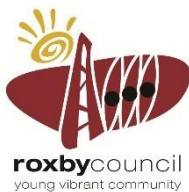




Roxby Downs Region Economic Growth & Investment Strategy

Prepared on behalf of Regional
Development Australia Far North,
the Outback Communities Authority
and Roxby Council

Revised Report, January 2019



This report has been prepared on behalf of Regional Development Australia Far North, the Outback Communities Authority and Roxby Council



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Disclaimer

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TABLE OF CONTENTS

Executive Summary

1.	Introduction.....	1
1.1	Strategy Background.....	1
1.2	Strategy Purpose	2
1.3	Strategy Outcomes	2
1.4	Strategy Framework	3
	Addressing The Determinants and Enablers of Economic Development.....	3
	Economic Growth and Investment Strategy Themes	7
2.	Economic Stocks and Flows.....	10
2.1	Overview of the Roxby Downs Regional Economy	10
2.2	The Roxby Downs Region’s Socio-Economic Structure and Dynamics	10
	Population	10
	Unemployment Trends.....	11
2.3	Economic Stocks and Flows	12
	Employment by Industry	12
	Industry Output and Value-Added	13
	Inter-regional Exports	15
	Import Replacement Opportunities.....	16
	The Roxby Downs Region’s ‘Driver’ Industries.....	17
3.	The Roxby Downs Region’s Economic Development Priorities	19
3.1	Support Development of Roxby Downs as a Sustainable Community	19
	Challenges and Opportunities for Growth	19
	Actions	22
	Performance Measures.....	22
3.2	Support Growth and Development of Mining.....	23
	Challenges and Opportunities for Growth	23
	Actions	25
	Performance Measures	25
3.3	Support the Development of the Roxby Downs Region’s Visitor Economy.....	26
	Challenges and Opportunities for Growth	26
	Actions	31
	Performance Measures	31
4.	Economic Growth and Investment Strategy Work Plan.....	33
4.1	Assessing and Prioritising Actions	33
4.2	Priorities for Action – Informing a Year 1 Work Plan	36
4.3	Continuing Collaborative Partnerships for Effective Implementation	37

References

LIST OF FIGURES

Figure 1.	Determinants and Enablers of Economic Development	5
Figure 2.	Economic Growth and Investment Strategy Themes	8
Figure 3.	Population Trend, Roxby Downs, 2007 to 2017	11
Figure 4.	Unemployment Rates, Roxby Downs Region, South Australia and Australia, June 2016 to June 2018	11
Figure 5.	Employment by Industry, Roxby Downs Region and Far North Region, 2017	12
Figure 6.	Roxby Downs Mining Industry Output as a Proportion of Total, 2017	14
Figure 7.	Value-Added by Industry, Roxby Downs and Far North Region, 2017	14
Figure 8.	Inter-regional Exports by Industry, Roxby Downs Region and Far North Region, 2017 ...	15
Figure 9.	Selected Industry Expenditure Breakdown by Location, Roxby Downs Region, 2017	16
Figure 10.	Roxby Downs Region's 'Driver' Industries	17
Figure 11.	Opportunity Assessment Matrix	33
Figure 12.	Summary of Action Assessment Outcomes	35

Executive Summary



Executive Summary

Informed and Strategic Planning for Economic Development

Regional Development Australia Far North (RDAFN), the Outback Communities Authority (OCA) and Roxby Council commissioned the preparation of this Roxby Downs Region Economic Growth and Investment Strategy to help address the region's challenges and to capitalise on new opportunities for growth and investment.

The Roxby Downs Region (for the purpose of this project) includes the Council area of Roxby Downs and the towns of Pimba, Woomera and Andamooka. The Strategy addresses the region's economic development challenges and prospects with a focus on providing opportunities for investment to support long-term growth. It includes a comprehensive and up-to-date analysis of the region's economic stocks and flows - both in and out of the region - identifying the local area's connections and interrelationships with the broader South Australian, national and global economies.

The Economic Growth and Investment Strategy promotes the notion that economic development is about the mutually-reinforcing and complementary relationship between improvements in economic activity, community wellbeing, cultural diversity, a sense of 'place' and the environment.

Articulating how this holistic approach to economic development can directly translate into the organisational priorities of RDAFN, the OCA and Roxby Council, it informs a strategic and targeted approach to facilitate change towards a prosperous future. It does this by providing the evidence base to support the region's engagement with both State and Federal Governments on matters of regional significance, which require further attention.

By taking an informed, strategic and targeted approach to the identification of opportunities and priorities for growth, the Economic Growth and Investment Strategy informs the short-term work planning of RDA Far North, the OCA and Roxby Council as well as longer-term opportunities for economic development which need to be planned for now.

Meeting the Challenges and Building Opportunities for Growth

Roxby Downs and the wider Outback Region of South Australia (the Outback) is undergoing a period of unprecedented change and adjustment following the resources sector slowdown and the resulting reduction and cessation of mining in the Far North Region, where the bulk of South Australia's mining activity is located.

The scale of subsequent job losses highlights the vulnerability of the region to a downturn in mining, with the majority of local industry activity directly or indirectly dependent on the prosperity of the resources sector.

Compounding the region's reliance on mining is the fact that a large share of the wealth generated by the resources sector is captured elsewhere due to industry expenditure and dividends flowing to areas outside the Far North Region.

The challenges associated with the region's heavy reliance on one industry and the fact that a large proportion of the wealth generated by that industry is captured outside the region are exacerbated by the remoteness of the Roxby Downs Region. The region has a population of just 5,000 dispersed across towns and settlements which grew out of the need to serve the mining industry, namely Roxby Downs, other settlements built on the defence industry, namely Woomera, and smaller settlements and 'satellite' communities such as Pimba and Andamooka.

Together, isolation and an over-reliance on mining create challenges for the Roxby Downs Region, including: vulnerability to sudden economic shocks caused by downturns, particularly in 'one-industry towns'; susceptibility to demographic changes, notably in-migration and out-migration from smaller towns; dis-economies of scale hampering the delivery of physical infrastructure such as information and communications technology as well as community services like health care and education; and distance from ports, by road and rail and from suppliers and markets, leading to relatively higher costs of goods and services and limited market reach for many local businesses.

Key Industries and Opportunities for Growth

Regardless of the challenges, the Roxby Downs Region is presented with good prospects for economic growth and development based on existing comparative and competitive advantages and opportunities to diversify the region's economic activity.

Mining is the region's principal economic driver accounting for by far the largest share of the industry output, jobs and exports out of the region. Despite the industry's decline, mining remains the anchor of the Roxby economy and the sector will continue to be a significant employer and economic contributor into the future.

The mining industry's linkages through other sectors in the local economy, however, are not strong when compared to other industries. This suggests more could be done to facilitate import replacement in the local resources sector.

Tourism is another industry with a solid base and potential for growth in the Roxby Downs Region, as national and international market trends support opportunities to capitalise on demand for outback experiences and historical attractions.

Tourism employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail and transport. Importantly, the tourism industry displays strong linkages back into the local economy.

In order to address the challenges and to capitalise on new opportunities for growth, the Roxby Downs Region Economic Growth and Investment Strategy puts in place an informed and strategic plan of action.

The Strategy identifies activities and projects which will have immediate, medium and long-term economic benefits for the communities of the region and it highlights planning and project priorities to facilitate change towards a robust and sustainable economic future for the Roxby Downs Region.

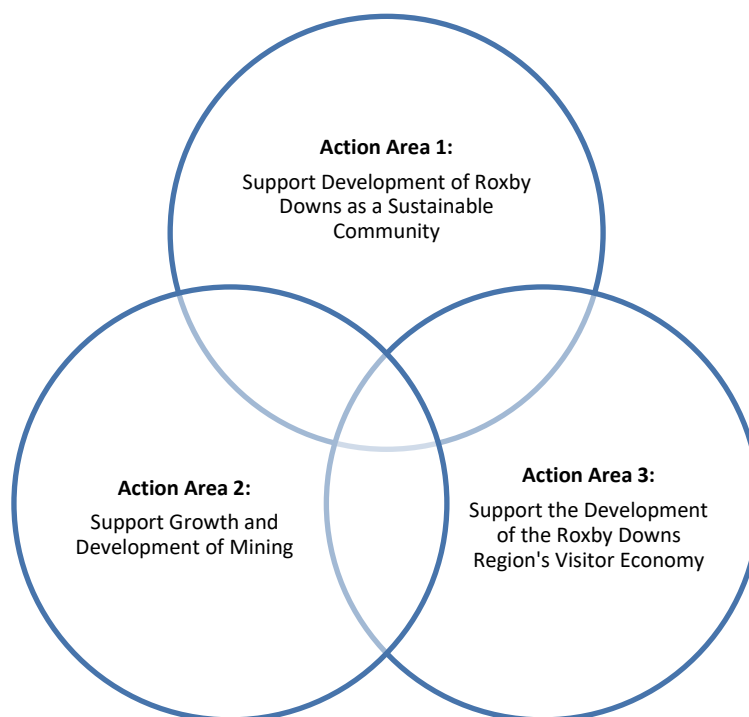
Strategy Themes and Actions

The Roxby Downs Region Economic Growth and Investment Strategy is defined by a set of principles which guide the preparation and implementation of the actions contained herein. It:

1. Prioritises initiatives and activities that support the growth and development of the Roxby Down's Region's **traditional industrial activities in mining**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets.
2. Promotes a **partnership approach to tourism development**, working in collaboration with other tiers of government and the industry to enhance regional branding, marketing, product development, visitor servicing and support infrastructure.
3. Prioritises activities that support **local industry diversification and the growth of 'knowledge-intensive' industries** in, for example, 'new generation' industries like alternative energy production and scientific, technical and professional services to mining.
4. Pro-actively **promotes the region to prospective investors**, using a strategic, informed and targeted approach.
5. Focuses on activities where there are likely to be **positive and measurable outcomes** for the community and long-term strategic economic benefits.

The Economic Growth and Investment Strategy provides the framework and directions for economic development, with the focus being on 17 actions across three strategic activity areas that can be achieved over the next three years. The Action Areas, which have been informed by the research, consultation and analysis undertaken to prepare this strategy, are illustrated below.

Economic Growth and Investment Strategy Themes



In summary, the actions are:

Support Development of Roxby Downs as a Sustainable Community

- 1.1 Roxby Council, BHP Billiton and the Roxby Downs community to work together to facilitate an updated vision for Roxby Downs that is aspirational beyond its current ties to the Olympic Dam mine and the spatial bounds of the Roxby Downs township.
- 1.2 Review and update Roxby Council's key land use and strategic plans to reflect the updated vision as part of a broader regional spatial framework and networked hierarchy of centres and towns.
- 1.3 Work with BHP Billiton and local businesses on opportunities for local supply of goods and services associated with the current planned expansion and ongoing operation of the Olympic Dam mine.
- 1.4 Continue to deliver business development services to build the capacity and sustainability of individual businesses in the Roxby Downs Region.
- 1.5 Investigate place-based community development opportunities to promote the region's smaller towns as locations of choice for working and living beyond mining, with a focus on Andamooka as a pilot project.

Support Growth and Development of Mining

- 2.1 Work with BHP Billiton on current expansion plans to gain an understanding of workforce requirements; map skills requirements against existing training available in the Roxby Downs Region and identify opportunities for additional training programs to support local employment opportunities.
- 2.2 Work with BHP Billiton and the Roxby Downs Area School and Roxby Downs TAFE to explore opportunities for school-based apprenticeships and traineeships associated with the current planned expansion of the Olympic Dam mine.
- 2.3 Work with BHP Billiton and local businesses on opportunities for local supply of goods and services associated with the current planned expansion and ongoing operation of the Olympic Dam mine.
- 2.4 Continue to deliver business development services to build the capacity and sustainability of individual businesses in the Roxby Downs Region.

