool (relatively highly skilled), road and rail access to Ports (with potential for containerisation at Bunbury and expansion at Fremantle) and high quality natural resources (gold, copper, bauxite, agri-food and fibre, plantation timber, power/energy and water sources). It is likely that over the time frame of the Boddington Economic Development Strategy that the focus of WA export industries and international and domestic demand will broaden from the present iron ore and gas base (lead by the global and trans-national businesses) to encompass a wealth of regionally produced raw materials including rare natural resources, food (particularly grain, meat, dairy, fruit and vegetables) and the processed products, services and technologies which spin off these goods. This focus shift will present opportunities for regional industries and businesses, particularly (and some commentators would suggest <u>only</u>) where there is a corresponding regional economic development program (skills development, training and business support) and transport, utility and ITC infrastructure investment.

The Peel Region and the Boddington District have "growth" industries. Most notable are bauxite, copper, gold, mineral sands and tourism. These strategic industries are key drivers of economic growth and contribute to population growth in three ways: providing direct employment, indirect employment and family impacts. Over the long term, however, economic growth is less likely to come from capital intensive, high power usage industries and industries reliant upon non-renewable resources or impacted by restrictions on carbon emissions; it is likely that emerging industries will need to seek a competitive advantage through technology advances, resource efficiencies and product quality improvements. More regionally based strategic industries and businesses which build upon the existing base of raw materials and production will also counter the effects of the resources FIFO impacts and provide stability 'beyond the resources boom'. Emerging industries in the Peel and particularly the Boddington District include export based wine making, gourmet food production, service based construction, and mining services (additional analysis is provided on the future potential of these industries in section 2.2).

Regional population growth is not automatic, is not equitable, and the Boddington District faces strong competition from strategic centres and urban areas. The Peel Region is primarily focused around the urban areas of Mandurah. Residential locations along the ocean coast and estuary/riverine foreshore around Mandurah have been more attractive than the upland and inland locations, although some tree-change migration is clearly taking place in the Boddington District. Mandurah's advantages as a place to live have been further reinforced by the completion of the rail and freeway links to Perth and the Forrest Highway link to Bunbury. Mandurah and the corridors between Mandurah and Rockingham, and Mandurah and Pinjarra, also offer key facilities in terms of shops, schools, TAFEs, 'satellite' university (Murdoch annexe), health and recreation centres and entertainment based resorts. The urban land supply in the southern Metropolitan corridors, despite anecdotal stories to the contrary, is monitored and adjusted regularly to meet short, medium and long term supply needs through the WAPC's strategic planning process. Mandurah has recently prepared intensification plans to absorb a significantly higher population and grow employment potential. The regional centres soak up population, employment and economic development focus, aptly referred to as "Sponge Cities' by Bernard Salt. Boddington District cannot compete on a level playing field and must seek to join the established networks and lobby the Regional Development Commissions to attract more investment to support their Economic Development Strategy. Equally the leadership group within the District should link into the emerging regional transportation, port, utilities, training, trade, and export alliances.

Regional settlements such as Boddington must develop sufficient employment opportunities to attract and sustain population. This means continuing growth from existing industries, developing new industries/projects, attracting firms from elsewhere and capturing the benefits of these projects for the local workforce. To date investment in the region has supported major infrastructure projects in road and rail, with more improvements and extensions to the network foreshadowed. Future local government project lists for the sub region consist predominantly of capital works built from projects. A Grattan Institute report (Investing in the Regions, 2011) suggests that the recent rural/regional infrastructure investment programs implemented across Australia by the Australian Government, totalling approximately $2 billion, have not changed the economic and employment disparity between urban centres and regional towns, and has not enhanced business growth. A twenty year study by the OECD confirms that the countries and regions which create the most jobs, experience the highest population growth and correspondingly the countries with the lowest levels of job creation experience the lowest population increases. The IMF has also confirmed in its studies that the locations with the highest job creation are the most successful in attracting working age migrants. The OECD points the way to job creation through investment in human capital from primary schools, through firm based training and lifelong education. Support for education and training, innovation and entrepreneurial activity can accelerate employment generation and business creation. It is interesting to note that Australia increases its job growth by an annual average of 2.3% 1993-2008, DEEWR), with WA outperforming the nation in 2008 with 3.8% employment growth compared to 3.3% nationally. High output growth supports employment growth, evident by the fact that in WA in 2008 almost 33% of all new jobs were in the balance of WA (outside SW Region and Perth Metropolitan area). The industries expected to have the greatest employment growth potential nationally between 2011 and 2016 are mining (34.5%), health care and social assistance (25%), utilities and waste (21%) construction (over 18%), professional, scientific and technical services (over 17%), transport (13%), education and training (nearly 11%) and personal and maintenance services (10%) (www.skillsinfo.gov.au). One in four new jobs up to 2026 is expected to be in health, construction and scientific/technical services. Employment gains will be smaller in lower skilled employment categories, stressing the importance of skills and qualifications, particularly VET qualifications in regional locations. Government literature stresses the need for 'Green Skills' to be job ready for emerging industries in a more environmental sustainability minded world. This initiative amongst other economic development functions may be supported by the Regional Development Australia Fund.

International case history suggests expenditure on hard infrastructure alone does not produce the economic results required according to the Grattan Institute report studies of Australia and similar studies in the UK and N America. There are limited productivity and employment gains from extensions, repair and maintenance of civic infrastructure. The largest returns accrue in the short term from implementing a new network. The trickle-down effect from construction of new infrastructure networks is high and there is potential for increased demand (UK Office of National Statistics). However other studies, particularly by the OECD of soft infrastructure (ICT) and corresponding economic development programs to enhance social capacity in training and education, reflect a better outcome over the longer term; in other words, a more sustainable outcome. Communities that gained access to high-speed broadband experienced net employment growth of 1% to 1.4%, with the most positive results in rural areas, according to a US Department of Commerce study in 2008. There are also considerable spin-off benefits of technology and appropriately trained workforce. Live videoconferencing at 115 health facilities in the US, reduced the cost of follow-up care by 42%, with overall care cost reduced by 6% according to a 2008 study Anytime, Anywhere: Telehealth Alters the Medical Ecosystem by Doty. Salem-Keizer School District in Oregon re-enrols more than 50% of dropouts and at-risk students through its online Bridge Program annually. Students who cannot be in school for health, child care, work or other reasons, can continue to learn online as recorded by a study called Online Learning for At-Risk Students and Credit Recovery by Evergreen Consulting Associates in June 2008.

In the UK a study by Marmot and Wilson for the British Medical Journal calculated that for every pound invested in community networks and services, approximately 10 pounds were saved in poor health costs, reduced crime and better employment outcomes. From an economic growth scenario perspective therefore, the rural potential derived from technology and application to education, training, services and business is enormous. Expenditure on hard infrastructure should be regarded as essential to support social equity and similar additional expenditure should be anticipated on economic development to sustain jobs and activity into the future. In the case of Boddington, hard infrastructure should be regarded as a State or National responsibility in partnership with local stakeholders, whilst the soft infrastructure or Local Economic Development, as the World Bank refers to it, is the responsibility of Local Government in partnership with regional stakeholders. The Economic Development strategy must demonstrate the combinations of hard and soft which will best achieve the SuperTown sustainable growth vision.

In conclusion, with regard to global and regional influences, the continued competitive advantage and growth of the Boddington District sub-region will only be achieved into the future with effective, integrated, regional economic development policies. The long term industry and business development future may lie less in the extractive industry and related primary processing sector (which has large land take and power requirements) and more with the knowledge based, innovative and technology industries based on value adding to regional resources and service provision (which may include intensification of activity on existing sites requiring high speed ITC). These would build upon the current economic strengths in mining and agriculture to diversify into new economic areas.

The sub-regional challenge is to apply economic development intervention to ensure that the benefits of the mineral resource and primary agri-production based industries and regional tourism initiatives are more widely distributed.

The Boddington town site challenge is to enhance its residential appeal to families and professionals engaged in the local strategic industries and emerging business sector to support the business training and education opportunities of local people wishing to service these industries. The Boddington District will require a similar level of hard and soft infrastructure as an urban location to create and sustain population and economic growth.

In turn, a net increase in resident and working population attracted by the strategic industries (existing and emerging) will stimulate the demand for services related to daily lives, in education, health, retail, domestic requirements and services associated with improving quality of life such as real estate, finance, entertainment and leisure.

The Boddington District must be 'project ready' and 'employment ready' to compete with the labour force in other regions and the steady land supply provided by the other regional centres in the Peel, SW Region and SW and SE Metropolitan corridors.

2.2. Economic Growth Opportunities

Summary of Industry and Business Growth Opportunity Implications

In summary the key messages from the analysis of economic growth opportunities are:

- Industry and business growth opportunities are realistic and diverse
- There are **seven** core industrial/business focus areas:

1. Value adding to mining and resource based industries with potential requirement for light and general industrial service land.
2. Primary agriculture production in livestock and cereals/feedstock, with spin off potential to increase agri-service industries, value added processing and venture into emerging agri/organic-sectors with potential requirement for light and general industrial service land.
3. Gourmet food/fine food products and health and wellbeing products derived from the land, with potential to expand the home based business sector and potential requirement for light industrial land and small main street retail hub.
4. Construction industries, with potential to branch out into green technologies/resource efficient with high potential for affordable rural branding with potential requirement for light and general industrial service land.
5. Tourism, taking advantage of the wealth of natural recreation and adventure resources and local rural, heritage and mining visitor attractions; potential to build upon a 'Hotham' brand, potential to increase motel, inn, short stay accommodation base, add to and supplement the event calendar with performance arts, collectors meets etc, requirement to identify and service a semi-permanent 'ground' for markets, events and gatherings, main street tourist office/interpretation centre and tour staging point. Opportunity to engage wealth of existing voluntary and not-for-profit organisations and build upon local knowledge base.

6. Population and personal services related to health care, aged care, education, safety, wellbeing, technology training and business support with potential for small main street outlets and essential worker housing
7. Creative industries drawing upon NBN (although all industry sectors above will also benefit from NBN) with potential to expand the home based business sector and combined technology resource centre. Opportunity to engage youth and retiree population.

- Services to these industry and business opportunities are essential and the demand for reliable water, sewerage, power and NBN supply exists and will increase with growth. Failure to meet the service needs of emerging industries and businesses will impede growth and economic sustainability; local business growth could be lost to Mandurah and Bunbury.
- Enhancement and engagement of the existing and potential human capital within the district is essential to a sustainable economy and community. Future projects should be developed in an inclusive a manner as possible. The local population is multi-skilled and proud of their settlements. The region is well served with representative groups and networks. The responsibility for the economic and community development of the district can be shared by Local Government through partnerships to generate a broader stewardship and advocacy base.

The existing key industry groups in the Peel and Boddington District represent different opportunities and challenges which are summarised below as context for the Boddington District Economic Development Strategy. This information is taken in part from the Peel Development Commission website which establishes the economic base of the region and is supplemented by existing and potential industry reports of future development potential developed by the economic consultant team.

In 2009-2010 the Peel Region's Gross Regional Product was valued at $7.6 billion, representing a 4% increase over the previous year and 4.1% of the Gross State Product.

2.2.1. Mining - Current and Future Opportunities

Mining and mineral processing are the most important economic activities in the Region and contributed 29.4% to the GRP in 2009-2010. In the 2009-10 financial year Department of Mines and Petroleum estimated the value of minerals mined and processed in Peel to be almost $2.7billion. The Peel is therefore the third largest mineral producing region in Western Australia. According to the Department of Mines and Petroleum approximately 6,700 people were employed in the mining industry in the Peel Region in 2010. Just over 4,100 of these were directly employed in mining bauxite and gold. A further 2,600 were employed in processing refineries producing alumina.

Bauxite is mined at McCoy (near Dwellingup), Waroona and Boddington for processing into alumina at the Kwinana, Pinjarra, Wagerup (near Waroona) and Worsley refineries. These operations combined represent the single biggest source of alumina in the world. The largest employer in the region is Alcoa World Alumina - providing feedstock for the production of 20% of the world's alumina.

The NBG mine was recommissioned in 2007. In 2010 it produced 728,000 ounces of gold and is expected to produce between 750,000 and 800,000 ounces of gold per year for the next twenty years. This mine is expected to be the largest open cut gold mine in Australia when it reaches full production. Copper is also mined by Newmont at Boddington with approximately 30,000 tonnes being produced in 2010.

Newmont advise that the mine life has recently been extended to 2052 with processing to continue to 2060. The workforce numbers are close to peak level at a total of 1991, comprised around 1,045 direct employees and around 946 contractors, who are mostly (over 75%) accommodated on site in the accommodation camp. Contractor numbers regularly increase by up to 400 contractors for maintenance shutdowns which can last up to four days. Less than 25% of the workforce lives within 50km of Boddington town. The additional opportunities offered for the local economy from the mine are in the service sector and in the mine value chain. Currently it is reported that approximately 80% of these service tasks are provided by firms in Mandurah. While this servicing profile supports the Peel Region economy, the Shire of Boddington would like firms in the Shire to capture more of the service sector activity.

A similar story exists in regard to the bauxite mining. The life of the open cut activity is reckoned to be 30 years. At 30 June 2011, BHP Billiton Worsley Alumina (Worsley) employed 319 people at its Boddington Bauxite Mine operations, which took in its mine site, on the outskirts of Boddington, and the overland conveyor that runs between the mine and the refinery, located near Collie in the South West of WA. Of the jobs located at the mining site, about 45% were filled by Boddington residents. In financial year 2011, Worsley estimated that it spent $13 million with business in the Boddington area and another $13.2 million in wages for local residents. Between 2007 and 2012, Worsley expended A$3.4 billion expanding the capacity of its refinery, improving its rail and port transport capabilities and developing a new mine site at Boddington, known as Marradong. The expansion is designed to lift annual alumina production from 3.5 million tonnes per annum to 4.6 million. The bauxite is refined near Bunbury. Most of the additional servicing related to the bauxite mine is currently captured in the greater Bunbury region.

Local companies wishing to provide or expand their mining support services may require support to take advantage of opportunities to provide goods and services currently being supplied from outside the Boddington District and Peel Region.

In addition, land suitable for industry servicing and allied industrial activity will be required close to the mine sites. 18Ha of industrial land on Gold Mine Road could fulfil some of this function as it is appropriately zoned, however it is understood that power, water and drainage is required and that access for large vehicles and machinery is constrained by overhead power cables which cross the access road.

2.2.2. Construction – Current and Future Opportunities

Building and construction accounted for 16.6% of the Peel economy in 2009-10, the second highest contribution behind mining. There were 1,663 residential building approvals in the 20010/11 year with a total value of $395.7 million. Non-residential building approvals were valued at $50.8 million in the same period. Boddington had a total of 25 residential approvals in 2010 and approximately 2% of the build value of Peel (the highest build value per unit in the region) and approximately 4% of the build value of non-residential development in the Region. According to REIWA, house prices in the Shire have risen significantly in the past 10 years, second only to Serpentine and Jarrahdale in the region.

Under the SuperTown Growth Plan a “stretch target” or Aspirational Scenario for the District population (Boddington, Wandering and Williams settlements) is to expand to up to 10,000 people by 2051 (subject to the implementation of the growth plan and economic development plan). This growth implies a net increase of approximately 2,300 new dwellings, employment land of around 110Ha for up to 1,800 new jobs including significant revitalisation in the town centre and numerous additional community facility projects (further information on these projects is given in sections 4 and 5). This level of construction has the ability to create a range of new construction jobs and business opportunities. Serviced industrial land will be required for local businesses as well as business support for new companies.

Of particular relevance to the Boddington District will be the issue of affordable and sustainable living and working accommodation. This should not be regarded as a negative, but an opportunity to develop niche market methodologies, using alternate materials and a key area for developing new skills and training programs which could be VET or TAFE related.

A number of other State Governments and Local Governments are also grappling with the need to vary building and design codes in rural areas to ensure an affordable product can be delivered. A good example of this is in Mandurah where the Sustainable Home has been a visitor attraction for those wishing to build as well as tourists and academics. A Rural Sustainable Home and 'display or demonstration street' initiative may merit some further study for application in the Boddington District.

2.2.3. Agriculture – Current and Future Opportunities

Primary agricultural production is a key economic activity for much of the Peel Region and adjacent Wheatbelt and Great Southern regions. The Shires in the Boddington District hold good farming land producing vegetables, beef cattle, dairy products, poultry, sheep and a variety of other crops such as cereals, fruit, olives, wine and table grapes. The Region is recognised as one of the most intensive horse activity areas in Australia and contains a high proportion of the greater South West Region sheep flock.

Opportunities for export and processing of goods, such as wine, olives, poultry, pork, fruit, vegetables and flowers are expanding. These opportunities are discussed further in this section.

The Peel Region contributed 1.8% to the State's total agricultural production in 2009. Agriculture production was estimated to value $129.3 million in 2009, a decrease of 17.3% in value from 2008. The largest decrease in value was crops, down by 35.3%, followed by livestock products, down by 23.6%. Livestock disposals increased by 7.8%. Despite the recent downturn, the long term opportunities for food production and export to the main Asian markets where food is in growing demand still exists and food security for this market offers an opportunity to WA. The SW agricultural region which includes the Boddington District is renowned for its high quality, accredited produce. Research by the WA and Federal Department of Agriculture and Food suggests that the high end, fine food market is an area of potential for growth and evolution into processing and added value; this fits well with the current Boddington produce profile.

The main growth export industries over the past eight years have been oils – excluding olive oil (+62.3%), seafood (+11.6%), wine (+6.8%) and dairy (+3.9%). Much of this produce is exported or taken up for domestic sale by Independent Grocers. IGA accounts for over 32% of total grocery turnover in WA which is much higher than the national figure of 20%. In addition other retailers, despite their recent trade war in the staples of the shopping basket, are providing incentives in certain areas; Coles has developed an Indigenous Food Fund to support small growers in the indigenous sector. Wesfarmers and Curtin University are supporting the Ngalang Boodja Enterprise group near Collie which is developing the largest crustacean farm in the Southern Hemisphere.

The existing agricultural and agri-food sectors are, however, identified by DAFWA as vulnerable without substantial Government support, particularly those businesses which sell from the cellar door or farm gate. At a National and State level the issue is limited access to information, institutional support/start-up coordination and at peak times in the season, access to skilled labour. An example of how an established industry can find growth opportunities in the Boddington District with institutional support is the wine industry. The Margaret River area is renowned for its wine, tours, holidays, events and concerts, which all support the wine sales. The wine industry reputation has created a national and international brand applicable to the wider region and its businesses and industries. Wine Australia is now supporting the emerging regional wine industries in Peel, Great Southern and beyond. Shiraz is the flagship of the Peel Region (Peel Estate) but other varieties such as Chenin Blanc, Chardonnay and Cabernet Sauvignon are also proving successful. In and around the Boddington District are Amarillo Wines, Cape Bouvard Winery, Drakesbrook Wines, Hotham Ridge, Lake Clifton Vineyard and Winery, Newbliss, Narrakine, Peel Estate, Peel Ridge, Plavins Vineyard, Riverbrook, Tanglefoot Vineyard, Tuart Ridge and Wandering Brook. This undoubtedly represents a cluster which should be recognised in a sub regional agri-food, tourism, hospitality and training strategy. The main growth market for Australian wines is in Asia; particularly China, Japan and Malaysia.

Similarly, from a non-existent industry 30 years ago to a major export industry today, the organic food sector is on a rising tide. Organic exports Australia wide are estimated to be worth more than $50 million. Worldwide demand for organic produce is growing at approximately 20% a year, with global supply lagging at 10-15%. Demand is particularly strong in Japan, Europe and North America. In the UK alone 70% of organic products are imported. Even the large fast food operators are introducing organic variety in their product range to meet public demand.

Other emerging agricultural sectors identified by the Rural Industries Research and Development Commission in 2009 which may require support and promotion in the Boddington District are:

- Aquaculture, particularly yabbies and marron
- Mallee plantations/ mallee oil
- Sandalwood
- Essential/ aromatic oils
- Culinary herbs
- Breeding alpacas
- Dairy sheep/specialist cheeses
- Cashmere and mohair goats
- Dairy goats
- Pigs/pork/smallgoods
- Bees
- Grains for feedstock
- Olives
- Wild flowers and native plants
- Organic and biodynamic produce
- Medicinal and therapeutic products

In addition to the business impediments noted above for existing industries, these emerging industries may require additional support to integrate with tourism networks, business incubators and incubator retail hubs.

From a local government point of view, in addition to the economic development support highlighted above, the main issue will be to enable these developments through the planning system, which may require a review of Scheme definitions, zoning, development requirements and setbacks. These activities often take place on relatively small farm lots, on average around 60Has but they can be as small as 40Ha.

2.2.4. Manufacturing – Current and Future Opportunities

There are many manufacturing establishments in the Peel Region producing fabricated metal products, wood products, food and beverage, transport equipment and printing, accounting for 9.9% of the GRP. Sales and service income generated from manufacturing is estimated at over $2.5 billion in 2006-07.

Apart from further processing of agricultural production, opportunities exist in the Boddington District for processing industries providing added value to agricultural produce. Examples that are prima facia viable include oat milling and barley malting, subject to power and water supply.

The Peel Region, with its access to ports, roads, rail and Perth's international airport facilities, holds considerable potential to attract new industry and the Peel Development Commission is working with State and Local Government partners to increase the availability of industrial land in the Region.

Boddington District is unlikely to be a destination for new locating manufacturing industries, however services to this sector may provide a niche market opportunity or open up new supply chain opportunities for products used by firms in the Boddington District. The main issue arising out the growth of the manufacturing and potentially the processing sector in Peel and in the SW Region around Bunbury is to ensure that sufficient industrial land exists and that information regarding growth opportunities is captured and circulated regularly by Local Government to the industry and business sector in the Boddington District. Business support will also be necessary to enable local businesses and industries to assemble competitive tenders and to negotiate contracts.

2.2.5. Retail – Current and Future Opportunities

The Peel Region has a broad range of retail facilities ranging from local community shopping to Mandurah's retail strip. Retail turnover for the Region increased 6.9% from $956 million in 2009-10 to $1,022 million in 2010-11. This was the largest increase of any region in Western Australia for this period. WA's total retail turnover increased 4.4% from 2009-10 to 2010-11 or $27,116 million. The Peel share of state total retail turnover has been steadily increasing over the past four years to 3.8% in the current year. In the 2006 Census, retail trade employed 4,242 of the region's workforce.

Retail opportunities in Boddington District are limited; there are few current shops and the trend of closures is likely to continue until there is a substantial upturn in the resident population and resident workforce. This presents a medium to long term rather than short term opportunity.

However there are short term opportunities to build upon the tourist events and the potential in the near future for a town centre based visitor centre, tour activities and merchandise for the gold mine. The Kalgoorlie Super Pit has been turned into a tourist attraction including a Super Pit Shop which alone attracted 22,475 visitors in 2011[1].

Around the world and particularly in North America, small country towns often with populations under 10,000 residents, have managed to build up their Main Streets with small retail outlets and incubators for local produce, handmade crafts and gifts, sporting equipment and hire outlets associated with the local recreation tours and special 'signature' events. A local example is the Williams Woolshed; it provides a combined visitor centre, outlet for local fine agri-produce and food, art and crafts and wool products from all around Australia. The Woolshed independently created a business plan, brand, marketing campaign, interactive techniques and methods to improve service delivery. The store focusses upon local icons and the farming/wool industry traditions of the surrounding country.

It is understood that the Shire of Boddington is to undertake a Tourism Strategy and this could investigate the potential for a Boddington style retail hub.

2.2.6. Tourism – Current and Future Opportunities

In studies of North and South America, Western Europe, Australia and New Zealand, the rural areas that show the most favourable growth and economic strength have their economies based on recreation and tourism. The lure of the natural environment and tourism (place and history) are significant parts of their

[1] Actual Super Pit (onsite, tours, and visitors to our public lookout) numbers/statistics are not kept.

economies. Firms and industries built around the exploitation of amenities show exceptionally strong growth and are a world leader in providing new jobs.

There are good and bad aspects of tourism; it is one of the world's largest industries; it relies however upon the wealthy and is an industry at risk in austere times. The firms that service the local industries are labour intensive and built around employment in food service, lodging and accommodation, information assistance, maintenance, and service sales to the travelling public. But it is often seasonal work and predominantly low paid. Tourism jobs may lure some of the workforce away from agricultural jobs.

Economic initiatives to create sustainable tourism must extend the visitor season by creating more opportunities:

- Improved transportation to overcome remoteness, mode choice and access networks
- Improved basic and visitor resources, utilities, accommodation, facilities
- Improved service delivery, supported by increasing skills and training through decentralising education – or improving rural education opportunities in place and in regional centres
- Improved communications, marketing and promotion through developing advanced ITC technologies

Tourism is a growth area with almost unlimited potential. As the number of tourists looking for something different increase, so do the opportunities for the Peel Region. Mandurah and the surrounding Shires of Boddington, Murray, Serpentine/Jarrahdale and Waroona, Williams and Wandering are ideally placed to attract both day trippers from Perth and overnight visitors.

The Region has much to offer visitors including a variety of different festivals, international standard golf courses, a fine wood centre, crabbing in the Peel Inlet, country retreats, rodeo, and eco-tourism based activities such as bushwalking, horse treks and more than 70 kilometres of accessible coastline. An asset map in section 3 of this report demonstrates that the Boddington District has a wealth of potential tourism assets to attract visitors.

Tourism Western Australia provides average visitor numbers over three calendar years. In 2008/09/10 an estimated 380,800 tourists per year visited the Peel Region. This number comprised 358,400 domestic visitors and 22,400 international visitors. Overall number of tourists visiting Peel has declined by 16.2% from 2006 to 2010, however international tourist visits increased by 35.8% over the same period. Travel parties comprised mostly adult couples for both domestic (29%) and international (41%) visitors. This was followed by family groups of parents and children; domestic 25% and international 38%. In Mandurah alone it has been estimated that tourism contributes approximately $200 million annually and supports 1,200 jobs. The Mandurah market is dominated by interstate visitors (85%). 17% of local visitors and 31% of international visitors seek hotel or motel accommodation.

To be a successful tourist location a place must be regarded as a destination. An example of taking advantage of local assets for tourism purposes is the redevelopment in Walpole of the Valley of the Giants in 1996. This project cost in the vicinity of $3 million and has subsequently increased visitor numbers by more than 350%, as well as the Walpole Visitor Centre's revenue by 2,200% from $22,000 to $500,000 in 2002. Visitor numbers increased from 18,609 in 1995, to 79,000 by 2002.

The planned commencement of tours of the Boddington Gold Mine in 2012 will be such a destination and is a significant opportunity to build a whole tourist experience for the Boddington district. The NBG mine will ultimately be larger than the Kalgoorlie Super Pit; the Super Pit is being expanded to about 3.9km long, 1.6km wide and 500m in depth and the NBG mine footprint will be 4km long, 1km wide and 700m deep. The depth of the Boddington Pit alone will be close to the height of WA's tallest mountain (Mount Meharry at 836m), and nearly twice the height of the Empire State building (381m). Based on visitor numbers from 2011, if everyone spent $10 per person (mine tours are $5 plus there is tea, coffee, and small merchandise sales), this alone would generate an annual turnover of $224,750.

It is essential that the visitors are encouraged to spend time and money in Boddington rather than just at the mine site. Other options include adventure and recreational sports, rural arts and crafts themed events, performance arts and 'foody' trails. Links to the rest of Peel and the Boddington District, Dwellingup and Pinjarra/Mandurah are essential to the tourist story from the estuary to the hills. The Hotham railway line is a critical link, and links to the Williams and Wandering settlements are essential for the agricultural hinterland story. More information on the indigenous heritage of the District should be gathered as part of the tourism strategy. Access and recreation in the Hotham River is a key component of any tourism strategy. Further interpretation of the Indigenous heritage and European settlement heritage of the District will enhance the visitor experience. Natural experiences such as the Hotham River, Forest trails and Dryandra Forest are examples.

The Peel Tourism Association represents the region and partners with key stakeholders and wider industry representatives. The Mandurah Tourism strategy 2011-2016 identifies opportunities for additional eco-tourism, year round attractions, additional backpackers accommodation, additional camping grounds, support a "buy local" business base, increased conferences, regional products and experiences, all of which provide a sound basis for collaboration and opportunity for the Boddington district in tandem with the development of a district specific tourism strategy.

2.2.7. Other Emerging Industry and Business Opportunities

- **Waste management industries**

The application of biotechnology through microbes has led to the generation of industries in bioremediation (Perth Petroleum Services and Spartel Pty in WA) which improve or remove contaminants from soil and water. Technologies being developed in NSW and QLD are capable of managing industrial effluent and domestic waste. Rural waste management in an ecologically sustainable manner may present new innovations and business opportunities to the local community. Boddington has already developed a zero waste policy. A number of innovative opportunities may emerge. CSIRO are at the forefront of waste management initiatives in Australia. The UK has an active economic development approach, supporting on–farm composting schemes for organic residues; farms charge gate fees of between $35 and $55 per tonne making the process a good business proposition. A federally funded initiative in Crows Nest Shire (QLD) developed an environmentally and socially sustainable resource recovery scheme for rural communities. Chittering Valley in WA is home to the Worm Shed, which sells castings through 100 outlets across the state and offers education incursions to schools and colleges.

- **Resource management and efficiency technologies/green industries**

In the context of climate change and resource efficiencies, industries which focus on cleaner fuels, renewable energies, water efficiency, green technologies and recycling resources and the knowledge based research behind them are emerging as a future cluster in the SW Region and Mandurah in the Peel Region. Applications for wind farm development at Williams have been developed in recent years. An example of what a settlement under 10,000 people can achieve is provided by Ararat in Victoria. Ararat Rural City Council has developed a comprehensive action plan for the reduction of greenhouse gas emissions in the region it serves. As a member of the Central Victorian Greenhouse Alliance, Ararat has undertaken a five-step audit program, identifying the ways the community, local businesses and council itself can effectively reduce emissions while also reducing costs, and building economic enterprise. In addition to this broad community education and engagement program, Ararat is developing an industrial precinct, known as the Renewable Energy Park, which initially will manufacture wind turbine blades for wind energy generators. The long-term aim, however, is to become a major regional producer of component parts for a wide range of alternative energy technologies. Bolwell Corporation and their technology partner LM Glasfibre from Denmark will establish their turbine blade manufacturing plant in Ararat as the key driver of Stage 1 of this initiative, and successive stages of development are intended to extend the precinct to the frontiers of emerging technologies. While this initiative is bringing big business to town, the process will also engage existing business, stimulate new ones, and build the knowledge base and general capacity of the local community.

- **Service oriented industries**

These include personal services, health and retail industries. These will be allied to increasing resident population and tourist demand, aging population and tourist trade. The service oriented industries are the largest potential growth area for home based businesses. These businesses, however, require fast broadband and the NBN initiative would provide a catalyst for Boddington and the surrounding District. An interesting example of how remote businesses can work with some entrepreneurial flair comes from Wyoming in the USA. Ten Sleep is a town of 350 people at the base of the Big Horn Mountains and is surrounded by vast ranches. A home based cyber business has been started by a holiday maker who chose to settle in the town and work remotely. Kent Holiday had been a top executive at Korea Telecom in South Korea. Holiday's Eleutian Technology uses fibre-optic bandwidth to link its teacher-employees with 15,000 students in Korea. The business now based in Wyoming expects to employ as many as 700 full- and part-time teachers from across northwest Wyoming with a payroll of over $3m US. The business has recently expanded its language school services into China and is now advertising for an additional 300 teachers to service this initiative.

- **Creative industries**

A competitive creative industries sector is a key policy platform of the Australian Government. The creative industry sector is made up almost entirely of small, dynamic firms and individuals. The NBN will be a catalyst for growth in this industry. The industry includes:

- Music and performing arts
- Film, television and radio
- Advertising and marketing
- Software development and interactive content
- Writing, publishing and print media
- Architecture, design and visual arts

The GRP of this industry sector was $31 billion in 08-09; it has an average growth rate of 3.9% and employed 438,000 people at the last census or 4.8% of the total employment. Events such as Leeuwin Estate concerts (WA) and creative competitions like Sheffield Mural Fest (Tas) and the Hawkesbury International Sand Sculpting Championship in Windsor (NSW) have the potential to draw large number of visitors to a region with significant follow-on economic benefit. A creative industries tourism focus is an ideal way to diversify outside of the mining industry and therefore cater to and attract a wider tourism market.

As the NBN is crucial to the growth of this industry (and very beneficial to the growth of other industries) it will be important for Boddington to be NBN ready. The NBN is to be rolled out to Mandurah and there is an opportunity for the SuperTowns to ‘piggy back’ this initiative. Boddington should prepare an NBN strategy for the District demonstrating the critical advantages to the local economy. The strategy should identify the opportunities for the local workforce, home based and small businesses and students, training, up-skilling requirements and collaborative workspace or business incubator space options. An example of how an old industry can be transformed and value added with additional skills and technology is Forestech in East Gippsland Victoria, which is an educational and professional development facility providing training on forest management ranging from picking the seed, harvesting the timber through to the creation of designer-made fine furniture. In the past, Australian hardwood has been typically used for railway sleepers, fence posts and wood-chipping with very little regard for its unique qualities and value. This is largely due to the difficulties associated with drying and working with these hard and heavy timbers. However, technology now allows these timbers to be worked into fine furniture creating new employment opportunities for the next generation of forestry oriented communities. One of the unique aspects of the Gippsland facility is that students of conservation, land management, forestry silviculture and furniture design are working together.

2.2.8. Business Demography and Business Development

As at June 2009, there were 7,878 actively trading businesses registered in the Peel Region. The construction industry had by far the highest registrations with 2,183 registered businesses. Over 70% of these were non-employing. Agriculture, forestry and fishing had the second highest number of actively trading registered businesses at 791. This industry also had a majority of non-employing businesses (76.7%). Information, media and telecommunications had the lowest number of registered businesses (24); half of these were non-employing.

Mining, the leading contributor to Peel GRP had 75 registered businesses, 56% of which were non-employing and manufacturing; the other major contributor to Peel GRP had 348 registered businesses, 57% of which were non-employing. Retail Trade, one of the largest employers in the region had 564 actively trading registered businesses, of which 40% were non-employing. Further discussion regarding businesses in the Boddington District can be found in Appendix 2 of this report: Local Business and Resident Perceptions and Stakeholder Comment.

Small businesses in the Peel Region are supported by the Small Business Centre – Peel, which was established in 1992 and is affiliated with the Small Business Development Corporation. It is located in Mandurah and is available to assist businesses to achieve their goals. The Centre has four staff including a CEO, Business Development Analyst, Special Projects Officer, and an Administrator. The Small Business Centre is also governed by a board with 10 members that include representatives from the Peel Shires of Waroona, Murray, and Serpentine.

The Centre organises training workshops, bookshop with publications available for sale to assist in the day-to-day running of business, operates the Mandurah Business Development Centre incubator, administers the New Enterprise Incentive Scheme, room and equipment hire, and provides guidance or a referral service for a range of topics such as:

- Developing and exploring business ideas
- Business Structures
- Business planning
- Marketing & Market research

A short term priority initiative included in the section 5.2.6 action plan is to facilitate the development of business technology and an incubator hub in Boddington. The Small Business Centre Peel provides an ideal model for this incubator hub, albeit on a smaller scale. Appendix 1, 1.3.9 provides a detailed description of business demography in Boddington, Wandering and Williams.

In Boddington at June 2009, there were 165 actively trading businesses registered, with agriculture, forestry and fishing as the industry with the highest number of businesses with 66 registrations, followed by construction with 21 and accommodation and food services with 18 businesses. 55% of all businesses were employing and 45% non-employing.

In Williams, of the 152 businesses, 107 (70%) were registered in the agriculture, forestry and fishing industry. This corresponds with agriculture, forestry and fishing being the highest employing industry with 75% of Williams' employment. There was a fairly even percentage of employing compared to non-employing with employing as the slight majority of 51%.

Like Williams, at June 2009, Wandering had 57 registered businesses with 42 (74%) registered as agriculture, forestry and fishing. Employing businesses were once again the majority with 53%, although outside of agriculture, forestry and fishing, all other industries were made up of 100% employing or 100% non-employing businesses.

Although 90% of Boddington respondents to the Business Perceptions Survey (results are shown in Appendix 2, 2.2) indicate that they source goods and services locally, anecdotal evidence suggests that there is limited business activity currently between Boddington and Williams at a household or business level. Boddington households and businesses typically don't link to Williams, while Williams households and businesses tend to link to Narrogin both due to proximity (30km compared with 50km to Boddington) and town size with Narrogin having more than twice the population of Boddington.

An exception to this are health and aging related businesses with Boddington providing GP services to Williams, anecdotally the chemist in Boddington is popular outside Boddington, and Boddington has been known to be selected for retirement by Williams locals.

An outcome of the SuperTowns strategic planning and implementation process (including the Economic Development Strategy and Boddington Growth Plan) will be the strengthening of household and business connections between the towns. This will be especially evident for the immediate-high priority action strategy of developing a District wide tourism strategy which will draw on the assets and attractions of the entire Boddington District.

2.2.9. Services and Infrastructure Provision

A series of meetings have been conducted with the State Government service providers to determine the capacity for land development in accordance with the SuperTowns and Aspirational growth scenarios. A full record of the meeting minutes is provided in Appendix 2 of this report. In summary the key points which are relevant to the Economic Development Strategy are:

- The Department of Health is currently considering the implications of SuperTowns growth scenarios and will be formulating an investment program. The Boddington District Shires should be core participants in this process.
- In the medium term a new model for a small scale aged care facility may be developed in Boddington, which will provide an additional, much needed service to the aging population. There is likely to be a small job creation element.
- It is envisaged that some local health support will be provided through tele-health services. This supports the imperative for the Boddington District to be NBN ready.
- The Police Department is looking to add facilities to the local Police Station including housing. The issue of homes for essential health, police and education staff is critical to the implementation of the Growth Plan and specific strategies should be developed for this purpose.
- There is limited short to medium term spare power capacity in Boddington, but the service has capacity issues in Wandering and Williams. A medium to long term plan to supply adequate power for industry, business and homes will need to be developed if the economic development potential of the SuperTowns project is to be realised.
- A similar story has emerged for waste water treatment.
- Potable water supply to Boddington and Ranford are very limited. An improved service to this location would also serve Wandering in the future.

- The Water Corporation growth assumptions of just over 6,000 people by 2050 fall short of the SuperTowns and Aspirational scenarios and further discussion will be required to inform their planning when the Growth Plan is finalised.
- New technologies to improve efficiency, recycling and treatment will be required in future to sustain capacity and this may lead to additional economic and employment development in the District.

3. Asset Map – Building on the Future

Summary of Implications

Current District Economy Assets:

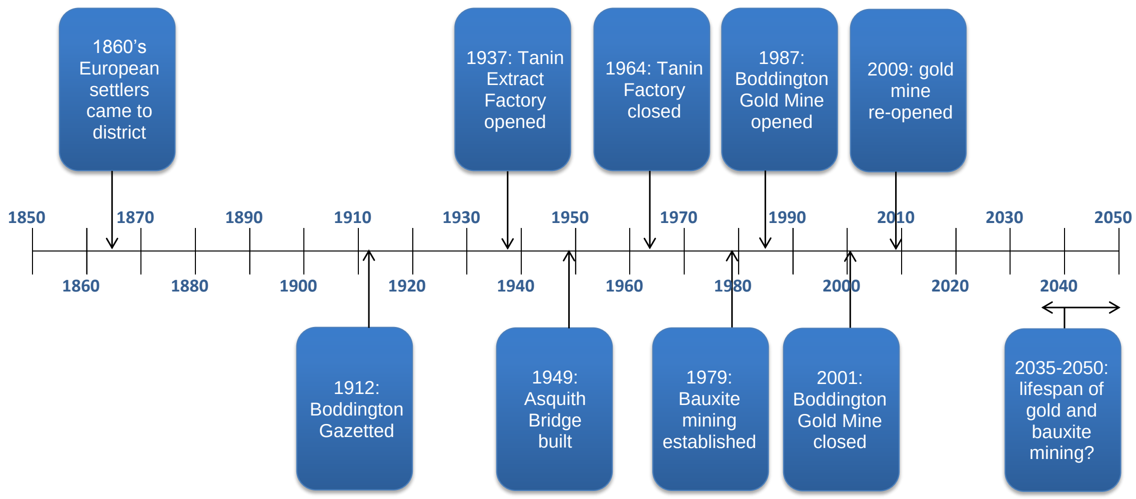
- Growing population with strong forecasts for next 20 years
- Development sites
- Stable population base of long-term residents
- Large portion of residents own their own home vs renting
- 'Young' population with a median age of 39 and large proportion of families compared with singles
- Low unemployment – less than 2% compared with current Australia unemployment of 5.3%
- Diverse industry base
- Industry base with potential for emerging industries, technology advances, new markets and investment opportunities
- Diverse range of natural, heritage and industrial attractions for visitors
- Volunteer groups, associations and clubs attractive to wide demographic range
- Opportunities for migrants to meet and assimilate
- Support services in health, community development
- High number of small businesses
- Self-employment with high proportion of owner-managers
- High proportion of businesses have been operating for longer than five years
- Broad community support for growth and diversity in order to sustain quality of life, improve prosperity and provide essential services and infrastructure
- 90% of survey respondents source goods and services both locally and elsewhere in WA
- 100% conduct business transactions online
- Majority indicated that vastly improved broadband capability would result in economic improvement for their business
- Majority of businesses expect improvement or strong improvement over the next 10 years
- Wide array of grants and funding available for application by local government, organisations and individuals for projects resulting in economic development outcomes

Factors to be ameliorated through implementation of the EDS:

- Improvement required in:
    - technology development,
    - education K-12, tertiary and lifelong learning
    - investment attraction and business start up
    - service provision to resource industries
    - ITC for home based business expansion
    - basic utilities, water , power, access
- Without Boddington Gold Mine providing employment between 2001 and 2006, the growth rate was 0.56% and job growth was -3.06%
- General consensus that the mine economy and workforce should be better integrated
- Business Perceptions Survey:
    - NBG employ the majority of their workforce from outside the Boddington District

- More than 50% were dissatisfied or neutral regarding Boddington features in the majority of areas, especially hard infrastructure, ITC infrastructure, business networks and representative organisations, and local leadership and governance
  - 73% of respondents consider that both ‘attracting new business investment to Boddington’ and ‘marketing/promoting Boddington to potential visitors’ is performed poorly or very poorly
  - ‘Facilitating local business networks and small business development’ was also weakly ranked with 60% choosing poorly or very poorly
  - There were no respondents who consider the Shire perform well or very well in ‘facilitating local business networks and small business development’ or ‘attracting new business investment to Boddington’
  - Difficulty in attracting and retaining staff, as well as locating suitable accommodation for staff, were the most significant factors affecting economic outlook. Technology and ICT access was also considered to be significant.
- Boddington District is not on the ‘list’ to receive optical fibre broadband during the NBN rollout. Boddington and Williams are to receive ‘next generation wireless’ and Wandering is likely to receive satellite coverage.
- Without optical fibre broadband, the District is not eligible to be included in the Digital Communities initiative to receive a ‘Digital Hub’

The Shire of Boddington has been in an ongoing cycle of evolution since its settlement in the 1860s. Boddington has proven itself resilient and able to adapt as it has responded to industry growth and decline, and will need to continue to do so into the future; especially to achieve significant growth under the SuperTowns initiative.



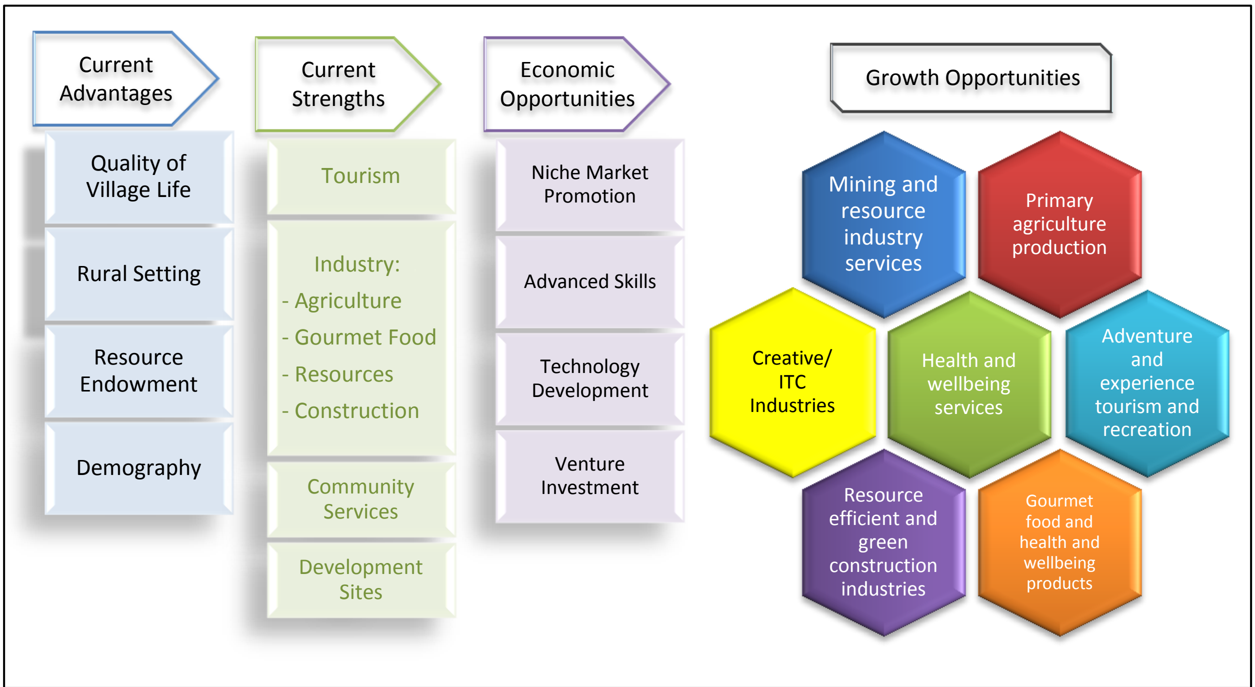
3.1. Economic Model for Boddington District

The following model has encompassed the strengths and economic opportunities for the Boddington District. The model identifies the potential for growth industries supported by the existing economic base, skill set and entrepreneurial capacity of the District.

The current advantages and current strengths of the Boddington District and wider Region are listed in the following Section 3.2. The model also captures the economic and growth opportunities and areas for improvement outlined in Section 2: Global and Regional Economic Context, particularly the seven core industrial/business focus areas.

Section 4 demonstrates the likely population and employment growth scenarios and the services and facilities required to support the anticipated growth achieved through implementing the economic development strategies contained within Section 5 and 6. These final chapters of this report weave the threads together in strategies, actions and implementation, based on the economic model.

Figure 2: Economic Model for Boddington District



3.2. Community Strengths and Assets

The current theory of sustainable communities is to base strategies and actions on the inherent strengths of the community. The focus is capacity building. This report has considered the global and national economic climate, the economic base of the District, the business and infrastructure requirements and this section adds the final element of research and analysis in terms of the current strength of the community. The more cohesive and endowed in public spirit a community is, the more likely the economic development strategies to improve prosperity and to enrich lifestyle will be. Professor Richard Putnam, Harvard, determined in his 20 year study of small Italian communities that the difference between those communities who prospered and those who did not was the quality and intensity of citizen involvement in the life of their communities. The different levels of success could not be explained by location, politics, geography, economic development or demographics. The differences existed in the socio-economic foundations.

"These communities did not become civic simply because they were rich. The historical record strongly suggests precisely the opposite: they became rich because they were civic."

This theory is supported in studies of "Resilient Communities" in Canada and the development of the NSW Handbook for Sustainable Rural Communities, 2000.

The Boddington District has a substantial number of attributes, attractions, assets, and opportunities. The community has a wealth of associations, clubs and leadership groups for a new community to join. There is a diverse cross section of demographics and strong participation from families and seniors. Some members of the community are involved in more than one community group. These qualities are essential features of community which coordinates, cooperates and volunteers for mutual benefit. The future growth of the town should be built upon these characteristic foundations rather than a formulaic or standard approach to economic development.

The following lists highlight key aspects of the community asset base that were used to develop the Economic Model shown above and ultimately, the Economic Strategies for the District. The list summarises the industry and economic base described in detail in section 2 and Appendix 2 of this report.

3.2.1. Current Advantages

The current advantages shown in the model are the tangible assets that make Boddington what it is as a location and the resulting population who choose to live there. These advantages contribute to attracting new residents to Boddington through employment and/or lifestyle enticement.

Quality of Village Life	• Sense of community with strong long term local base • Vast number of community clubs and associations • Local produce and service providers • Rural activities, rodeo, farmers market
Rural Setting	• 'Tree change' • Rural attractions (bush, river, wildlife) • Proximity to Perth and Bunbury, road and rail access • Remnant European settlement and Indigenous heritage
Resource Endowment	• Bauxite, gold, copper with life expectancy out to 2060 • Owned by two large multinational companies • Primary agricultural production • Land available for development
Demography	• Median Age 39 - economically active • Low unemployment of 1.7% • Highly educatated with 43.14% with a post school qualification • Family migrants with Generation Y and Z offspring

3.2.2. Current Strengths

The following tables provide an overview of Boddington's current strengths (as appear in the model) that can be used and built upon for the development of the emerging and future industries that are documented in section 2 of this report.

Toursim		
Accommodation	Attractions	Events
- Caravan park - Boddington Hotel (4 units, approval for further 12) - Boddington Motel (12 rooms and ablutions) - B &B /retreats/farm stays	- Hotham River - Fawcett 4WD track - Hotham way tourist route (golden grain to coastal plain) - Bush walks (Bibbulmun Track) - Bike Trails (Munda Biddi Bike Trail) - Fishing - Bird Watching - Scenic Drives - Bush Camping and Canoeing - Proximity to Peel estuary and coast, Margaret River Wine Region and Albany /Denmark Region, etc	- Community markets - Rodeo (3-4,000 attendees) - Community festival/Christmas extravaganza (Worsley) - Field of quilts - Arts and crafts display - Quindanning Picnic Races - Australia Day Concert - Boddington triathlon

Industry			
Resources	Agriculture	Construction	Manufacturing
- Major international export focus - Bauxite – resource life - 50 years from 2010 - Gold & copper – gold mine life 50 years from 2010 - Largest employer (BGM) in Boddington District	- Strong international and domestic export base - Timber - Broad-acre farming - Livestock & agriculture - Pine & blue gum plantations - Viticulture & Orchards - Gourmet foods	- Strong growth in residential values - Highest residential build value per unit in the Peel Region - Strong growth forecast up to 2050	- Was largest employing industry in Boddington in 2006 due to alumina production

Community Services

Community and Social	Sport and Fitness	Facilities & Meeting Places
- CRC - CWA - Garden group - P &C - St John's Ambulance - Bible study - Arts Council - Fire brigade/junior fire brigade - Friends of the reserves - Playgroup - RSL - SES - Family support group - Heritage and cultural group - River action group - Book club - Community markets and auction - Community club - Community newsletter - Home and community care - Ladies hospital auxiliary - Lions - Tidy towns - Toy library	- Football club/Junior Football (150-200 members) - Golf club (approx 40 members) - Cricket club (approx 30 members) - Soccer club (nearly 100 members) - "Stay on your feet" exercise class - Mountain bike club - Riding club (approx 40 members) - Rifle club - Badminton - Junior Basketball & Netball (approx 200 members) - Tennis club - Bowling club (approx 60 members) - Darts club - South west games - Swimming club - Teedermully archery - Hash House Harriers	- Boddington old school + CRC + Tourist office + Community Resource Centre + Men's shed + TAFE courses (computer skills, horticulture), other centres in Mandurah, Rockingham, Northam - Dance and drama classes - Youth centre, Blue light disco - Library - Early learning centre/day care centre - Old Baker- craft shop - Post Office - District hospital (16 acute beds, A&E, X Ray, inpatient and outpatient services, 35 staff inc 12-15 medical) – Wheatbelt health system - Home and Community Care - RSL Hall - Old Road Board Office – Community newsletter office - Boddington hotel - Swimming pool - Hospital - 18 hole golf and country club - BBQ at Ranford Pool - Medical Centre (2 doctors, visiting dentist, physiotherapist, allied health professionals) - Shire offices - Chemist - Deli - NAB Bank - BP service station - Gull service station - District school, 5 school buses (approx 300 K-10 enrolled – 150-200 extra places planned- catchment is Quindanning, Wandering, Bannister and Crossman) - Police Station - Boddington arts and crafts – "craft shoppe" - Op shop

3.2.3. Economic Opportunities

Economic opportunities are key focus areas that are essential for taking advantage of industry and business growth opportunities in the District. There is both internal (District) and external (Regional) opportunity that together will provide sustainable development.

Niche Market Promotion	• Road and rail access to Ports, Perth CBD, Bunbury CBD • High quality natural resources and food (grain, meat, dairy, fruit/nuts) • Spin off processed products, services and technologies • Domestic and international visitors to Peel, Wheatbelt, and southern regions
Advanced Skills	• Developing regional specialisms or competitive advantages • Skills development, training and business support • Additional post school qualification, firm based training and lifelong education • Generation Y and Generation Z capabilities/capacity
Technology Development	• Improve and enhance supply chain efficiencies (ICT and RFI technology) • Accelerate the level of competition within markets • Develop global linkages for education, training, services and business application • Intergenerational knowledge sharing
Venture Investment	• Lobby government, local entrepreneurs, external investors • Network emerging agri/organic-sectors • Promote popular and unique tourism experiences •Homebased business teleworker boom

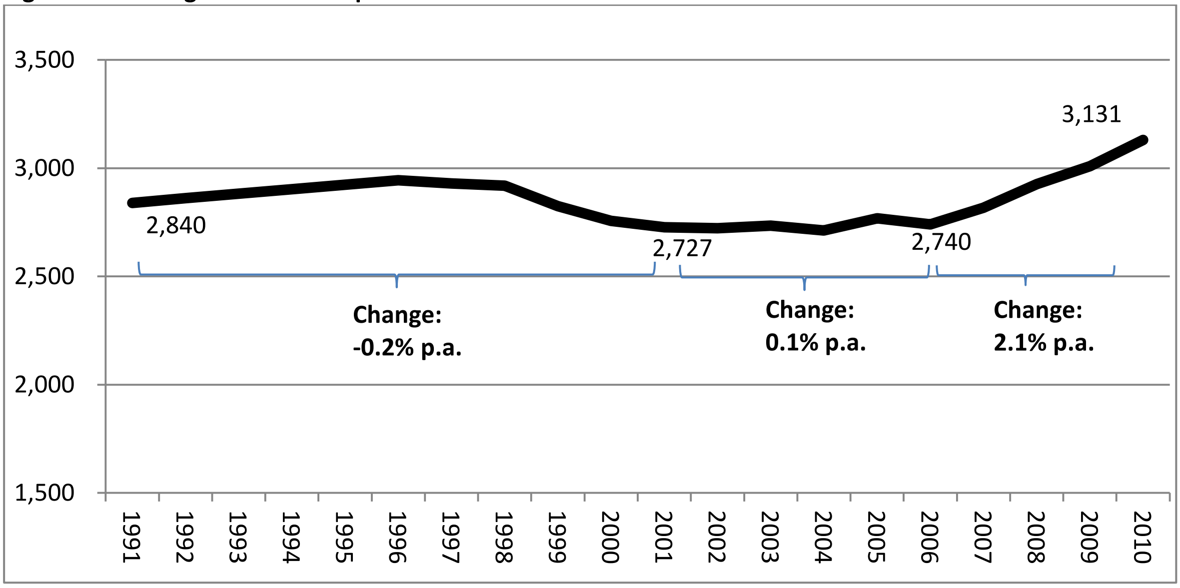
4. Growth Scenarios

Summary of Implications

- Three scenarios have been tested: Business as Usual, SuperTowns Initiative, and Aspirational Growth
- Unlikely to meet community need for services, employment self-sufficiency and housing choice with 'Business as Usual'
- SuperTown growth scenario of around 7,000 people by 2051 is feasible for District with economic development and strategic collaboration and coordination
- Aspirational target of 10,000 people in the District by 2051 achievable only if significant economic development, additional resources, services and infrastructure is delivered
- The SuperTowns growth scenario of around 7,000 by 2051 is the preferred scenario

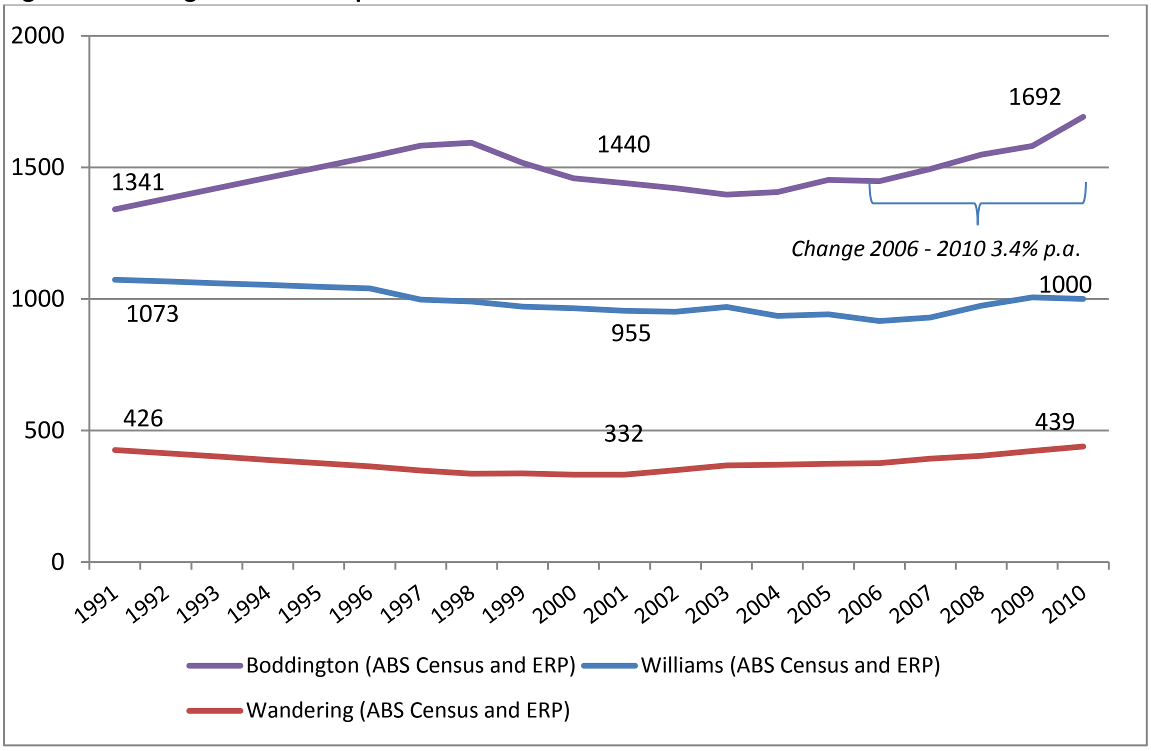
Historic long term population growth in the district has historically been very flat, only increasing to around 2%pa from 2006. This reflects the economic base, with majority of employment arising from the agricultural sector, which is stable but with little employment growth. In 2006, 35% of all employment was in the agricultural sector. From 2006 to 2010, growth rates in the Shire of Boddington have averaged 3.4%pa, with some additional growth in Williams and Wandering, reflecting the re-opening of NBG and the expansion of Worsley's alumina operations.

Figure 3: Boddington District Population Growth 1991 to 2010



Source: ABS

Figure 4: Boddington District Population Growth 1991 to 2010



Source: ABS

The question is how this historic growth informs estimates of future growth. To do this some consideration of the driving forces of this growth is necessary. There are three broad causes of population growth:

- Expansion of the economic base
- In-bound migration of people with no direct economic link to the district
- Increase in the number of 'local' mining employees

Three scenarios are worth investigating in the context of the SuperTowns initiative:

Scenario 1: 'Business as Usual'
- No major new initiatives, incremental change from current

Scenario 2: SuperTowns Initiatives
- Growth as a result of SuperTowns initiatives

Scenario 3: 'Aspirational'
- Accelerated growth exceeding expectations

Without any economic development intervention (Business as Usual), it is expected that the Boddington District population will experience limited growth as per the 2001-2006 period, and then experience decline beyond 2051 as resources are exhausted and mines close once again. The SuperTowns Initiative scenario requires ongoing outcomes focused actions through strong District and Regional partnerships and an injection of economic resources (labour, land, capital, and entrepreneurial). These actions and strategies are to be particularly targeted due to the current global economic climate where increased competition is prevalent. An Aspirational scenario goes above and beyond the efforts required for the

SuperTowns scenario and therefore may currently be out of reach. However, due to a potential future return to a 'boom economy' (this would require a global turn-around, not just nationally) this scenario should not be ignored. The SuperTowns scenario economic development activity focus on education, employment, industry development, technology, linkages, and infrastructure, will all require substantial additional support from State and Federal Government to achieve a population of 10,000 by 2051.

4.1. Expansion of the Economic Base

For the Boddington District to achieve population growth as described in the three scenarios, employment growth will be required. Taking into consideration the current industries of employment, an expanded economic base is expected in several main areas:

- Agriculture intensification and value-add
- Tourism
- Mining services (training, technology) and increased local participation in mining value chain
- Increased local participation and growth of the population and community driven service sector, retail, tourism spin-off etc

Table 1: Employment Growth Scenarios to 2031 and 2051

	Current	2031			2051		
		Business as Usual	SuperTowns Initiatives	Aspirational	Business as Usual	SuperTowns Initiatives	Aspirational
Agriculture intensification	435	435	479	544	435	522	653
	additional	0	44	109	0	87	218
	growth %	0%	10%	25%	0%	20%	50%
Agriculture value-add	50	50	75	100	50	100	150
	additional	0	25	50	0	50	100
	growth %	0%	50%	100%	0%	100%	200%
Tourism (Accom & food services)	52	65	156	260	65	208	312
	additional	13	104	208	13	156	260
	growth %	25%	200%	400%	25%	300%	500%
Retail (tourism, etc spin-off)	81	101	122	162	101	162	243
	additional	20	41	81	20	81	162
	growth %	25%	50%	100%	25%	100%	200%
Mining services (training, technology)	15	19	30	45	19	33	53
	additional	4	15	30	4	18	38
	growth %	25%	100%	200%	25%	120%	250%
Mining Value Chain	30	38	60	90	38	66	75
	additional	8	30	60	8	36	45
	growth %	25%	100%	200%	25%	120%	150%
New jobs, identified sectors		**75**	**288**	**568**	**75**	**458**	**852**
Direct Spin-off to other sectors	**25%**	**19**	**72**	**142**	**19**	**115**	**213**
Total New Jobs		**93**	**360**	**710**	**93**	**573**	**1,065**

The table above shows the growth in the various sectors of the base economy that might reasonably be expected under the various growth scenarios. As a point of reference and comparison, in the aspirational scenario the District tourism sector, as measured by the 'Accommodation and food services' statistical category, is considered to have the capacity to grow strongly from its current (2006) employment figure of 65 to around 260 in 2031 and 312 in 2051; this is still considerably fewer than the equivalent category in the Shire of Augusta-Margaret River, which employed 608 people in 2006.

There is roughly one job per household across the economy, translating into approximately the same number of households; that is, the direct labour demand from the sector growth outlined above directly supports around 1,065 additional households by 2051 under the 'Aspirational' scenario. These households will support additional population driven jobs in areas such as such as household services, education services and health services.

4.2. Lifestyle In-bound Migration

These are people who can make a lifestyle choice and have no direct link to the local economy, for example:

- Retirees and pre-retiree 'tree-changers'
- Tele-workers

Table 2: Lifestyle In-Bound Migration

Estimates:	2031			2051		
	Business as Usual	SuperTown Initiatives	Aspirational	Business as Usual	SuperTown Initiatives	Aspirational
New Households:						
Lifestyle in-bound migration – increment from 2010	50	200	400	100	400	600

4.3. Increased 'Local' Mineworker Content

Working patterns are set and little change is expected in scale of mining operations. Workforce turnover is relatively low.

Table 3: Increased Local Mineworker Content

Estimates:	2031			2051		
	Business as Usual	**SuperTown Initiatives**	**Aspirational**	**Business as Usual**	**SuperTown Initiatives**	**Aspirational**
New Households:						
Increased 'local' mineworker content – increment from 2010	20	200	400	40	300	600

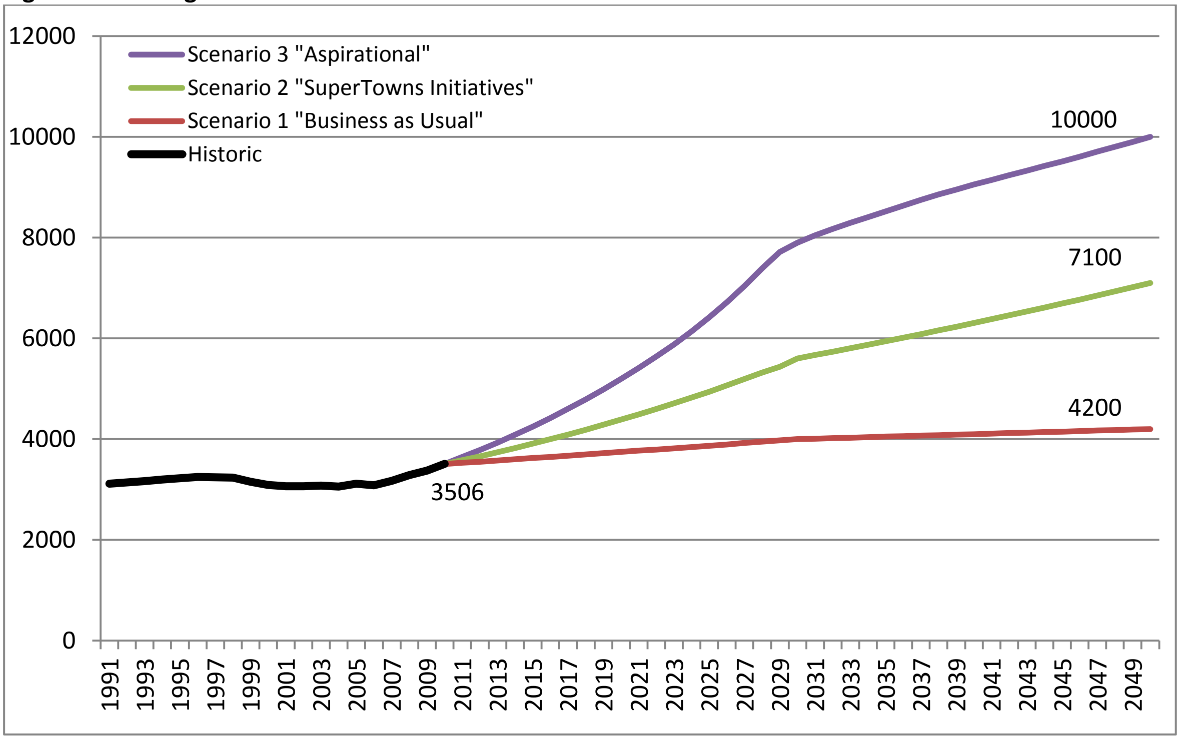
4.4. Summary – Boddington District Growth Scenarios

These translate into the following growth scenarios for the Boddington District.

Table 4: Boddington District Growth Scenario (Additions to the Economic Base)

	2031			2051		
Summary	Business as Usual	SuperTown Initiatives	Aspirational	Business as Usual	SuperTown Initiatives	Aspirational
New Households:						
Expansion of Economic Base	93	360	710	93	573	1,065
Lifestyle in-bound migration	50	200	400	100	400	600
Increased 'local' mineworker content	20	200	400	40	300	600
Total New Households	**163**	**760**	**1510**	**233**	**1,273**	**2,265**
New Population	457	2,128	4,227	653	3,563	6,342
Existing	3,506	3,506	3,506	3,506	3,506	3,506
Total Population	3,963	5,634	7,733	4,159	7,069	9,848
Range:						
Growth from 2010	450 - 500	2000 - 2200	4200 - 4400	650 – 700	3,500 – 3,700	6,300 – 6,500
Total Population	**3,950 – 4,000**	**5,500 – 5,700**	**7,700 – 7,900**	**4,150 – 4,200**	**7,000 – 7,200**	**9,800 – 10,000**

Figure 5: Boddington District - Growth Scenarios



4.5. Growth – Individual Shires

An estimate of how this growth might be distributed amongst the three Shires is shown below. Table 5 illustrates population and Table 6 shows Households. It is assumed that the majority of growth will be in the Boddington Shire, with some growth in Williams and Wandering. This reflects the various elements comprising the growth, with many of the drivers (tourism development, agricultural intensification and value–adding and lifestyle in-bound migration) applying across the three Shires.