Support the Development of the Roxby Downs Region's Visitor Economy

- 3.1 Work with key agencies, communities and tourism operators to develop and promote local tourism packages to link the Roxby Downs Region more explicitly into The Explorers Way. Consider geo-tourism and other potential product/experience linkages.
- 3.2 Undertake a cost-benefit analysis and pre-feasibility study on options to re-align the Borefield Road to incorporate Andamooka.

- 3.3 Prepare a wayfinding strategy for the Roxby Downs Region as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.
- 3.4 Work with staff and volunteers from VICs and other visitor information points to build their understanding and capacity to cross-promote towns and regional visitor products to facilitate a 'One Outback' visitor experience.
- 3.5 Work with APOMA to develop and fund a program of works to support visitor access to and experience of Lake Torrens, including an all-weather road, directional and interpretative signage and walking and viewing infrastructure.
- 3.6 Work with Arid Recovery on options for accommodation development and associated tourism packaging opportunities in the region.
- 3.7 Ensure a positive climate for private sector investment in new and upgraded accommodation in the Roxby Downs Region through supportive planning, development assessment and approvals processes.
- 3.8 Continue to work with local communities to develop and implement Community Park Plans across the Roxby Downs Region and the Outback.

Priorities for Action – Informing a Year 1 Work Plan

Priority projects and activities for implementation as part of a Year 1 work plan are identified based on the application of two broad sets of assessment criteria – *benefit assessment* and *capacity to implement*. They reflect priorities that RDAFN, the OCA and Roxby Council should advance (in association with identified partners where relevant) as short-term priorities.

The Year 1 priorities are:

1. Roxby Council, BHP Billiton and the Roxby Downs community to work together to facilitate an updated vision for Roxby Downs that is aspirational beyond its current ties to the Olympic Dam mine and the spatial bounds of the Roxby Downs township.
2. Review and update Roxby Council's key land use and strategic plans to reflect the updated vision as part of a broader regional spatial framework and networked hierarchy of centres and towns.
3. Work with key agencies, communities and tourism operators to develop and promote local tourism packages to link the Roxby Downs Region more explicitly into The Explorers Way. Consider geo-tourism and other potential product/experience linkages.
4. Undertake a cost-benefit analysis and pre-feasibility study on options to re-align the Borefield Road to incorporate Andamooka.
5. Prepare a wayfinding strategy for the Roxby Downs Region as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.

In progressing these actions, cultivating collaborative partnerships will be key.

Continuing Collaborative Partnerships for Effective Implementation

Promoting economic growth and investment in the Roxby Downs Region requires both leadership and the formation of partnerships.

Using the Economic Growth and Investment Strategy as a plan of action, RDA Far North, the Outback Communities Authority and Roxby Council will take the lead, working together with other stakeholders to address opportunities for improved integrated planning and management concerning matters arising from the interface of natural resources management, economic development and community wellbeing.

To this end, the Economic Growth and Investment Strategy guides the efforts of RDA Far North, the OCA and Roxby Council to facilitate opportunities for investment to support long-term growth. Using the evidence presented in this report, it also supports the region's engagement with both State and Federal Governments on matters of significance.

1. Introduction



1. Introduction

1.1 Strategy Background

Regional Development Australia Far North (RDAFN), the Outback Communities Authority (OCA) and Roxby Council commissioned the preparation of this Economic Growth and Investment Strategy for the Roxby Downs Region.

The Roxby Downs Region (for the purpose of this project) includes the Council area of Roxby Downs and the towns of Pimba, Woomera and Andamooka. Informed by a comprehensive and up-to-date analysis of the local and broader regional economy, a review of the economic development policy and strategy environment and targeted consultation with selected stakeholders, the Economic Growth and Investment Strategy identifies future activities and ‘focal’ areas in support of the region’s economic growth and development.

Roxby Downs and the wider Outback Region of South Australia (the Outback) is undergoing a period of unprecedented change and adjustment following the resources sector slowdown and the resulting reduction and cessation of mining in the Far North Region, where the bulk of South Australia’s mining activity is located. The scale of subsequent job losses highlights the vulnerability of the region to a downturn in mining, with the majority of local industry activity directly or indirectly dependent on the prosperity of the resources sector.

Compounding the region’s reliance on mining is the fact that a large share of the wealth generated by the resources sector is captured elsewhere due to industry expenditure and dividends flowing to areas outside the Far North Region.

The challenges associated with the region’s heavy reliance on one industry and the fact that a large proportion of the wealth generated by that industry is captured outside the region are exacerbated by the remoteness of the Roxby Downs Region. The region has a population of just 4,000 dispersed across towns and settlements which grew out of the need to serve the mining industry, namely Roxby Downs, other settlements built on the defence industry, namely Woomera, and smaller settlements and ‘satellite’ communities such as Pimba and Andamooka.

Together, isolation and an over-reliance on mining create challenges for the Roxby Downs Region, including: vulnerability to sudden economic shocks caused by downturns, particularly in ‘one-industry towns’; susceptibility to demographic changes, notably in-migration and out-migration from smaller towns; dis-economies of scale hampering the delivery of physical infrastructure such as information and communications technology as well as community services like health care and education; and distance from ports, by road and rail and from suppliers and markets, leading to relatively higher costs of goods and services and limited market reach for many local businesses.

In order to address the challenges and to capitalise on new opportunities for growth, the Roxby Downs Region Economic Growth and Investment Strategy puts in place an informed and strategic plan of action.

1.2 Strategy Purpose

The Roxby Downs Region Economic Growth and Investment Strategy addresses the region's economic development challenges and prospects with a focus on providing opportunities for investment to support long-term economic development. It includes a comprehensive and up-to-date analysis of the region's economic stocks and flows - both in and out of the region - identifying the region's connections and interrelationships with the broader South Australian, national and global economies.

The strategy provides the evidence base to support the region's engagement with both State and Federal Governments on matters of regional significance which require further attention.

As well as identifying priorities for the region's future, the Economic Growth and Investment Strategy articulates the role of RDA Far North, the Outback Communities Authority and Roxby Council in facilitating economic development and attracting investment to ensure growth in the Roxby Downs Region is managed and sustainable.

By taking an informed, strategic and targeted approach to the identification of opportunities and priorities for growth, the Economic Growth and Investment Strategy informs the short-term work planning of RDA Far North, the OCA and Roxby Council, as well as longer-term opportunities for economic development which need to be planned for now.

1.3 Strategy Outcomes

The Economic Growth and Investment Strategy identifies activities and projects which will have immediate, medium and long-term economic benefits for the communities of the Roxby Downs Region. It highlights planning and project priorities to facilitate change towards a robust and sustainable economic future for the region.

By documenting the region's economic stocks and flows, the Economic Growth and Investment Strategy informs a targeted approach to project selection to maximise the economic benefits of any form of funding packages or other resources directed to the region within the Roxby Council's boundary.

In short, the Economic Growth and Investment Strategy:

1. Provides an understanding of how the Roxby Downs Region connects economically and socially and the interdependencies across local communities;
2. Shows how the region contributes to the state and national economies and the level of outflow or leakage from the region to other centres such as Adelaide;
3. Identifies projects that have good prospects to contribute positive employment outcomes for the Roxby Downs Region and which should help improve economic diversification and links to regional growth sectors;
4. Identifies priority infrastructure needs to enable economic development to occur; and
5. Informs how funding and other resources that may come into the Roxby Downs Region need to be targeted to maximise positive investment, economic development and employment outcomes.

The Economic Growth and Investment Strategy identifies the Roxby Downs Region's existing and potential supply chain links, between local business and industry and economic activity located

external to the region. It recognises and promotes the region's strategic comparative and competitive advantages and its 'investment-ready' projects, in key sectors or areas of activity which build on this advantage.

In this regard, the Economic Growth and Investment Strategy reflects the vision and strategic priorities for the region and it articulates the region's attributes and challenges. This ensures Roxby Council, the OCA and RDA Far North have the information and resources in place to prioritise activities and pro-actively seek-out and facilitate new investment and economic activity in the region.

This is one of five economic growth and investment strategies that have been prepared for the Far North Region of South Australia. The Roxby Downs Region Economic Growth and Investment Strategy, along with those prepared for Coober Pedy, Flinders Ranges, Port Augusta and the Outback Communities Authority Region will inform regional priorities and a renewed Regional Roadmap for the Far North. It will also guide RDA Far North's short-term work planning across its various operational streams of activity, for the following 12 months.

1.4 Strategy Framework

Addressing The Determinants and Enablers of Economic Development

The Roxby Downs Region Economic Growth and Investment Strategy recognises 'economic development' as the continuous process of growing the region's level of income and capital (wealth) and distributing that wealth (through expenditure and employment) to the community.

While measured in terms of income (or gross regional product) and employment, economic development also encapsulates improvements in education, health, culture, community wellbeing, a sense of place and the environment.

Efforts to stimulate economic growth and investment in the Roxby Downs Region must be cognisant of the determinants and enablers of regional economic development. These provide the 'pre-conditions' for prosperous businesses and a healthy economy and they are the foundations upon which economic interaction and exchange takes place.

While there is no uniformly-agreed definition of what constitutes the determinants or enablers of economic development, broadly-speaking, they include:

1. Regional Comparative Advantage and Business Competitiveness;
2. Human Capital (Skills);
3. Strategic Infrastructure;
4. Access to Local, National and International Markets; and
5. Effective Regional Partnerships.

Each is explained in turn below.

Regional Comparative Advantage and Business Competitiveness

Comparative advantage is an area of relative strength or specialisation. Efforts to develop regional economies are most successful when they focus on building on such strengths.

Businesses can also use a region's comparative advantage to build a competitive advantage, which is developed through the combination of factors such as knowledge, resources, skills and the ability to innovate.

A region's comparative advantage can stem from various sources, such as its geographic location, availability of natural resources, the existence of industry clusters, access to infrastructure or the skill profile of the local population. These underlying attributes influence the types of economic activity that are likely to be successful. They also have implications for development initiatives, which are generally more effective where they build on an existing strength.

A critical input to the Roxby Downs Region's economy, and central to its competitiveness, is its natural resources. Much of the economic activity in regional Australia is directly linked to local natural resources. The Regional Australia Institute (2015) asserts that access to natural resources can create economic opportunities through offering inputs to production (such as access to water or good quality soil) and can be used to generate production outputs (such as minerals or extractives), or as a foundation for services such as tourism and recreation.

It follows then that natural resource management is critical to developing and maintaining a comparative economic advantage as it underpins the region's 'driver' industries of tourism and mining. Key inputs to these industries include conservation of biodiversity, management of regional landscapes, water quality, soil quality, water planning and management. These, in-turn, contribute to key outputs that include visitor experiences and satisfaction, management of mining impacts and sustainable water resources for communities.

Building on existing attributes does not mean the Roxby Downs Region cannot diversify its economy. Rather, the communities of the region can benefit if it can leverage its natural assets and strengthen current areas of specialisation, and diversify by developing new ways to capitalise on these assets, resources and knowledge.

Human Capital (Skills)

Human capital is the stock of knowledge, expertise and abilities of a region's population. It is one of the most important inputs to economic activity because it is crucial to supporting local businesses to be competitive and drive economic growth. Businesses need access to workers with appropriate skills. Access to human capital is influenced by workforce participation and the mobility of labour.

Developing a skilled and educated workforce assists with building the resilience of the local economy. Individuals with greater education and skills can pursue a wider range of employment opportunities and adapt to new processes and technologies which enhances productivity and improves living standards.

An appropriately skilled and educated workforce can help places such as the Roxby Downs Region take advantage of new opportunities, overcome challenges and make the region more attractive to investment.

Government agencies and organisations such as RDA Far North and employment service providers can play a role in supporting the development of local skills to meet industry needs. For example, they can liaise with local businesses (and prospective new investors in the region) to identify apparent labour shortages or skills gaps and they can engage with education and training providers to help fill those gaps.