Table 5: Boddington District Growth Scenario

		2031				2051		
	Current	Business as Usual	SuperTown Initiatives	Aspirational		Business as Usual	SuperTown Initiatives	Aspirational
Population								
Boddington	1,692	2,222	3,837	5,267		2,321	4,836	6,771
Williams	1,000	1,222	1,315	1,896		1,326	1,719	2,396
Wandering	439	556	548	737		553	645	833
Total	3,131	4,000	5,700	7,900		4,200	7,200	10,000
Proportion of District Population:								
Boddington	54%	56%	67%	67%		55%	67%	68%
Williams	32%	31%	23%	24%		32%	24%	24%
Wandering	14%	14%	10%	9%		13%	9%	8%
Total	100%	100%	100%	100%		100%	100%	100%

This roughly translates into new dwelling demand as follows:

Table 6: Scenario 1: Business-as-Usual

Change (Households)	*2011 - 2015*	*2016 - 2020*	*2021 - 2025*	*2026 - 2030*	*2031 – 2051*	*Total*
Boddington	26	27	28	25	36	
Williams	9	9	9	9	36	
Wandering	5	5	6	5	-	
	40	**41**	**43**	**39**	**71**	**235**

Table 7: Scenario 2: SuperTowns Initiatives

Change (Households)	*2011 - 2015*	*2016 - 2020*	*2021 - 2025*	*2026 - 2030*	*2031 – 2051*	*Total*
Boddington	125	150	180	186	357	
Williams	17	18	18	22	143	
Wandering	5	5	6	6	36	
	183	**184**	**185**	**184**	**536**	**1,273**

Table 8: Scenario 3: Aspirational

Change (Households)	*2011 - 2015*	*2016 - 2020*	*2021 - 2025*	*2026 - 2030*	*2031 – 2051*	*Total*
Boddington	198	260	361	366	536	
Williams	58	67	80	79	179	
Wandering	20	22	25	26	36	
	382	**393**	**409**	**343**	**750**	**2,277**

Figure 6: Population Growth Scenario 2

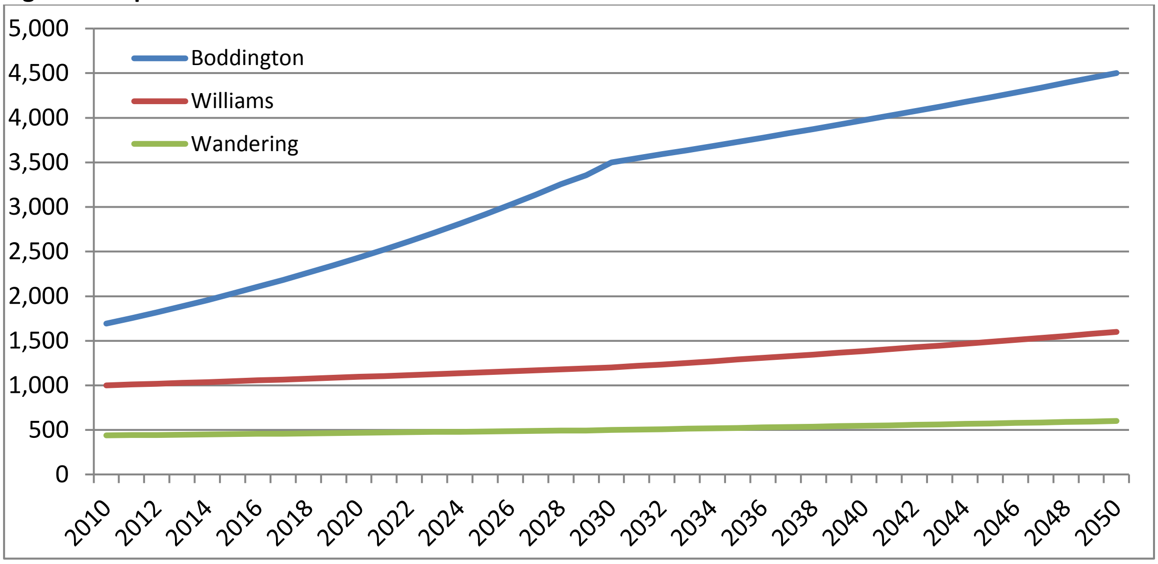
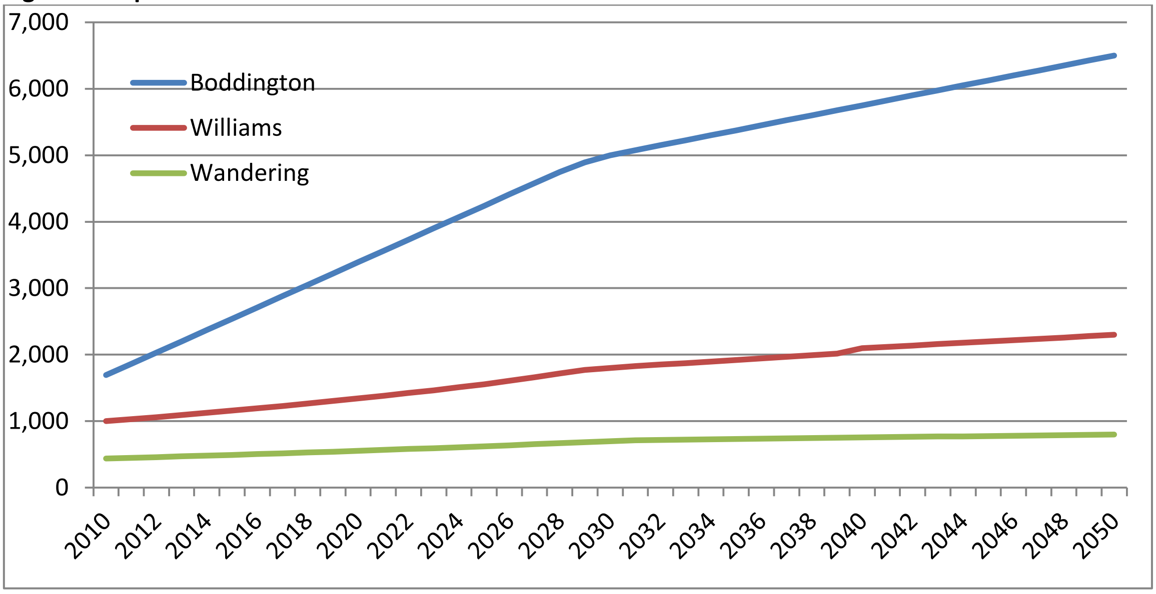


Figure 7: Population Growth Scenario 3



Note that this demand will be spread across a wide range of dwelling types, including:

- Low cost , low maintenance, medium density villa units in town centre locations aimed at key support workers
- Infill lots in existing town subdivision
- New town lots
- Larger lifestyle lots – these might be expansions of existing hamlets if possible/viable as well as new development associated with the larger towns

4.6. Community Facilities

Based on Syme Marmion & Co research from several regional local authority areas and other sources, the following table of ratios has been developed which highlights the types of community facilities that will likely be triggered within the Boddington District based on the potential population projection scenarios.

Facilities	Service Level	Population to Facility Ratio
Active Recreation Space Standards		
Playing Fields	District	15,000
Playing Fields	Sub-District	5,250
Playing Fields	Neighbourhood	N/A
Playing Fields	Local	3,500
Aquatic Centre	District	50,000
Aquatic Centre	Sub-District	20,000
Indoor Recreation Centre	District	35,000
Indoor Recreation Centre	Sub-District	25,000
Indoor Recreation Centre	Local	7,000
Skate Park	District	25,000
Skate Park	Sub-District	7,000
Skate Park	Local	3,500
BMX Track	District	25,000
BMX Track	Sub-District	10,000
Passive Recreation Space Standards		
Combined Passive and Active spaces		N/A
Local Parks and Playgrounds	Local	1,000
Other Standards		
Public Toilets	Local	1 per park
Public Change Rooms (Beaches)		
Specific Standards		
Sports Change Rooms	Sub-District	4,000
Clubrooms	District	15,000
Clubrooms	Sub-District	7,000
Golf Course	District	25,000
Beach Facilities	Sub-District	
Social/Cultural		
District Community Centre	District	20,000
Local Community Centre/ Neighbourhood Centre	Sub-District	5,000
Library	District	12,000
Library	Sub-District	6,000
Youth Centre	Sub-District	15,000
Seniors Centre	Sub-District	10,000
Childcare Centre	District	7,500
Childcare Centre	Sub-District	5,000
Health		
Community Health Clinic	Sub-District	10,000

Source: Syme Marmion & Co Research

The anticipated community facilities requirement would be very different for a scenario of 4,200 persons (top of 'business as usual' range at 2051) compared with the SuperTown target of 7,000 and aspirational target of 10,000 persons. These population-to-facility ratios are only a guide and have been included to indicate the general level of additional facilities that might be expected under various growth scenarios.

These benchmarks however do not take into account the needs of specific groups or the broader community needs such as cultural interests. For example, an indoor recreation centre may be identified as a community need prior to reaching a population of 7,000, especially when proximity to sub-district and district facilities prohibits the desired level of use. The town of Merredin for example, has a population of 3,630 and has a Community and Leisure Centre as well as an Olympic size swimming pool. Boddington is relatively close to Pinjarra (indoor recreation and 25m heated pool) and Mandurah (multiple recreation venues and two indoor 25m pools). These target ratios for facilities do not take account of local government's ability to fund maintenance and operational costs. This requires long term income streams via rate base, fee for service and event hire.

Currently, there are no dedicated, purpose-built indoor recreation facilities in the town. The existing pavilion on the eastern side of the main town oval is old and at the end of its useful life. The Department of Sport & Recreation supports this fact and agrees that a new facility is warranted, to replace the existing pavilion.

Background analysis by others of the population indicates there should be an emphasis on the needs of, and facilities provided for children and the baby boomer generation as they are groups at above average levels within the Boddington population (ABV Leisure Consultancy Services, 2011).

A summary of similarly sized Shires in WA (population range from 2,000-4,000) revealed that the provision of recreation facilities for these 'like comparators' included most of what Boddington currently has, with the notable exception of an indoor recreation centre.

4.7. Employment Self-Sufficiency/Self-Containment

An important factor in long term sustainable communities is the ability to live and work in relative proximity. Measures such as employment self-sufficiency and self-containment must be considered. Employment self-sufficiency and self-containment are defined as follows:

$$\textit{Employment Self-sufficiency ratio} = \frac{\textit{Local job stock}}{\textit{Employed local resident workforce}}$$

$$\textit{Employment Self-containment ratio} = \frac{\textit{Employed local workforce also working locally}}{\textit{Employed local resident workforce}}$$

In 2006, the employment self-sufficiency and self-containment for Boddington was 102% and 67.3% respectively. An employment self-sufficiency of over 80% is what is usually expected in a large metropolitan area such as Perth and frequently some regional areas have employment self-sufficiency approaching 100%. This data is interesting because it predates the reopening of the gold mine. The 2011 census will no doubt give a much higher self-sufficiency. It is important to maintain self-sufficiency at a high level through the economic development strategy.

Of the 651 jobs located in Boddington at 2006, 458 were filled by persons living within the Shire of Boddington resulting in an employment self-containment of about 67% (ABS Census 2006).

If the population of the Boddington, Williams and Wandering areas increases to 9,800 persons by around 2051 under the Aspirational growth scenario, this implies that the employed labour force living in the District will be in the order of 4,700 assuming an employment participation rate similar to 2006. Based on the number of jobs in the District at 2006 and the number of jobs at NBG, it is likely that in order to maintain an employment self-sufficiency of around 100%, then economic expansion and economic development within the region will need to target an expansion of up to 1,800 jobs by 2051. This would include the 1,065 jobs identified in Table 1 and additional jobs required for the anticipated additional households that would locate to the District under this scenario.

If the Boddington District population increases to 7,200 by 2051 under the SuperTowns Initiatives scenario, this implies that the employed labour force living in the District will be in the order of 3,600 assuming an employment participation rate similar to 2006. Additional population driven jobs such as household services, education services, and health services, will result in a target expansion of up to 1,000 jobs by 2051. This includes the 573 jobs identified in Table 1.

In this context the composition of the economy is important to note – the economy is characterised by a very small number of very large employers (BGM and BHPBW) and a very large number of small and micro enterprises, either sole employers or employing one or two employees. The employment numbers of the large employers are unlikely to change very much until around 2060. On the assumption that the largest employers are at peak employment rate until 2060 and that other enterprises are generally self-employing or employing below five people per firm, the emphasis for employment growth will also be on small business creation. This implies up to 180 firms if each employs around 10 people, 360 firms if each employs around five people, 900 firms employing two people or 1,800 sole employer firms. The most likely mixed outcome is that the new work force might be working in 500-1,500 new enterprises. This is a significant economic development task. After 2060 an additional consideration is that within this time frame the mines may be winding down and additional business creation will be required to retain this workforce locally.

There are local and international examples of 'post-mining' use of mine sites for economic purposes. If tourist facilities are established at the Newmont Boddington Gold mine similar to the Kalgoorlie Super Pit (visitors centre, tours, merchandise), then these services can continue beyond the cessation of active mining. The Eden Project in the UK is an environmental biodiversity research facility and education facility inside an old china clay mine. The project not only considers the environment, but also provides more jobs and income than the previous mine did. The project has also increased social inclusion through education and awareness campaigns. Other specific and general examples and potential uses include:

- Collie pit lakes – aquaculture potential
- The Woodlawn bioreactor at Tarago in New South Wales is situated in an old copper, zinc and lead mine and includes an aquaculture facility and education centre
- Chevron New Mexico – wind farm, solar farm
- In Ontario, industry waste from mining works is used to grow corn and canola crops for biofuels production
- Underground salt mines in Poland have been used as wedding and dining venues
- Moldova is home to a wine cellar in an old limestone mine
- In Italy there is a cheese store in an old copper mine
- The Zollverein Colliery in Germany has both an ice-skating rink and swimming pool nestled in the old plant
- Diving and indoor ski centres have been made in underground mines in both the UK and Germany
- Los Angeles will develop at the Mesquite mine a landfill to receive garbage from the county for the next 1,000 years

Whilst some or none of the above examples may be suitable for Boddington, it is never too soon to contemplate post mining activities and to build such plans into an integrated rehabilitation and remediation strategy for the future.

5. Economic Development Strategies and Action Plan

JW Keller, Professor of Economics, Kansas State University, summarises the key rationale for the importance of rural economic development into the 21st century:

"Growth itself will not fulfil basic needs; the new paradigm of economic development calls for self-sustaining economic growth and social policy designed to provide the requisites of existence and citizenship"

Peter Keynon (Bank of IDEAS) also provides a compelling rationale for Local Economic Development (LED) in rural towns and settlements:

- Quality of life, country people experience greater happiness and contentment in terms of relationships, community support and involvement and safety
- Source of heritage and national identity
- Economic contribution, 80% of our exports originate from rural and remote areas with agriculture accounting for 25% of all exports

The emphasis in rural LEDs must be to achieve a balance between economic growth and job creation whilst retaining the essential qualities which attracted people to the location.

The WA Government has developed a Strategic Framework for the development of LED Strategies which inform the Regional Centres Development Plans (SuperTowns). The Government has developed eligibility and evaluation criteria to determine the merits and priorities within the array of individual project lists, programs and plans. The criteria are weighted in favour of economic development.

5.1. The Economic Development Imperative

Economic development needs to begin immediately in the Boddington District. Economic development tasks will evolve over the 40 year time frame of the Development Plan according to the quantum and discrete constituents of growth as it occurs over time. Economic development activity should not be deferred or held up until multiple partnerships can be formed. Within a competitive market every day lost will count against a successful outcome. As the District's initiatives develop and its focus is outward looking, so the strategy will become more widely understood in the public and private sectors; partners will emerge and will offer support.

Within much of government and the community sector at present, separate responsibilities and work programs exist under the three main areas of society, environment and economy. Within the private sector there is greater emphasis on 'joined up' action. It is apparent from State Government correspondence that it too is considering the benefits of joined up and collaborative government which may merge disciplines and lead to a more holistic approach. In the meantime the strategy adopts a triple bottom line assessment and monitoring approach, and presents an economic development and governance framework which will pervade all action areas and provide essential criteria for the purpose of performance monitoring.

5.2. Economic Development Strategy for Boddington District

The economic development framework is described below. The framework has a vision, four guiding principles and ten objectives. The strategies have been developed under five of the key focus area references of the overall Regional Centres Development Plans (growth plan framework) which have referred to as themes in the Economic Development Strategy. Separate specific strategies, actions, responsibilities and timeframes are allocated in the attached tables. A Business Case for Economic Development Activity has been prepared under separate cover which details programs under each of the strategies and indicates corresponding resource requirements.

5.2.1. Economic Development Strategy Vision

The Economic Development Strategy Vision is:

To maintain the quality of life and small town character of the Boddington district whilst striving to attract more residents to share in these benefits and achieve greater economic self-sufficiency.

5.2.2. Economic Development Strategy Principles

The Economic Development Strategy Principles are:

- A sustainable community
- Maintain economic growth and broader, targeted spectrum of economic development and social investment in the district
- A transparent framework within which priority actions can be assessed
- Assist in long term planning, management and performance monitoring processes

5.2.3. Economic Development Strategy Objectives

The Economic Development Strategy Objectives are:

1. To articulate a shared public, private, community vision which achieves a triple bottom line outcome
2. To tailor economic development to meet specific needs of Boddington District community
3. To maintain and enhance economic diversity of the district
4. To generate greater opportunity for local jobs, skill matching, community services, entrepreneurial activity, investment and innovation
5. To support opportunities for increased individual and community prosperity
6. To foreshadow emerging economic growth trends and initiatives to support advanced planning and rapid responses to opportunities
7. To interpret infrastructure and development plans to optimise economic benefits to the widest community
8. To open up opportunities to tap into inherent capacity and resources of local residents
9. To support collaborative partnerships, funding applications and development prospectuses
10. To support the development of marketing, branding and promotion

5.2.4. Economic Development Strategy Themes

The themes below have been deliberately annexed from the Key Focus Areas of the Super Towns growth plan framework, as they clearly reflect the emerging economic development themes of the Boddington District and can be used to align the high level aspirations of the overarching framework, District growth plan and detailed economic development action list.

- A sustainable community
- Economic activity and employment opportunities
- Maximisation of the benefits of technology and innovation
- Integrated transport and key infrastructure linkages

- Marketing and strengthening of identity

Each theme is briefly described below in the context of the Boddington District.

5.2.5. Theme 1 - A Sustainable Community

At present the population of the Boddington District is too low to support a full range of services that the community wants and needs. A District target of around 7,000 people has been established as the preferred 'SuperTowns scenario', which should provide the ability to maintain a senior high school, small recreation centre, aged care facility, exciting main street, NBN and diverse range of lifelong learning and employment opportunities. Beyond the Super Town threshold a further 'Aspirational scenario' has been tested which may reach a population of approximately 10,000 people; at which level, additional recreation, youth and family support services become viable, a broader range of employment and tertiary education initiatives and greater sustainability can be developed. The first phase of this population transformation is already underway with lifestyle migrants, some of who choose to work elsewhere, locating to Boddington in the past five years. This phase includes family households. The next phase of population transformation and the focus of this strategy and the Growth Plan will be to generate the conditions for significant population growth and sufficient appropriate employment for people who can then choose not to travel out of the District for work under the SuperTowns scenario.

Achieving population growth will require strategies to improve the Boddington retail offer, increase land available for residential accommodation, choice of residential lot sizes, allow innovative housing styles, affordable product and materials (including sustainable materials) and design to suit multi-generational and home working families, promote the lifestyle opportunities and improve the range of local health and education services.

Studies of small settlements across Australia and North America have shown that rural towns which have 'persisted' have done so because of their economic diversity; diversity beyond resource extraction, agriculture and services to agriculture. It is essential therefore that the Economic Development Strategy pursues the goal of enhancing and extending the present economic and employment base to support start-ups in added value and emerging technologies, tourism, construction and business and community services.

A key strategy should also be to reduce employment, industry and business leakage outside of the District by furnishing the local community with the appropriate tools to be competitive, land, accommodation, utilities, skills, networks and technologies amongst other things.

The balance between types of jobs and location of jobs requires clear economic development policy direction. The employment self-sufficiency and employment self-containment of Boddington in 2006 was healthy at 100% and 60% respectively. A self-sufficiency level over 60% in a diverse economic base is regarded as good, a level above 100% indicates that the centre provides for a more regional catchment and is the centre for a number of strategically important facilities. The latest ABS should provide more up-to-date data, and targets should be reviewed regularly. Potentially both self-sufficiency and self-containment could fall significantly as the population grows. As a SuperTown providing services to a wider population in the hinterland, Boddington should aim to maintain the current healthy self-sufficiency and self-containment levels.

The Economic Development Strategy will need to create approximately 1,800 new jobs to serve a population of 10,000 and almost 1,000 new jobs for a population of 7,000. Interestingly the Boddington Gold Mine employs approximately 1,991. Given that most local businesses are micro and small in size, this implies a total business creation task of approximately 500 – 1,500 new enterprises over the Growth Plan period. These job growth targets imply an annual average requirement of 30-50 new jobs every year to 2051. This is a significant ongoing task as in the period 2001-2006 “a business as normal’ scenario the Shire of Boddington job growth was -20 or an annual average figure of -5; the implication is for significant economic development activity by the three Shires and other Government organisations in the associated Regions. Without sufficient local employment the draw of FIFO employment opportunities could lead to lower levels of employment self-sufficiency and a less sustainable community.

Forward planning should aim to establish and maintain a balance in terms of supply and demand. Developable land should be identified in the local planning system for long term growth and protected for the chosen purpose. Development should be consolidated and integral, building out from the town centre and coordinated with infrastructure provision and capacity. The Shire should communicate to the community/developers through the Growth Plan where key infrastructure will be prioritised. Careful monitoring of take-up rates and sales data should identify property cycles and aim to avoid the problems associated with over supply and under supply. Adequate strategic collaboration and lead-in times should be allowed for trunk services to be implemented. Land requirements will include up to 110Ha for industry and town centre employment land (including services and facilities) for a population of 10,000 people and over 75Ha for a population of 7,000.

The demographic profile and life cycle of the resident and business community should be monitored through the Local Planning Strategy as well as the trends in requirements of the population. Policies and provisions should be adjusted accordingly to maintain the balance between needs and service and accommodation. For example, an aging population provides a knowledge asset to the Boddington District and provides family stability but increases demand for specialised health and care services. In turn this can provide an opportunity for local businesses. Specific residential accommodation will be required to support the older generation choosing to lead active, independent lives for as long as possible. At a certain point in our lives we require additional care and residential support; there is currently unmet demand for specialised care provision and suitable accommodation for the elderly in Boddington District.

Essential workers such as doctors, nurses, teachers, policemen and key Local Government employees require local accommodation and are often unable to afford mortgages, particularly on a rising market as is the case in Boddington specifically at present. Some accommodation for essential workers (possibly on a rental/leasehold rather than sale basis) would be beneficial to ensure key positions are filled by quality people. Similarly, young start-up businesses require incubator accommodation with shared business services. Home-based businesses require additional space within the home for an office and reception or additional storage in the yard where large equipment or vehicles may need to be stored. There is a fine line between a home-based service which involves some machinery, and the need for separate industrial accommodation and clear guidance will need to be developed as the economy grows to ensure land uses are compatible. Small retail outlets can be successfully run from home on a mail order/internet basis but would benefit from a retail incubator with a Main Street address where passing trade may increase sales and reputation.

The activities of the network of other agencies, organisations and firms should be identified and where possible, integrated into the general business of the Shires to avoid duplication and assist in a transparent approach to growth management. In the first instance the Growth Plan should plot the position of the District in the network of related organisations and plethora of regional policies to ensure consistency with the growth scenario and reduction of bureaucracy.

Table glossary of abbreviations

Shires	Boddington, Wandering, Williams
PDC	Peel Development Commission
DoP	Department of Planning
DoC	Department of Commerce
DET	Department of Education
DoH	Department of Housing
DoW	Department of Water
WC	Water Corporation
MRWA	Main Roads WA
DAFWA	Department of Agriculture and Food
WP	Western Power
TWA	Tourism WA
Peel CCI	Peel Chamber of Commerce and Industry
CRC	Community Resource Centre
	Indicates SuperTowns project priority

Theme 1: A Sustainable Community, **Theme 2**: Economic Activity and Employment Opportunities, **Theme 3**: Maximisation of the Benefits of Technology and Innovation, **Theme 4**: Transport and Key Infrastructure Linkages, **Theme 5**: Marketing and Strengthening of Identity

Theme 1: A Sustainable Community									
Priority Actions/Initiatives	**Key Activities**	**Responsibility**	**Theme**					**Timeline**	
			1	**2**	**3**	**4**	**5**	**Priority/Term**	**Review Term**
Adopt District Growth Plan	• Demonstrate ability to accommodate 7,000-10,000 population, associated facilities and employment land in District • Review Local Planning Strategies, District Planning Schemes, Scheme maps and development policies to guide target 1,000-1,800 new jobs, 75-110Ha of employment land (including industry, town centre, service accommodation, facilities)	Shires, Growth Plan consultant team	✓	✓	✓	✓	✓	Immediate – High Priority	Longer term review
Establish policies and provisions to maintain healthy employment self-sufficiency and self-containment ratios	• Local Planning Strategies and Planning Schemes include targets for SuperTown self-sufficiency and self-containment of 100% and 60% respectively • Develop home based business policy	Shires, DoP	✓	✓				Immediate	Longer term review
Establish accurate current infrastructure capacity, additional requirements, specific projects to meet growth demand, identify in forward budgets	• Develop infrastructure strategy for SuperTown growth for timely delivery of serviced land and to guide future subdivisions • Provide adequate controls to maintain appropriate vegetation, water, air& soil quality	Shires, Growth Plan team, statutory utility providers	✓	✓		✓		Immediate	Ongoing – every 5 years
Establish networks with co providers, government agencies related to growth plan objectives	• Consult on economic development strategy and growth plan strategies seeking integration with wider strategic plans of government agencies • Review and align approval processes and planning/development control provisions to facilitate property development and regeneration, speed implementation and to remove impediments to rural enterprises	Shires, PDC, DoP, DoC, DET, DoH, DoW, WC, MRWA, DAFWA, WP, TWA, Peel CCI		✓	✓		✓	Short Term	Ongoing as required
Facilitate residential choice, independent living and housing affordability	• Local Planning Strategy to ensure housing strategy component factors in forecast household/affordability demand from SuperTown growth • Facilitate development of aged care/retirement village near town centre • Identify target for key workforce accommodation and ensure perpetual affordability	Shires, DoP, DoH	✓	✓				Short Term	Ongoing – every 2 years
Ensure sufficient ongoing serviceable housing land supply to meet needs of three year supply and 30% contingency	• Facilitate subdivision of Lot 8016 • Ensure provision in the District for up to 2,300 new homes to 2051 • Monitor land supply, take-up rate, forecast demand and housing trends, ensure collaborative approach with utility service providers	Shires, DoP, PDC, DoH, Statutory utility providers	✓	✓	✓	✓	✓	Immediate – High Priority	Ongoing – every 3 years
Ensure Main Street/town centre remains key attraction and provide conditions for growth	• Identify infill development sites and prioritise development in Main Street location, medium density, mixed use/retail based (limit 'out of centre' retail) • Identify location and guidelines for retail hub/incubator, develop prospectus • Identify Main Street upgrade initiatives to create meeting places, visitor attractions, public art, orientation and identity	Shires, Growth Plan consultant team	✓	✓	✓	✓	✓	Immediate – High Priority	Ongoing – annual review

5.2.6. Theme 2 - Economic Activity and Employment Opportunities

Industrial, commercial and residential developments are significant contributors to the economic growth and future prosperity of the Boddington District which must support the existing and future populations, services and businesses. Sufficient land supply (particularly for industrial purposes) and serviced and accessible lots must be identified and safeguarded for future development. The key issue is to ensure a balanced approach to development to ensure effective and efficient use of land, resources and infrastructure.

Without an increase in employment opportunities, the attraction of skilled inward migration and the associated economic growth will slow. The attraction of new investment and skilled workers is vital for economic development. It is important that there are sufficient local employment opportunities to match the needs of the local labour market and the local employers are regarded as employers of choice. Skilled migrants should be attracted to the District as a lifestyle choice.

Improving the skills base of residents through targeted education and training programs will support the future labour skills requirements of public and private enterprise in the District. Basic training in terms of business management, finance and marketing can have a significant impact on communities. The location of training should be as local as possible.

Enabling and facilitating economic and employment diversification will require a flexible approach to planning and economic development, as farming, mining and construction methodologies adapt to market requirements, climate change and sustainable practices. Diversification in the agricultural economy may lead to more intensive processes, additional or alternative reefing process in mining and renewable and recyclable elements in construction.

Maintaining and developing links with other public groups, particularly the regional development commissions and tertiary institutes already targeting business development, with a view to collaborative projects, will extend capacity and enhance skill development.

Good practice suggests that by linking new and small business owners with established businesses, significant benefits can result for all parties. These need not be formal networks. In addition, informal networks of mentors and new businesses can create further benefits by developing supplier linkages and establishing a critical mass for specialist training. The development of a local business support guide for start-ups will assist operators and investors. The guide should identify alliances, support services and the approvals process. Alignment of the three Shires' approvals and development guidance and development incentive/bonus provisions would reduce barriers and stimulate development. Examples of support and financial incentives that can be offered to new and existing businesses who are planning to locate and expand or are planning to value add to their enterprise, is provided in Appendix 4, section 4.3.

Developing a District wide Tourism Strategy based on destination development, management and marketing will strengthen the economic foundation of the District. The geographic focus of the strategy should be the Hotham Valley and Hotham Ridge between the Albany Highway and lower Peel. A centre piece of the strategy should be a Boddington visitor centre and tours to the gold mine. The rural and natural resources of the region are traversed by multiple tracks and trails worthy of exploration and a reinstatement of the Hotham Valley railway through to Boddington would be a big asset in the longer term.

Theme 1: A Sustainable Community, **Theme 2**: Economic Activity and Employment Opportunities, **Theme 3**: Maximisation of the Benefits of Technology and Innovation, **Theme 4**: Transport and Key Infrastructure Linkages, **Theme 5**: Marketing and Strengthening of Identity

Theme 2: Economic Activity and Employment Opportunities									
Priority Actions/Initiatives	**Key Activities**	**Responsibility**	**Theme**					**Timeline**	
			1	**2**	**3**	**4**	**5**	**Priority/Term**	**Review Term**
Form strategic alliance	• Establish MOU for strategic partnership/company • Detail resource allocations, reporting protocols, strategic plan	Shires/PDC	✓	✓	✓	✓	✓	Immediate	Ongoing – annual review
Prioritise economic development resources within the District and provide ongoing economic input into SuperTown growth plan	• Appoint economic development taskforce as executive to strategic partnership and identify support team resources • Develop an Economic Development Charter • Align with strategic partnership	Shires/PDC	✓	✓	✓	✓	✓	Immediate	Ongoing – annual review
Ensure sufficient ongoing serviced industrial land supply to meet needs of three year supply and 30% contingency	• Advocate for additional funding for implementing servicing and access improvements to zoned industrial land on Gold Mine Road • Monitor land supply, take up rate, forecast demand and industry trends and requirements	Shires, DoP, PDC	✓	✓	✓	✓	✓	Immediate – High Priority	Ongoing – every 3 years
Ensure sufficient serviced land and accommodation choice for business growth/ lifecycle needs	• Monitor land supply, take up rate, forecast demand and business accommodation trends	Shires, DoP, PDC	✓	✓	✓			Short Term	Ongoing – every 2 years
Facilitate and encourage higher District levels of direct employment and indirect mining services to local resources industry	• Develop a Boddington District Workforce Strategy • Develop training and mentoring policy for local-local contracts with Boddington suppliers • Facilitate supply of accommodation within Boddington to attract mining workforce	Shires, NBGM, Worsley Alumina, local contractors, Peel Business Support	✓	✓	✓		✓	Immediate – High Priority	Ongoing – every 2 years
Support business start-ups in added value and emerging technologies, farming, tourism, construction and business and community services	• Facilitate development of business technology and incubator hub in Boddington • Facilitate networking with business support agencies and industry representative group • Support development of a local Chamber of Commerce and Industry • Review Government procurement policies and investigate opportunities for additional 'buy local' campaigns • Facilitate diversification in the agricultural economy where appropriate	Shires, DoP, PDC, CRC	✓	✓	✓			Short Term	Ongoing – annual review

Develop targeted Education and Training Programs to support the future skills requirements of public and private enterprise in the District	• Identify central Boddington location for training hub • Identify first round training programs in conjunction with key resource industry requirements • Identify VET and K-12 learning and training opportunities focused only industries and businesses • Utilise youth/senior volunteers for visitor tours, environmental clean-ups, Main Street upgrade	Shires, NBGM, Worsley Alumina, local contractors, Peel Business Support, DET, CRC	✓	✓	✓		✓	Immediate-High Priority	Ongoing – annual review
Develop District wide Tourism Strategy	• Identify destination development, management and marketing strategies • Develop Hotham/Boddington brand, rural retreat, adventure trails, heritage, gourmet food/wine, performance art festival themes, identify 'signature projects' eg Gold Mine experience • Facilitate Boddington District visitor centre/ Gold Mine tours	Shires, NBG, PDC, CRC	✓	✓	✓	✓	✓	Immediate – High priority	Ongoing – annual review

5.2.7. Theme 3 - Maximisation of the Benefits of Technology and Innovation

The growth theory proposition of Aghion and Howitt (Harvard) is that in order to sustain a positive growth rate of output per capita in the long run, there must be continual advances in technological knowledge in the form of new goods, new markets, or new processes.

Building the capacity of the community through the advances in technology and innovations in all walks of life is a key element of the Boddington District Economic Development Strategy. The aim is to increase the inherent knowledge base of Boddington District and apply this locally to create and maintain employment and a sustainable community. The strategy is place based rather than firm, school or industry based. Knowledge sharing is a strong community principle in Boddington which will be enhanced by additional technology. Developing a culture of lifelong learning and a stronger focus on learning from K-12 and beyond will ultimately create an environment more conducive to new local business start-ups. A stronger education base will assist the community in retaining its youth. Education also has a high self-sufficiency level and is an important employment sector.

The home based and micro business sector is growing but will only be able to expand in Boddington if access to NBN, advanced business services and a level of Main Street amenity can be provided.

In the immediate and short term the emphasis is to be upon strengthening the potential for technology research, development and transfer of this knowledge base amongst industries in the District and a general upgrading of skills in the area through education institutions, professional development and possibly the development of a specialist skill and entrepreneurial training unit or Innovation Accelerator based on the two major resource industries and any inherent experience of retired professionals which may exist in the District. Pivotal to this element in the longer term, is the potential for NBN and the need to be 'NBN ready' and active in the next round bidding process. The establishment of the NBN is likely to support a strong migrant population of a skilled and graduate workforce, as technology removes the distance/isolation barrier; this new community in turn feeds the upward cycle of innovation and goods and services demand profile. The Shires should stay up-to-date on the profile of its industries and businesses, the work force patterns and requirements and preferences of the labour cohorts. The recent Survey Monkey carried out for this project is a starting point and a three yearly review could build upon this data base.

The Shire could commence an Innovation Index to monitor its pathway; sufficient data exists within 2006 and 2011 ABS census to generate a database. The Department of Commerce facilitates a Western Australian innovation Centre, responsible for maintaining an Innovation Service Directory which is available to an International audience and supporting the Innovation Xchange which offers opportunities for knowledge and technology transfer within the wider region. Links into the wider State network should be actively explored and integrated into the day-to-day economic development activity of the District.

Opportunities to be energy and resource smart are likely to theme many industrial and business innovations over future decades. The Boddington district should investigate suitable opportunities, support start up business and industry innovations aligned with smart technologies and augment guidance to promote smart systems in the district where viable and affordable. Whilst on a much larger scale it is interesting to note that in the early years of planning the Milton Keynes New Town a conscious decision was taken to ensure new property was energy efficient. The 'Energy World', demonstration subdivision was established to demonstrate energy conscious design (minimum 30% greater than the prevailing building codes) in residential, business and industrial accommodation. The lifecycle energy cost savings were attractive to prospective purchasers. Nearer to home, the City of Wanneroo has a SMART strategy and Mandurah has a demonstration sustainable home and development sustainability index.

Theme 1: A Sustainable Community, **Theme 2**: Economic Activity and Employment Opportunities, **Theme 3**: Maximisation of the Benefits of Technology and Innovation, **Theme 4**: Transport and Key Infrastructure Linkages, **Theme 5**: Marketing and Strengthening of Identity

Theme 3: Maximisation of the Benefits of Technology and Innovation									
Priority Actions/Initiatives	**Key Activities**	**Responsibility**	**Themes**					**Timeline**	
			1	**2**	**3**	**4**	**5**	**Priority/Term**	**Review Term**
Increase the inherent knowledge base of Boddington District and apply this locally to create and maintain employment and a sustainable community	• Develop business and industry newsletter • Maintain web based business and industry database • Periodically renew survey of Business and Industry perceptions, act on feedback • Facilitate access to professional development and advanced training courses	Shires, PDC, Newmont, Worsley, CRC	✓	✓	✓		✓	Immediate – High Priority	Ongoing – every 2 years
Be NBN ready	• Prepare submission for next round of bids	Shires, PDC, CRC	✓	✓	✓	✓	✓	Immediate – High Priority	
Commence an Innovation Index	• Maintain a profile of District industries and businesses • Identify use of advanced technology or innovation	Shires, CRC		✓	✓			Short Term	Ongoing – every 2 years
Integrate specialist skill and entrepreneurial training unit into technology and business support resource hub	• Tap into Peel and Perth business support services and mobile resources • Utilise NBN courses provided by Commonwealth • Draw upon volunteer resources of retired professionals in District as mentors in business development	Shires, PDC, CRC						Short Term	
Encourage resource efficient, energy efficient and smart technology in built forms, subject to affordability constraints	• Develop 'smart' but affordable guidelines for residential and industrial development • Facilitate demonstration projects of advanced and smart technologies wherever possible, in aged care accommodation, energy efficient homes, technology in business hub, industrial resource efficiency techniques	Shires, PDC, DoP						Immediate – High Priority	Ongoing – every 3 years

5.2.8. Theme 4 - Transport and Key Infrastructure Linkages

The transport, haulage and distribution sector is expanding in WA and the wider SW Region in particular as settlements disperse and as regional centres grow in function and complexity. There are firms in the Boddington District which provide this service and rely upon safe and direct access to ports, centres and depots in Mandurah, Bunbury, Albany and Armadale. The regional network must be in good condition for this sector to function efficiently.

Both the Worsley and Newmont mines use large vehicles which must use relatively narrow and windy rural roads to their point of distribution.

The recently zoned industrial area is on Gold Mine Rd which is traversed by electricity cables which will severely constrain the height and scale of vehicles entering the site and which may exclude the development of a much needed local service centre for large machine pieces associated with local mining.

Lack of adequate public transport to the key settlements from the regional centres of Armadale, Mandurah and Bunbury and within the region between the key towns, affects access to education, training, employment, essential services and leisure pursuits. Improvements to the peak service would be beneficial to the economy.

There is evidence from the interviews conducted by PDC with the key infrastructure providers that there are some short term limitations on the capacity for growth, particularly in the Ranford and outlying hinterland and longer term capacity issues in Boddington in the water, sewerage and power systems. The systems can be improved sufficiently to support the growth plan, at a cost and over time. It is essential that planning for the growth plan starts immediately and that priority is given to essential service upgrades for the designated SuperTown, particularly for water which appears to be the most constrained service and limited reticulated network. Limited water supply will directly impact upon Boddington District's ability to develop industry, business and residential property.

The broadband and telecom network coverage is limited and significant black spots occur. This level of service impedes economic growth and particularly hinders small business and home working development. The NBN is to be rolled out to Mandurah in the next round of implementation, with construction due to start in 2013 to service 17,500 premises. A priority case should be launched to include Boddington in the next rollout. Presently Boddington is earmarked for wireless service which, due to topographical constraints, may not provide a comprehensive or uninterrupted service. Further investigation is required to ensure the proposed NBN system is the best fit for the Super Town demographic and employment scenario. In the meantime black spot and void service locations should be addressed and a high level of lobbying will be required.

Theme 1: A Sustainable Community, **Theme 2**: Economic Activity and Employment Opportunities, **Theme 3**: Maximisation of the Benefits of Technology and Innovation, **Theme 4**: Transport and Key Infrastructure Linkages, **Theme 5**: Marketing and Strengthening of Identity

Theme 4: Transport and Key Infrastructure Linkages									
Priority Actions/Initiatives	**Key Activities**	**Responsibility**	**Theme**					**Timeline**	
								Priority/Term	**Review Term**
Ensure regional road network remains in good, safe condition and suitable to the needs of heavy industry	• Road safety audit • Regular maintenance	Shires, MRWA		✓		✓		Short Term	Ongoing – annual review
Ensure appropriate access to industrial zone on Gold Mine Road	• Assess industry requirements	Shires, MRWA		✓		✓		Short Term	Four years
Facilitate improvements to public transport to key regional centres	• Assess future needs for SuperTown growth	Shires		✓		✓		Short Term	Ongoing – every 2 years
Ensure adequate capacity for growth in the present water, sewerage and power systems	• Assess future needs for SuperTown growth • Develop infrastructure strategy to guide implementation over time • Prepare detailed water supply improvement plan for first release residential and industry development and main street infill	Shires, Growth Plan team, statutory utility providers	✓	✓	✓	✓	✓	Immediate – High Priority	Ongoing – every 4 years
Pursue broadband/telecom improvements prior to NBN roll out and be NBN ready	• Assess industry requirements • Prepare NBN bid	Shires, Growth Plan team, statutory utility providers		✓	✓			Immediate	Every 2 years

5.2.9. Theme 5 - Marketing and Strengthening of Identity

The strength of successful regions comes from their ability to proactively promote and market themselves and to build increased levels of community confidence.

The attraction of skilled workers to the District as residents, particularly with younger families, is important to maintain and expand the workforce and achieve a balanced resident population. Attracting a local workforce will strengthen the economy and the lifestyle and business advantages of the District should be promoted. It is also important to attract business investment and partners in projects, programs and collaborations. Communication is necessary with tourists and the tourism industry to increase visitor numbers, length of stay and level of expenditure. Good clear signage and up-to-date information and maps are essential.

Links and partnerships with other government and not-for-profit organisations in the region should assist in increasing awareness.

A comprehensive marketing plan and identity brand should be developed in conjunction with key stakeholders such as private firms and government agencies which will support the maximisation of business and promote the District's public face. In the short term the plan should stress the strengths of the community, heritage and culture, community facilities in health and lifelong learning, the resource based industries, and the environmental setting. In the longer term, individual industry and business clusters, if and when they emerge, and innovations in existing industries and the application of new technologies including NBN when it arrives could be addressed in separate marketing plans.

Often settlements are known for a single or related group of 'signature' projects; for example, the environmental experience centres of the Tree Top Walk at Walpole and the Forestry Experience Centre at Dwellingup, further afield the bio-dome laboratories reusing the old China Clay pits of the Eden Project at St Austell, Cornwall, or the demonstration homes and industrial units challenging using resource and energy efficiency technology in Energy World at Milton Keynes, Buckinghamshire. The Gold Mine experience at Boddington could be an important and potentially international draw card and should be considered alongside other 'signature' projects in a marketing plan.

Theme 1: A Sustainable Community, **Theme 2**: Economic Activity and Employment Opportunities, **Theme 3**: Maximisation of the Benefits of Technology and Innovation, **Theme 4**: Transport and Key Infrastructure Linkages, **Theme 5**: Marketing and Strengthening of Identity

Theme 5: Marketing and Strengthening of Identity									
Priority Actions/Initiatives	**Key Activities**	**Responsibility**	**Theme**					**Timeline**	
			1	**2**	**3**	**4**	**5**	**Priority/Term**	**Review Term**
Identify marketing priorities for tourism, business, industry, community and Government	• Communicate Economic Development Strategy initiatives to stakeholders • Identify the Hotham/Boddington Brand, 'signature' elements, key messages, key audiences • Prepare fact sheets to convey key messages for specific audiences	Shires		✓	✓		✓	Immediate – High Priority	Ongoing - annual review
Develop guidance to ensure character of Boddington is retained	• Ensure focus of development strengthens and consolidates town centre • Integrate specific design guidance into growth plan, Local Planning Scheme and District Planning Scheme, development prospectus • Develop signage and public realm design guide which reflects essential character and identity	Shires, Growth Plan team	✓	✓			✓	Immediate – High Priority	Ongoing – every 5 years
Expand networks and advocacy	• Map networks and key messages for each audience • Maintain high level of Shire staff and public interface with SuperTown growth plan • Identify public and private sector partners and potential for joint marketing campaigns, eg home builders, utility providers, government agencies	Shires, Government agencies					✓	Short Term	Ongoing – annual review
Update communication and marketing materials	• Ensure marketing and promotional materials are up-to-date and available in prominent visitor locations	Shires	✓	✓	✓		✓	Short Term High Priority	Ongoing - annual review

6. Implementation and Governance

6.1. Governance

The current regional governance structure is fragmented; there are competing economic, environmental and social values and competing land use requirements.

From a **planning, heritage and economic development** perspective, within the Boddington district:

- Boddington is in the Peel Region, a growth region with strong links to Perth
- Wandering is in the Wheatbelt with a focus on Narrogin as its main centre
- Williams is in the Great Southern with strong links to the settlements along the Albany Highway to the south coast

The **health, police and education** district administrations are also complicated.

- All three towns fall into the Wheatbelt Health district, but all are part of the Great Southern General Practitioner training District
- All three towns fall in the Wheatbelt Education District
- All three towns are in the Great Southern Police Region, with Boddington and Williams at the centre of their respective district hubs with a police station, whilst Wandering is closest to the Boddington District hub focused on a station at Pingelly

From a **tourism** perspective, the district is on the edge of Tourism WA's Golden Outback.

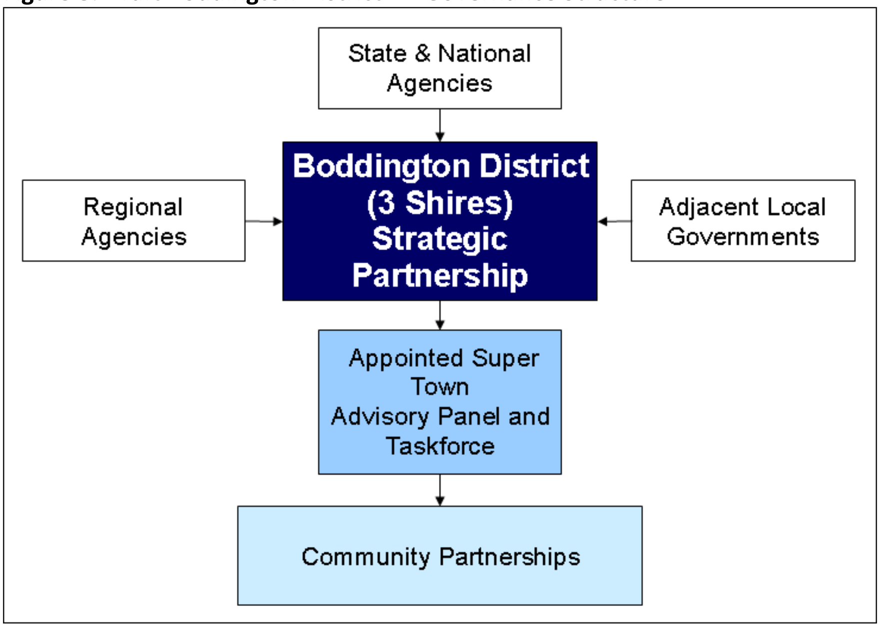
At a local level there are many informal local governance groups requiring direction and guidance. The current structure contains many Government departments and overlapping environmental groups. For example there is the South-West Catchment Council, Peel-Harvey Catchment Council, Boddington River Action Group, Hotham Catchment Land Care, Hotham-Williams Catchment Environmental Alliance. These groups are particularly successful in their ability to attract funds from the Natural Heritage Trust and Australian Enviro Fund for ongoing rehabilitation and management of the catchment area and environmental projects relating to the catchment. Boddington and Williams are members of the International Councils for Local Environmental Initiatives water campaign which encourages councils to make support water saving initiatives. This is in line with the Economic Development Strategy proposition that there are emerging industry and business opportunities in resource management. There may be the need to facilitate crossover and funds pooling with eco–tourism, other tourism projects, VET and other job creation initiatives.

The Economic Development Strategy aims to provide a framework for balanced growth, collaboration, coordination and monitoring. The framework provides a mechanism for prioritising projects and facilitates collaboration and partnership actions.

A governance structure is proposed with opportunities for greater sharing of responsibility, greater levels of community engagement and enhanced private sector leadership which places the Super Town initiative at the forefront of the three Shires' strategic planning. The governance recommendation is that a Boddington District Strategic Partnership should be formed within government at local level between the three shires; Boddington, Wandering and Williams (in essence the Super Town initiative has already caused this to happen informally and the three Shires have collaborated on the Economic Development Strategy and Growth Plan):

- The Strategic Partnership would be aligned with the Growth Plan Framework established by the State Government and would prioritise the actions from the Economic Development Strategy and Growth Plan within their organisations.
- The Strategic Partnership would liaise and report to the state on a regular basis (and to Federal levels as the need arises for projects such as NBN). The focus of these collaborations would be forward planning and budget planning, grants/funding strategies, strategic project promotion and priority evaluation.
- The Strategic Partnership would appoint a Super Town Advisory Panel (appointed by the Shire presidents) which would advise the District on major projects, policies and plans as required. This advice may vary in terms of specialist technical, financial, economic, environmental and social detail. The panel is likely to harness the skills of the private sector as consultants and key stakeholders in industry, business and finance.
- The Strategic Partnership would also identify an executive or taskforce made up with appropriately qualified and experienced officers from the three local governments, charged with collaborative day-to-day economic development tasks, SuperTowns project development and assessment and KPI monitoring. KPI monitoring would be closely aligned with the Shires' strategic plans.
- The community would be invited into voluntary engagement and stewardship roles in SuperTowns projects.

Figure 8: Draft Boddington District ED Governance Structure



6.2. Implementation

The following table highlights the projects which are regarded as being required immediately and as a high priority category in terms of the Economic Development Strategy. It is estimated that the Immediate - High Priority, Immediate and Short term projects would fulfil the day-to-day economic development business of the three Shires for the next three years; beyond this timeframe in a contingent 2-3 years the Short term projects would take priority. Thereafter in the 5-15 year timeframe, assuming the Growth Plan and Economic Development Strategy remain broadly consistent in their scope, the longer term initiatives and reviews would be factored into the Shires' work plans. A detailed overview of implications and requirements for strategies and actions relating to the key, new economic development areas: tourism and NBN, is provided in Attachment 4. Strategy Implementation.

Specific Economic Development Strategy and Actions *(Immediate - High priority - refer section 5 EDS for full strategy)*		Year 1	Year 2	Year 3
Theme 1:A sustainable community				
Adopt District Growth Plan	Align Scheme, policies, targets			
Investigate three year housing land supply options	Match demand, align services			
Prioritise Main Street infill options	Identify sites/capacity, Prospectus/Design guides			
Theme 2: Economic activity and employment opportunities				
Form Strategic Partnership	MOU, Advisory Panel, Executive Taskforce			
Prioritise ED resources	Develop ED Charter			
Investigate 3 year employment land supply options	Match demand, align services			
Facilitate local mine servicing employment	Develop workforce plan, policy provisions			
Support business/employment start-up	Develop Town Centre training/technology hub			
Facilitate training and learning opportunities	Identify local VET,K-12 opportunities, form mentor network			
Support tourism industry development	Develop District Tourism Strategy			
Theme 3: Maximisation of the benefits of technology and innovation				
Increase knowledge/innovation base	Service web based newsletter, innovation promotion			
Be NBN ready	Develop NBN bid, lobby Commonwealth			
Encourage resource/energy efficiency	Develop SMART guide, policy provisions, demonstration projects			
Theme 4: Transport and key infrastructure linkages				
Ensure timely services for Growth Plan	Develop District Infrastructure Strategy			
Theme 5: Marketing and strengthening of identity				
Promote and market tourism	Develop Town Centre Visitor Centre, Develop Hotham Brand			
Retain and enhance character	Develop design guides for new development			
Communication	Update promotional material			

6.3. Funding Sources and Services

There are a large number of grants available for local government and individuals in the community to assist with the development and implementation of economic development initiatives. Examples of the types of grants available in various funding areas are shown in Attachment 4, section 4.3. In addition to funding, local government have access to a wide range of free services that will assist them in the development and delivery of their economic development strategies.

Table 9: Economic Development Resources

Resource	Details
Small Business Centres – Great Southern (Albany), Peel (Mandurah), Wheatbelt (Narrogin)	Provide assistance and support to new and existing businesses by offering: • practical help • referral to specialist advisers (accountants, lawyers, and so on) • help through the maze of government departments and regulations • business workshops • business information • help with problem solving
Innovation Centre WA	Located at Technology Park, Bentley, as a focal point and meeting place for entrepreneurs, innovators and service providers
Innovation Service Directory	Assists innovative organisations and start-up companies to access professional services such as patent attorneys, intellectual property specialists, test manufacturers, commercialisation strategists and capital providers to develop and grow their businesses
Business.gov.au	Access to all the government information, forms and services you need, providing essential information on planning, starting and growing your business
Department of Commerce	Works with the community to ensure high standards of safety and protection for workers and consumers, and promotes and fosters innovative industries, science and enterprise
Department of Regional Australia, Local Government, Arts and Sport	Engaging with and empowering local communities, developing informed regional policy, overseeing the rollout of regional initiatives, and providing a dedicated source of advice on regional development
Department of Broadband, Communications and the Digital Economy	NBN, digital hubs (initial 40 communities each received $13.6 million in grant funding over three years – round 2 closed February 2012), digital enterprise

6.4. Review and Update

The Economic Development Strategy is not a static document and requires ongoing review and reprioritisation to ensure:

- it is current
- it is relevant
- recent and emerging priorities are included
- it is in-line with proposed timeframes
- adequate resources have been allocated
- external funding has been sought and received

- implementation adheres to best practice
- communication of progress internally and to the wider community
- alignment with other Shire, regional, state and national strategies and policies

Local government are required to review, update, and report on performance, plans and strategies on a regular basis. In order to streamline this process, it is recommended that the ongoing review and updating of the Economic Development Strategy be completed in conjunction with other review processes. The following list provides an example of the current reporting requirements and timeframes for the Shire of Boddington.

Table 10: Current Review and Reporting Requirements

Report	Timing	Synergies
Annual Budget	prior to end of financial year	• Budget allocation for activities in next financial year
Annual Report	finalised by 30 September	• Actual expenditure previous financial year • Report on progress and KPIs achieved
LPS and TPS Review	every five years	• Review EDS as a whole • Availability of newly released ABS data
Integrated Planning	to be developed by 30 June 2013	
◦ Strategic Community Plan	desk-top review every two years, full review every four years	• Ensure consistency and avoid conflicting strategies/actions
◦ Corporate Business Plan	annual review and reprioritisation	• Budget allocation for activities in next financial year

Each of the priority actions and initiatives shown in section 5.2 and 6.2 have a suggested review timeline included in the table. Individual actions will require review based on the key performance indicators (KPIs) set for that task. KPIs have been provided for all projects that have been identified as Immediate or High Priority and are shown in the table in section 6.2.

The Shire's Annual Report is due each year by 30 September and is an ideal opportunity to be able to communicate the Shire's progress and successful outcomes to date. This not only keeps the community informed regarding the current and future projects, but also advises of any delays or major alterations to projects.

The *Local Government (Administration) Regulations 1996* has been amended to require each local government to adopt a Strategic Community Plan and a Corporate Business Plan by 30 June 2013. The Strategic Community Plan sets short, medium and long term priorities for the community, while the Corporate Business Plan is the internal planning tool that translates the priorities into operations by assigning the required economic and human resources to complete the tasks. These plans will replace the current Plan for the Future and Strategic Plan. The EDS will become an important informing strategy during the development of these plans.

In addition to the monitoring and review of individual action strategies, the plan as a whole will need to be examined and updated on a periodic basis. It is suggested that this be completed on a five year basis corresponding with the release of the latest Census data that occurs every 5 years. As the Boddington Local Planning Strategy is already reviewed in the year following the Census (last updated 2007), the first review of the Boddington SuperTown EDS should also be conducted in 2017, five years after its adoption.

List of References

Affordable Housing the Key to Sustainable Rural Housing, 2007, Dr Martin Gaskell and Diane Diacon, Building and Social Housing Foundation

An Opportunity too Good to Waste!, May 2009, Joint Response of ACOR & Boomerang Alliance to The Commonwealth of Australia Consultation Paper for: A National Waste Policy

Ausgold extends gold mineralisation at Boddington South, Proactive Investors, www.proactiveinvestors.com.au/companies/news/21278/ausgold-extends-gold-mineralisation-at-boddington-south-21278.html

Australian Jobs 2011, Department of Education, Employment and Workplace Relations

Australia's Agriculture, Fisheries and Forestry at a Glance 2010, Department of Agriculture, Fisheries and Forestry

Banksia Estate, http://www.banksiaestate.com.au/banksia-estate/

Bauxite Boddington, Australian Aluminium Council Ltd, http://aluminium.org.au/australian-bauxite/ bauxite-boddington

BHP Billiton Worsley Alumnia's Efficiency and Growth Project, Survey Dynamics, http://surveydynamics.com.au/ projects/bhp-billiton-worsley-alumnia/

Boddington 6390 Property Sales Figures, October 2011 (Interim Release), On The House, www.onthehouse.com.au/rex/WA/South+West/6390/BODDINGTON/

Boddington Demographics, OK Travel, www.oktravel.com.au/au/wa/boddington/stats/

Boddington Floodplain Management Study, Shire of Boddington

Boddington-Ranford Townsite Strategy, April 2010, GHD for Shire of Boddington

Boddington Suburb Profile, Property Data, www.realestateview.com.au/propertydata/suburb-profile/wa/ boddington/

Boddington Town Centre Design Guidelines, 2007, Shire of Boddington

City of Mandurah Strategic Data Analysis and Research Mapping, November 2006, Syme Marmion & Co for City of Mandurah

Creating and Sustaining Jobs in Rural Areas, Clackmannanshire Council, www.clacksweb.org.uk/property/ localplan/chapter2/objective3/

Creative Industries, a Strategy for 21st Century Australia, 2009, Attorney-General's Department; Department of Broadband, Communications and the Digital Economy; Department of Innovation, Industry, Science and Research; Department of Foreign Affairs and Trade; and Department of Education, Employment and Workplace Relations

Department of Broadband, Communications and the Digital Economy, www.nbn.gov.au

Design of Sustainable Rural Housing Prototype House, June 2006, John Gilbert Architects for Forestry Commission Scotland and Perthshire Housing Association

Developing Policy for Australia's Small Towns: From Anthropology to Sustainability, July 2005, Jerry Courisanos and John Martin, University of Ballarat

Directions 2031 Draft Spatial Framework for Perth and Peel, June 2009, Western Australian Planning Commission

Drivers of Regional Agritourism and Food Tourism in Australia, October 2010, Saan Ecker, Rachel Clarke, Sophie Cartwright, Rober Kancans, Patty Please and Bill Binks, Australian Bureau of Agriculture and Resource Economics – Bureau of Rural Sciences

Economic Survey of Australia 2010, Organisation for Economic Co-operation and Development (OECD)

Economic Trends and Drivers Affecting the Wheatbelt of Western Australia to 2030, Ross Kingwell and David Pannell, Australian Journal of Agricultural Research, 2005, 56, CSIRO Publishing

Establishing Standards for Social Infrastructure, August 2005, Sharyn Casey, The University of Queensland

Finding work in rural areas: barriers and bridges, October 1999, Sarah Monk, Jessica Dunn, Maureen Fitzgerald and Ian Hodge, Joseph Rowntree Foundation, www.jrf.org.uk/publications/finding-work-rural-areas-barriers-and-bridges

From Mine to Wine: Creative Uses for Old Holes in the Ground, September 2011, The Conversation, http://theconversation.edu.au/from-mine-to-wine-creative-uses-for-old-holes-in-the-ground-3245

Future of jobs in regional Australia, February 2009, Australian Broadcasting Corporation, www.abc.net.au/rural/content/2008/ s2483089.htm

Gold rush has Boddington booming, September 2009, Australian Broadcasting Corporation, www.abc.net.au/7.30/content/2009/s2685794.htm

'Growing Moorabool' Economic Development Strategy and Action Plan, April 2006, SGS Economics and Planning for Moorabool Shire Council

Heart of the Hawkesbury, Sand Sculpting Championship, http://heartofthehawkesbury.com.au

Heavy Industry Strategy, March 2009, Department of State Development

How Regions Grow, March 2009, Policy Brief, Organisation for Economic Co-operation and Development

Indicators of Regions, Supplementary Report, 2007, Department of Regional Development and Local Government

Industrial Land Needs Study – Perth and Peel, June 2008, Syme Marmion & Co and ERA for LandCorp and Department for Planning and Infrastructure

International Mural Fest Sheffield, www.muralfest.com.au

Investing in Regions: Making a difference, May 2011, John Daley and Annette Lancy, Grattan Institute

Land Use Planning in Rural Areas, State Planning Policy 2.5, January 2011, Western Australian Planning Commission and Department of Planning

Local Enterprise Partnership Toolbox, Department for Business Innovation and Skills, UK

Local Water Management Strategy, 2009, McDowell Affleck for Shire of Boddington

Managing Western Australia's Economic Expansion: The Need for People and Skills, September 2009, Western Australian Technology and Industry Advisory Council

Minerals Futures Cluster, P3: Regions in Transition, Case Study: Boddington Radius

National Research, Development and Extension Strategy for New and Emerging Industries, Industry Overview, September 2009, Max Foster and Julie Bird, Rural Industries Research and Development Corporation

NBN Co, www.nbnco.com.au

Needs Analysis for the Shires Impacted by Re-Opening of the Boddington Gold Mine, June 2008, Economic Consulting Services for Department of Industry and Resources

New Mexico Puts Old Mine to Solar Use, May 2010, CNET, http://news.cnet.com/8301-11128_3-20004897-54.html

Newmont Boddington Production on Track, August 2009, Sydney Morning Herald, http://news.smh.com.au/breaking-news-business/newmont-boddington-production-on-track-20090805-e9yz.html

Newmont Needs More Space at Boddington, November 2011, The West Australian, http://au.news.yahoo.com/thewest/business/a/-/news/11710051/newmont-needs-more-space-at-boddington/

Non-Farm Employment Opportunities in Rural Areas In Asia, September 2001, Asian Productivity Organization

One minute guide to economic development for remote and rural small towns, Par Forrest Miller

Ontario Tourism Infrastructure Research Study, February 2009, Malone Given Parsons Ltd and HDR Decision Economics for Ministry of Tourism, Ontario Tourism Competitiveness Study

Overview of Strategic Industrial Areas in the South West of Western Australia, October 2004, Sinclair Knight Merz for Department of Industry and Resources

Peel Development Commission Area Overnight Visitor Factsheet Years Ending December 2008/09/10, Tourism Western Australia

Peel Profile, September Quarterly Edition, 2011, Peel Development Commission

Peel Region Infrastructure Plan 2007-2027, October 2006

Peel Workforce Development Strategy, November 2006, Geografia for Peel Development Commission, Department of Education and Training, and Challenger TAFE

Peel 2020 Sustainability Strategy, October 2006, Peel Development Commission

Perth's Swan Valley, May 2009, Bregg Boalch, Perth's Northern Suburbs Better Business Blitz Gravity Discovery Centre

Planning for Tourism, Planning Bulletin 83/2009, June 2009, Western Australian Planning Commission

Policy Responses to the Economic Crisis: Investing in Innovation for Long-Term Growth, 2009, Guellec, D. and S. Wunsch-Vincent, OECD Digital Economy Papers, No. 159, OECD Publishing

Queensland's approach to the National Broadband Network, March 2011, Department of Public Works

Regional Centres Development Plan (SuperTowns) Framework 2011 – 2012, Department of Regional Development and Lands

Rural Revitalisation and the Need to Create Sustainable, Healthy and Resilient Communities, Peter Kenyon, Bank of IDEAS.

Rural Development Policy 2007-2013, Agriculture and Rural Development, http://ec.europa.eu/agriculture/rurdev/index_en.htm

Rural Development Seven Strategies for Economic Development, Rural Development, www.rurdev.usda.gov/RD_EconomicDevelopment.html

Rural Wireless Broadband Creates Jobs, Maybe, February 2011, TMC News, www.mobilitytechzone.com/broadband-stimulus/topics/broadband-stimulus/articles/148244-rural-wireless-broadband-creates-jobs-maybe.htm

San Jose Economic Strategy 2010, City of San Jose

Shire of Boddington Adopted Planning Policies

Shire of Boddington Local Planning Strategy, August 2007

Shire of Boddington Plan for the Future 2008-2013

Shire of Boddington Strategic Plan 2009

Shire of Boddington Town Planning Scheme No. 2, updated July 2011

Shire of Merredin, www.merredin.wa.gov.au

Shire of Mundaring Economic Development Strategy 2009, January 2009, Nick Tester, Shire of Mundaring

Shire of Wandering Local Planning Strategy, May 2007

Shire of Wandering Strategic Directions: A Plan for the Future, 2010-2015

Shire of Wandering Town Planning Scheme No. 3, Version 1, June 2005

Shire of Williams Strategic Plan 2010-2020

Shire of Williams Town Planning Scheme No. 2, updated December 2010

Shire of Williams Townsite Expansion Plan, 2010

Small Business Centre Peel, www.sbcpeel.com.au

Small Towns, Big Ideas: Case Studies in Small Town Community Economic Development, March 2009, Georgia Municipal Association

Social Impact and Opportunities Assessment, Stakeholder Workshop Findings, August 2011, Coffee Environments for BHP Billiton Worsley Alumina

Southern Metropolitan and Peel Sub-Regional Structure Plan, 2009, Western Australian Planning Commission

Southern Sectors Spatial Plan and Policy Framework, May 2008, Syme Marmion & Co for Department for Planning and Infrastructure

South-West Framework, October 2009, Western Australian Planning Commission and Department of Planning

South West Regional Profile, 2009, Main Roads Western Australia

South West Region Industrial Land Study, Stage 1 Land Demand Analysis, Syme Marmion & Co in association with APP, TME, RPS for LandCorp

Subiaco Economic Development Directions, February 2004, SGS Economics & Planning for City of Subiaco

SuperTown Growth Plan Toolkit: Guide to Preparing a SuperTown Growth Plan, 2011-12

Survey of Industrial Trends, March quarter 2010, Australian Chamber of Commerce and Industry and Westpac Banking Corporation

Sustainable Enterprise Creation: Making a Difference in Rural Australia and Beyond, 2005, Maureen Rogers and Rhett Walker, Common Ground, Published in The International Journal of Enviornmental, Cultural, Economic and Social Sustainability

Swan Hill Rural City Economic Development Strategy 2007 – 2010, August 2007, Swan Hill Rural City Council

Swan Valley, www.swanvalley.com.au

The Connected Continent: How the internet is transforming the Australian economy, August 2011, Deloitte Access Economics

The Department of Agriculture and Food Plan to Support Food Industry Development 2009-2012, 2009, Department of Agriculture and Food

The Department of Agriculture and Food Plan to Support Livestock Industry Development 2009-2012, 2009, Department of Agriculture and Food

The Future of Rural and Regional Australia, Australia 2020 Summit, April 2008

The Infrastructure for Success: Economics in Long-Term Business Planning, February 2011, Agenda Advancing Economics in Business, Oxera

The Missing Link: How Population Increases Correlate with Job Creation, 2000, Michel Godet, LIPS Working Papers Collection, no. 6

The New Economy E-Development Strategies, Progressive Policy Institute

The Williams Woolshed Destination Management Strategic Plan, November 2006, Murdoch University

The World in 2050, Beyond the CRICs, 2008, Price Waterhouse Cooper

Think Local and Give Country Towns the Freedom to Prosper or Perish, July 2011, The Australian, www.theaustralian.com.au/national-affairs/opinion/think-local-and-give-country-towns-the-freedom-to-prosper-or-perish/story-e6frgd0x-1226099597072

Tourism Western Australia Strategic Plan 2010/11

Towards Queensland's Clean Energy Future: A plan to cut Queensland's greenhouse gas emissions from electricity by 2010, 2005, Dr Mark Diesendorf, Clean Energy Future Group

Valley of the Giants Tree Top Walk, Information Pack for Senior Students, Department of Conservation and Land Management, www.dec.wa.gov.au/pdf/tourism/vog_info_senior_students.pdf

What is Local Economic Development, 2011, The World Bank

Why Mandurah needs the National Broadband Network, Submission to House of Representatives Standing Committee on Infrastructure and Communications: Inquiry into the National Broadband Network, February 2011, City of Mandurah

Wine Australia Overview, June 2011, Wine Australia

Appendix 1. The Boddington District Economy

Summary of Implications

The Boddington District consists of the Shires of Boddington, Wandering and Williams. The Shire of Boddington is located within the Peel Region and the Shires of Wandering and Williams form part of the Wheatbelt. The following overview provides a snapshot of the Shire of Boddington as compared with the Peel Region.

Key Indicator	Shire of Boddington	Peel Region
Area	1,901km^2	5,648km^2
Population (June 2010)	1,692	108,560
Population Growth*	4%	4.4%
Median Age	39	40
Internal Migration (lived in Shire 5 years ago)	64%	66%
Labour Force (March 2011)	868	46,889
Unemployment Rate (2010)	1.7%	5.9%
Post School Qualifications	43.14%	47.8%
Main Industries of employment	Manufacturing (alumina production), Mining, Agriculture, Forestry & Fishing	Construction, Manufacturing, Retail Trade

** Average Annual Growth Rate 5 Years to 2010*

The demographical information contained within this section is predominantly based on information from the 2006 Census, which is expected to be significantly different from 2011 Census data. Population figures also fail to recognise the 1,991 permanent NBG employees and contractors who live on-site at the camp.

1.1. Geographic Scope of the Analysis

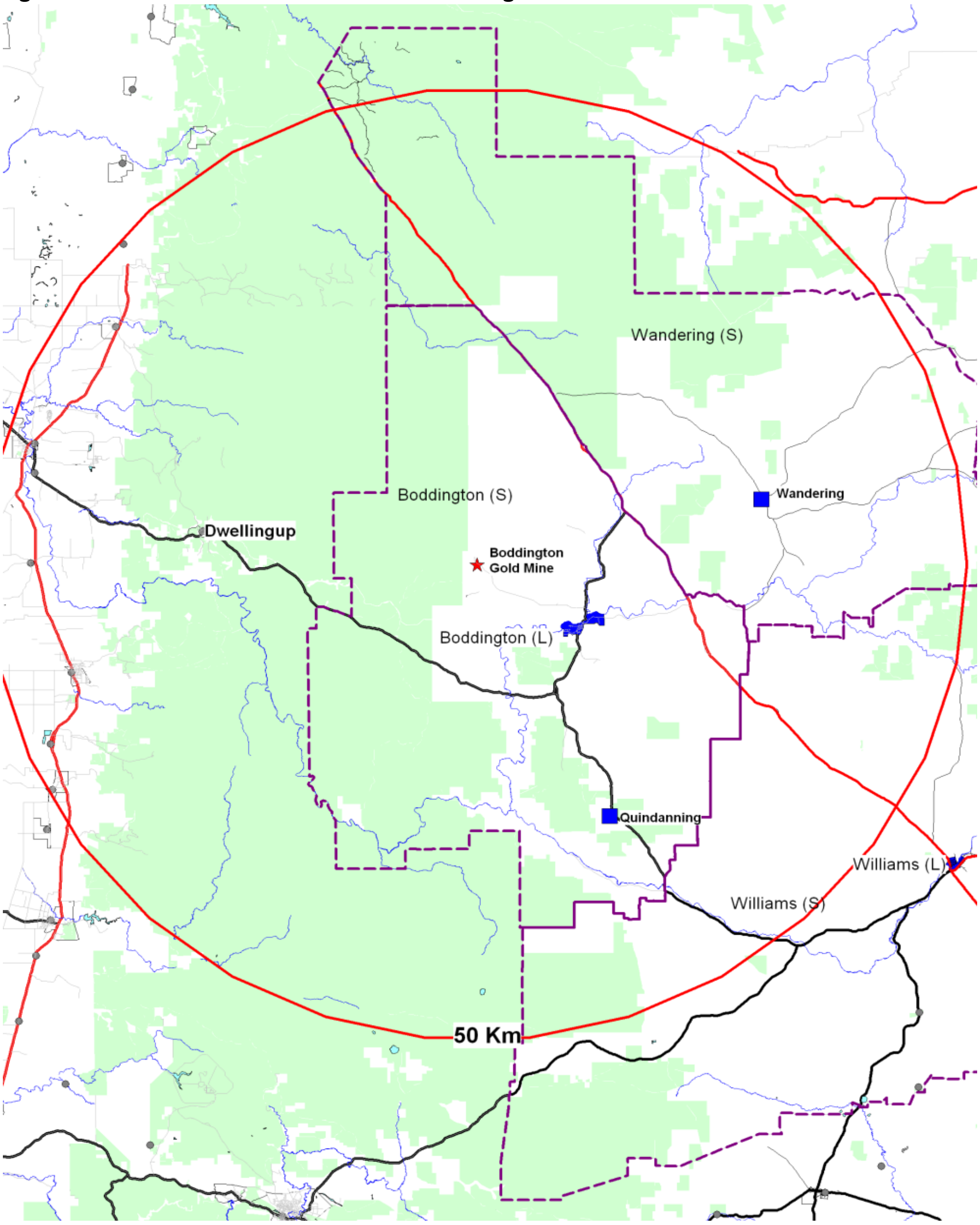
The Shire of Boddington is located within the Peel Region of Western Australia. The following map provides an outline of each of the Shires within the Peel Region.