Strategic Infrastructure

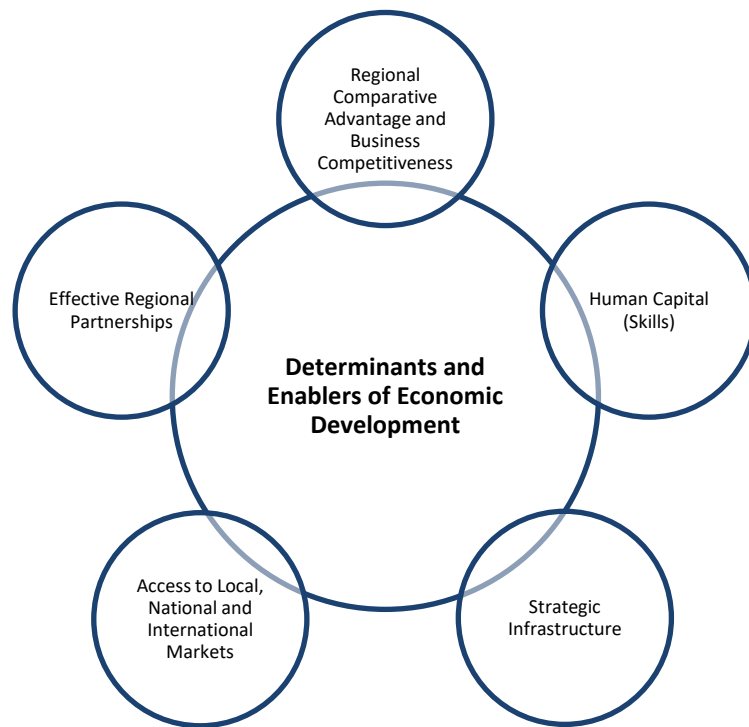
Efficient and effective infrastructure underpins economic activity and is fundamental to a prosperous regional economy. It includes 'physical' infrastructure (like roads, seaports and airports, information technology and telecommunications, power and water) and quality 'community' infrastructure (like recreation and leisure facilities, cultural services and facilities and community services and facilities).

Together these elements should offer good physical and functional links that support social, cultural and economic interaction and exchange in the community.

RDA Far North, Roxby Council, government agencies and service providers can help ensure these fundamentals for investment and economic development are addressed by identifying the region's infrastructure challenges and shortfalls, and liaising with private infrastructure and service providers on matters of regional significance and opportunities for development.

Identifying the Roxby Downs Region's infrastructure investment priorities is essential if economic development opportunities are to be strategically pursued and to ensure any critical gaps can be addressed.

Figure 1. Determinants and Enablers of Economic Development



Source: SC Lennon & Associates

Access to Local, National and International Markets

Access to international, national and local / regional markets includes access to trading partners, clients and labour. Improving the Roxby Downs Region's access to markets will broaden trade, allow both existing and potential new competitive industries to grow and increase the availability of goods and services to the communities of the region.

Access to markets is facilitated by physical and non-physical connections. Reducing transport costs can improve physical access to markets and enable businesses to move goods more quickly. Other 'soft' infrastructure, such as strong business relationships and networks, supported by good access to quality communications technology, is equally important.

Some businesses, by their nature, are focused on the local market. For example, demand for retail and personal services is driven by local consumption. Hence local retailers will typically serve specific local needs and focus on relatively small local markets. These businesses are important and should be encouraged. Other industries like tourism for example, are outward-oriented and have stronger export potential. Growth in these sectors is greatly aided by building connections to larger trade markets throughout the Far North Region, South Australia and beyond.

Greater access to markets provides local businesses with opportunities to grow by trading more goods and services. Producing on a larger scale can help local businesses to bring down their costs through economies of scale, making them more competitive. Importantly, greater access to markets opens the door to new investment and innovation, through the sharing of information, knowledge and technology.

Effective Regional Partnerships

Promoting partnerships and collaborative regional planning is the key to successful implementation of activities, projects and initiatives designed to meet priorities for economic development.

No one agency can be all things to all people and no one level of government can fully respond to the diverse needs and circumstances of the communities of the Roxby Downs Region. Hence, collaborative partnerships - between the Council, the OCA, RDA Far North and others - are essential for co-ordinating the activities and investments of different stakeholders.

The Roxby Downs Region Economic Growth and Investment Strategy and the activities which inform it play an important role in articulating a shared understanding of the region's social, environmental and economic development priorities and opportunities for investment.

As noted above, a critical input to the region's economy, and central to its competitiveness, is its natural resources. SA Arid Lands Natural Resource Management (SAAL NRM) is the organisation responsible for ensuring the sustainable use of the region's resources, including water, soils, plants and animals.

As articulated on the SAAL NRM website, the natural systems and human activities in the SAAL NRM Region make it fundamentally different from other NRM regions in South Australia, containing a greater percentage of intact ecosystems and natural biological diversity than any other region in the State.

Engaging SAAL NRM (and others) will therefore be critical to facilitating and promoting a holistic approach to sustainable economic development. Effectively promoting and facilitating economic development in the Roxby Downs Region will require all key stakeholders to work in partnership with each other, communities and the private sector, to focus on the challenges and opportunities for the region and its communities. To do this effectively requires a strategic, informed and targeted approach.

The recommended actions presented in this Strategy are themed, each theme reflecting the region's priorities as informed by the research, data analysis and targeted consultation with selected stakeholders. Importantly, the actions presented under each theme reflect the roles and capacities of RDA Far North, the OCA and Roxby Council by focussing on those determinants and enablers of regional economic development which each organisation can influence, to varying degree, either in its own right or in collaboration with others.

Economic Growth and Investment Strategy Themes

The Roxby Downs Region Economic Growth and Investment Strategy responds to RDA Far North's, the OCA's and Roxby Council's commitment to promoting and facilitating the region's economic development.

It is defined by a set of principles which guide the preparation and implementation of the actions contained in this strategy. The principles reflect a desire to encourage a holistic approach to economic development in the Roxby Downs Region. This holistic approach is one that embraces the notion of 'economic development' as the mutually-reinforcing and complementary relationship between improvements in economic activity, community wellbeing, cultural diversity, a sense of 'place' and the environment.

In essence, the Roxby Downs Region Economic Growth and Investment Strategy:

1. Prioritises initiatives and activities that support the growth and development of the Roxby Downs Region's **traditional industry activities in mining**, with an emphasis on new opportunities in value-added economic activities which target existing, new and emerging markets.
2. Promotes a **partnership approach to tourism development**, working in collaboration with other tiers of government and the industry to enhance regional branding, marketing, product development, visitor servicing and support infrastructure.
3. Prioritises activities that support **local industry diversification and the growth of 'knowledge-intensive' industries** in, for example, 'new generation' industries like alternative energy production and scientific, technical and professional services to mining.
4. Pro-actively **promotes the region to prospective investors**, using a strategic, informed and targeted approach.
5. Focuses on activities where there are likely to be **positive and measurable outcomes** for the Roxby Downs community and long-term strategic economic benefits.

Informed by the findings from the economic research and analysis, the Economic Growth and Investment Strategy provides the framework and directions for the region's economic development, with the focus being on 17 individual actions across three strategic activity areas that can be achieved over the next three years.

The Economic Growth and Investment Strategy will be implemented by RDA Far North in collaboration with Roxby Council and the OCA as the lead agents, working in partnership with other key stakeholders including industry bodies, non-government organisations and government agencies.

Figure 2. Economic Growth and Investment Strategy Themes

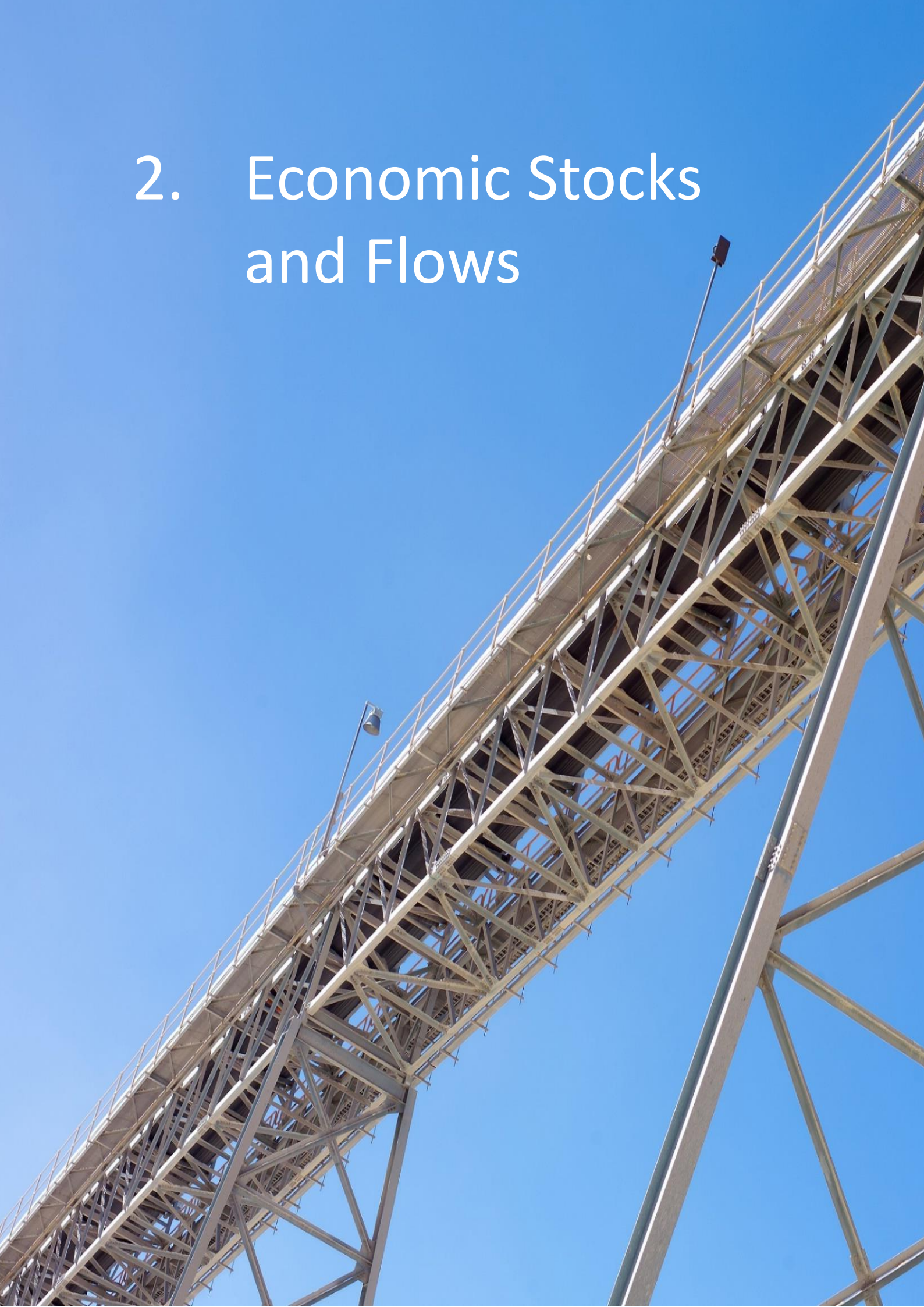


Effective planning and strategy implementation requires an understanding of the structure and dynamics of the local economy and its interrelationships with the wider Far North Region as well as the State, national and global economies.

By identifying priorities for growth, the Roxby Downs Region Economic Growth and Investment Strategy is designed to help facilitate investment in the region and encourage established businesses to invest further into developing the local economy.

To do this effectively requires an informed and targeted approach. Hence, understanding the region's economic stocks and flows is essential.

2. Economic Stocks and Flows



2. Economic Stocks and Flows

2.1 Overview of the Roxby Downs Regional Economy

The Gross Regional Product (GRP) of the Roxby Downs Region is estimated at \$495 million, which is 16% of the wider Far North Region's GRP and approximately 0.5% of South Australia's Gross State Product (GSP). GRP per worker in the Roxby Downs Region is approximately \$212,000 and GRP per capita is \$128,000. This compares to South Australia's GSP per capita of approximately \$62,100.

The region's relatively high GRP per capita reflects the strength of its mining industry and the capital-intensive nature of that sector. Mining has played a major role in the economic prosperity of South Australia, and much of that activity has been centred in the Far North with the returns from minerals extraction benefiting businesses and residents throughout the State and beyond.