Figure 9: Map of Peel Region

Source: Peel Profile

The Newmont Boddington Gold (NBG) mine is located within the Shire of Boddington. The BGM has a commitment to encouraging staff to live within a 50km distance from the centre of Boddington. As Boddington is one of the closest towns to the mine site, the town's population has historically been affected by the opening, closing, and reopening of the mine. A map of a 50km radius from the BGM is shown below.

Figure 10: 50 Kilometre Radius from the Boddington Gold Mine



1.2. Population Structure and Change

1.2.1. Historic and Current Population

The population of the Shire of Boddington is already growing steadily, due to the re-opening of the NBG mine and the expansion of the BHPBW bauxite mine in the past five years. In 2009-2010, the Shire population grew by 5.6%; the Peel regional growth rate was 3.5%, compared to a National and State average of 2.1% and 2.2%, respectively. In the period 2006-2010, the Shire of Boddington grew at around 3.4%pa.

Table 11: Population Change 2001-2027

	Boddington	Wandering	Williams
Population 2001	1,440	332	955
Population 2006	1,448	376	916
Change 2001-2006	***0.56%***	***13.25%***	***-4.08%***
Population 2010p	1,692	439	1000
Change 2006-2010	***16.85%***	***16.76%***	***9.17%***
Population Projection (DoHA) 2027	1,755	392	967
Change 2010-2027	***3.72%***	***-10.71%***	***-3.30%***

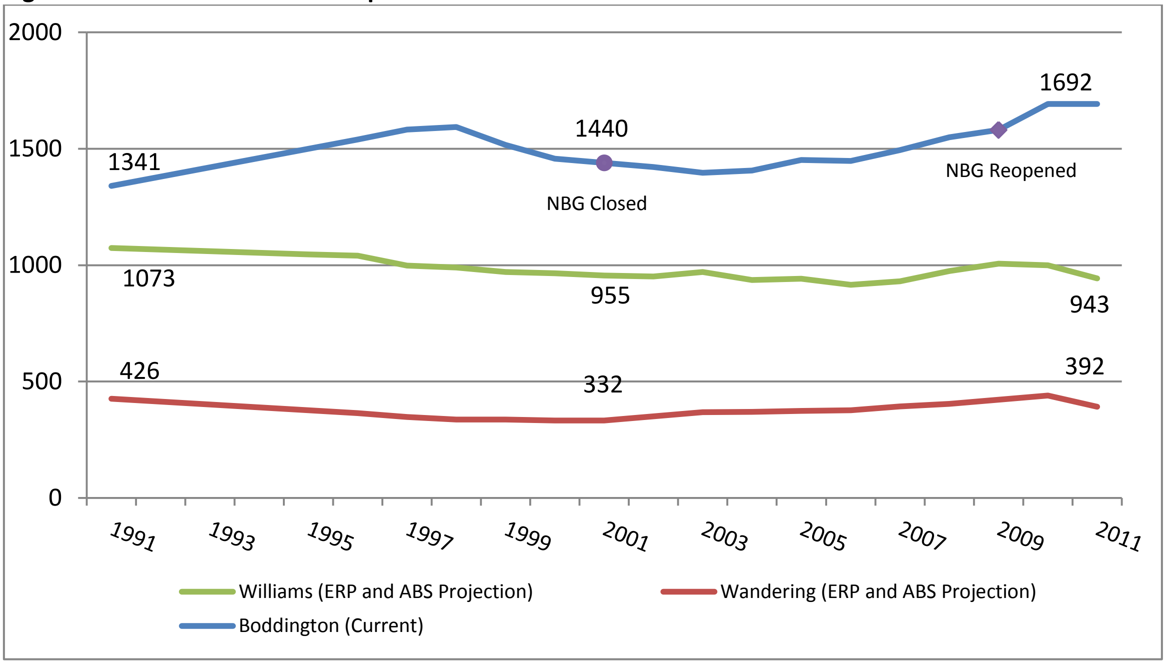
Source: ABS

As can be seen from the table above, the Department of Health and Aging (DoHA) population forecasts for Wandering and Williams at 2027 have already been reached in 2010. Boddington is also nearing its forecast population.

The Boddington-Ranford Townsite Strategy shows a population forecast for Boddington of 2,100 by 2016 and 3,600 residents by 2031.

The following graph shows the population of each of the towns in the Boddington District.

Figure 11: Estimated Resident Population 1991 - 2011



Source: ABS

Figure 11 shows that Boddington's population has been heavily influenced by the mining industry, and outlines the effect that the closure and re-opening of the gold mine had on population growth in Boddington, Wandering and Williams from 1996 to 2011. The population in Boddington between 2001 and 2006 remained stable (0.56% growth), however the reopening of the mine in 2009 caused the rapid growth between the period 2006 and 2010 (16.85%) due to an increase in the number of 'local' mining employees. The population in Wandering and Williams however remained relatively consistent during the closure and reopening of the mine.

Section 4 provides a detailed description of future growth scenarios including:

- Scenario 1: Business as Usual
- Scenario 2: SuperTowns Initiatives
- Scenario 3: Aspirational

1.2.2. Resident Population by Age

The median age range in the Peel Region as well as Wandering and Williams Shires is as follows:

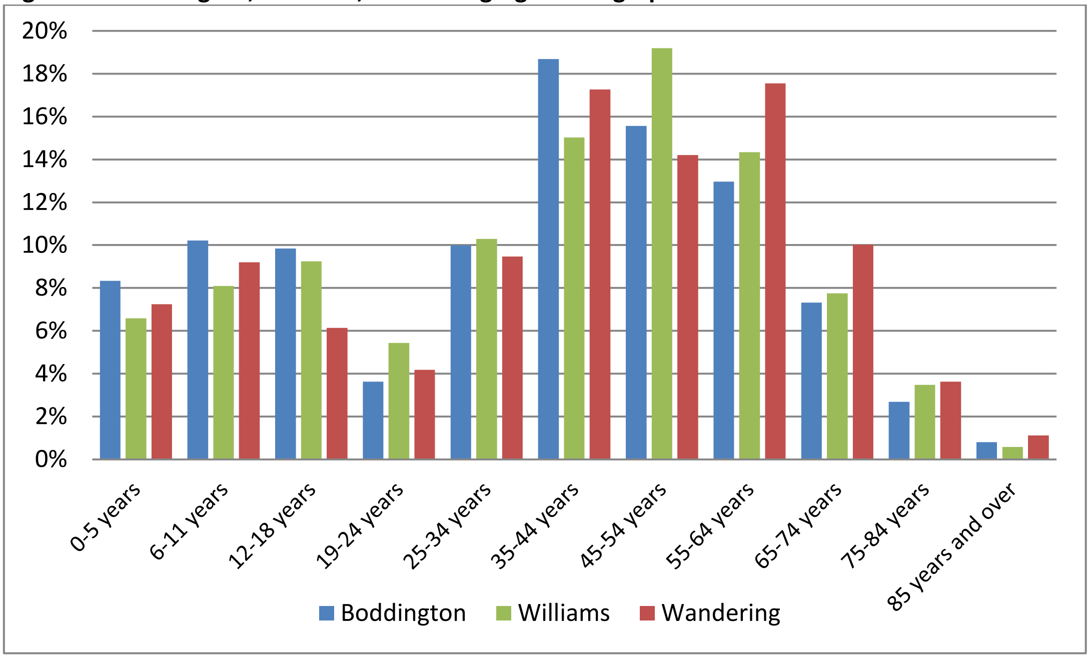
Table 12: Median Age Range – Peel Region, Wandering, Williams

Local Government	Median Age
Boddington	39
Wandering	43
Williams	42
Peel	40

Source: ABS 2006 Census

The age structure of residents in the Shires of Boddington, Wandering and Williams is shown in Figure 12.

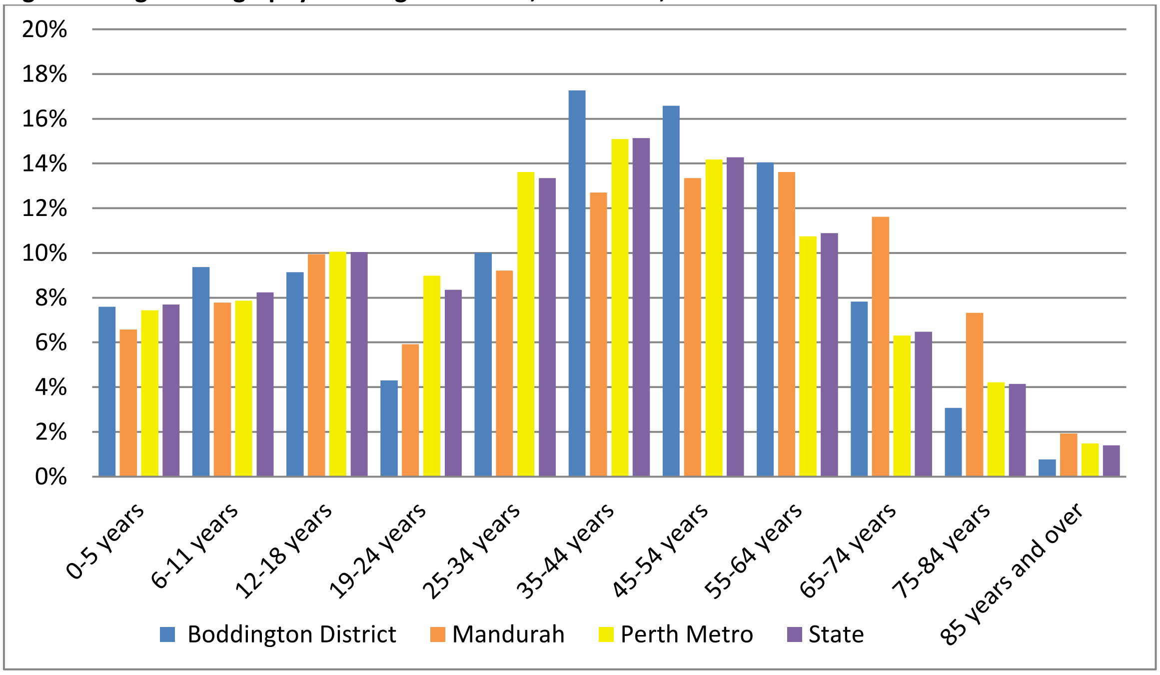
Figure 12: Boddington, Williams, Wandering Age Demographics



Source – ABS 2006 Census

Figure 13 provides a comparison between the age demography in the Boddington District compared with the City of Mandurah, Perth Metro, and WA as a whole. Recent growth in families with young children is clearly illustrated and establishes a very different profile to Mandurah which contains a much older population in the retirement stage of life. The decrease in labour force participation that is expected in the medium to long term in WA due in part to the aging population is likely to be avoided in Boddington if this current distribution continues.

Figure 13: Age Demography Boddington District, Mandurah, Perth Metro and WA



Source – ABS 2006 Census

1.2.3. Migrants

At the time of the 2006 Census, 9.8% of the population living in the Shire of Boddington were born in North-West Europe and a total of 14.2% of the resident population (205 people) were born overseas. Only 1.3% of the population (17 people) however, spoke a language other than English at home. Other languages included Dutch, French, German, and Sinhalese.

Similarly, in Wandering 2% spoke a language other than English at home (Dutch and Other), and 1.4% in Williams (Other). The additional languages spoken in the district should be regarded as core strengths and should enable additional teaching and learning opportunities and international linkages for prospective businesses.

1.2.4. Education / Qualifications

The following school information is provided by the My School website for 2011.

The **Boddington District High School** offers education for K-12 students. The school has state-of-the-art facilities with a networked computer for every three students. Specialist facilities include computer laboratories, aquaponics, horticulture, science laboratory, home economics, manual arts, music, photography, visual arts, library resource centre, undercover area, canteen, playgrounds and purpose built kindergarten and pre-primary and adult learning buildings for Years 11/12. The school has access to two ovals, swimming pool, tennis and basketball courts, golf course and bowling greens.

Wandering Primary has a student population of thirty. Wandering is a two-room school made up of two split-grade classes. The junior class caters for Kindergarten to Year three students and a senior class caters for Year four to Year seven students. Although relatively isolated, strong bonds are fostered with Boddington District High School, 34km to the west, Williams Primary School, 60 km south, and Darken District High School 100km south-west. All four schools collaborate for sporting carnivals and incursions.

Williams Primary School caters for 90 students aged from 4-12 years. There are four class groups and offer literacy and numeracy support, science program, French, music and instrumental music. The school has an automated library and classrooms that are networked with Broadband access; the school grounds cater for a wide range of sporting and physical activity.

Although information is not available for Wandering and Williams, the following table shows the student distribution for the Boddington District High School from 2008 to 2011. The data shows that although 2010 had a decline in students in the middle quarters which increased the bottom quarter, by 2011 the school had the highest percentage of students in the top quarter and the lowest in the bottom quarter for the four year period.

Table 13: Distribution of Students, Boddington District High School

	2008	2009	2010	2011	Australian Distribution
Bottom Quarter	30%	30%	48%	29%	25%
Lower Middle Quarter	37%	37%	20%	22%	25%
Upper Middle Quarter	25%	25%	20%	33%	25%
Top Quarter	9%	9%	12%	16%	25%

Percentages are rounded and may not add up to 100%

The following table shows the post school qualifications of people in the study area (aged 15 and over) compared to the Peel Region and the City of Mandurah. “Not Stated” refers to the percentage of respondants who indicated they had a qualification but did not provide sufficient information.

Table 14: Post School Qualifications

Region	Post Grad Degree	Grad Dip/ Grad Cert	Bachelor	Diploma	Cert	Not Stated	**Total**
Shire of Boddington	0.57%	0.85%	6.53%	5.68%	17.98%	11.54%	**43.14%**
Shire of Wandering	1.07%	0%	4.98%	6.41%	11.74%	16.37%	**40.57%**
Shire of Williams	0%	1.69%	7.9%	6.06%	13.54%	9.45%	**38.65%**
Peel Region	0.62%	0.64%	5.3%	5.93%	20.34%	14.98%	**47.8%**
City of Mandurah	0.49%	0.54%	4.33%	4.87%	16.25%	12.93%	**39.42%**

Source – ABS 2006 Census

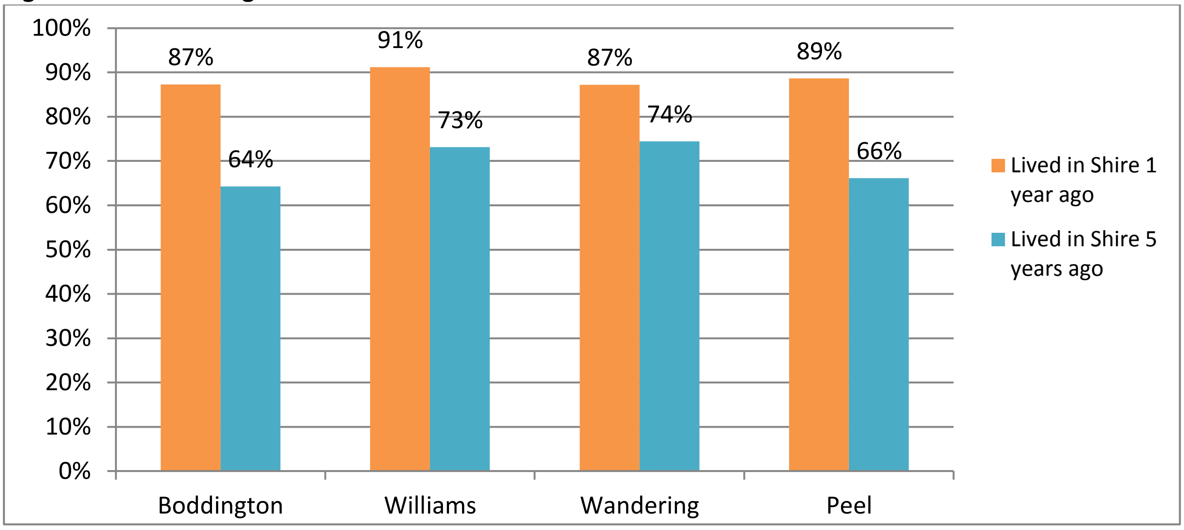
The City of Mandurah has been included in this comparison due to having the reputation of a ‘well educationed’ population. The Shire of Boddington has the highest percentage of residents with post school qualifications when compared to the neighbouring Shires of Wandering and Williams, however has a lower percentage than the Peel Region as a whole. The Shire of Williams is the only Shire that had a lower Total percentage of post school qualifications than the City of Mandurah. This provides an excellent base for life long learning opportunities.

1.2.5. Household Formation

Internal Migration

The following graph shows the percentage of households who lived in the same Statistical Local Area (SLA) one year ago and five years ago. The Boddington Gold Mine had been closed for over three years at the time of the Census and it was another four years before the mine reopened.

Figure 14: Internal Migration at 2006



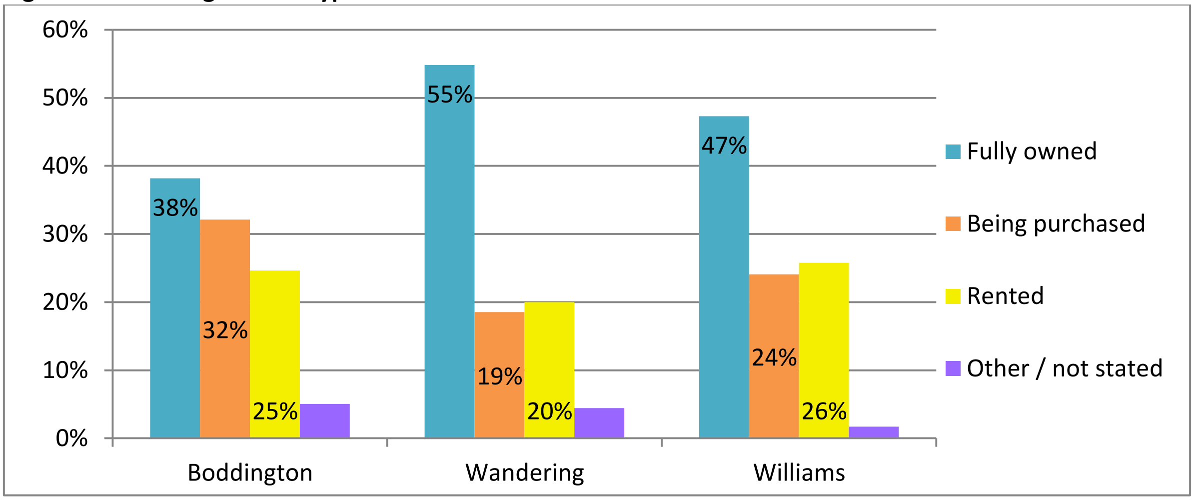
Source – ABS (2006) Census of Population and Housing

Figure 14 shows that 87% of Boddington's population has lived in the Shire for at least a year, and 64% have lived in the Shire for at least five years. These figures are very similar compared to the Peel Region, however slightly lower than the Shires of Wandering and Williams with regards to those who lived at the same address or SLA five years ago.

Dwelling Tenure Type

Within the Boddington District, the majority own their own house with at least 70% owner occupied in each of the three Shires, and with approximately 25% renting in Boddington.

Figure 15: Dwelling Tenure Type



Source: ABS 2006 Census

Housing Affordability

Housing is considered affordable when mortgage repayments or rental costs are up to 30% of household income. When comparing the gross weekly household income with rental payments at 2006, Figure 16 and Figure 17 show that on a whole housing is generally affordable in Boddington, Wandering and Williams. It should however be noted that anecdotal reports reveal that housing affordability has declined since the reopening of the NBG in 2009.

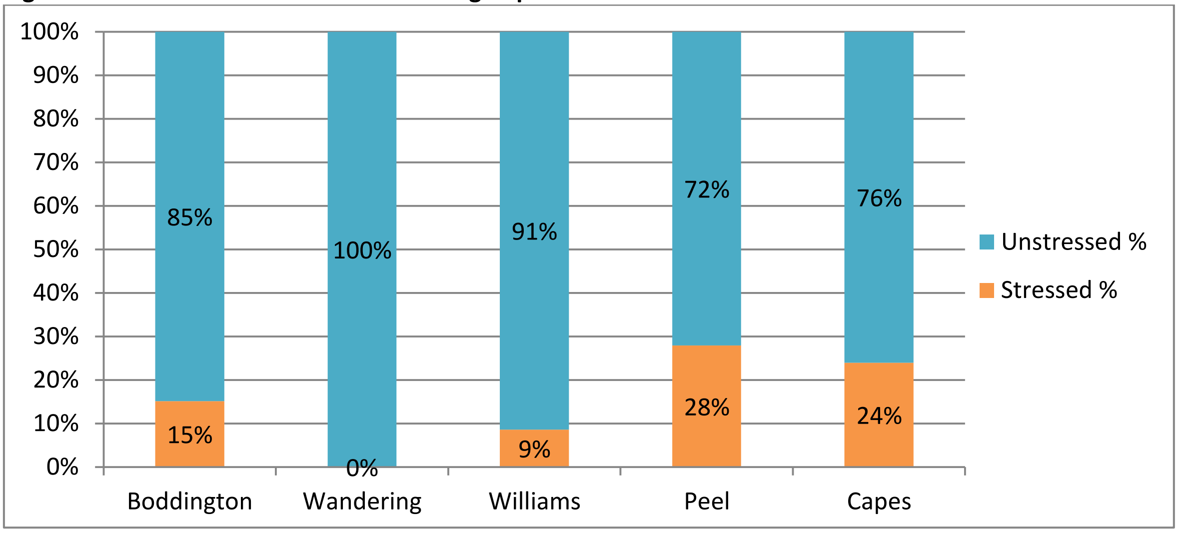
Figure 16: Housing Affordability in Boddington

Stress												
0.3		**$167**	**$333**	**$467**	**$600**	**$750**	**$917**	**$1,167**	**$1,500**	**$1,833**		
	Rent											
	$0 - $49	*$50 - $99*	*$100 - $139*	*$140 - $179*	*$180 - $224*	*$225 - $274*	*$275 - $349*	*$350 - $449*	*$450 - $549*	*$550 or more*	*Not stated*	*Total*
Gross Weekly Household Income	*2006 CENSUS*											
Negative/Nil income	4	5	0	0	0	0	0	0	0	0	0	9
$1-$149	0	0	0	0	0	0	0	0	0	0	0	0
$150-$249	0	0	0	0	0	0	0	0	0	0	0	0
$250-$349	0	0	7	0	0	0	0	0	0	0	0	7
$350-$499	5	0	3	4	0	0	0	0	0	0	0	12
$500-$649	0	0	7	3	0	0	0	0	0	0	0	10
$650-$799	0	6	3	0	0	0	0	0	0	0	0	9
$800-$999	0	0	11	0	0	0	0	0	0	0	0	11
$1,000-$1,199	4	3	7	3	5	0	0	0	0	0	0	22
$1,200-$1,399	5	4	0	0	0	0	0	0	0	0	5	14
$1,400-$1,699	3	0	3	0	0	0	0	0	0	0	4	10
$1,700-$1,999	0	0	0	3	0	3	0	0	0	0	4	10
$2,000-$2,499	0	0	0	7	0	0	0	0	0	0	0	7
$2,500-$2,999	0	0	0	0	0	0	0	0	0	0	0	0
$3,000 or more	0	0	0	0	0	0	0	0	0	0	0	0
Partial income stated(b)	0	0	0	0	7	0	4	0	0	0	0	11
All incomes not stated	0	0	0	0	0	0	0	0	0	0	0	0
Total	**21**	**18**	**41**	**20**	**12**	**3**	**4**	**0**	**0**	**0**	**13**	**132**
Households Stressed	4	5	7	4	0	0	0	0	0	0		**20**

Source: ABS 2006 Census

In 2006, of the 132 households renting in Boddington, 20 or 15% of the households are considered to be 'stressed'. As can be seen in Figure 17, this is less than Peel (28%) but greater than Williams (9%) and Wandering (0%). The Capes Region (Busselton to Augusta) has also been included as an additional comparator.

Figure 17: Stressed and Unstressed Renting Population



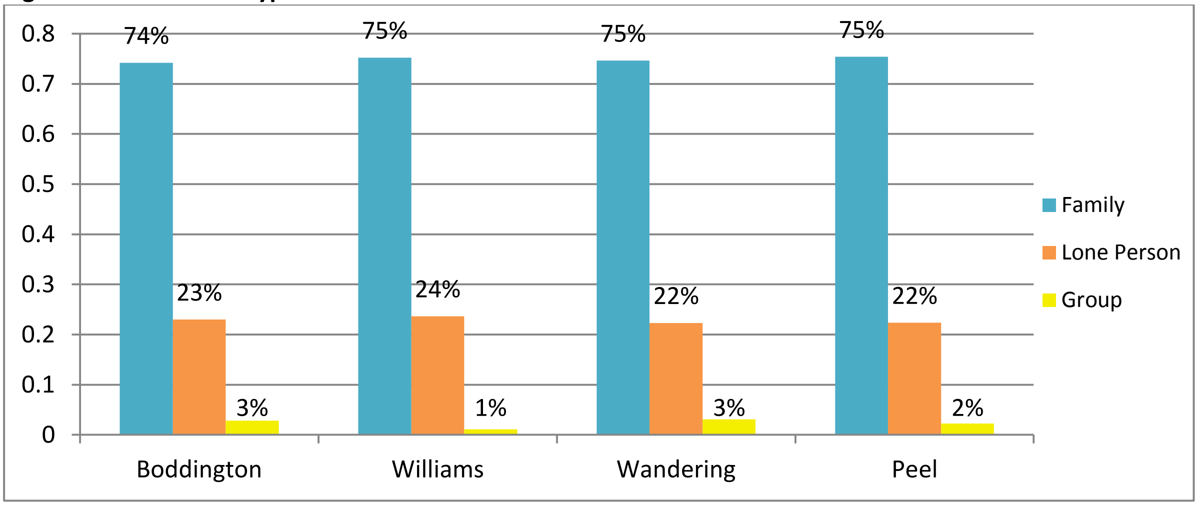
Source: ABS 2006 Census

Current Household Characteristics

At the time of the 2006 Census there were 496 households in Boddington and 30,953 in the Peel Region.

The distribution of the household types at the time of the 2006 Census is shown in Figure 18. The Shire of Wandering and Williams as well as the Peel Region distribution is shown as a comparison. The ABS categorise a household as a group if there is more than one person and these persons are not related by blood, marriage (including step-relationships), adoption or fostering.

Figure 18: Household Type Distribution



Source – ABS (2006) Census of Population and Housing

This chart indicates that the household type distribution is very similar in Boddington when compared to Williams, Wandering and the the wider Peel Region. Williams has the lowest portion of group households.

Building Approvals

The following table shows the building approvals for residdential buildings in the Boddington District from 2006 to 2011. 2006-2007 had the lowest number of building approvals within the period and this may be attributed to the closure of NBG in 2005.

Table 15: Building Approvals: Residential Buildings

	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Boddington	24	30	35	34	25
Wandering	6	16	3	10	12
Williams	6	4	7	8	4
Total	**36**	**50**	**45**	**52**	**41**

Source: ABS Building Approvals Data

In addition to residential buildings, the following table shows the total building licences issued by the Shire of Boddington which includes ‘other structures’ such as renovations and expansions to existing properties. Whilst other structures’ building approvals do not equate to the addition of a new dwelling, they are essential to a developing community as it is assumed that the majority will result in an improved value on the property; they support the local construction industry which in turn maintains and creates employment, and provides opportunities for training and innovation.

Table 16: Building Approvals: Total Licences Shire of Boddington

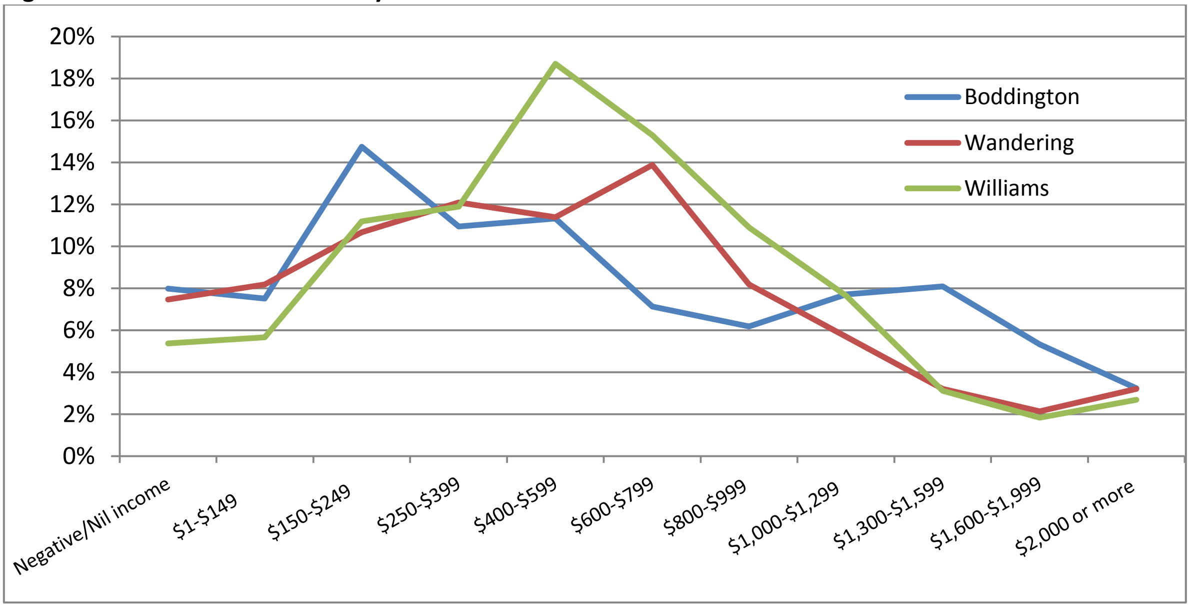
Year	Dwellings	Other Structures	Total Licences
2011	33	69	102
2010	18	68	86
2009	43	68	111
2008	29	72	101
2007	20	70	90
2006	25	82	107
2005	14	47	61
Total	**182**	**476**	**658**

Source: Shire of Boddington

1.2.6. Individual and Household Income

The following graph shows the individual gross weekly income distribution within the Boddington District. In Boddington, the largest percentage of individuals earn within the bracket of $150-$249 per week. 37% of individuals in Boddington earn between $150 and $599 per week. Boddington also has the highest portion of individuals earning more than $1,300 per week (16%) compared with Wandering and Williams (both 8%), but also the highest low income earners with 42% earning less than $400 per week compared with 38% in Wandering and 34% in Williams.

Figure 19: Individual Gross Weekly Income Distribution

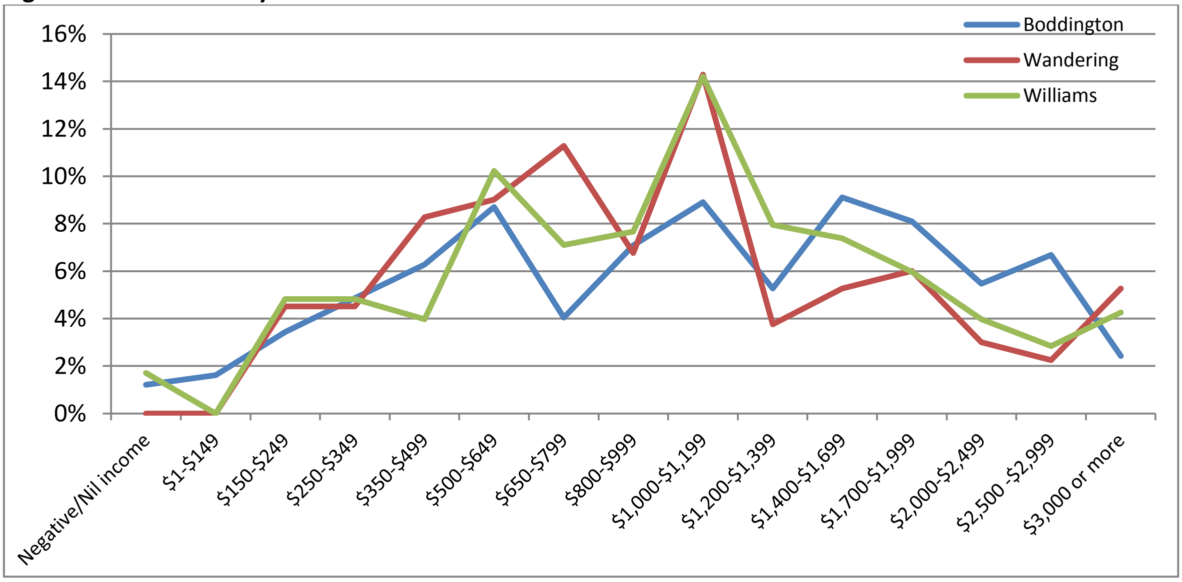


Source – ABS (2006) Census

Household Income

Figure 20 shows the gross weekly income distribution for households. Boddington has a relatively even distribution of households earning between $350 and $2,999 per week, whereas both Wandering and Williams peak at $1,000-$1,199 with 14%.