Employment in the Roxby Downs Region has been concentrated in mining, which accounts for 53 per cent of local employment, and related construction activity (8 per cent of employment). The local education and training sector is another notable provider of jobs in the region, accounting for 6 per cent of local jobs. The resources sector drives the local economy and the activities of Roxby's other industries is underpinned by the success or otherwise of mining.

Roxby Downs and the wider Outback Region has had to deal with a significant period of transition as a result of the mining sector slow-down and industry closures. The continued transition of the sector requires consideration when planning for ways to influence future economic development. Challenges impacting upon the Far North Region include decreasing demand for fossil fuels, the fall of the Australian dollar and technological change. Whilst some of these impacts have the potential to be negative, there are also opportunities upon which Roxby Downs can capitalise.

Tourism is another industry with a solid base in the Roxby area and potential for growth in the region as national and international market trends support opportunities to capitalise on demand for outback experiences. The significance of mining and related industries, and tourism as drivers of the local economy and as potential pillars of future economic prosperity, is illustrated in the economic stocks and flows analysis.

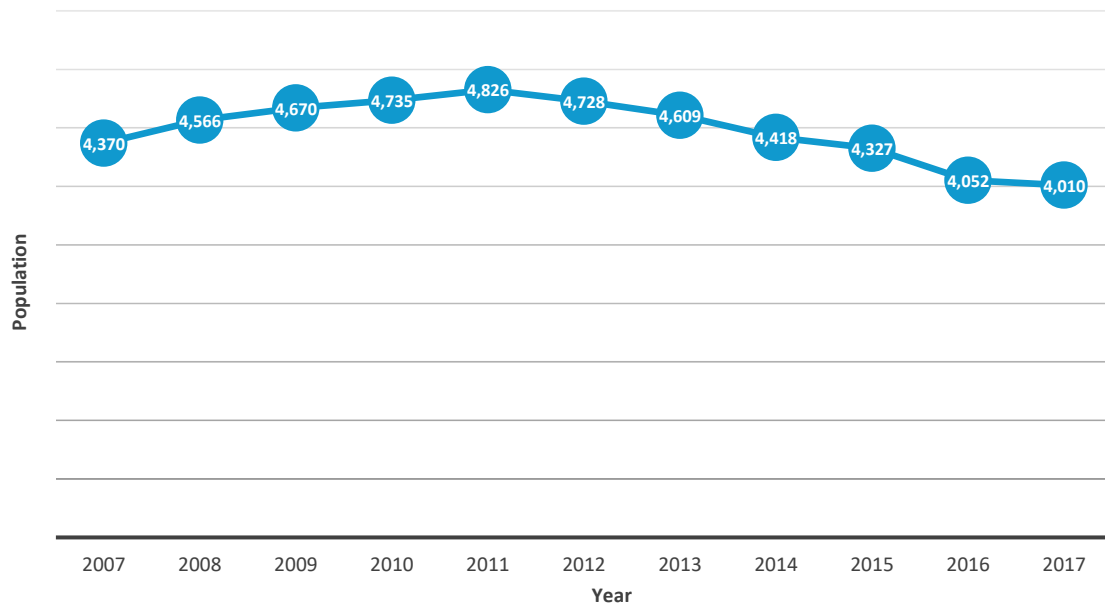
2.2 The Roxby Downs Region's Socio-Economic Structure and Dynamics

Population

The Roxby Downs Region has an estimated resident population of approximately 4,000. The Roxby Downs Region estimates are based on local government area and statistical area level 1 (SA1) data sourced from the ABS.

As illustrated below, the resident population of the region increased steadily between 2007 and 2011, at an average annual rate of 2.5%, from 4,370 to 4,826. From 2011, Roxby Downs' population declined steadily, at an average annual rate of 3%, from 4,826 to 4,010.

Figure 3. Population Trend, Roxby Downs, 2007 to 2017

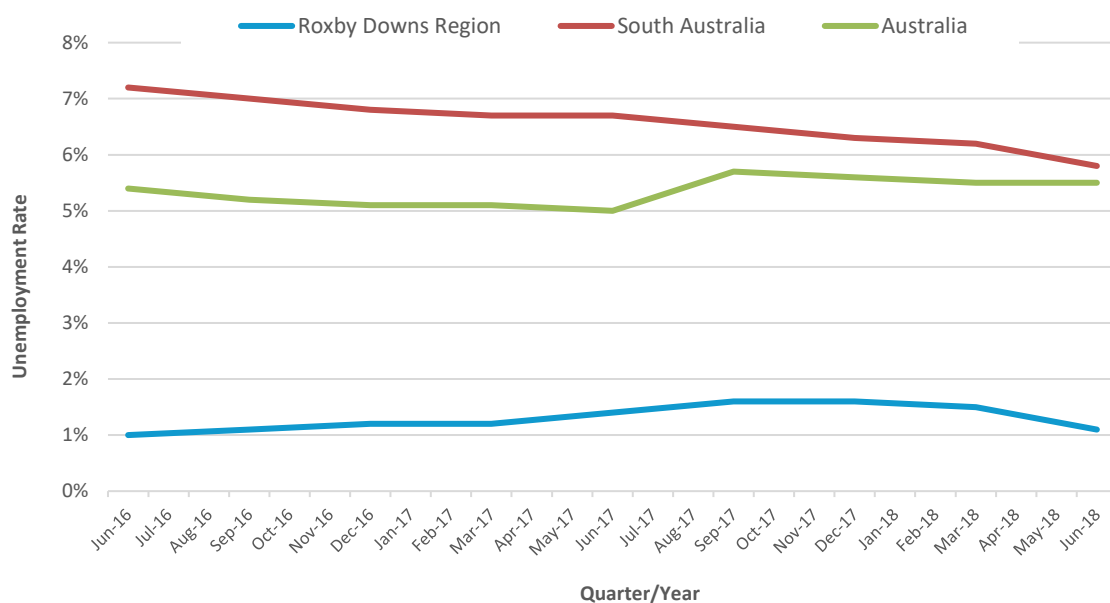


Source: <https://www.economyprofile.com.au/rdafarnorth/trends/population#table>, viewed 7th December 2018

Unemployment Trends

According to data sourced from the Department of Jobs and Small Business, between June 2016 and June 2018, the unemployment rate in Roxby Downs remained fairly steady, at around 1%. Roxby Downs' unemployment rate is substantially lower than the State and national averages, thanks largely to the fortunes of the local mining industry which has maintained a steady level of employment over the period despite the recent industry downturn.

Figure 4. Unemployment Rates, Roxby Downs Region, South Australia and Australia, June 2016 to June 2018



Source: Department of Jobs and Small Business, June 2017 and June 2018

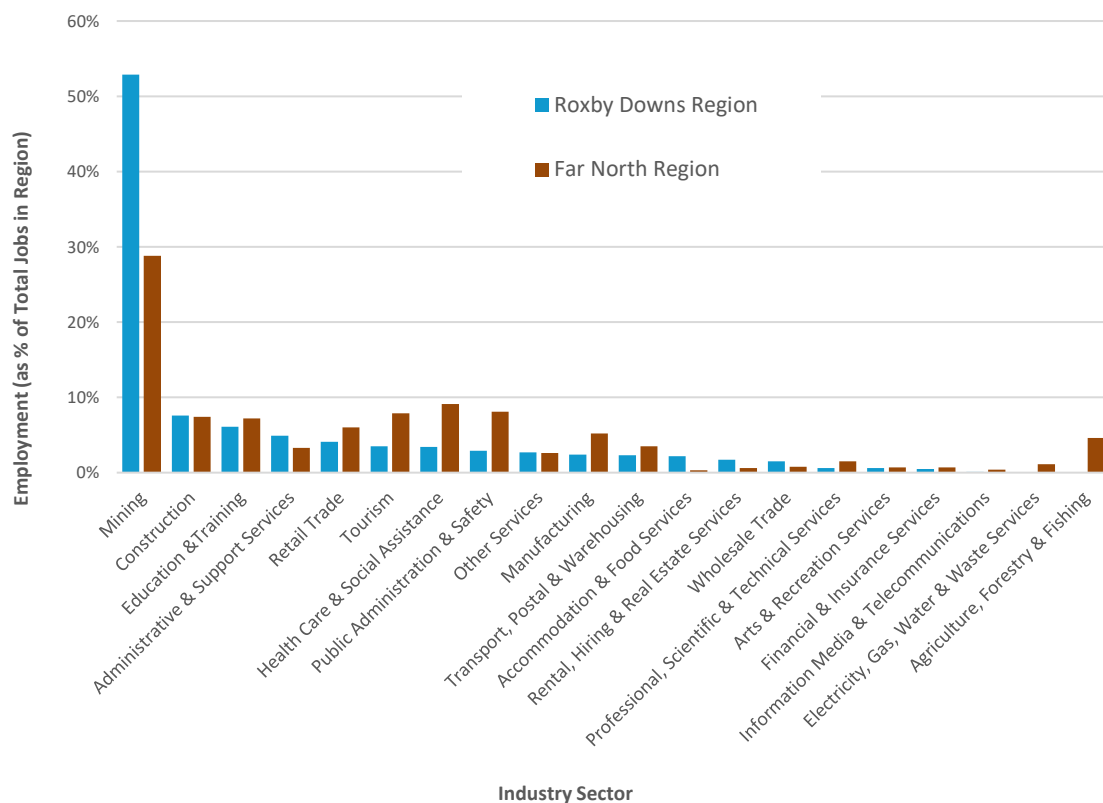
2.3 Economic Stocks and Flows

Employment by Industry

Figure 5 illustrates the Roxby Downs Region's profile of employment by industry (that is, the number of employees whose place of work is located within the Roxby Downs Region).¹ The data is the latest release (June 2018) from REMPLAN, which uses 2016 ABS Census Journey to Work data as a base and adjusts employment numbers to current (2017) estimates using the latest (2014/15) national input-output tables and June 2017 Gross State Product data.

As illustrated below, mining provides for the majority of jobs located in the Roxby Downs Region, accounting for over half (53%) of the total, compared to 29% of jobs located in the Far North Region. As the majority of South Australia's mining activity takes place in the Far North, this highlights the significance of mining to economic activity in the Roxby Downs Region.

Figure 5. Employment by Industry, Roxby Downs Region and Far North Region, 2017



Source: REMPLAN, June 2018

¹ The employment data presented in this report represents the number of people employed by businesses / organisations in each of the industry sectors in the Roxby Downs Region. The employment data is place of work data and represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.

As well as being a large employer in the Roxby Downs Region, the mining industry also displays a high level of employment self-containment, with almost two-thirds (61%) of the mining workforce also residing in Roxby Downs. This is significant when it is considered that in surrounding areas such as the Outback, only a small proportion of mining workers reside in the area where they work with a high number of drive-in drive-out and fly-in fly-out nature mining workers accounting for the workforce in those areas. The fact that Roxby has a high number of residents living and working locally bodes well for the sustainability of the local community.

Other major contributors to employment in the Roxby Downs Region include Construction (8% of all jobs in the Roxby Downs Region), Education and Training (6%), Administrative and Support Services (5%), Retail Trade (4%) and Tourism (4%).

To better capture the true size and value of tourism, REMPLAN quantifies the tourism sector as a stand-alone industry. The tourism industry is an amalgam of activities across various sectors including Retail Trade, Accommodation and Food Services, Arts and Recreational Services and Transport, Postal and Warehousing. REMPLAN's Tourism Analysis Module estimates the total number of jobs and the value of tourism for the local economy and incorporates a 'Tourism Sector' into the output and employment data.

The total value of the Roxby Downs Region's tourism output is estimated at \$11.3 million, which is 1% of the value of the region's total output. As illustrated in Figure 5, the region's tourism industry accounts for approximately 4% of jobs located in the Roxby Downs Region (and 8% of jobs across the wider Far North Region). Employment numbers in this sector are higher than in some of Roxby's other service industries including Health Care and Social Assistance and Professional Services. The REMPLAN modelling estimates that for each dollar spent by a tourist in the Roxby Downs Region, \$0.64 is spent on accommodation and food services, \$0.10 on retail and \$0.07 on ownership of dwellings.

Industry Output and Value-Added

The REMPLAN economic modelling which informs this Economic Growth and Investment Strategy uses a combination of inputs including data from the ABS 2016 Census of Population and Housing, ABS 2016 Census Journey to Work (JTW) employment data, ABS 2014/15 National Input Output Tables and ABS June 2017 Gross State Product.

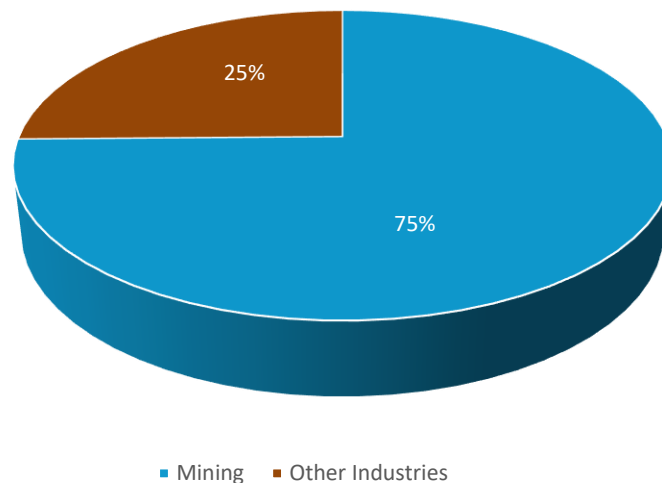
The economic modelling estimates the Roxby Downs Region's total value of economic output, that is, gross revenue generated by businesses and organisations in the region, at approximately \$1.3 billion. The region's mining sector accounts for three-quarters (75%) of economic output. Although much smaller in scale than Mining, other industries which make notable contributions to Roxby Downs' gross revenue are Construction (7% of the total value of local output) and Manufacturing (3%).

The economic model also calculates industry value-added, which is the value that is added by industry sectors in the Roxby Downs Region to intermediate inputs. Value-added is considered to be a better reflection of the strength or otherwise of a local or regional economy because it refers to only the value of output generated in the region less the cost of inputs such as the purchase of machinery and equipment and other non-labour inputs used in the production process.

The total value-added estimate for the Roxby Downs Region is \$465 million, which is 16% of the total for the whole Far North Region. The majority of the Roxby Down's Region's industry value-added is attributable to mining, which accounts for 68 per cent of the region's total value-added. Other

notable contributors include Construction (7% of total value-added), Ownership of Dwellings (6%), Education and Training (3%) and Administrative and Support Services (2%).

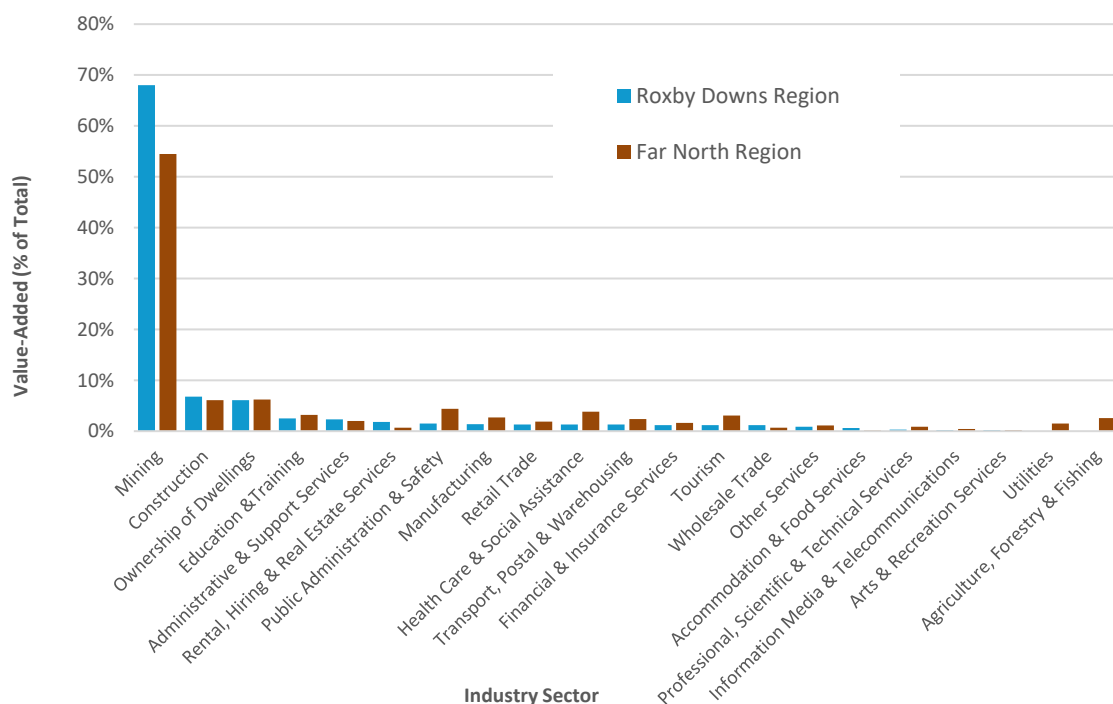
Figure 6. Roxby Downs Mining Industry Output as a Proportion of Total, 2017



Source: REMPLAN, June 2018

As a proportion of value-added, manufacturing - which consists largely of metal product manufacturing directly associated with mining - is more pronounced in the Far North Region (2.7% of the total) as a share of total value-added compared to that for the Roxby Downs Region (1.4%). This suggests a large share of processing activity takes place outside the local area, in Port Augusta.

Figure 7. Value-Added by Industry, Roxby Downs and Far North Region, 2017



Source: REMPLAN, June 2018

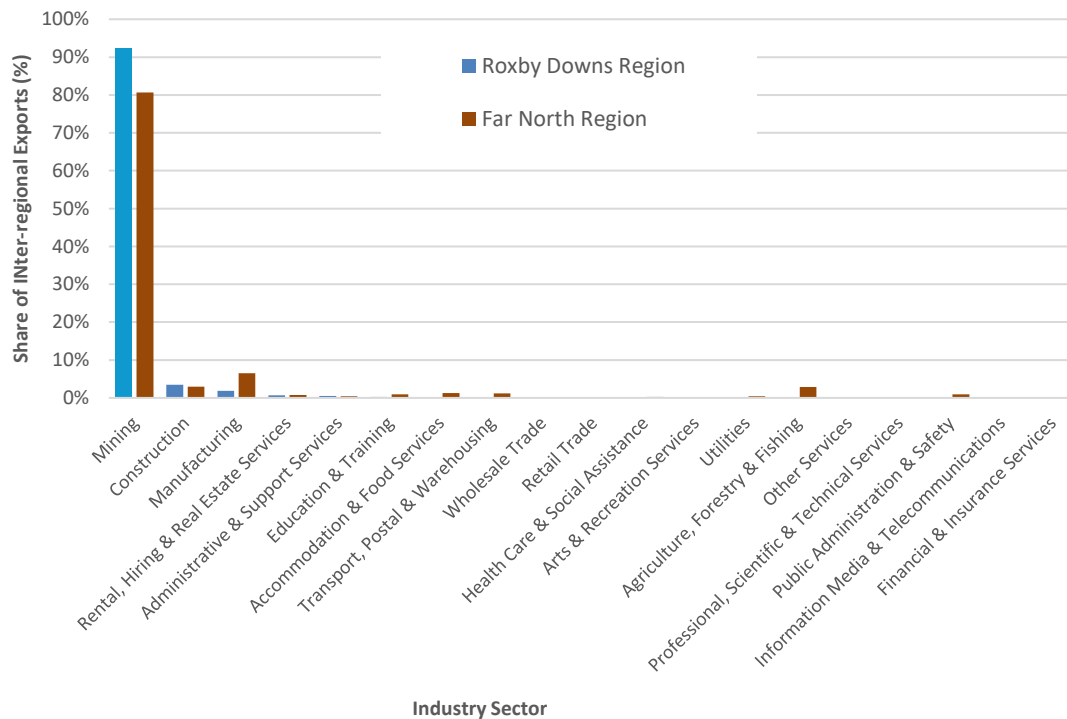
Inter-regional Exports

Economic modelling shows the value of goods and services produced by industry sectors in the Roxby Downs Region that are sold to consumers, businesses, and governments based outside the region's boundaries. This includes 'exports' to locations in other parts of South Australia (including the Far North Region), Australia and overseas.

The total estimated value of regional exports for the Roxby Downs Region is \$946 million, which is 74% of the region's economic output.

Mining is by far the largest contributor to regional exports (92% of total export value compared to 81% for the wider Far North Region), followed by Construction (4%) and Manufacturing (2%).

Figure 8. Inter-regional Exports by Industry, Roxby Downs Region and Far North Region, 2017



Source: REMPLAN, June 2018

Import Replacement Opportunities

Figure 9 shows the value of expenditure by industries in the Roxby Downs Region by geographic location of purchase. In other words, for selected industries, it shows the amount businesses located in the region collectively spend on goods and services which are purchased from within the region, imported from the elsewhere in Australia and imported from overseas, respectively.

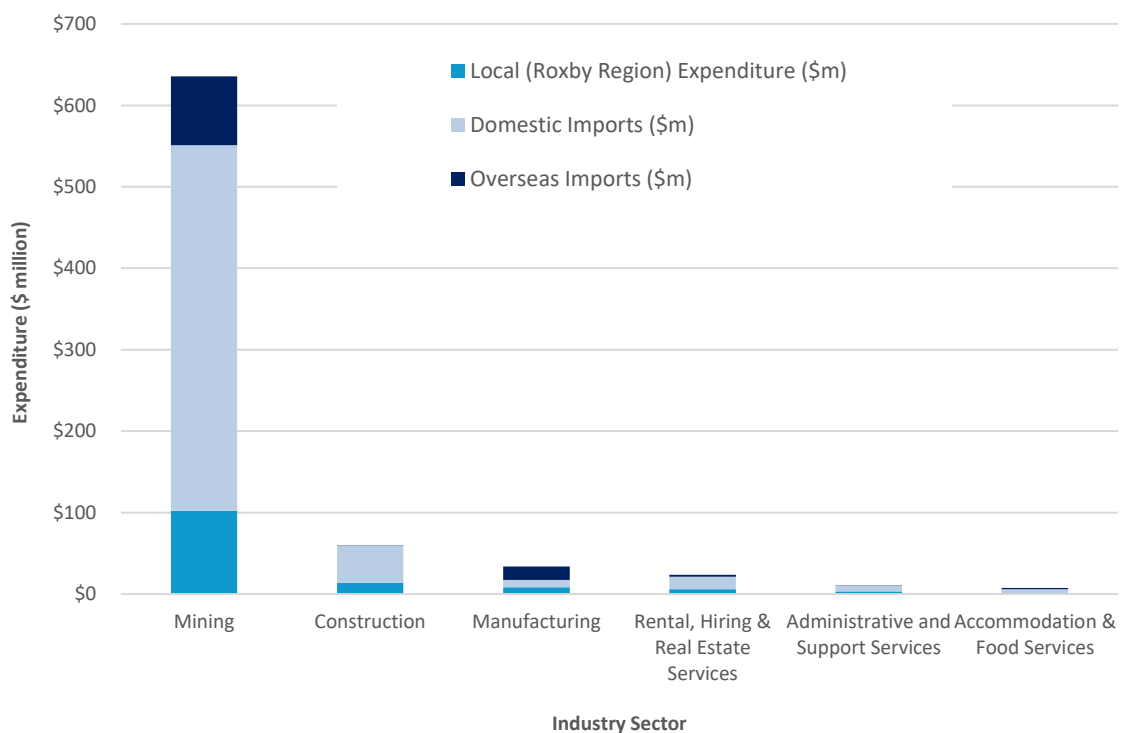
Of the approximately \$635 million spent by the Roxby Downs Region's mining industry on goods and services, 16% is spent locally, the remainder being spent elsewhere in Australia (71%) or overseas (13%).