Figure 20: Gross Weekly Household Income Distribution



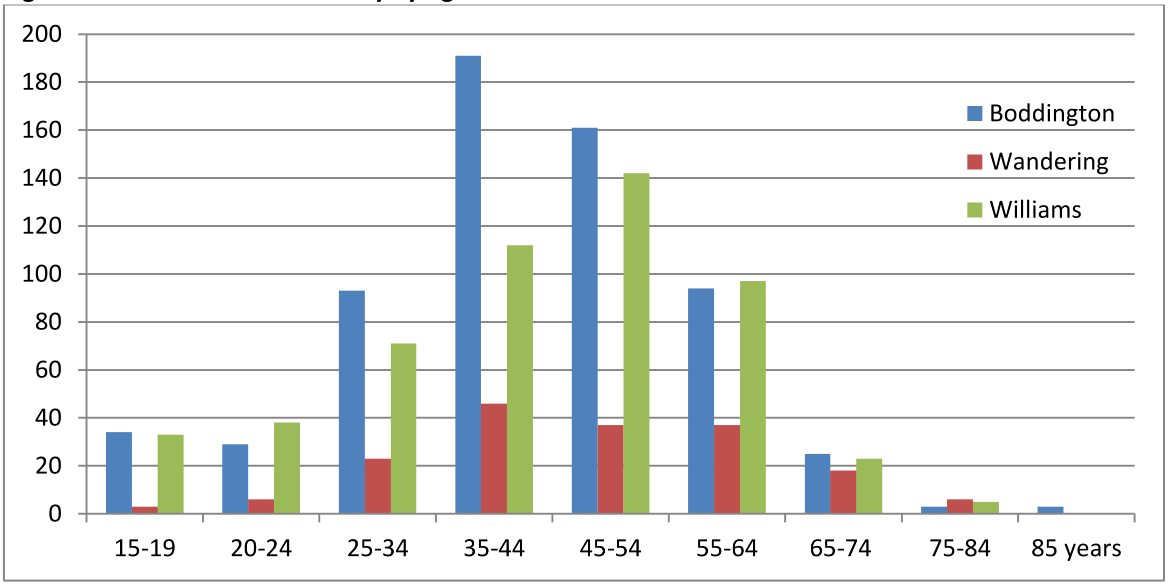
Source – ABS (2006) Census of Population and Housing

1.3. Current Labour Force

1.3.1. Labour Force Composition

The Peel Regional Profile (2011) estimates the labour force in Boddington at March 2011 to be 868. At the time of the 2006 Census, the labour force in Boddington was 633. The distribution of employees by age group is shown below.

Figure 21: Labour force to Industry by Age



Source: ABS 2006 Census

1.3.2. Unemployment

The unemployment rate in 2010 in Boddington was 1.7% compared with 5.9% in Peel.

Table 17: Boddington Estimates of Unemployment - June Quarter

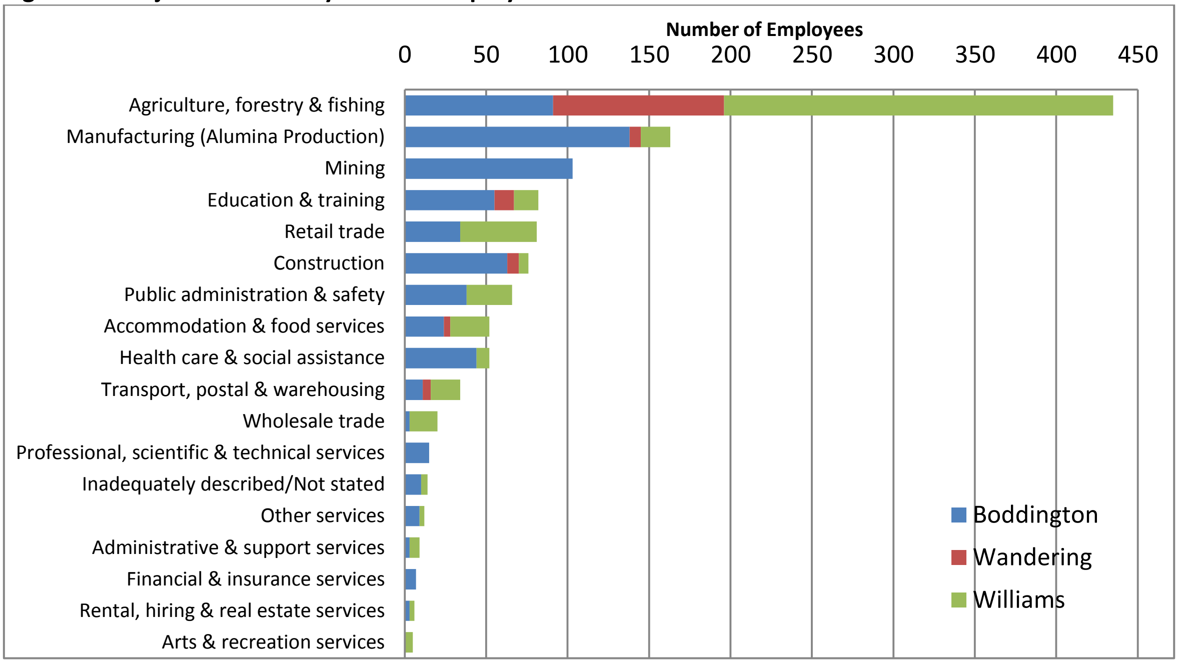
	Boddington		Wandering		Williams	
	Unemployed Persons	Unemployment Rate (%)	Unemployed Persons	Unemployment Rate (%)	Unemployed Persons	Unemployment Rate (%)
2006	21	2.4	8	3.0	7	1.0
2007	12	1.4	8	3.0	11	1.7
2008	11	1.2	12	4.3	8	1.2
2009	10	1.1	13	5.3	5	0.7
2010	15	1.7	16	6.7	5	0.7

Source: ABS

1.3.3. Industry of Employment

In 2006 the major industry of employment in the Boddington District was agriculture, forestry and fishing, followed by manufacturing (alumina production) and then mining. In Boddington, manufacturing is the largest industry of employment (includes alumina production) followed by mining; manufacturing includes the Worsley Alumina workforce. In Wandering and Williams however, agriculture, forestry and fishing is the primary industry of employment. It should however be noted that at the time of the 2006 Census, the gold mine had not yet reopened. The current NBG workforce is estimated to be 1,991 (1,045 employees and 946 permanent contractors).

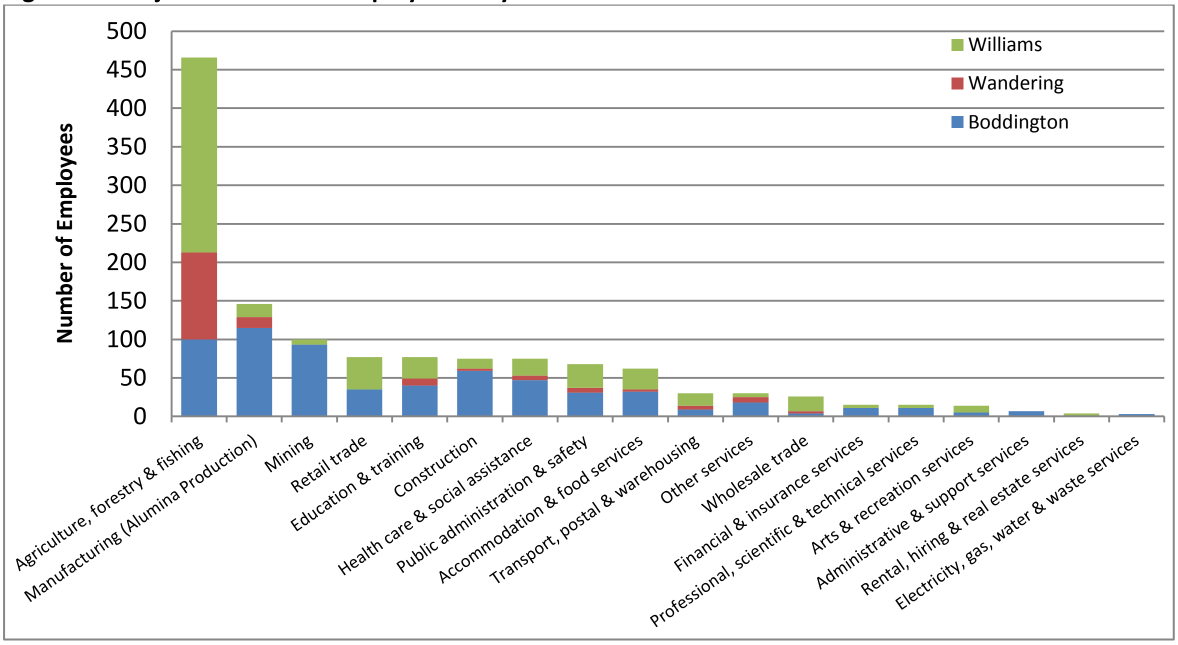
Figure 22: Major Industries by Place of Employment – 2006



Source – ABS 2006 Census

The following graph also shows industry of employment by number of employees, however it is by place of usual residence rather than place of employment.

Figure 23: Major Industries of Employment by Place of Usual Residence – 2006



Source – ABS 2006 Census

The growth in employment by industry for Boddington residents between 2001 and 2006 is shown in the table below. The Boddington gold mine closed during this period and resulted in significant changes as other industries absorbed job losses in mine related industries. Industries that experience a change of more than 10 jobs are highlighted.

Table 18: Employment by Industry 2001-2006

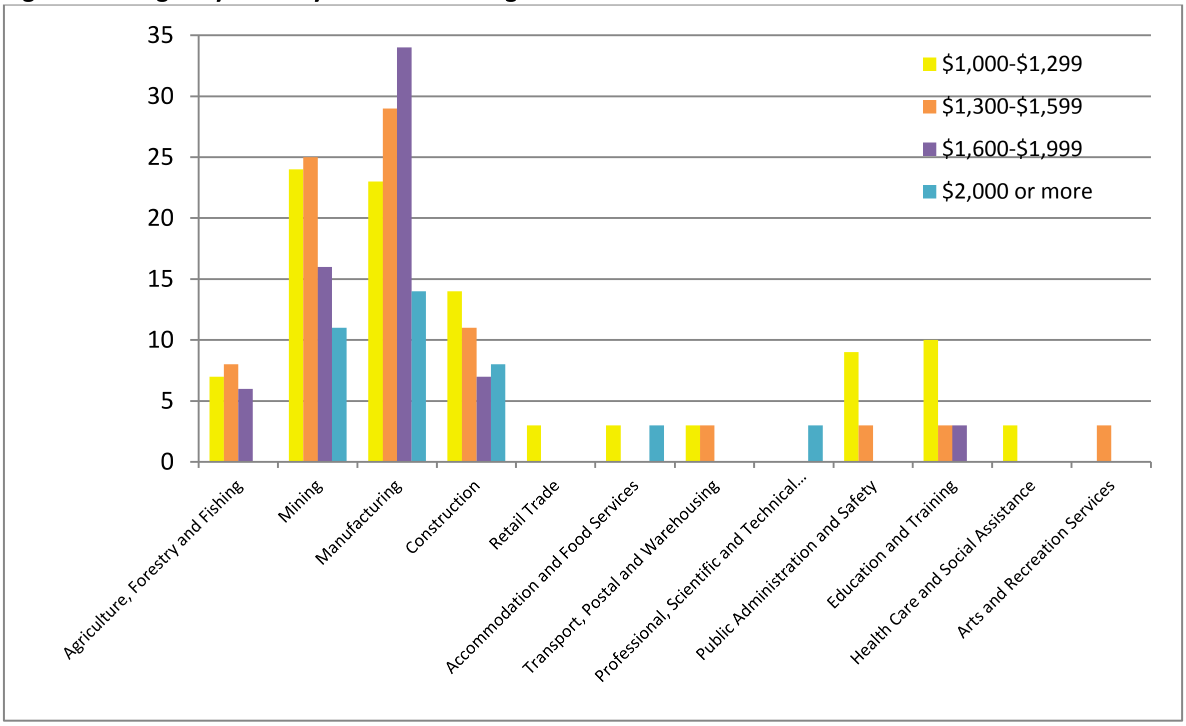
Usual Place of Residence	*2001*	*2006*	Change	% Change
Agriculture, forestry & fishing	86	100	14	16.28%
Manufacturing (Alumina Production)	48	115	67	139.58%
Mining	245	93	-152	-62.04%
Education & training	34	40	6	17.65%
Retail trade	30	35	5	16.67%
Construction	57	59	2	3.51%
Public administration & safety	20	31	11	55.00%
Accommodation & food services	27	32	5	18.52%
Health care & social assistance	23	47	24	104.35%
Transport, postal & warehousing	10	9	-1	-10.00%
Wholesale trade	9	4	-5	-55.56%
Professional, scientific & technical services	12	11	-1	-8.33%
Inadequately described/Not stated	9	13	4	44.44%
Other services	3	18	15	500.00%
Administrative & support services	0	7	7	-
Financial & insurance services	12	11	-1	-8.33%
Rental, hiring & real estate services	22	0	-22	-100.00%
Arts & recreation services	0	5	5	-
Electricity, gas, water & waste services	3	3	0	0.00%
Information media & telecommunications	3	0	-3	-100.00%
Total	**653**	**633**	**-20**	**-3.06%**

Although there was a negative net change of 20 jobs between 2001 and 2006, there was significant growth in manufacturing (possibly absorption of job losses at gold mine), and moderate growth in health care & social assistance, other services, and agriculture, forestry & fishing. The greatest reduction in jobs was in the mining industry and moderate job loss in rental, hiring & real estate services.

1.3.4. Wages by Industry Sector

The following graph shows the industry that provides the highest wages in the Shire of Boddington. Mining and manufacturing (alumina production) are the highest paying industries while retail trade and health care and social assistance do not provide a weekly income above $1,299.

Figure 24: Wages by Industry Sector – Boddington 2006



Source: ABS 2006 Census

1.3.5. Travel to Work Patterns

The following table shows the number of people who travel to Boddington for work. It is assumed that this is primarily on a drive-in drive-out (DIDO) basis. The majority of the people who travel to Boddington are employed in the manufacturing and mining industry. This is confirmed by the Business Perceptions Survey results that reported a large number of employees from outside of the Boddington District.

Table 19: Place of Residence for Employees by Industry Sector

	Boddington	Wandering	Williams	Within Peel (ex Boddington)	Other WA	**Total**	Total Travel to Boddington
Manufacturing	83	6	3	32	13	**137**	54
Mining	53	0	0	14	26	**93**	40
Agriculture, Forestry and Fishing	69	4	3	5	6	**87**	18
Construction	32	0	0	6	30	**68**	36
Education and Training	37	3	3	0	13	**56**	19
Health Care and Social Assistance	31	0	3	4	6	**44**	13
Public Administration and Safety	30	0	0	0	9	**39**	9
Retail Trade	26	3	0	0	3	**32**	6
Accommodation and Food Services	24	0	3	0	0	**27**	3
Professional, Scientific and Technical Services	8	0	0	3	4	**15**	7

Source: ABS 2006 Census

1.3.6. Economic Activity

Although data is not available at a local level regarding economic activity by industry sector, the following table is an estimate by the Department of Regional Development and Lands for the Peel Region 2010.

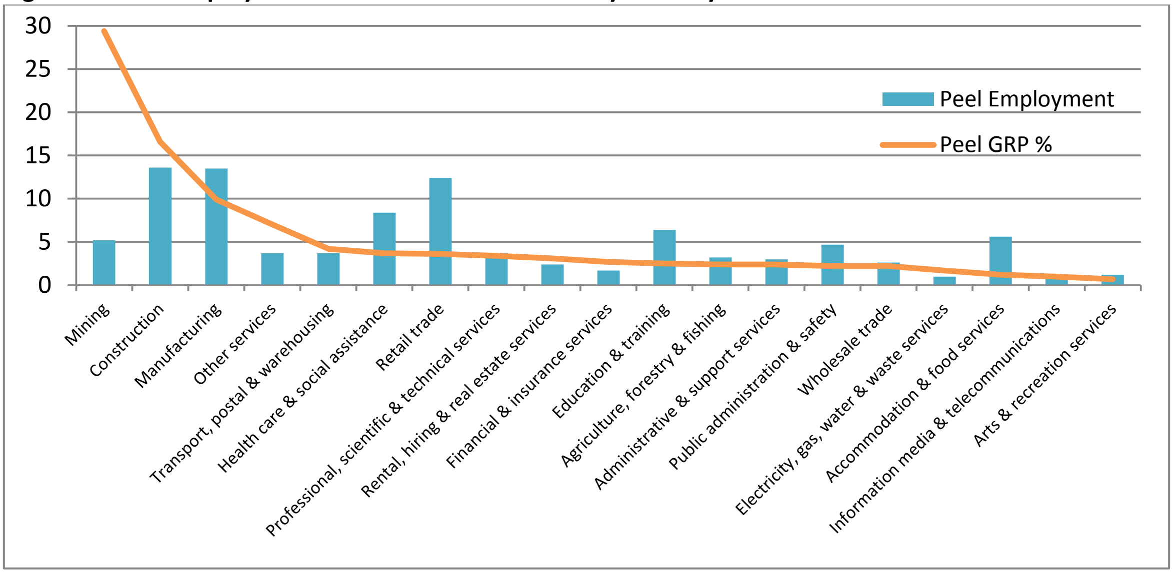
Table 20: Peel Gross Regional Product Share by Industry 2010

Industry	%
Agriculture, forestry & fishing	2.4
Mining	29.4
Manufacturing	9.9
Electricity, gas, water & waste services	1.7
Construction	16.6
Wholesale trade	2.2
Retail trade	3.6
Accommodation & food services	1.2
Transport, postal & warehousing	4.2
Information media & telecommunications	1.0
Financial & insurance services	2.7
Rental, hiring & real estate services	3.1
Professional, scientific & technical services	3.4
Administrative & support services	2.4
Public administration & safety	2.2
Education & training	2.5
Health care & social assistance	3.7
Arts & recreation services	0.7
Other services & Ownership dwellings	7.0

Source: Estimated by the Department of Regional Development and Lands

A similar comparison for employment and GRP for the Peel Region is shown below.

Figure 25: Peel Employment 2006 and Peel GRP 2010 by Industry



Source: Peel Profile September 2011

1.3.7. Agriculture

Table 21 demonstrates the current agricultural focus in the District on sheep, lambs, meat cattle and cereals, with currently limited concentration in potential emerging agricultural commodities such as pigs and other livestock and vegetables.

Table 21: Boddington Agricultural Commodities

Agricultural Commodities * - year ended 30 June 2006		
Total area		
Area of holding	ha	64 789.1
Cereals for grain	ha	4 057.5
Vegetables for human consumption	ha	0.0
Orchard trees (including nuts)	ha	13.1
All fruit (excluding grapes)	ha	13.1
Non-cereal broad acre crops	ha	786.3
Total number		
Sheep and lambs	no.	191 394
Milk cattle (excluding house cows)	no.	0
Meat cattle	no.	6 392
Pigs	no.	19
GROSS VALUE OF AGRICULTURAL PRODUCTION * - year ended 30 June		
Gross value of crops	$m	4.7
Gross value of livestock slaughtering	$m	5.4
Gross value of livestock products	$m	4.7
Total gross value of agricultural production	$m	14.8

** Agricultural commodities and value of production data is subject to relative standard error (RSE)*
Source: ABS National Regional Profile

1.3.8. Tourism

Tourism in the Boddington District, surrounding regions and wider WA is described in more detail in section 2.2.6. Although Tourism WA does not provide a breakdown of visitor information for the Boddington District, the following tables provide an overview of visitor statistics for the Peel Region.

Table 22: Peel Development Commission Area Visitor Summary

	YE Dec 2008/09/10 Annual Average Visitors	YE Dec 2008/09/10 %
Estimated Visitors		
Intrastate	320,700	84%
Interstate	37,700	10%
International	22,400	6%
Total	**380,800**	**100%**
Estimated Visitor Nights		
Intrastate	782,300	60%
Interstate	192,000	15%
International	320,800	25%
Total	**1,295,100**	**100%**
Average Length of Stay (Estimated Nights)		
Intrastate	2.4	-
Interstate	5.1	-
International	14.3	-
Total	**3.4**	-

Source: Tourism WA Peel Development Commission Area Overnight Visitor Fact Sheet

Table 23: Peel Development Commission Area Annual Average Visitors

	YE Dec 2008/09/10 Annual Average Visitors	YE Dec 2008/09/10 %
Estimated Domestic Visitors		
Home of friend or relative	165,300	46%
Hotel, resort, motel or motor inn	54,300	15%
Own property (eg holiday house)	32,300	9%
Estimated International Visitors		
Home of friend or relative (no payment required)	11,200	50%
Hotel, resort, motel or motor inn	5,300	24%
Caravan	2,300	10%

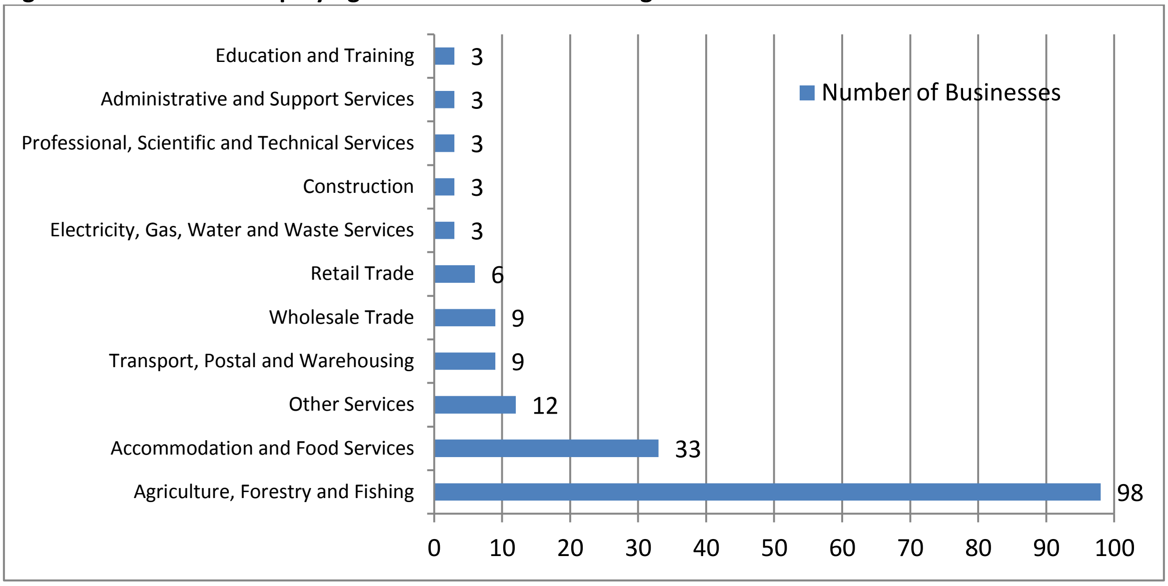
Source: Tourism WA Peel Development Commission Area Overnight Visitor Fact Sheet

In 2010, there were an estimated 380,800 annual visitors to the Peel Region. The average length of visit was 2.4 days for intrastate, 5.1 days for interstate, and 14.3 days for international visitors. Tourist expenditure increased by 20.4% to reach $144.7 million over the five years to 2009. In 2009, international tourist expenditure was $20.4 million and domestic tourist expenditure was $124.3 million.

1.3.9. Business Demography

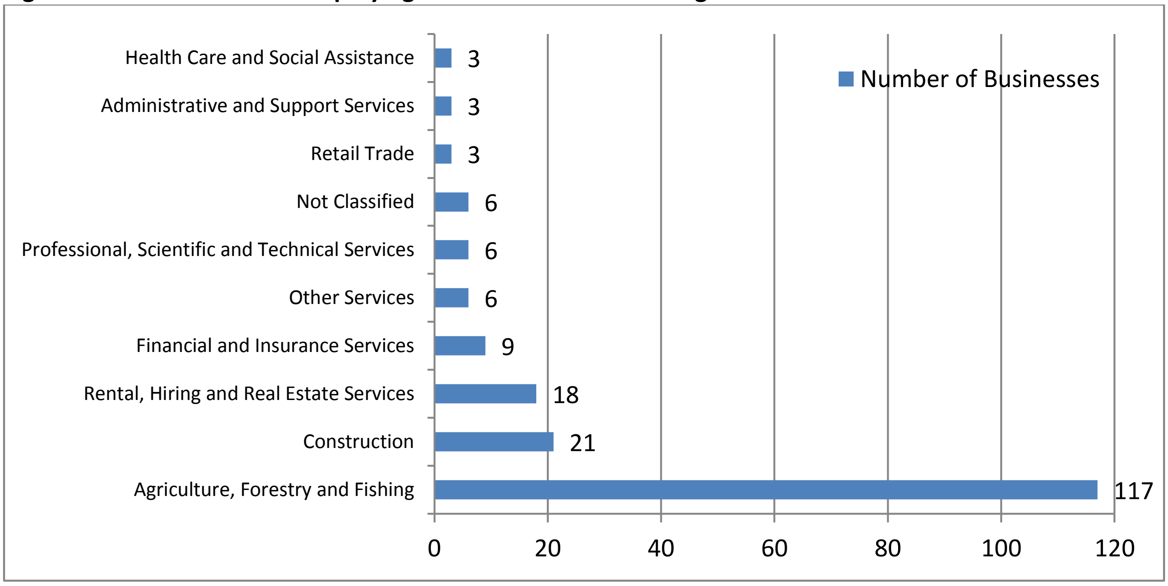
This section provides an overview of businesses in the Boddington District including the number of businesses, the business industry, and the number of employees. The total number of businesses in the Boddington District at June 2009 was 374, consisting of 165 in Boddington, 57 in Wandering, and 152 in Williams.

Figure 26: Number of Employing Businesses in the Boddington District 2006



Source: ABS, Businesses by Industry Division by Statistical Local Area by Employment Size Ranges, June 2009

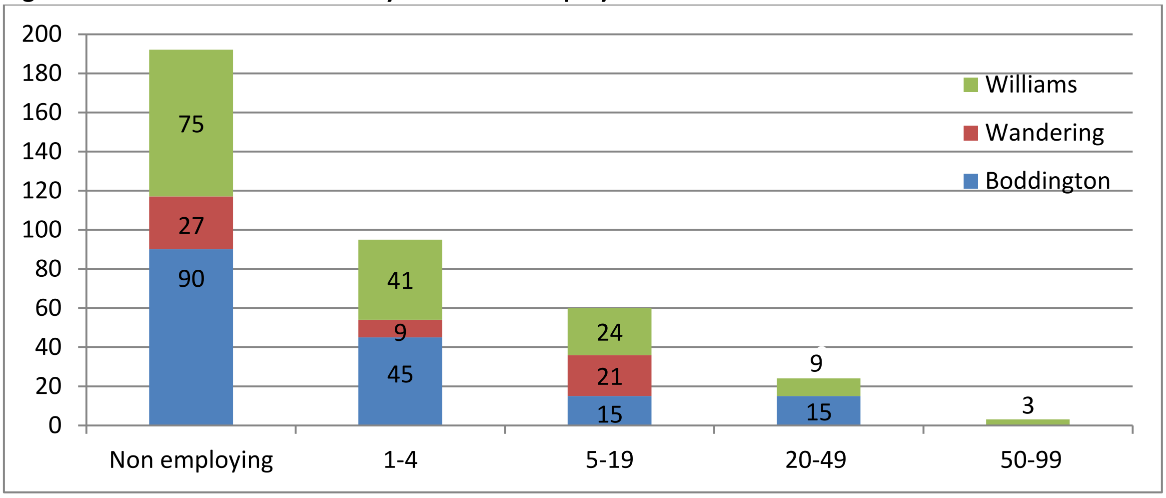
Figure 27: Number of Non-Employing Businesses in the Boddington District 2006



Source: ABS, Businesses by Industry Division by Statistical Local Area by Employment Size Ranges, June 2009

This information illustrates the relatively broad spread of business activity and the large number of small enterprises. Appendix 2 of this report provides an insight into the opportunities for business development and support.

Figure 28: Number of Businesses by Number of Employees 2006

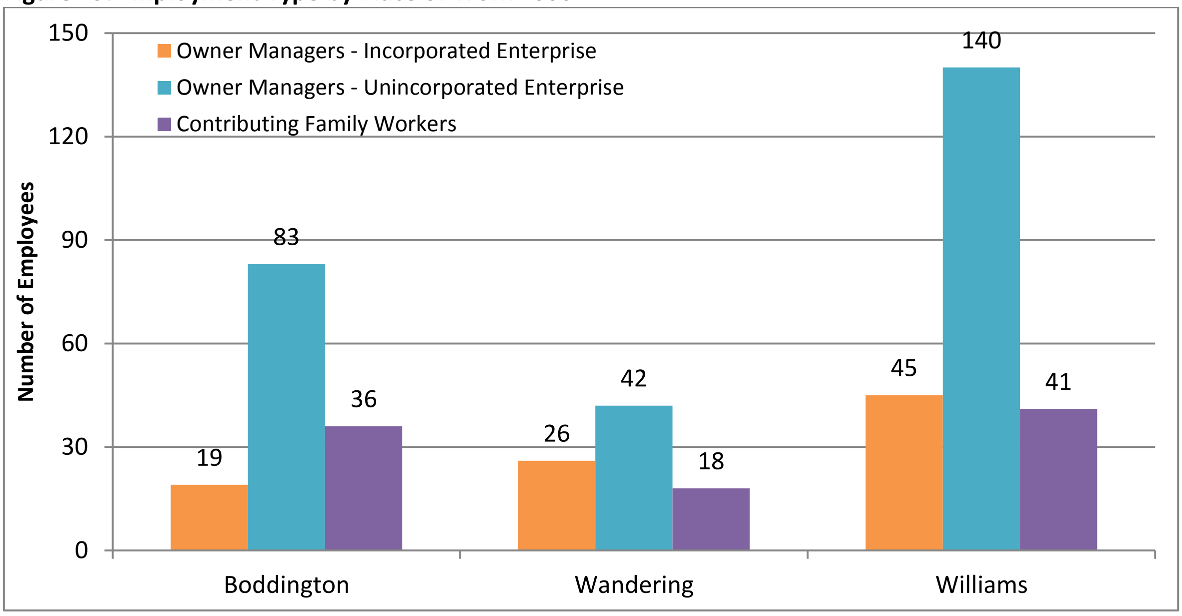


Source: ABS, Businesses by Industry Division by Statistical Local Area by Employment Size Ranges, June 2009

Small Business – Owner Manager

A large number of businesses in the Boddington District are managed by the business owner and family members and therefore is an essential form of employment in the area. A large portion of these businesses fall within the agriculture, forestry and fishing industry sectors.

Figure 29: Employment Type by Place of Work 2006



Source: ABS, Businesses by Industry Division by Statistical Local Area by Employment Size Ranges, June 2009

Appendix 2. Business and Resident Perceptions and Stakeholder Comment

2.1. Community Workshops

A community visioning workshop was held in Boddington on 29 November 2011. The following are summary notes taken at the workshop. The notes provide context to the Business Perceptions Survey in Appendix 2 - 2.2, and a lead into the Economic Development Strategies in section 5. A full workshop and visioning report has been prepared by the Growth Plan consultants Hames Sharley. This report should be read in conjunction with the Hames Sharley report.

- A Strong 'CBD' is required in Boddington (Minister Grylls has made similar statement to this effect) – hard to achieve with competition from online services and facilities
- One objective could be: make main street a 'hot spot' for ITC – make it visitor friendly – enable opportunity to catch-up on email etc, do business from cafés
- First impressions are most important – streetscape and legibility/orientation all need improvement
- Be broad minded to opportunities
- Water supply/dam needs to be safe and secure
- School issues: independently run preferably; retention of students is especially a problem in high school
- Aged care – developers have reported it is difficult in the current financial market to build 34 units as a large lot development; aged care may have to be implemented in smaller lots - one by one is not very viable
- Vacant land/space on High Street creates a disjointed centre and gives an 'abandoned' appearance.
- Shire and community keen to understand how other communities work (rural, semi urban) – 3,000, 7,000, 10,000 population thresholds. What are they like, economies, services, facilities

2.1.1. Worksheet 1 and 2 opportunities and challenges identified

Negatives	Positives	Challenges	Trends
Limited education / primary/secondary	Community lifestyle	Diversity of opportunity	Housing and land prices
Limited aged care	Rural beauty / river scenery	Affordability, land availability	Tree change with employment
Lack of shop diversity / opening hours	Feels safe	Business	Climate change
Lack of public transport	People are friendly	Competition from other towns	Young innovative people
Limited mobile telephone coverage	Opportunity for eco-tourism	Overcoming uncertainty linked to resources	Commodity, mineral prices may impact on need for fewer resources
No fuel supply on weekend	Community events / groups	'City' level services	Changes in workplace supply downward
No auto gas available	Economic base	Ability to adapt to change	Life/work balance
Access to essential services, doctors, childcare	Good basic range of facilities	Retention of youth	Y Gen values
Poor management of issues at school		Service keeping up with population	Living longer / aging population, more retired, more leisure time

Negatives	Positives	Challenges	Trends
Streetscape needs improvement		Staff turnover ($ from mining)	Mining sector vs small business
Lack retail choice			
Lack housing choice			
Some community negativity			

Worksheets 1 and 2 illustrated the potential challenges and opportunities to broaden the economic base and create a more vibrant centre. The community recognised many of the competing regional and global factors and understood that to increase service provision and retain young people and jobs that the settlement would need to grow substantially.

2.1.2. Future Possibilities Identified in Worksheets 3 and 4

Workshop sheets 3 and 4 expanded upon the possibilities for new development, enhanced character and growth scenarios.

Preferred Scenario
Boddington to become a learning community
Regular Local CCI/Newmont/Worsley seminar to make businesses contract/service ready
Rapid public transport to get to other centres like Perth
More integrated with major centres
Boddington satellite city
Multiculturalism
Diversified employment
Essential services
Retain youth into essential service jobs
Population base enough to attract investment / offer choice
Tourism
Food / agri

The workshop attendees also considered some projects which were appropriate to the growth scenario vision.

Projects
Recreation centre - establishes vibrant community
Crèche
Squash
50m pool
Seniors village
Youth centre
A retail incubator like Williams Wool Shed 6-12 small shops
Two schools, two supermarkets and other facilities
Incentives for businesses/retailers/rent free/rate free period
Trail through Boddington and from Boddington to other areas
Tullis Bridge to Dwellingup Hotham rail

Amphitheatre – entertainment (Dankworth Stables at Wavendon or the Quarry for theatre and ballet in Perth)
Dam – water source for reticulation to parks and gardens
Safer roads – slip lane to Bannister Rd
More parks and gardens
BBQ public picnic sites
Major attraction associated with mining
Visitor/Interpretive centre
Library
Flying fox – adventure playground
River tours – hire equipment
Basic infrastructure - Water / power etc. – beyond Randford, Rubbish collection, TV, radio connections
Underground power – enhance Main Street
Banner poles to advertise
Detour trucks away from town – separate access out of town
Affordable housing – rental and sale
Minimum block size 1,000m^2 to keep rural feel
Council buy and develop land between ambulance station and old school
Other shops food and beverage
Opening hours / trading hours to be extended and consistent
Improved education – PDC investigating option to be independent government school
Better pub – use of land down to river
Quindanning rural lifestyle blocks will be in demand
Roads to Quindanning need improvement

Overall there was broad consensus for change and a larger scale Boddington settlement. Some expressed a view that a population of 5,500 was about right to retain essential character and small town qualities; others felt there should not be a limitation on size. Scale was important to attract permanent residents and retain school leavers and to offer a range of education and services and shops which everyone wanted.