The construction industry also sources the majority of its inputs from outside the region, with 77% of purchases made elsewhere in Australia. The remainder is spent in the Roxby Downs Region itself with only a negligible amount (less than one per cent) spent overseas.

The manufacturing sector in Roxby Downs purchases 25% of inputs locally, 27% from elsewhere in Australia and 48% from overseas suppliers.

There may be scope to replace expenditure on imports in some industry sectors with local goods and services, particularly in mining as well as in manufacturing and construction. This will depend on which imports are 'contestable', that is, those items that can be produced and supplied competitively using local capabilities.

Figure 9. Selected Industry Expenditure Breakdown by Location, Roxby Downs Region, 2017



Source: REMPLAN, June 2018 with interpretations by SC Lennon & Associates

The Roxby Downs Region's 'Driver' Industries

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

Mining is the Roxby Downs Region's principal economic driver accounting for by far the largest share of the industry output, jobs and exports out of the region. The mining industry's backward linkages through other sectors in the local economy are relatively strong when compared to the wider Far North Region, though not as strong as other sectors of the local economy. This suggests more could be done to facilitate import replacement in the local resources sector.

Figure 10. Roxby Downs Region's 'Driver' Industries

	Backward Linkages	Exports	Employment	Value Added
Mining		✓	✓	✓
Construction	✓	✓	✓	✓
Admin & Support Services	✓	✓	✓	✓
Manufacturing	✓	✓		
Tourism		✓	✓	

Source: REMPLAN, June 2018 with interpretations by SC Lennon & Associates

The Tourism sector is a key industry in the Roxby Downs Region with potential for growth given its contribution to employment and regional exports, coupled with linkages throughout the local economy. Tourism employs local residents across a diversity of sectors including accommodation and food services and retail.

The Construction, Administrative and Support Services and Manufacturing sectors also display all of the attributes of 'driver' industries in the local economy and for this reason, further attention should be paid to these sectors in efforts to diversify and grow the Roxby Downs Region's economy.

3. Economic Development Priorities



3. The Roxby Downs Region's Economic Development Priorities

3.1 Support Development of Roxby Downs as a Sustainable Community

Challenges and Opportunities for Growth

Roxby Downs is at a pivotal point in its determination. Established to service the Olympic Dam Mine, Roxby Downs is known first and foremost as a mining town. The interdependence of the mine and community is reflected in Council's *raison d'être* as outlined in the Roxby Council Strategic Management Plan (2012-2017):

"To turn a World Class Mining Deposit into a World Class Mining Operation requires people with highly specialist skills to choose BHP Billiton and Roxby Downs as their preferred destination over many other world-wide alternatives".

This statement forms the cornerstone of Council's strategic direction and *"shapes the essence of what we, on behalf of the community, are striving to achieve."* Furthermore, *"the standard of the town's infrastructure as well as the community functions and services provided by the Council are critical for BHP Billiton to achieve its goal, consistent with the current operation and future expansion of the mine."*

Recent planning for Roxby Downs has been premised on a major expansion of the mine that was only deferred in 2012. The planned expansion was to position Olympic Dam as the world's largest open cut mine with the population of Roxby Downs estimated to double over a 10 to 15-year period, after which time the Council would be normalised.

While the mine life is forecast at between 70 and 100 years and there is relative certainty that there will be an expansion within the next few years, the size of the expansion and therefore, the town's growth potential remain uncertain. Recent targeted consultation to help inform the Roxby Downs Economic Growth and Investment Strategy suggests a nominal production increase from 200,000 tonnes per annum (tpa) of copper to 250,000 tpa, with the possibility of a further increase to 500,000 tpa. This in turn could require in the order of 200 to 300 additional workers in the next few years.

With the revised mine production outlook, the Roxby Council Strategic Management Plan notes several issues from Council's perspective:

- Significant growth would have assisted in the financial sustainability of the Council;
- Therefore, BHP Billiton and the State Government still have significant potential funding responsibilities;
- On the other hand, Council and the community have more time to adapt to the future environment and focus positively on developing in a sustainable manner; and
- While the need to address complex resource issues has been deferred somewhat, the need to deliver capital works which have been deferred pending an expansion will likely increase.

Land use planning and design in Roxby Downs is primarily governed by the Roxby Downs (Municipality) Development Plan (consolidated – 18 October 2012) and the Roxby Downs Draft Master Plan (2006). The Draft Master Plan was developed as part of the Olympic Dam Expansion Environmental Impact Statement (EIS) and is premised on the large expansion that was planned at that time. It was last revised in 2009.

Within this context it is timely for Roxby Council, BHP Billiton, the community, Regional Development Australia Far North (RDAFN) and the State Government to revisit the future of Roxby Downs to ensure that the vision, and

various policies and strategies that guide the on-the-ground implementation of this vision, remain relevant and timely to the development of a sustainable community in Roxby Downs and the surrounding region.

Identity and Role

Roxby Down's primary role as a mining town is unquestionable. The mutualistic nature of the mine-community relationship is driven by BHP Billiton's desire to be an employer in a location of choice. In turn, BHP Billiton can attract and retain the best possible candidates to its operations, while growth in its residential workforce provides the community with an opportunity to grow and diversify the number of locally supported business and services and to improve the standard of the town's infrastructure.

In February 2013 BHP Billiton separately developed its own vision which is to *"support Roxby Downs to become Australia's mining town of choice"* (Roxby Council, 2015), in part a reflection of the high turnover of around 20% per annum. Recruitment and retention, therefore, is a critical consideration, and a functional, liveable community is paramount to supporting this.

It is arguable that defining a community's identity too narrowly can limit its outlook and opportunities. For example, there is a difference (albeit subtle) between a community perceiving itself as a mining town and positioning itself as a community that supports a mining operation.

Although Roxby Downs may have been built to support the Olympic Dam Mine, its role is recognised as being more than this by many people from outside of and within the community. The size and nature of its development has meant the town has become an important regional centre over time. It holds key regional services and infrastructure, particularly in health, education and training, as well as in sporting and cultural facilities.

Roxby Downs is a key service centre for retail and service industries, mining support services and tourism. It provides potable water to the town of Andamooka. It has good transport connectivity, being located on the National Freight Route and near the Adelaide to Darwin rail link and with direct flight services to and from Adelaide.

Similarly, the broader region has much to offer Roxby Downs in its assertions to achieve growth and sustainability. Andamooka offers an alternative residential opportunity for mine workers, given its proximity, reputable relaxed lifestyle and relative affordability. Attracting and retaining residential mine workers also requires being able to offer a broader lifestyle and experience than that to be found within the bounds of Roxby Downs, particularly for families.

The broader Roxby Downs Region, and beyond, offers opportunities for residents to be visitors within their own region and to pursue tourist and recreational opportunities provided by the key townships of Andamooka, Woomera and Pimba and the touring routes that they link to. Opportunities for exploring the region's history, four-wheel driving, camping, fishing, bushwalking, and so on, can all form part of the broader offer to potential mine workers and their families.

Although the Roxby Council Strategic Management Plan recognises that Roxby Downs is a regional centre in terms of specific facilities and services offerings (e.g. education and training, the cultural centre) it is not explicit in couching the future of Roxby Downs within a regional context.

There is a hint of broader regional development potential within the SWOT analysis undertaken for the plan's development, where it is recognised that there is an opportunity to expand tourism both within the town and as a gateway to the Far North Region. Similarly, the Draft Development Plan and Master Plan recommend providing for the development of two large regional parks that could be used for bushwalking, etc.

There is no suggestion that the Roxby Council should be anything other than the statutory municipal council it is mandated to be under the *Local Government Act 1999* and the *Roxby Downs (Indenture Ratification) Act 1982* and

to fulfil its core obligations of infrastructure and services delivery, fiscal responsibility and asset management, among other functions. At the same time, it does not exist in isolation from the broader region and beyond. In times of change and uncertainty, it is not necessarily helpful in the longer run to define the community's role too narrowly, when thinking carefully about real purpose can open up a range of possibilities.

For example, opportunities may arise from shifting focus from being a mining town to being part of a prosperous region. To achieve such a shift in thinking / positioning is not Council's role alone, and requires a partnership approach with BHP Billiton, the Outback Communities Authority, RDA Far North, the State Government and, of course, the local and regional communities.

Updated and Relevant Planning to Support Economic Development

The key land use and strategic plans governing the development of Roxby Downs are the Roxby Downs (Municipality) Development Plan (consolidated – 18 October 2012), the Roxby Downs Draft Master Plan (revised in 2009) and the Roxby Council Strategic Management Plan (minor review in 2015). It is timely that these planning documents be reviewed and updated as part of the process of considering the future identify and role of Roxby Downs as outlined in the previous section of this report.

The Planning Institute of Australia (PIA) has a policy position on rural and regional development (<https://www.planning.org.au/policy/rural-and-regional-development-1210>) that provides a useful framework for considering Roxby Downs' broader regional position and potential. PIA highlights the lack of a clear spatial framework to guide planning policies and actions and to provide certainty to both public and private investment across regional Australia. It argues that competitiveness on a global scale demands a stronger integration of all regions into the global economy.

Resources and policy efforts should be guided by an overarching spatial strategy for each State and Territory. While such a strategy framework has a spatial orientation, it can nevertheless be integrated with the strategic directions embedded in broader social and economic plans, as well as existing regional structure planning.

In fact, apart from their role in providing information and support for new and existing business and preparing information and material to help promote and attract business investment, a lot of what Councils typically do to facilitate sustainable economic development outcomes is place-based with a focus on the physical enablers of growth (i.e. infrastructure) and the land use planning frameworks and regulations which guide business development. Hence, urban planning and place-making are both fundamental components of a Council's role in economic development.

There are ten principles and considerations supporting PIA's policy. There is much about Roxby Downs that already addresses many of these principles. This includes, for example, its position as a centralised location for key educational, health, economic and cultural services and facilities and also its broader cultural and community programs that focus on equity and social justice and its ongoing initiatives to become an environmentally sustainable town. Other principles / considerations that may assist in developing a framework for reviewing the key spatial and strategic plans for Roxby Downs include:

- Considering Roxby Downs' role in the context of a network of regional centres (e.g. Port Augusta and Coober Pedy) and linked smaller towns and rural areas (e.g. Pimba, Woomera and Andamooka);
- Linking the spatial framework to service delivery frameworks, including health, police, education and emergency services, to assist in delivering integrated and effective outcomes for the broader region;
- Linking smaller towns and rural areas to Roxby Downs (and other regional centres) through localised transport services, improved road connections and information and communication technologies (the provision of basic infrastructure, transport connections and communications technologies are integral to the economic development of regional and rural areas);

- Roxby Downs, other regional centres and smaller towns in the spatial network should pursue physical and non-physical strategies to develop distinctive and attractive built environments and opportunities that offer a high quality of life in coherent, integrated communities (a high level of amenity and liveability is crucial not only for attracting tourists but also the human capital necessary to support a productive, sustainable and flexible regional economy);
- Planning should incorporate strategies for managing decline, particularly in relation to the mining life cycle; and
- Taking a partnership approach to planning for the future of Roxby Downs and the broader region.

Taking such an approach to the future development of the Roxby Downs Region would also respond directly to the South Australian Government's Far North Region Plan (2010). Under Principle 13 of this plan, Roxby Downs, Coober Pedy, Leigh Creek and Port Augusta are all noted for dominating the Far North Region in terms of population and commercial activities. It states that, together with Port Pirie, Broken Hill and Alice Springs, these towns will continue to be the region's major service centres.

Under this principle, there is a commitment to reinforce the primary commercial role of Port Augusta; the secondary commercial role of Leigh Creek, Roxby Downs and Coober Pedy; and the local commercial role of Marla and Andamooka. Relatedly, under Principle 16, the plan commits to reinforcing the important commercial and service role of Leigh Creek, Coober Pedy and Roxby Downs as the focus of retail, commercial, administrative, education, health, justice and recreational developments for their sub-regions.

Actions

Recommended actions are as follows:

- 1.1 Roxby Council, BHP Billiton and the Roxby Downs community to work together to facilitate an updated vision for Roxby Downs that is aspirational beyond its current ties to the Olympic Dam mine and the spatial bounds of the Roxby Downs township.
- 1.2 Review and update Roxby Council's key land use and strategic plans to reflect the updated vision as part of a broader regional spatial framework and networked hierarchy of centres and towns.
- 1.3 Work with BHP Billiton and local businesses on opportunities for local supply of goods and services associated with the current planned expansion and ongoing operation of the Olympic Dam mine.
- 1.4 Continue to deliver business development services to build the capacity and sustainability of individual businesses in the Roxby Downs Region.
- 1.5 Investigate place-based community development opportunities to promote the region's smaller towns as locations of choice for working and living beyond mining, with a focus on Andamooka as a pilot project.

Performance Measures

- Roxby Downs vision updated within 12 months.
- Relevant land use and strategic planning documents updated to reflect the revised vision within 18 months.
- An increase in the permanent population of the Roxby Downs township over the next three years.

3.2 Support Growth and Development of Mining

Challenges and Opportunities for Growth

Mining is a driver of the South Australian economy, and most of the State's major mining and gas operations and its priority mineral exploration areas are located in the Far North Region. The Far North's major mining operations includes Olympic Dam, a large multi-mineral ore body containing uranium oxide, copper, gold and silver around which the Roxby Downs township has been developed.

As illustrated in Section 2 of this report, mining provides for the majority of jobs located in the Roxby Downs Region, over half (53%) of the total, and it accounts for 68 per cent of the region's total industry value-added.

The Far North Region's mining operations have benefitted from unprecedented resource sector growth experienced in Australia over the past decade, with the rapid industrialisation of China and India driving demand for natural resources and industrial commodities.

As global demand surged, many Australian mining companies, including those operating in the Far North Region of South Australia, committed to new projects, resulting in a swell of capital investment and mining volumes. BHP Billiton's Olympic Dam acquisition and planned expansion was one such project. This flow of investment worked its way down the supply chain, through the exploration and mining services industries, and increased mining output. However, increased supply contributed to large price declines for many mining industry goods over the five years through 2015-16.

More recently, the global resources sector slowdown has resulted in a reduction and cessation of mining activity. In keeping with the moderation of mining sector growth experienced in the last few years, mine expansions in the Far North have slowed, production has been scaled back and job numbers have fallen substantially.

Olympic Dam is characteristic of this dynamic. Purchased by BHP Billiton in 2005 for its potential as a world class resource, the company planned for a significant expansion of the existing mining and processing operation through a major capital investment centred on the creation of a new open pit mine that would have increased ore production six-fold and require expanded minerals processing facilities.

The expansion would have also required the development of major support infrastructure including a coastal desalination plant, a new power line and possibly a gas-fired power station, a rail line, an airport, port facilities, a village to accommodate workers, and more housing, retail, commercial and community facilities in the Roxby Downs Region.

Direct employment was projected to more than double, in addition to significant opportunities for third-party businesses and considerable increases in government and export revenues (BHP Billiton, 2009).

According to IBISWorld (2016), mining in Australia remains in a decline phase of its economic lifecycle, following commodity pricing falls that were only partly offset by increased investment to expand production. Despite major year-to-year fluctuations, mining's share of total economic output is projected to remain relatively stable in the decade through 2020-21.

Over these years, the mining industry's value-added (the contribution to national GDP) is expected to decrease at a compound annual rate of 0.1%. This is in contrast to the projected compound annual growth rate of Australia's national GDP of 2.6% over the same period. This indicates that the contribution of mining to the overall economy will continue to fall.

Despite the industry's general decline and the specific deferral of the Olympic Dam major expansion, mining remains the anchor of the Roxby Downs Region economy and the sector will continue to be the largest employer and economic contributor into the future. In discussing the role of mining as a key industry for Australia's future prosperity, Deloitte (2014) conclude that the sheer size of the mining sector and its continuing potential will ensure it remains central to Australia's economy for many years to come.

Acknowledging the challenges associated with the industry's recent downward trends, IBISWorld (2016) reports that over the next five years, capital expenditure in the mining sector is actually expected to increase. Most Australian mining companies are also expected to focus on cost control and efficiency improvements over the course of the next five years, allowing them to remain globally competitive and well-placed to prosper in the market over the medium term. With a renewed focus on costs and productivity, mining sector profitability is expected to increase over the next five years, driven by strong growth in key export markets (IBISWorld, 2016).

BHP Billiton has recently announced plans to increase production at Olympic Dam, much more quickly and cheaply than previously expected, and in time to fully capitalise on a predicted shortfall in global copper supply (Stevens and Saunders, 2016). Changes to the mine plan triggered by the decision in 2012 not to proceed with the (\$US20 billion) open cut mine make it possible for Olympic Dam to target high-grade zones previously isolated from the existing mine plan. While current plans are well short of the scope of previous expansion plans, future operations could still lead to moderate jobs growth in the next few years.

BHP Billiton has expressed concerns about the security and reliability of the mine's electricity supply. South Australia has recently been in the media and political spotlight for its high and rising electricity prices and concerns around a growing risk of supply disruptions throughout the State. About 40 per cent of the State's power generation is now created by wind and solar. South Australia's only connection to the national grid is now through a transmission interconnection with Victoria and it has few options for local base-load power back-up.

Politicians and the media have highlighted the Olympic Dam mine as an example of the economic risks of rising energy prices and supply disruptions in South Australia, and BHP Billiton has stated it is concerned about the instability and a future in which South Australian electricity costs look set to remain uncompetitive (FitzGerald, 2016).

The Olympic Dam mine is a case in point for the boom and bust dynamics of resources projects. It highlights not only the consequences of the Roxby Downs Region's high degree of economic exposure to the resources sector, but also the relative lack of control that communities, local governments and regional organisations have over their development.

By and large, resource projects will develop as their financial viability permits, and associated major infrastructure developments will result from private sector investment and / or through partnership agreements with governments.

On the one hand, such dynamics emphasise the need for a more diversified economy in the Roxby Downs Region and across the Far North Region generally. They also highlight the importance of the Roxby Downs community and its key stakeholders taking a broader perspective on the future role and identity of the township in order to develop a sustainable community, as discussed in Section 3.1.

(Source: BHP Billiton (2009) *Olympic Dam Expansion Draft Environmental Impact Statement 2009 Executive Summary*).

Actions

Recommended actions are as follows:

- 2.1 Work with BHP Billiton on current expansion plans to gain an understanding of workforce requirements; map skills requirements against existing training available in the Roxby Downs Region and identify opportunities for additional training programs to support local employment opportunities.
- 2.2 Work with BHP Billiton and the Roxby Downs Area School and Roxby Downs TAFE to explore opportunities for school-based apprenticeships and traineeships associated with the current planned expansion of the Olympic Dam mine.
- 2.3 Work with BHP Billiton and local businesses on opportunities for local supply of goods and services associated with the current planned expansion and ongoing operation of the Olympic Dam mine.
- 2.4 Continue to deliver business development services to build the capacity and sustainability of individual businesses in the Roxby Downs Region.

Performance Measures

- A Local Content Plan (procurement, employment and training) developed to support the updated Olympic Dam mine plan within six months.
- Steady growth in the mining sector's contribution to the Roxby Downs Region's gross regional product (GRP) over the next three years.
- An increase in expenditure by BHP Billiton in the Roxby Downs Region over the next three years.
- An increase in the value of local goods and services provided to the Olympic Dam mine over the next three years.
- An increase in the number of mining workers and families living in and working in the Roxby Downs Region over the next three years.
- An increase in the permanent population of the Roxby Downs township over the next three years.
- An increase in the offering and uptake of school-based apprenticeships and traineeships associated with the Olympic Dam mine over the next three years.

3.3 Support the Development of the Roxby Downs Region's Visitor Economy

Challenges and Opportunities for Growth

Tourism is a key contributor to the Roxby Downs Region economy with linkages back into other local industry sectors and a notable contribution to employment and regional exports. For each dollar spent by a tourist in Roxby Downs Region, \$0.64 is spent on accommodation and food services, \$0.10 on retail and \$0.07 on ownership of dwellings. The total value of the Roxby Downs Region's tourism output is estimated at \$11.4 million, which is 1% of the value of the region's total output.

Tourism accounts for 4 per cent of jobs located in the Roxby Downs Region (and 8 per cent of jobs across the wider Far North Region). Employment numbers in this sector are higher than in some of Roxby's other service industries including health and professional services. Tourism employs local residents across a diversity of sectors including accommodation and food services, arts and recreation services, retail and transport.

According to IBISWorld (2016), Australia's tourism industry has exhibited strong revenue growth over the past five years, due primarily to a healthy increase in international visitor arrivals as the Australian dollar has depreciated. According to Tourism Research Australia, China has become Australia's second-largest source of international visitors. As a result, industry revenue is expected to increase at an annualised 3.7% over the five years through 2016-17, to total \$123.7 billion, with 4% growth anticipated in the current year.

According to the South Australian Tourism Commission (SATC), South Australia's visitor economy is at an all-time high, with a value of \$5.9 billion, an increase of 11.4% or \$608 million since June 2015. It states that the latest data released by Tourism Research Australia shows domestic tourism expenditure in South Australia has grown by \$439 million to reach \$5.0 billion, while international expenditure has increased by \$170 million to reach \$944 million since June 2015.

South Australia's international and domestic visits have also increased. In June 2016, South Australia received 422,000 international visits (up 9.5%) and 6.1 million domestic visits (up 7.7%). Despite rising demand from international visitors, South Australia's tourism industry heavily relies on domestic visitors, with Australian households and businesses accounting for more than 70% of industry revenue.

Despite rising demand from international visitors, the tourism industry relies on domestic visitors, with Australian households and businesses accounting for more than 70% of the industry's revenue. Over the five years through 2021-22, Australia's tourism industry revenue is expected to increase by an annualised 2.6% to total \$141 billion. Over the next five years, the industry is expected to further enhance its online capabilities as consumers increasingly use the internet to research and organise trips.

Drive Tourism Opportunities

The tourism industry's outlook is positive, and outback tourism is growing rapidly with the natural landscape the major drawcard. International visitors are seeking new experiences and the domestic drive market is growing each year. The 'grey nomad' experience is generating new income opportunities for many regions throughout the Australian outback. Regions elsewhere in Australia are taking full advantage of the growth in demand for drive tourism experiences by promoting touring routes and providing the facilities and services that visitors typically seek.

Tourism development within the Roxby Downs Region needs to be considered, first and foremost, within the context of linkages provided by broader touring routes throughout the region (and beyond) and connectivity to other regional icons (e.g. Flinders Ranges) and major service centres. The Explorer's Way is one of five key touring

routes which the South Australian Tourism Commission (SATC) is actively marketing, including through joint activity with Tourism NT (Northern Territory).

Secondary touring routes for the Explorer's Way exist through Woomera, Roxby Downs and Andamooka and the area offers the shortest route to access the Oodnadatta Track from the Stuart Highway. Such touring route travelers represent 'low hanging fruit' for Roxby Downs and other towns in the region.

Regional and remote communities such as those in the Roxby Downs Region can benefit from the income generated from drive tourists (on stopovers), as those passing through often buy local tourism products and services, and basic travel necessities like fuel, food and other supplies.

Drive tourism provides a number of benefits to businesses, including: opportunities for new business start-ups; increased demand for new products and services; opportunities for business collaboration; and additional income and employment.

The drive tourism market is expected to experience healthy growth due to Australia's ageing population and a corresponding increase in retirees who travel around Australia. Measures of success for the drive tourism market include the number of tourists embarking on self-drive journeys, the length of their journeys, the time they spend in particular places and the amount of money they spend.

Attracting travellers onto the secondary touring routes and into the towns that comprise the Roxby Downs Region requires a multi-tiered approach encompassing high-appeal experiences, supporting infrastructure and marketing / promotion. These are discussed briefly below.