Some key principles were considered to support the growth plan:

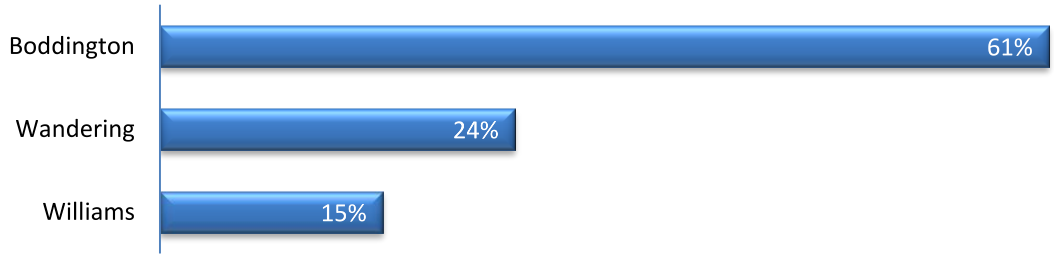
- Build on what we have
- Keep balance
- Maintain lifestyle
- Establish design guides

2.2. Business Survey

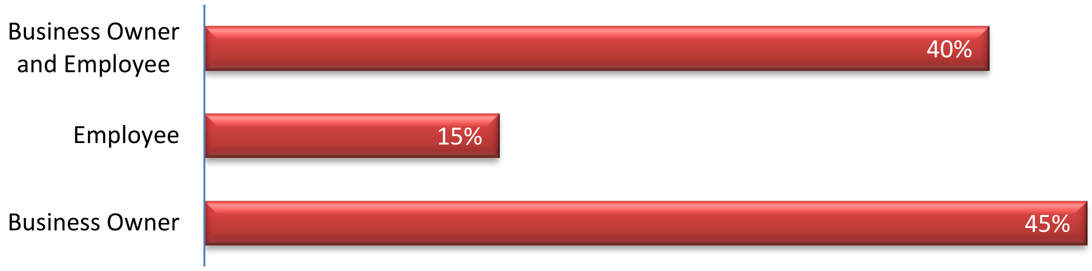
A business perceptions survey was distributed to approximately 80 businesses within the Boddington District either via email or post. The majority of the surveys were completed online using Survey Monkey. A copy of the survey for businesses located in Boddington is shown as Attachment 1.

A total of 33 surveys were returned. A summary of the results are shown below. As this report is an Economic Development Strategy for the Shire of Boddington, the following information is the result of responses from businesses located within the Shire of Boddington. Where responses from businesses located in Wandering and Williams are significantly different to those shown below, comparative comments have been made.

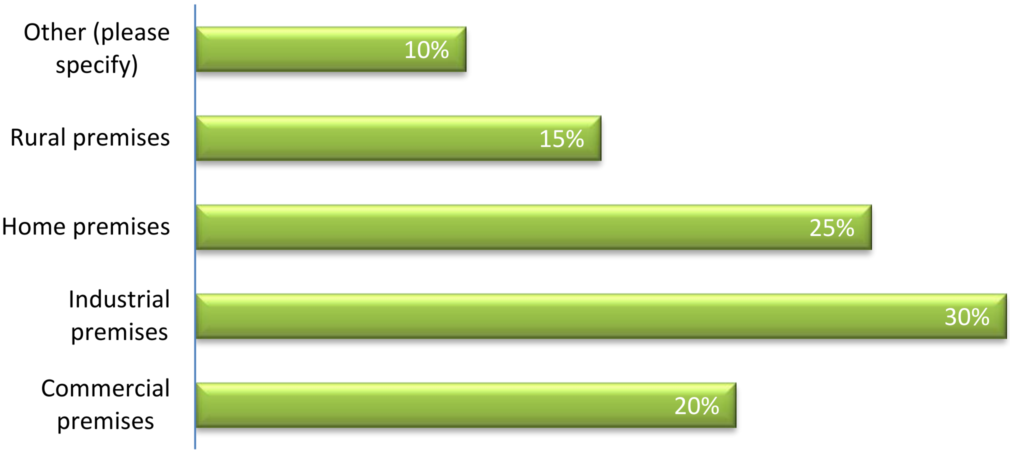
Business Location



Survey Respondents



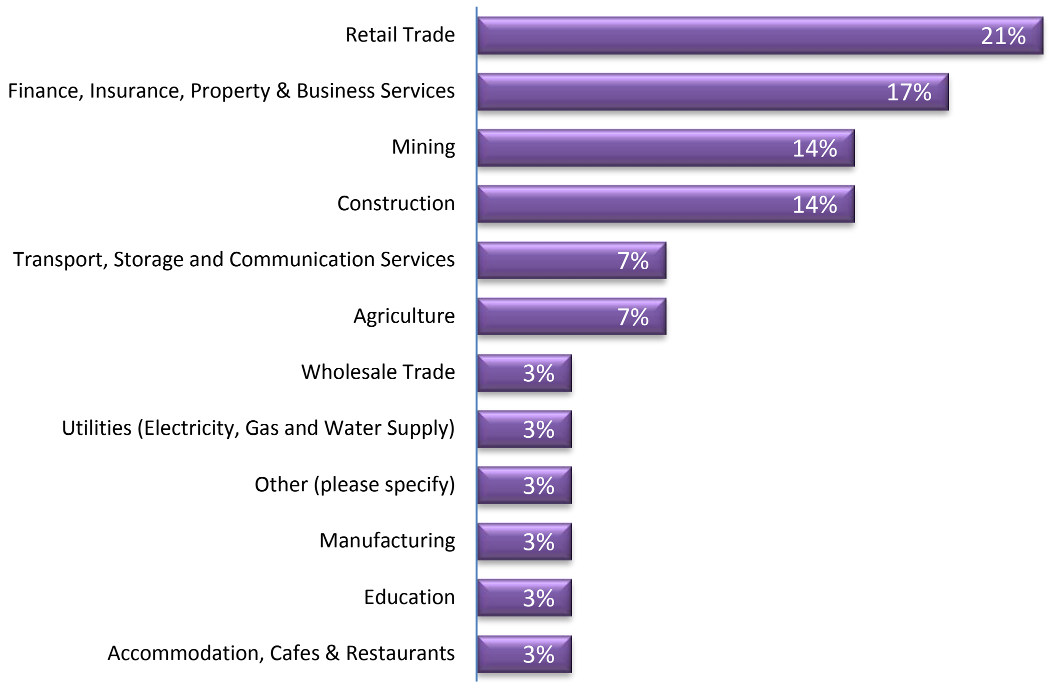
Location of Operation



- 'Other' responses included: services to home owners/mine site; and mobile.
- In Wandering, 71% were 'rural premises' and 29% were 'other' – winery/vineyard
- In Williams, 80% answered 'commercial premises' and 20% answered 'rural premises'

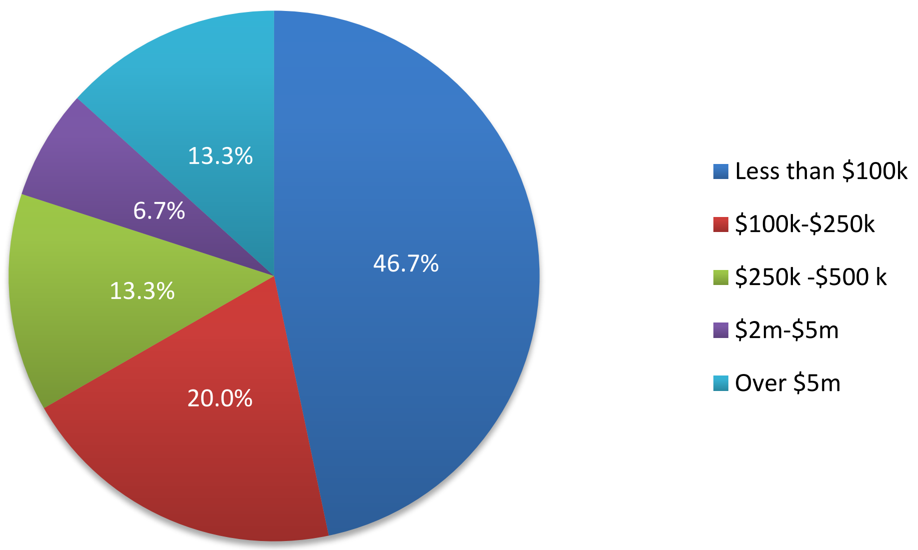
For respondents who indicated that their business operates from either 'home premises' or 'rural premises', they were then asked, "Approximately how much of your total household income is derived from this business (estimated %)?". Four of the seven responses to this question were between 97-100%; two answered 20% and one answered 5%.

Business Type



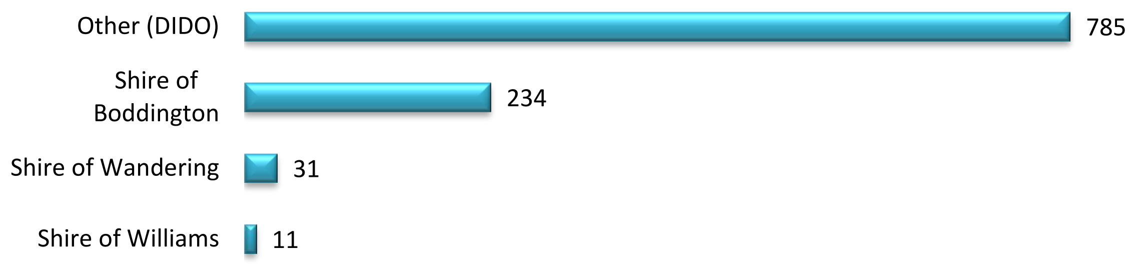
- Other: Child Care
- In Wandering and Williams, the majority (both 57%) were ‘agriculture’

Annual Turn-Over



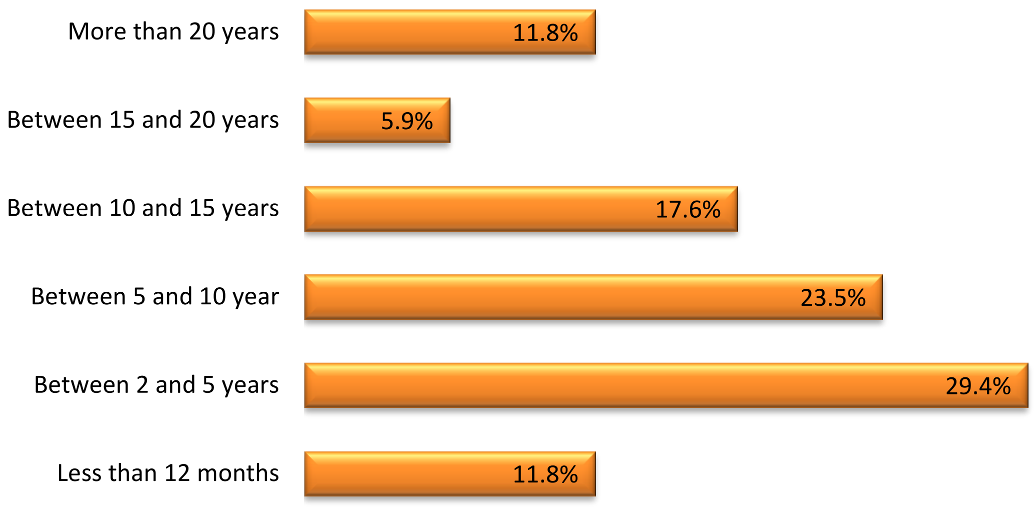
- Majority of business with a turn-over of less than $100k per annum reflects the large percentage of non-employing, owner-operator businesses in Boddington.
- Wandering: 83% less than $100k
- Williams: 50% turn-over $1m-$2m (2 of 4 responses)

Number of Employees by Location



- Other (DIDO) is skewed due to one respondent reporting a drive-in drive-out employment number of 750
- No businesses reported hiring on a fly-in fly-out basis

Length of Operation

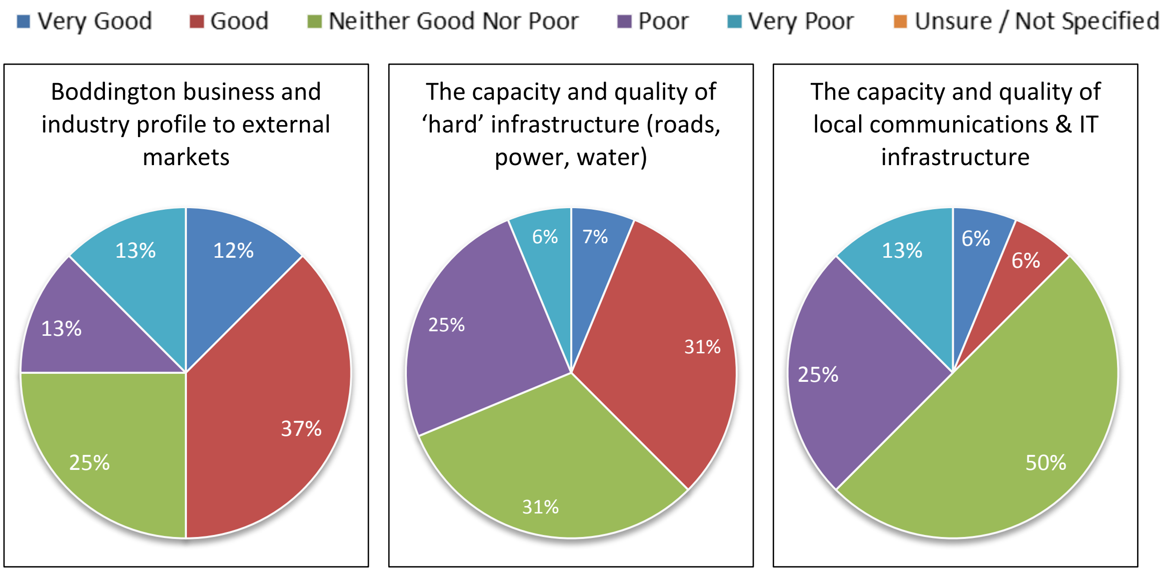


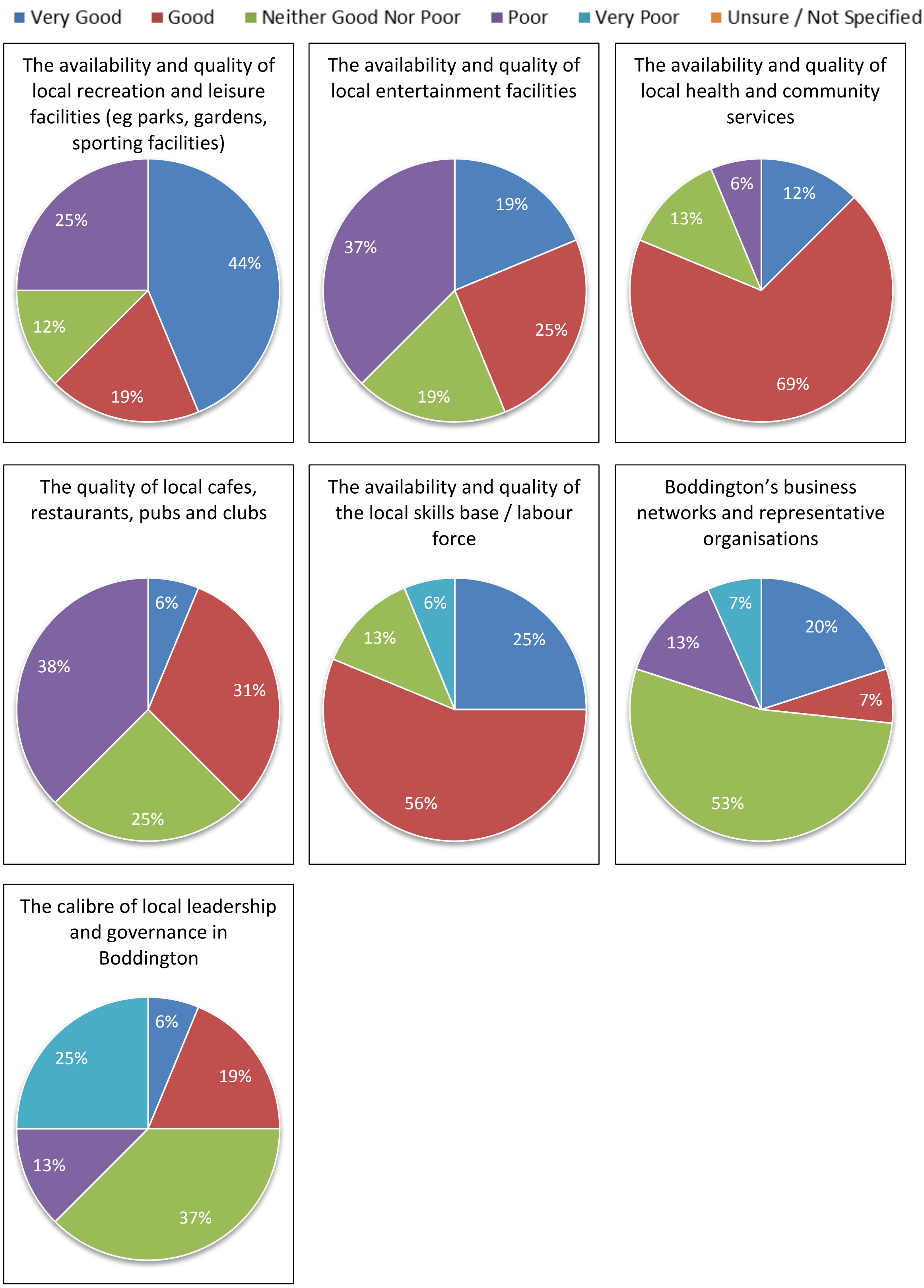
This result showed that many companies had been in operation for a long period of time suggesting stability.

Quality of Shire of Boddington Features

The following graphs provide feedback regarding the quality of a number of attributes or features of the Shire of Boddington. Participants were asked to rank each feature according to the scale shown below.

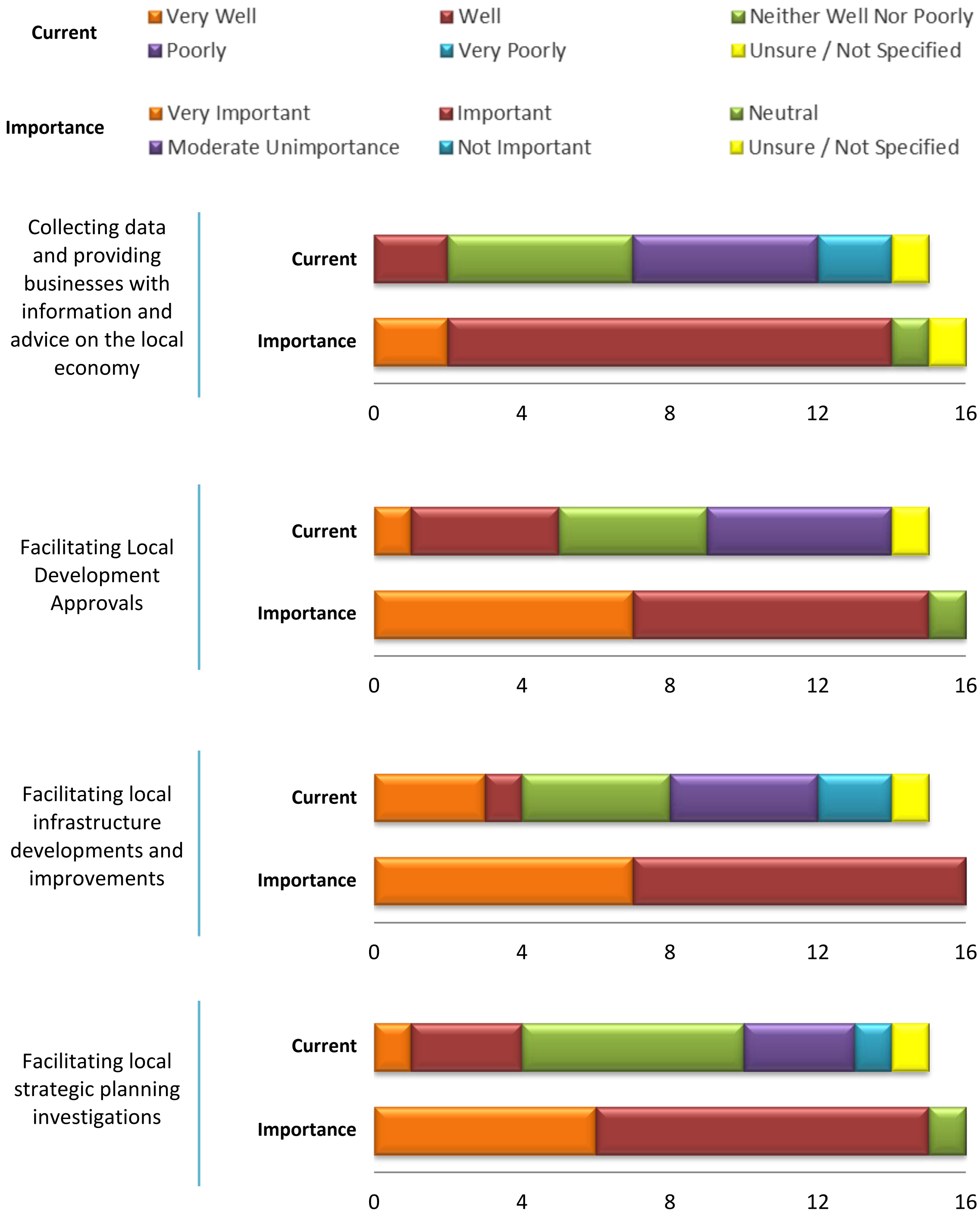
- Nearly half of respondents were satisfied with their industry profile to external markets, but there was room for improvement as a quarter were dissatisfied and the remainder had no firm view either way
- Around a third of respondents were dissatisfied with the hard infrastructure and ICT provision in the District
- Over half of respondents felt the recreation and leisure facilities, including parks and entertainment facilities, were poor
- Over three quarters of respondents felt the quality and availability of health and community services were good
- Three quarters of respondents showed some degree of dissatisfaction with business networks and representative organisations
- Nearly half of respondents were dissatisfied with the quality of local pubs, clubs, cafes and restaurants
- Over three quarters of respondents were satisfied with quality of skills in the labour force
- There was room for improvement in local government leadership with over a third of respondents expressing some degree of dissatisfaction

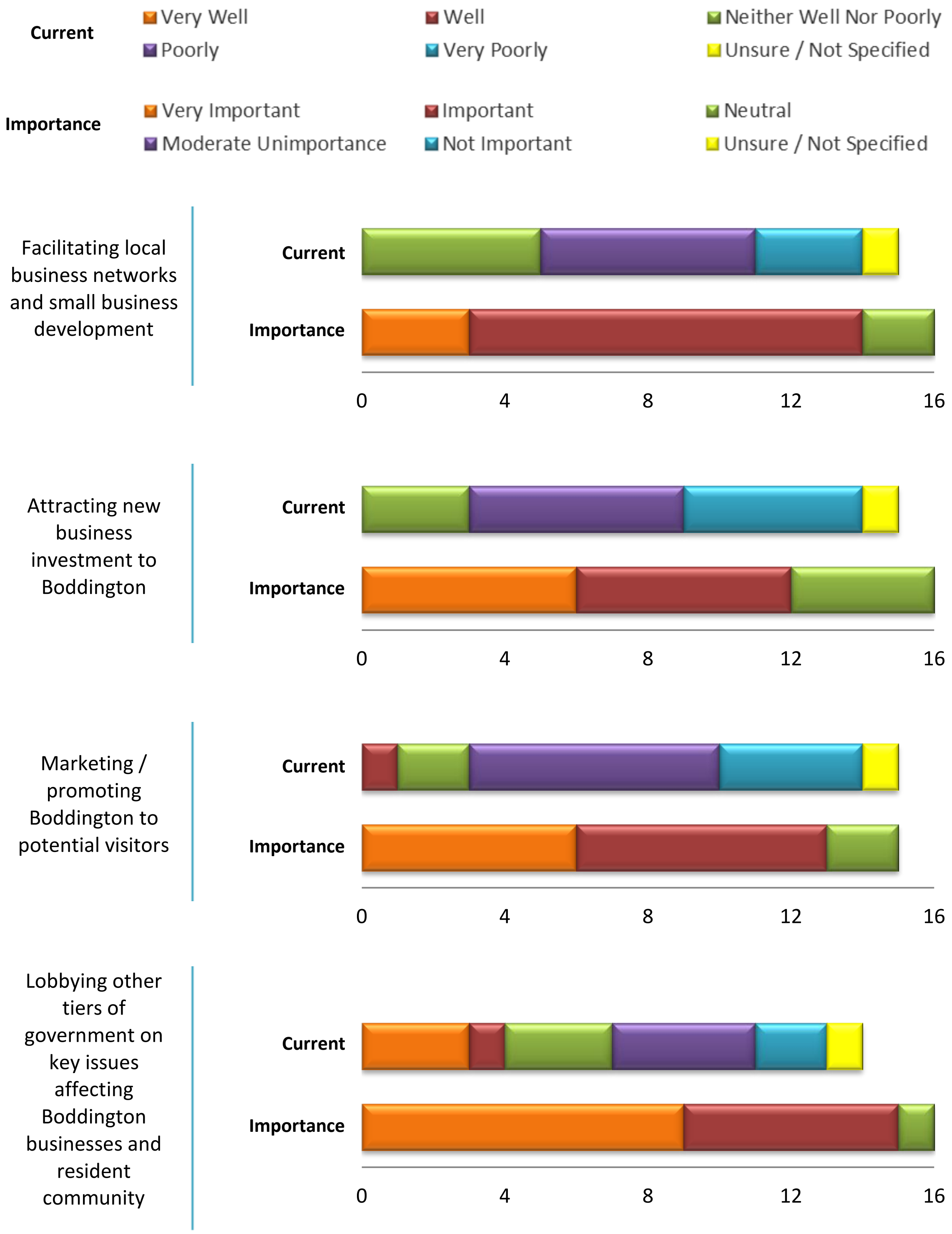



Very Good
Good
Neither Good Nor Poor
Poor
Very Poor
Unsure / Not Specified
The availability and quality of local recreation and leisure facilities (eg parks, gardens, sporting facilities)
44%
19%
12%
25%
The availability and quality of local entertainment facilities
19%
25%
19%
37%
The availability and quality of local health and community services
12%
69%
13%
6%
The quality of local cafes, restaurants, pubs and clubs
6%
31%
25%
38%
The availability and quality of the local skills base / labour force
25%
56%
13%
6%
Boddington's business networks and representative organisations
20%
7%
53%
13%
7%
The calibre of local leadership and governance in Boddington
6%
19%
37%
13%
25%

Shire's Role in Facilitating Economic Development

The following graphs make a comparison between the level of importance that respondents placed on various activities that the Shire Council is or could be engaged in to help facilitate local business development, and the opinion on how well respondents think the Shire currently performs these activities.




Current
Very Well
Well
Neither Well Nor Poorly
Poorly
Very Poorly
Unsure / Not Specified
Importance
Very Important
Important
Neutral
Moderate Unimportance
Not Important
Unsure / Not Specified
Facilitating local business networks and small business development
Current
Importance
0
4
8
12
16
Attracting new business investment to Boddington
Current
Importance
0
4
8
12
16
Marketing / promoting Boddington to potential visitors
Current
Importance
0
4
8
12
16
Lobbying other tiers of government on key issues affecting Boddington businesses and resident community
Current
Importance
0
4
8
12
16

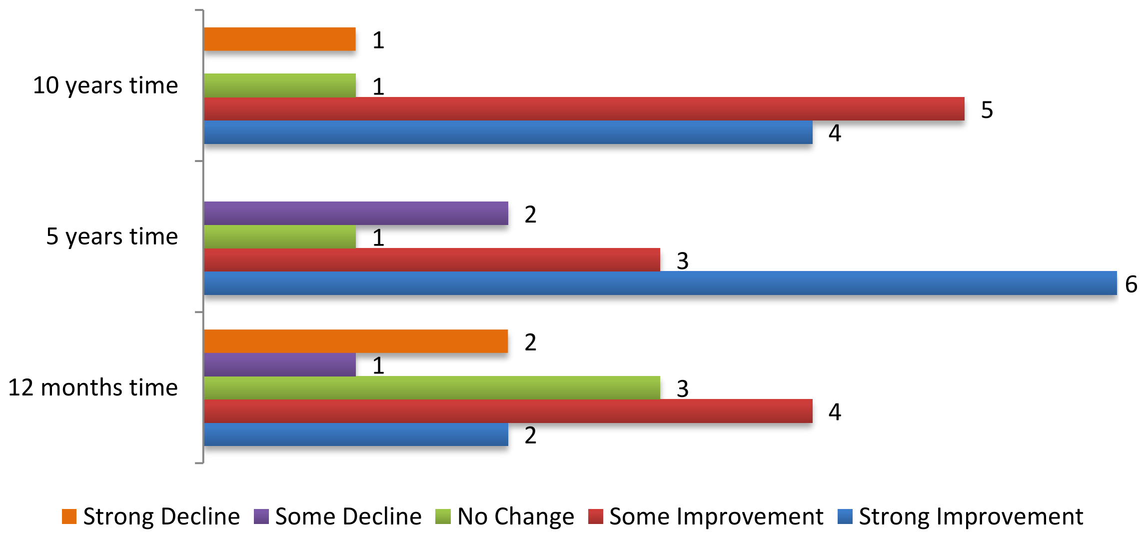
A summary of findings are as follows:

- For each of the business development activities, at least 75% of respondents consider that they are important or very important
- 100% of respondents consider 'facilitating local infrastructure developments and improvements' to be important
- 'Lobbying other tiers of government on key issues affecting Boddington businesses and resident community' had the highest count of respondents considering it to be very important
- The activity considered to be best performed by the Shire is 'facilitating local development approvals', however only 33% selected well or very well, and equally 33% selected poorly or very poorly
- 73% of respondents consider that both 'attracting new business investment to Boddington' and 'marketing/promoting Boddington to potential visitors' is performed poorly or very poorly
- 'Facilitating local business networks and small business development' was also weakly ranked with 60% choosing poorly or very poorly
- There were no respondents who consider the Shire perform well or very well in 'facilitating local business networks and small business development' or 'attracting new business investment to Boddington'

The Boddington SuperTown EDS strategies and actions are designed to address current performance perceptions by either improving actual performance; conducting regular monitoring and evaluation to ensure short, medium and long term community needs are being met; or communicating with the wider community about Shire services, facilities, infrastructure, and progress on current and future projects.

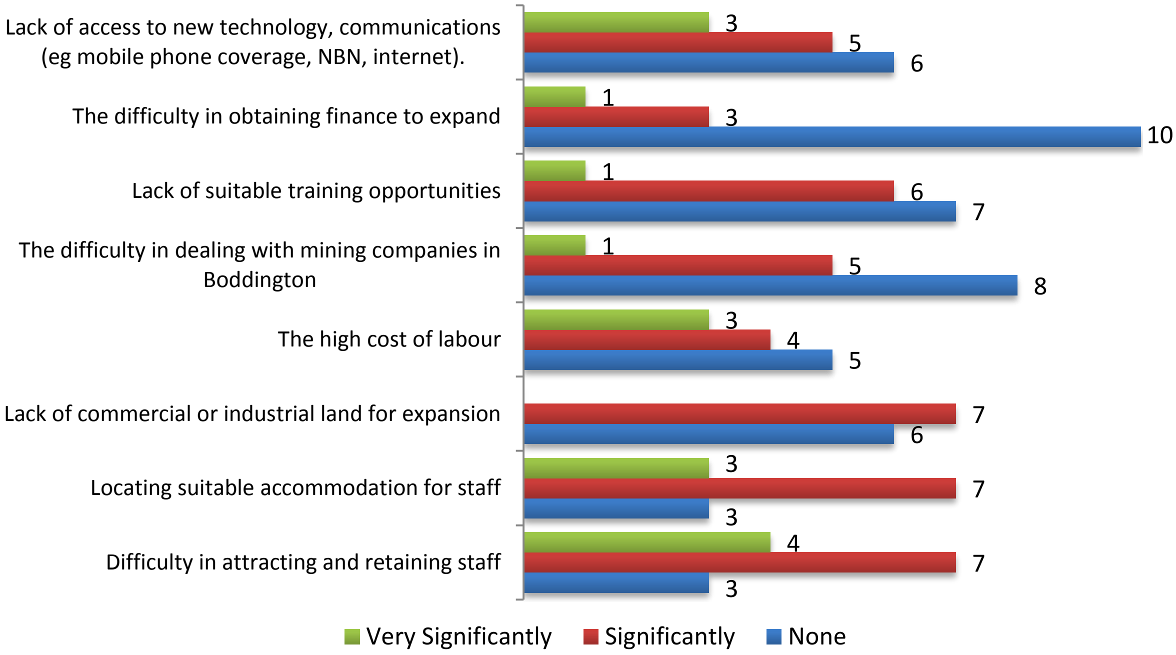
Economic Outlook

Businesses were asked how they saw the economic outlook over different periods in the future: 12 months time, 5 years time, and 10 years time. The majority expect that their business will experience some improvement or strong improvement in each period to 10 years time.



Factors Affecting Economic Outlook

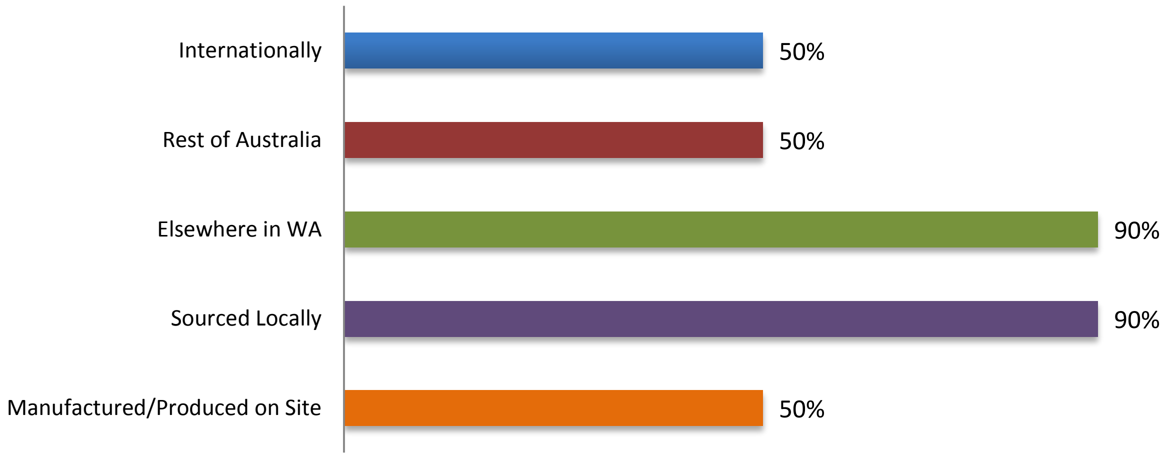
Respondents were asked to indicate how a number of factors will affect the expected economic outlook as shown above in the previous question.



- The factor with the least impact on economic outlook was 'difficulty in obtaining finance to expand'
- The factors with the greatest perceived impact on economic outlook were 'locating suitable accommodation for staff' and 'difficulty in attracting and retaining staff'

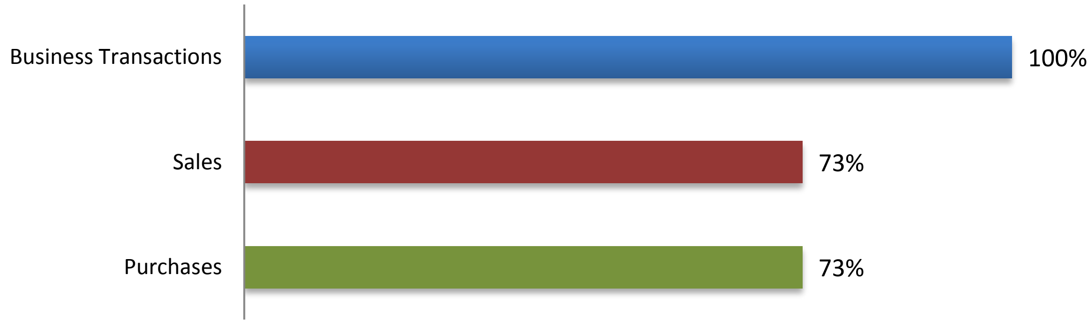
Supply Chains

The following graph shows the percentage of respondents that source goods and services from each of the listed locations. The supply chain has a good local focus which presents opportunity for additional local businesses.



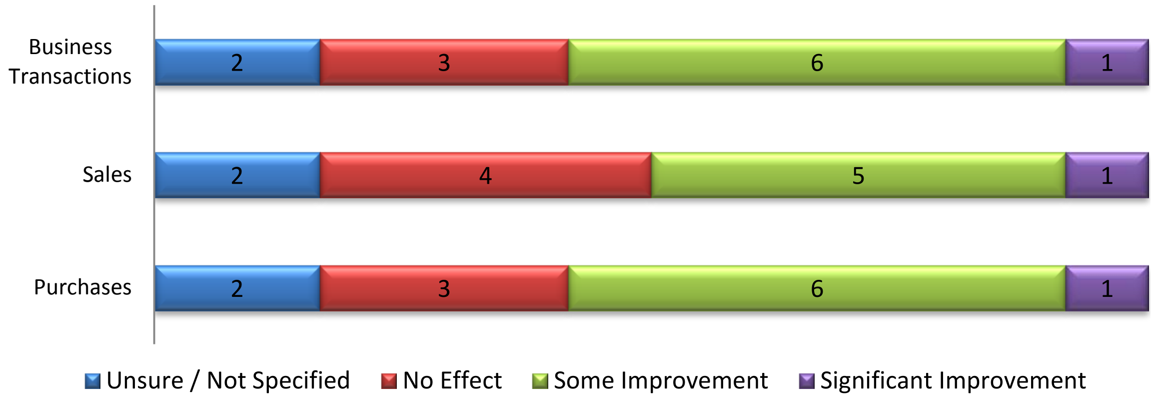
Business Conducted via a Website

The following graph shows the number of respondents who use websites to conduct at least a portion of their business transactions online. All businesses reported that at least a portion of their business transactions were completed online and the majority conduct at least some of their sales and purchases via the internet. This highlights a strong dependence on internet services and the need for Boddington to be NBN ready.



Broadband Improvement

Survey respondents were asked: If you had vastly improved broadband capability (such as improved videoconferencing ability and high resolution information transfer), what would be the economic effect? The majority of participants indicated that it would result in economic improvement for their business.



Other Activities to Help Facilitate Local Business Development

The following comments are responses to the survey question, 'Are there any other activities that the Shire of Boddington is or could be engaged in to help facilitate local business development?'.

Engagement with SBDC to support existing business; development of commercial land; shops for sale/lease.
Promoting building of alternate industry - tourism/hospitality.
A bypass road between mines and industrial area, so companies can transport equipment around town and not through it; this would also allow development in industrial area of large sheds to rebuild mine site equipment. Currently large pieces of equipment cannot enter the area as overhead power lines stop the transport of them from site to town.
• Community forums on a quarterly basis to advise current and potential residents on plan status, new implementations, hold-ups, ask for on-the-spot input. • Website needs updating on a regular basis.
Community forums on a quarterly basis to advise current and potential residents on plan status, new implementations, hold-ups, ask for on-the-spot input. Website needs updating on a regular basis.

Other Survey Comments

The following comments are responses to the survey question, 'If there was one thing you would do to improve business in Boddington, what would it be?'

Develop commercial centre - business incubator - "Build it and they will come" - will work!
Better sporting, recreational, parks and leisure space so that I could take kids somewhere other than the park in town which meets standards, but also to improve leisure time. Also any tourism, cafe type improvement/addition would aide variety of activities for business and pleasure.
Transform the main street into a more vibrant and attractive village centre with improvement to social and economic elements
Ask locals to support
Put in a bypass road from industrial area to the gold mine/BHP mine and remove a 1 km long section of overhead power lines in the industrial area.
Need to promote the LOCAL community - No one lives locally from the mines - no one spends any money in town There is no tourism No business are even open on the weekends (except IGA)
Make the main street more attractive
Better cafes so visitors have some experience of our town and local people when visiting on weekends
Very high rent in town for people to pay if they do not work for the mines
Advertising: updating of all Shire run websites regularly with up to date contact information, hours of availability of CEO, Health & Safety Officer, Councillors and Works Foreman.
LGA is very proactive but lacks personnel to increase workload that has occurred in last 2-5 years. Local businesses and investors are reluctant to engage and develop opportunities without a guaranteed contract with a mining company. Badly affected by GFC, closure of Ravensthorpe and banking industry viewing Boddington as part of Wheatbelt (drought) not Peel (boom). Access to finance in Bodd - investment, commercial, residential - is extremely difficult with many barriers.
Overhead power lines in the industrial area and the roads accessing the LIA. This is a joke and stops large equipment being transported to the LIA.

2.3. Government Agency Stakeholder Comments

The comments below have been sourced from interviews with the key service and utility providers. The comments provided an insight into the scope of task to upgrade, expand and develop appropriate service for a SuperTowns district of an approximate ultimate population of 10,000 people. The notes are in random order and not meant to convey a priority list of actions.

2.3.1. Health

1. Boddington/Wandering/ Williams are part of the Department's Southern Wheatbelt Health District.
2. The referral hierarchy is currently Boddington hospital → Narrogin hospital → Armadale hospital → Perth hospital.
3. The Department is currently engaged in the Southern Inland Health Initiative. This is a $565 million program to reform and improve the access to health care for the southern inland area. $240 million is earmarked for investment in the health workforce and services, and $325 million for capital works. A draft report on Priority Stream 2 (District Hospital and Health Service Investment Program) is due by the end of December, and the Department will be including specific sections into this report to cover the envisaged services/facilities for the SuperTowns that exist in the planning area – including Boddington. The report will consider current services, projected demographics, required future services and any capital works arising from this. It has been indicated to the Department the possibility that the population within the Boddington/Wandering/Williams sub-region might approach 10,000 by 2051 (resident and transient).
4. Generally the feeling in the Department is that the Boddington hospital has sufficient beds for a considerable period of time to come (potentially to 2040), and that the focus for Boddington is therefore likely to be on the issue of services required and the necessary workforce to accompany these services.
5. The Southern Inland Health Initiative is focused on pioneering new and innovative ways of delivering health services, including the introduction of tele-health services which will link smaller health centres, higher order centres, and specialised services via video technology.
6. On the issue of aged care, the Department is likely to play a decreasing role – deferring to the Commonwealth, private sector and not-for-profit groups. Aged care is a difficult area to make work commercially and generally 60 beds are required to make the facility work. However, Global Care Group (GCG) is piloting a model for schemes with smaller bed numbers in York, and intends implementing one in Boddington in the medium to long term.

2.3.2. Police

1. Police are looking to add facilities at Boddington Police station, including housing facilities for additional staff – to meet the need created by the growth in the town and sub-region.
2. A business case for this project has already been prepared.
3. Police are keen to participate in the SuperTowns growth scenarios

2.3.3. Western Power

1. Boddington is supplied via a single transformer and feeder line – there is no contingent supply. The Boddington area is currently "code green" indicating spare capacity.
2. Wandering and Williams are fed from Narrogin, and this supply area is currently "code red" indicating capacity issues.

3. The Boddington system and the Wandering/Williams system are not currently interconnected but this is possible in the future. The map suggests that the infrastructure is connected, but Western Power confirmed that there are connection gaps between the two.
4. There are two possibilities for the future development of electricity infrastructure – expand the current Boddington system through the development of a new transformer and a new feeder line, or expand the Narrogin supply – and in the case of both, look to interlink the systems. The easier and preferred option for Western Power is to expand the current Boddington system.
5. Power usage in the Boddington system peaked at 4 MVA in 2011, and has been as high as 4.8 MVA in 2009. The Boddington feeder line potentially has a further 3-4 MVA capacity (largely determined by the relatively long length of the feeder and the losses associated with that).
6. If there is a significant increase in industrial, commercial or urban development in the short term, then it is likely that the first upgrade would need to be a second feeder line from the sub-station into Boddington. Potentially this might need to happen in 2015. If this growth is sustained, then it will be necessary to look at putting in a new transformer at the sub-station – somewhere around 2025.
7. The cost of a new feeder line is approximately $150,000 per KM, which at approximately 20 KM would cost $3 million. The cost of a new transformer and associated works is currently priced at approximately $10 million.
8. If the need to upgrade is "triggered" by "underlying growth" (population growth and urban development), then the costs of upgrading will be the responsibility of Western Power. If, however, the trigger is specifically an industrial or commercial activity, then that activity would bear responsibility for the cost of the upgrade.
9. Over the next five years, Western Power will be attending to a number of limited voltage supply issues (single phase electricity) that still remain in the Boddington area – as part of normal business.

2.3.4. Water

1. Bulk potable water supply from Harris dam is solid for the future (as solid as any surface water capture facility can be). Main issue is infrastructure upgrades and the funding of the upgrades (storage tanks and pipelines). Boddington and Wandering are serviced off the same infrastructure – Williams has its own infrastructure. The NBG mine has its own potable water supply which runs a small desalination plant.
2. Waste water treatment facilities are fine in Boddington for the future. The town has its own facility and the NBG mine has its own facility (dates for any upgrades to be determined).
3. Water Corporation will do an initial assessment of water and waste water treatment future requirements, based on interim growth figures for Boddington and Wandering of: current (2000), 2020 (2600), 2030 (3500), 2040 (4800) and 2050 (6300). These numbers are a combination of a 3% per annum growth rate in resident population off the current base, plus a shift in mine workers from the camp into the Boddington/Wandering subregion. Note these do not exactly tally with the ultimate vision of 10,000 people in a SuperTown stipulated by the Government's Growth Plan Framework.
4. Recent upgrades to potable water supply (storage and mains distribution) in Boddington townsite are sufficient for approximately 145 new residential lots. The Growth Plan will need to determine key trigger points for upgrading of infrastructure to allow for more subdivisions. An additional $9 million expansion has been planned which could accommodate a further 200 residential lots. Planning beyond this threshold needs to be undertaken.
5. Ranford townsite has no secure potable water supplies to allow for subdivision. A $2million pipeline from the Boddington tanks to Randford would enable a significant number of lifestyle lots to be developed in the Boddington – Wandering "lifestyle corridor ", and it would also secure water supply to Wandering into the future. This could become a key SuperTowns project, and the Water Corporation would repay the costs of the pipeline to the Shire under an agreed formula over a period of time.

6. PDC is working closely with Alcoa, and the Water Infrastructure Group on the development of a regional water reuse scheme which involves taking water from the Gordon Road and Woodman Point WWTPs and piping it through the region and as far south as the Wagerup refinery. Initial thoughts have been given to the possibility of a branch line off the main line, to Boddington – maybe 5 to 10 GL per annum – with the two mines as base customers.
7. Need to look at new technology to be introduced to manage water supplies into the lifestyle lots environment such as pre-paid cards so as to improve revenue collection from “rural” properties.
8. Lot 8016 has water supply (pressure) issues above a particular height (requiring additional raised storage and pumping), and the Water Corporation would be reluctant to take on this type of infrastructure in Boddington – therefore preferably keep urban development below that specific height level. The area where subdivision approval has been given on 8016 is below the problem height.
9. The Water Corporation would like to explore the potential of transferring ownership of the old dam and associated catchment land, to the Shire. The dam requires expenditure of $1.8 million on the dam wall. Water Corporation would consider putting in $800 k and transferring the land as part of the deal. The dam area could become the possible new golf course site – with the current golf course being released for future urban development in due course.
10. Funding mechanisms for future upgrades to be looked at. Water Corporation preferred proponents/others to prefund infrastructure and for the Water Corporation to then reimburse against an agreed formula.

Appendix 3. Business Perceptions Survey

Business Perceptions Boddington

Syme Marmion & Co has been commissioned by the State Government and local Shire to help formulate an economic development strategy for the region. This is part of the Royalties for Regions "SuperTowns" project with an objective to support the economy of Boddington and surrounding towns and districts. We would appreciate if you could participate in this very short survey. All information is reported to Syme Marmion & Co and is strictly confidential and will only be reported on an aggregated basis.

This survey applies if you operate a business of any size.

***1. Please state which local government area your business is located in:**

- Boddington
- Wandering
- Williams

***2. Please indicate whether you are a:**

- Business Owner
- Employee
- Business Owner and Employee

3. Does your business mainly operate from:

- Commercial premises
- Industrial premises
- Home premises
- Rural premises
- Other (please specify)

Page 1

Business Perceptions Boddington

4. Since you selected 'Home premises' or 'Rural premises', approximately how much of your total household income is derived from this business (estimated %)?

Please provide the following information about your business:

5. What industry sector is your business in?

- [ ] Agriculture
- [ ] Mining
- [ ] Manufacturing
- [ ] Utilities (Electricity, Gas and Water Supply)
- [ ] Construction
- [ ] Retail Trade
- [ ] Wholesale Trade
- [ ] Accommodation, Cafes & Restaurants
- [ ] Transport, Storage and Communication Services
- [ ] Finance, Insurance, Property & Business Services
- [ ] Government Administration
- [ ] Education
- [ ] Health & Community Services
- [ ] Cultural & Recreational Services
- [ ] Personal Services
- [ ] Other (please specify)

6. What is your business's main source(s) of income?

Please provide a list of revenue items and the proportion of total income (to equal 100%). For example,

Page 2

Business Perceptions Boddington

7. Please provide us with your annual turnover?

- ◯ Less than $100k
- ◯ $100k-$250k
- ◯ $250 k -$500 k
- ◯ $500 k -$1m
- ◯ $1m-$2m
- ◯ $2m-$5m
- ◯ Over $5m

8. Please provide the total number of employees and where relevant, the residential location of all employees:

Total Employees	
Shire of Boddington	
Shire of Wandering	
Shire of Williams	
Outside of these Shires:	
- Fly-In / Fly-Out	
- Drive-In / Drive-Out	

9. How long has your business been in operation:

- ◯ Less than 12 months
- ◯ Between 12 months and 2 years
- ◯ Between 2 and 5 years
- ◯ Between 5 and 10 year
- ◯ Between 10 and 15 years
- ◯ Between 15 and 20 years
- ◯ More than 20 years

Considering the Shire of Boddington as a location that facilitates local economic development:

Business Perceptions Boddington

10. How would you rate the quality of the following attributes or features of the Shire of Boddington?

	Very Good	Good	Neither Good Nor Poor	Poor	Very Poor	Unsure / Not Specified
Boddington business and industry profile to external markets	○	○	○	○	○	○
The capacity and quality of 'hard' infrastructure (roads, power, water)	○	○	○	○	○	○
The capacity and quality of local communications & IT infrastructure	○	○	○	○	○	○
The availability and quality of local recreation and leisure facilities (e.g. parks, gardens, sporting facilities)	○	○	○	○	○	○
The availability and quality of local entertainment facilities	○	○	○	○	○	○
The availability and quality of local health and community services	○	○	○	○	○	○
The quality of local cafes, restaurants, pubs and clubs	○	○	○	○	○	○
The availability and quality of the local skills base / labour force	○	○	○	○	○	○
Business networks and representative organisations	○	○	○	○	○	○
The calibre of local leadership and governance in Boddington	○	○	○	○	○	○

Any comments to add?

Considering the role of the Shire of Boddington in facilitating local economic development:

11. How would you rate the importance of the following activities that Boddington Shire Council is or could be engaged in to help facilitate local business development?

	Very Important	Important	Neutral	Moderate Unimportance	Not Important	Unsure / Not Specified
Collecting data and providing businesses with information and advice on the local economy	○	○	○	○	○	○
Facilitating Local Development Approvals	○	○	○	○	○	○
Facilitating local infrastructure developments and improvements	○	○	○	○	○	○
Facilitating local strategic planning investigations	○	○	○	○	○	○
Facilitating local business networks and small business development	○	○	○	○	○	○
Attracting new business investment to Boddington	○	○	○	○	○	○
Marketing / promoting Boddington to potential visitors	○	○	○	○	○	○
Lobbying other tiers of government on key issues affecting Boddington businesses and resident community	○	○	○	○	○	○

Page 4

Business Perceptions Boddington

12. How well do you think the Shire currently performs these activities?

	Very Well	Well	Neither Well Nor Poorly	Poorly	Very Poorly	Unsure / Not Specified
Collecting data and providing businesses with information and advice on the local economy	○	○	○	○	○	○
Facilitating Local Development Approvals	○	○	○	○	○	○
Facilitating local infrastructure developments and improvements	○	○	○	○	○	○
Facilitating local strategic planning investigations	○	○	○	○	○	○
Facilitating local business networks and small business development	○	○	○	○	○	○
Attracting new business investment to Boddington	○	○	○	○	○	○
Marketing / promoting Boddington to potential visitors	○	○	○	○	○	○
Lobbying other tiers of government on key issues affecting Boddington businesses and resident community	○	○	○	○	○	○

Any comments to add?

13. Are there any other activities that the Shire of Boddington is or could be engaged in to help facilitate local business development?

○ No / don't know

Yes (please specify)

Page 5

Business Perceptions Boddington

14. What is the expected economic outlook for your business:

	Strong Improvement	Some Improvement	No Change	Some Decline	Strong Decline
12 months time	○	○	○	○	○
5 years time	○	○	○	○	○
10 years time	○	○	○	○	○

15. Which of the following factors will affect the above expected economic outlook:

	Very Significantly	Significantly	None
Difficulty in attracting and retaining staff	○	○	○
Locating suitable accommodation for staff	○	○	○
Lack of commercial or industrial land for expansion	○	○	○
The high cost of labour	○	○	○
The difficulty in dealing with mining companies in Boddington	○	○	○
Lack of suitable training opportunities	○	○	○
The difficulty in obtaining finance to expand	○	○	○
Lack of access to new technology, communications (eg mobile phone coverage, NBN, internet).	○	○	○

16. We would like to find out where you source your goods and services. Please list business services that are produced or sourced from each of the locations.

Manufactured/Produced on Site

Sourced Locally

Elsewhere in WA

Rest of Australia

Internationally

How does broadband and telecommunications affect your business operations?

17. What percentage of your business is conducted via a website?

Purchases (%)

Sales (%)

Business Transactions (%)

Page 6

Business Perceptions Boddington

18. If you had vastly improved broadband capability (such as improved videoconferencing ability and high resolution information transfer), what would be the economic effect?

	Significant Improvement	Some Improvement	No Effect	Unsure / Not Specified
Purchases	○	○	○	○
Sales	○	○	○	○
Business Transactions	○	○	○	○

19. If there was one thing you would do to improve business in Boddington, what would it be?

Thank you for taking the time to complete this survey.

Page 7

Appendix 4. Strategy Implementation

4.1. Draft Structure for Boddington Tourism Development

Tourism plays a significant part in the Australian economy, contributing 2.6% to Australia's GDP and 4.5% to Australia's employment in 2009–10. With 46% of tourism expenditure in Australia spent in regional areas, tourism is also of considerable importance to many of Australia's regional communities. Tourism is a key economic driver generating over 73,000 jobs and injecting over $5.9 billion into the Western Australian economy[2]. The economic and resulting social benefits of tourism can reshape a location and provide significant growth and opportunity. Tourism figures in the Peel Region are provided in Attachment 2.

A focus on tourism including the development of a District Tourism Strategy is a significant part of the economic development strategies and actions contained within the report. Because the Boddington District does not have the same scale of facilities and attractions as many of the other competing tourist locations south of Perth (Margaret River, Bunbury, Albany etc), the aim of the tourism strategy should not be to promote Boddington as an alternate holiday location, but rather a 'must have' stop along the way. This focus can then be aimed at those travelling on the Albany Highway, as an alternate to the coastal route down to Capes Region and wider South West Region, and a stop for those heading north (from the south) to the Wheatbelt and Goldfields regions.

Like most smaller towns capturing the tourist market, Boddington will not only need to promote local and district wide attractions, but make the entire region and neighbouring regions a part of its asset promotion. Boddington is included in tourism advertising for Peel and Australia's Golden Outback, but this can be expanded to include a connection to the South West Region as mentioned above. The City of Bunbury has included the Boddington Gold Mine as a project of regional significance in their current Economic Development Strategy, and Mandurah promotes itself as a place to live for those employed by NBG.

A key element in a tourism strategy is defining the tourism market that is to be captured. This includes preferences in regards to accommodation, activities, attractions and scenery. PR strategies and tourism development (especially infrastructure and business expansion) can be targeted at these broad and niche markets. The following table provides examples of sectors that the Boddington District could appeal to. Information and statistics are from 2009.

Table 24: Tourism Market Sectors

Sector	Snapshot	District Application
Backpackers	• 75% of internationals spent time in regional Australia • Holiday for longer (77 nights compared with 29 nights)	• Advertise current applicable accommodation as backpacker suitable • Backpacker specific accommodation
Bed and Breakfast	• Most popular accommodation for European visitors • Engaged in more activities than other visitors • Market is predominantly domestic	• Advertise current B&Bs and farmstays • Local resident and farm opportunities

[2] Tourism Western Australia

Sector	Snapshot	District Application
Caravan or Camping	• Domestic visitors spend more of their nights in regional Australia than other visitors • Large increase in domestic visitors aged 60 years and over	• Current caravan parks • 'RV Friendly'
Cultural and Heritage	• 21.4 million participants in 2009 • Average stay of 45 nights • Majority participate in more than one activity	• Annual festivals and events • Interpretive signage • Local historic museum in visitors centre
Food and Wine	• Average stay of 54 nights • 70% of domestic visitors purchase wine to take-away • Majority visit more than one winery	• Large number of local wineries • Local produce – organic market • Proximity to internationally renowned Margaret River Wine Region
Culinary Tourism	• 31% of holiday/leisure visitors in WA • Rely heavily on previous experience and internet for information • Domestic visitor average spend per night of $179	• Internet advertising • Restaurants and wineries • Use of local produce
Nature Tourism	• Most popular activities are bushwalking and visiting national parks • Majority use internet for information	• Internet advertising • Walk and drive trails • Hotham River • Proximity to coast and estuary

Source: Tourism Australia 2009

Many aspects of the Boddington District, Peel Region, and surrounding areas are able to appeal to international visitors classed as 'global experience seekers'[3]. This sector includes long haul travellers who are less affected by barriers to travel distance, time and cost. Attractors include:

- Desire to get off the beaten track and interact with local people to make friends, develop personal relationship and engage in the lifestyle
- Long for self-discovery and education when travelling; a want to personally experience cultures and lifestyles
- Challenge themselves physically, emotionally and/or mentally
- Destinations away from the standard tourist trail; to be able to experience the true natural and cultural surroundings
- Exposure to unique and personally compelling experiences

Case studies of taking advantage of and benefiting from the tourism industry are shown below.

[3] Tourism Australia, 2009

CASE STUDIES

Swan Valley

The Swan Valley is renowned for its food, wine, art, and events, and is popular as both a day trip and weekend get-away destination. The success of the Swan Valley as a brand is due to the deliberate and ongoing efforts of the City of Swan (CoS), and the Swan Valley Tourism Council (SVTC). The need for destination marketing was identified to promote the large number of established businesses and the quality product produced.

Factors of success and outcomes achieved include:

- Active Tourism Council (in operation for over 20 years)
- Map & annual magazine
- Acknowledged fragmented track record of working together (businesses) and lack of support for SVTC
- Branding campaign to increase visitation and spend
- SV Marketing: overseen by board (business + CoS), CoS acts as financial clearing house
    - Professional market research
    - Use professional agency
    - Present to and engage community
    - Open reporting
    - Performance measurement
    - 5M Methodology applied: Message, Market, Medium, Measurement, Management
    - Campaign funded for three consecutive years
    - Lessons learnt: Do it professionally; do it transparently; set realistic performance targets; build the business case
- Swan Valley Tours example of business that utilised resources, identified market segments, partnered with other suppliers, look for win-win opportunities, use of technology. Result: AAG of 50%, awards, profitability
- Swan Valley website (SVTC/Visitors Centre/Shire) that provides information about accommodation and tours; attractions and experiences; suggested itineraries; general information about the swan valley i.e. history, how to get there, travel time and distances, weather and climate etc

CASE STUDIES

Margaret River

Margaret River region is known domestically and internationally as a destination primarily for its wine, food, beaches, and landscape. It is a strong brand nationally and internationally for both the tourism and wine markets. This brand is important for both attracting tourists and supporting premium wine prices.

Tourism WA identifies the Margaret River Wine Region as the most visited region outside of the Perth area. This region includes the townships of Margaret River, Dunsborough, Yallingup, Augusta, Busselton, and Cowaramup. It has around 9% of all interstate and international visitors to the State. Events are also attracting a growing number of visitors with the Margaret River Wine Region Festival and Telstra Drug Aware Margaret River Pro surfing competition.

Broome

Broome is located in the Kimberley Region of WA, 2,200km north of Perth. Tourism plays such an important role in the town as the population goes from approximately 15,000 to over 45,000 in the peak tourist season. The majority of businesses service the tourism industry and therefore are reliant on visitor numbers.

The Shire of Broome combined with Tourism WA and local businesses have put a significant amount of resources into marketing Broome nationally and internationally as an essential holiday destination. Similarly to Margaret River, although the town itself provides visitors with attractions (Cable Beach and pearl farming) and events, it has positioned itself as the 'gateway' to the rest of the Kimberley for those seeking an 'outback adventure'.

Table 25: Tourism Development

Data Collection/Analysis	Development	Requirements	KPIs
SWOT analysis to identify: • Macro and micro environmental factors (including sensitivities and sustainability issues) • Market segmentation/customer profile analysis/ expenditure/ occupancy patterns/yield • Competitor analysis • Database/categorise natural resources/local assets/special interest attractions and experiences • Identify potential for local partnerships/strategic alliances (geographic and operational) • Identify trends, issues and future "new tourism" (eco/cultural) development and "weatherproofing" opportunities	• Identify and promote future smart infrastructure, ICT requirements • Identify and promote key marketing/ advocacy, branding, accreditation and award initiatives • Establish framework for integrated stakeholder participation, management and implementation for a sustainable tourism industry which complements the established and planned permanent communities' needs	• Structure plans and subdivision applications to identify any tourism related land uses or activities and ensure consistency with City and State policies, strategies and interim provisions	• Increase in tourism expenditure • Increase in accommodation – number of beds • Increase in occupancy of accommodation • Increase in tourism business start ups • Increase in strategic and local tourism partnerships with the Shire and external organisations • Improvements in time and process for approving tourism development applications • Growth in tourism related employment • Growth in short stay tourist nights • Increased knowledge of Boddington as a tourism destination (visitor survey)

4.2. Draft Structure for Boddington NBN Development

'The demise of distance as the key to the cost of communications may well prove to be the most significant economic force shaping the next half century' (The Economist, Sept 30 1995). Deloitte Access Economics (The Connected Continent, 2011) reported that in 2010, the internet contributed $50bn to Australia's GDP, with 190,000 people employed in occupations directly related to the internet. The internet will play a major role in the growth of the Boddington District as a SuperTown as it provides a catalyst for the success of business by improving connection with customers and suppliers as well as managing their internal operations.

The Australian Government has announced a plan to deliver fast-speed internet to Australian businesses and residents. The current plan is to roll out fibre optic cable to 93% of premises in Australia, which would enable internet speeds of up to 100Mbps (and 1Gbps at its peak). The remaining 7% of premises are expected to be covered by satellite or wireless coverage, which would enable speeds of 12Mbps.

In WA, the NBN rollout (optical fibre) has either commenced (construction underway) or is due to commence within a 12 month period, in the following locations:

- Applecross
- Geraldton
- Mandurah
- Meadow Springs
- Pinjarra
- South Perth
- Victoria Park

Boddington and Williams are included on the indicative list of cities and towns who are to receive wireless coverage, which will enable internet speeds of 12Mbps. Wandering is not on this list and is therefore likely to receive satellite coverage in the longer term and may be eligible for interim satellite services.

The Shire of Boddington will need to determine whether, as a location identified as a SuperTown by the State Government, next generation wireless is sufficient for the needs and purposes of the District, especially when considering that York, Brookton, and Narrogin have all been included as towns to receive optical fibre.

Aside from the economic and social benefits that are derived from high speed internet access, once the NBN (optical fibre) has been rolled out in a location, they are then selected or eligible to apply for, inclusion in the Digital Communities initiative. The NBN website by the Department of Broadband, Communications and the Digital Economy (DBCDE) provides the following information. The Australian Government will provide funding of $23.8 million over three years from 2011–12 for a Digital Communities initiative, a focus of which will be to establish a 'Digital Hub' in each of the 40 communities that will first benefit from the NBN. Applications Round Two of the Digital Enterprise program closed on 3 February 2012. Future funding rounds will be advertised on the DBCDE website.

A Digital Hub is a community-based computer training and internet access point containing a number of internet ready computers. Each Digital Hub will be run by staff that will provide training and assistance to explain the benefits of participating online, to drive greater digital literacy skills and to demonstrate the possibilities of using the NBN. Participants will learn how to engage in basic online activities such as setting up an email account, conducting effective internet searches, and participating in e-commerce and online shopping. Those who attend a Digital Hub will also have the opportunity to experience the kinds of online services and quality of connection the NBN can deliver.

NBN Co is asking for assistance from local councils to provide information to assist with expediting the rollout process whilst protecting amenities. The following check-list has been provided as a guide for the information that may be required.

- Zoning maps and planning controls
- Identification and location of heritage conservation areas and / or heritage items (both indigenous and non-indigenous)
- Location of environmentally significant areas eg conservation / protected areas, national parks / nature reserves, wetlands, bushland, significant street trees
- Any specific local planning controls, policies or codes that may apply specifically to telecommunication facilities
- Confirmation of any local exemptions, restrictions or prohibitions for telecommunication facilities
- Development application requirements (if necessary), including likely timeframes, processes etc
- Location of Commonwealth land and education, health or government facilities
- Location of major development proposals and areas (eg greenfield sites), major infrastructure locations or areas that require major upgrades to infrastructure

4.3. Business Support

To support and encourage micro and home-based business, an investment facilitation package can be developed for new and existing businesses who are planning to locate and expand or are planning to value add to their enterprise. This can include:

- assistance with coordination of services, liaison, identifying sites, locations/equipment, supply chain development and mentor support
- assistance to access state/commonwealth grants and
- establishing a budget for financial incentives
- financial incentives – applicable to new and growth business only not where a developer purchases an existing business or farm

The following table provides an example of incentives offered and the eligibility guidelines for business located in the Loddon Shire in Victoria.

Table 26: Business Incentives, Loddon Shire, Victoria

Business Size	Incentive packages	Eligibility guidelines
Small Up to 5FTE	• Rate relief for 1 year (registered commercial premises) subject to commencement within 12 month period/ application to postpone or defer being granted, normal rates thereafter • Advice and referrals on business planning • Assist with planning permit application process • Referrals to potential funding bodies • Seed capital start up grant $1000 • Quarterly mentoring support for the first 12 months	• Registered business • Documented business plan • Compliance with regulations/policies on sustainability • Principal/operator resident of Shire

Medium 6-15FTE	• Rate relief for 1 year (registered commercial premises) • Assist with planning permit application process • Referrals to potential funding bodies for business growth and innovation • Assistance with business promotion • Infrastructure costs up to the value of $1000 per effective additional FTE generated from the business growth	• Registered business • Completed business plan • Compliance with regulations/policies on sustainability • Principal/operator resident of Shire
Large 16+FTE	• One on one professional partnership support • Assistance with local supply chain development and business relationships • Assistance with access to State and federal networks • Support for regional fund applications • Specifically tailored support services	• Registered business • Completed business plan • Compliance with regulations/policies on sustainability • Extent to which the business adds to the diversity index of the Shire

4.4. Funding Sources

The following table provides examples of funding that may be able to be accessed by the Shire of Boddington or by community organisations and individuals for the purpose of achieving economic development outcomes.

Table 27: Grants and Funding Sources

Grant	Provider	Details	Amount/ Due Date
Local Government Support			
Experience + Training	DEEWR	To train their mature age workers so they can provide supervisory or mentoring support in the workplace	$4,950 June
Lotterywest Grants Program	Lotterywest	Projects that have broad community benefit such as events and celebrations, community and recreation centres, specific programs for people with special needs etc	$1,000+ Year round
Regional and Rural			
Regional Development Australia Fund	Dept of Regional Australia, Regional Development and Local Government	Projects that identify and invest in regional priorities. Eligible organisations can apply for funding for 'investment ready' projects.	$500k to $15m December
Small Grants for Small Communities	Foundation for Rural & Regional Renewal	Projects to contribute to community development in social and community welfare, economic, environmental, health, education or cultural areas.	Up to $5,000 March and September

Grant	Provider	Details	Amount/ Due Date
Rural Early Childhood Education Program	FRRR	Projects and activities that assist in the delivery of early childhood education within the community	Up to $20,000 May
Rural Education Program	FRRR	To extend the educational recourses and individualised learning support that rural students require	
Sport and Recreation			
Community Sporting and Recreation Facilities Fund	DSR	Assistance to community groups and LGAs to develop basic infrastructure for sport and recreation	Up to $150,000 August and March
Arts and Culture			
Various	DCA	Wide range of categories and eligibility	$ Various
Catalyst Community Arts Fund	CANWA	For individuals and organisations	March and September
Looking Forward Regional Fund	DCA	Encourage and stimulate strong and diverse regional arts and cultural activity leading to social and economic benefits for communities and artists	TBA
Lotterywest Grants Program	Lotterywest	A very wide range of purposes may be supported including support for cultural groups, projects, community events etc	$1,000+ Year round
Young People and the Arts	DCA	The program assists young people to participate in a broad range of arts and culture activities	$ Various February
Mentorship Program	Country Arts WA	Funding for both career and emerging artists. Enables creative people to share knowledge/experience while developing new networks and skills.	Up to $25,000 March
Strategic Regional Partnerships	Country Arts WA	Develop programs/positions that have a long-term impact and strategic intent	Up to $150,000 over 3 years
Creative Networks Fund	CANWA	Support LGAs to develop their capacity to use art and culture to improve the lives of their citizens. Participants undertake the Community Engagement and Cultural Planning Course	July
Community and Society			
Aged Care and Population Ageing Programs	Department of Health and Ageing	Programs focus on ensuring that older Australians receive a choice of high quality, accessible and affordable care	$ Various February
Lotterywest Grants Program	Lotterywest	Provides grants for a very wide range of purposes including recreation initiatives such as trails.	$1,000+ Year round

Grant	Provider	Details	Amount/ Due Date
Small Grants for Small Communities	FRRR	Projects and activities that offer clear public benefit for communities, with populations of 10,000 or less, contributing to their development in social and community welfare, economic, environmental, health, education or cultural areas	Up to $5,000 March
Environment and Nature			
Environmental Community Grants Program	DEC	Categories: biodiversity conservation, sustainable catchment management, fauna rescue and rehabilitation, interpretation and sustainable recreation in natural areas, Regional Parks, Bush Forever, support for major conservation/ environment organisations, and protection of high value areas by landholders	Up to $5,000 April
Community Grants Scheme	Waste Authority of WA	Supports WA's move Towards Zero Waste.	Up to $20,000 May
Pastoral Water Grant Scheme	Department of Water	Encourages commercial pastoralists to overcome the problems associated with water supply deficiencies	Up to $20,000 Year round

Source: Grants Directory, Department of Local Government