High-Appeal Visitor Experiences

Andamooka

Andamooka's opal fields were discovered in 1930 and opal is still mined in close proximity to the town. Andamooka has unique miners' cottages of heritage significance and APOMA maintains them for historical and tourism purposes. Andamooka is also considered the gateway for four-wheel-drive vehicles connecting with the Oodnadatta or Birdsville Tracks or taking the Farina Adventure Trail and linking up to the Flinders Ranges. For travellers to be drawn onto the secondary touring routes, they need high-appeal product and service offerings that make the trip worthwhile.

Andamooka has undergone beautification works recently through the combined efforts of the Andamooka Progress and Opal Miners Association Inc. (APOMA) and the Outback Communities Authority (OCA). In addition to the historic cottages, Andamooka has a lot to offer tourists, including Duke's Bottle House Opal Museum and Motel, the refurbished Andamooka Yacht Club Café, Caravan Park, Opal sales and 'noodling' for gemstones in the slag heaps.

Andamooka is also close to Lake Torrens (and associated National Park), an ephemeral salt lake and important wetland and bird area. Consultation highlighted the need for improved infrastructure to support access to and experience of the lake, including an all-weather road, directional and interpretative signage and walking and viewing infrastructure.

Woomera

Historically, Woomera has existed as a site for testing experimental rockets and missiles used in both defence and space applications since the 1940s. Today, a total of about 5,000 to 6,000 people annually is deployed to Woomera to conduct tests, trials and training activities at the Range.

Woomera is open to the visiting public and is arguably the better known of the towns in the region with respect to its tourism infrastructure. Accommodation options include the Eldo Hotel, which offers 400 beds in a varying

range of formats and the Traveller's Village Caravan Park, mostly servicing the motor home and backpacker traveller markets.

Woomera's attractions include the Woomera National Aerospace and Missile Park, the Woomera Heritage Centre (incorporating a cafe and tenpin bowling alley), a modern interactive display and interpretive centre covering the full life of the Range, a souvenir shop and a display of the region's history. Next to Missile Park, there is a museum featuring a range of artefacts and information about the activities and people who lived and worked at Woomera in the early years. Woomera is also a location for observing and interpreting Australia's desert flora and fauna, and there is an observatory which operates one night a week or by appointment.

Pimba

Pimba is regarded as the gateway to Roxby Downs, Andamooka and Woomera. It is the first settlement on the Stuart Highway en-route north from Port Augusta. From here travellers can go all the way through to the Oodnadatta Track from Roxby Downs on the Borefield Road or travel the Torrens Track (4WD) from Andamooka across station country to the Upper Flinders Ranges.

Spud's Roadhouse at Pimba is an iconic roadhouse offering a range of services and facilities including a petrol station, bar, restaurant, accommodation and supermarket. Although Pimba's population is small, the trains, Indian Pacific (running between Sydney and Perth) and the Ghan (running between Adelaide via Alice Springs to Darwin), call at Pimba Siding with both trains servicing the town twice a week in each direction.

Roxby Downs

The principal tourist offerings out of Roxby Downs are the mine tour and Arid Recovery Reserve tour (located north of Olympic Dam). The Olympic Dam Discovery Tour runs each Wednesday and incorporates a virtual underground tour and surface mine tour. A nature tour of the Arid Recovery Reserve is also included. Consultation identified opportunities to develop the mine tour as a major regional attraction and that major investment is required to do this.

Arid Recovery run sunset tours each Wednesday and Thursday between April and October and is currently trialling a new product called 'Dinner on the Dunes'. The tour to the Arid Recovery Reserve provides visitors with the opportunity to view a number of native species, previously extinct in the area. The tour incorporates a guided interpretive walk to a viewing platform at sunset and an exploration of the dunes after dark via a nocturnal hide and then spotlighting. As with the mine tour, Arid Recovery has plans to continue to develop the overall tourism product for the business but requires funding assistance to do so.

Infrastructure to Support Drive Tourism

Consistent with the Far North Region generally, tourism infrastructure issues identified for the Roxby Downs Region include:

- The need for all-weather access roads;
- A lack of adequate directional and interpretive signage;
- Quality of accommodation infrastructure; and
- Reliability of telecommunications.

Roads

A specific infrastructure issue that has reportedly been raised over many years is a proposal by Andamooka residents to re-align the Borefield Road through Andamooka. The Borefield Road is an unsealed road that connects Roxby Downs to the Oodnadatta Track and is currently the quickest connection to the primary outback tracks. It currently bypasses Andamooka.

Another road owned by BHP Billiton and privately managed provides a potential alternative route to Andamooka. It is through this road that it has been proposed that the Borefield Road could be re-aligned. This would direct more tourists via Andamooka on their way to access the Oodnadatta and other outback tracks.

The Borefield Road is categorised by the South Australian Government Department of Planning, Transport and Infrastructure (DPTI) as a 'Primary Link' road, the highest of four categories in the Outback roads classification structure. This classification is likely to explain, at least partly, why the issue has been around for so many years yet failed to gain traction. Re-alignment plans would need to consider the impacts on any future expansion plans for the Olympic Dam mine and other land uses, potential disturbances to heritage sites and areas of vegetation and also the impact of increased travel times for road users accessing the outback tracks.

Any plans for realignment should also consider potential alternative alignment and configuration combinations of the current road network and assess their relative merits. For example, one option might be to maintain the existing Borefield Road alignment as it is and create an optional bypass road through Andamooka to give travellers enhanced choices in their travel planning and on-the-road decision-making.

Signage

Signage is an ongoing issue affecting the Outback, the Far North Region and the State of South Australia generally. Resolving this issue requires a multi-stakeholder and coordinated approach.

Consultation highlighted that a priority issue for the Roxby Downs Region is directional and informational signage to help visitors travelling through Pimba to find Andamooka and Roxby Downs and to facilitate awareness of the broader tourism offer in the region beyond Woomera. This requires further investigation to inform a strategic and co-ordinated approach to ensure the provision of quality signage in support of drive tourism throughout Roxby and the wider region.

Visitor Accommodation

The range and quality of accommodation across the Outback and the Far North Region is another well documented issue. It has been noted that events in the Outback are hindered by limited infrastructure and accommodation for events of scale and that there is unmet demand for 4-star and higher accommodation.

As an example, the previous Outback Destination Action Plan (2012-2015) recommended an accommodation target for Roxby Downs to upgrade 45 rooms from 3-star to 4-star and to build 60 new rooms of which 15 should be of 4-star quality. This target was also to respond to the anecdotal perception that it is difficult to find accommodation within the town and that any accommodation will be expensive.

Arid Recovery has previously proposed opportunities for further tourism development within the Arid Recovery area that focuses on expanding the accommodation offering in the region. The proposal includes offering a high end safari style tented accommodation and also non-powered sites for caravans/camper trailers. This combined offering would not only respond to the demand for higher quality accommodation in the region but also tap directly into the key caravan and camping market.

According to the South Australian Tourism Commission (2015), 93 per cent of visitors to the Flinders Ranges and Outback are domestic visitors and that, of these domestic visitors, 36 per cent prefer caravan and camping style accommodation.

Consultation also identified that the Roxby Downs Caravan Park requires upgrading, including new sites, new accommodation buildings, ablution block, camp kitchen and landscaping. Similarly, the Andamooka Caravan Park requires upgrading (including landscaping and lighting), and APOMA and the OCA have been working together to progress this as a Community Park Plan. Another recently completed Community Park Plan has seen beautification

works and facilities improvements in Pimba for both travellers and locals. The works have included the development of parking bays, barbeques, shelters and shower facilities.

Communications Infrastructure

The final infrastructure issue for the Roxby Downs Region, affecting tourism and economic development more broadly, is that of telecommunications. Consultation highlighted that economic development in the Roxby Downs Region is constrained by telecommunications shortfalls, including limited Wi-Fi coverage and poor internet connectivity. This makes it difficult for businesses that sometimes can't complete transactions due to inadequate EFTPOS facilities and for meeting the expectations of the majority of modern day travellers who expect continuous connectivity and free Wi-Fi.

Marketing and Promotion

Connecting with Wider Regional Drive Tourism Routes

There is an opportunity to better promote all towns in the Roxby Downs Region before visitors arrive. As emphasised earlier, tourism development within the Roxby Downs Region needs to be considered within the context of linkages provided by broader touring routes and to regional icons.

The Explorer's Way, marketed by the South Australian Tourism Commission (SATC) as a *"journey through the Outback,"* is an opportunity to develop a local tourism package that links into this regional and State tourist trail. One potential 'hook' to integrate the Roxby Downs Region into the wider Outback offering is to link geo-tourism in the Flinders Ranges with fossil and other related discoveries from Andamooka (to be showcased in Roxby Downs) and the Umoona Opal Mine and Museum in Coober Pedy.

This opportunity has been highlighted previously in the Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan (2008-2014). Other potential geo-tourism linkages exist with mine tours at Olympic Dam and fossicking in Andamooka.

The towns of Andamooka, Pimba, Roxby Downs and Woomera previously shared a Tourism Strategic Plan (2003-2004). The plan's vision was to position the region as a major tourist destination of international significance and ensure sustainable development of tourism through collaboration between the four communities.

Regional Co-operation and Co-ordination

Ongoing cooperation and coordination of destination development and marketing activities in the Roxby Downs Region is critical. Agencies that need to be engaged in this process include the South Australian Tourism Commission, Flinders Ranges Outback SA Tourism (FROSAT), Roxby Council, APOMA and other Progress Associations, the OCA and RDA Far North.

There is also scope for closer working relationships and coordination of promotional activities between visitor information centres (VICs) in the Roxby Downs Region. There are two VICs located within the Roxby Downs Region (Roxby Downs and Woomera) and other VICs in the Far North (Port Augusta, Coober Pedy, Flinders Ranges (Quorn) and Hawker).

Previous tourism plans have highlighted the opportunity to forge closer interactions between VICs and with the programs and priorities of FROSAT/RDAFN and to develop closer integration with regional tourism strategies. Other visitor information points should be considered as part of any coordination activities, including accommodation, shops and fuel stations.

Actions

Recommended actions are as follows:

- 3.1 Work with key agencies, communities and tourism operators to develop and promote local tourism packages to link the Roxby Downs Region more explicitly into The Explorers Way. Consider geo-tourism and other potential product/experience linkages.
- 3.2 Undertake a cost-benefit analysis and pre-feasibility study on options to re-align the Borefield Road to incorporate Andamooka.
- 3.3 Prepare a wayfinding strategy for the Roxby Downs Region as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.
- 3.4 Work with staff and volunteers from VICs and other visitor information points to build their understanding and capacity to cross-promote towns and regional visitor products to facilitate a 'One Outback' visitor experience.
- 3.5 Work with APOMA to develop and fund a program of works to support visitor access to and experience of Lake Torrens, including an all-weather road, directional and interpretative signage and walking and viewing infrastructure.
- 3.6 Work with Arid Recovery on options for accommodation development and associated tourism packaging opportunities in the region.
- 3.7 Ensure a positive climate for private sector investment in new and upgraded accommodation in the Roxby Downs Region through supportive planning, development assessment and approvals processes.
- 3.8 Continue to work with local communities to develop and implement Community Park Plans across the Roxby Downs Region and the Outback.

Performance Measures

- Preparation of a development plan and costing to improve visitor access to Lake Torrens completed within 18 months; infrastructure works to be implemented over the next 3 years.
- A decision on the future alignment of the Borefield Road made within two years.
- Development of onsite accommodation at the Arid Recovery area within two years.
- Development and delivery of a capacity building program for VIC staff and volunteers within 12 months.
- Increase in the number of tourists taking self-drive journeys through the Roxby Downs Region.
- Increased average length of stay for visitors to the Outback from 4.4 nights to 7 nights.
- Steady growth in the tourism sector's contribution to the Roxby Downs Region's gross regional product (GRP) and employment over the next five years.



4. Economic Growth and Investment Strategy Work Plan

4. Economic Growth and Investment Strategy Work Plan

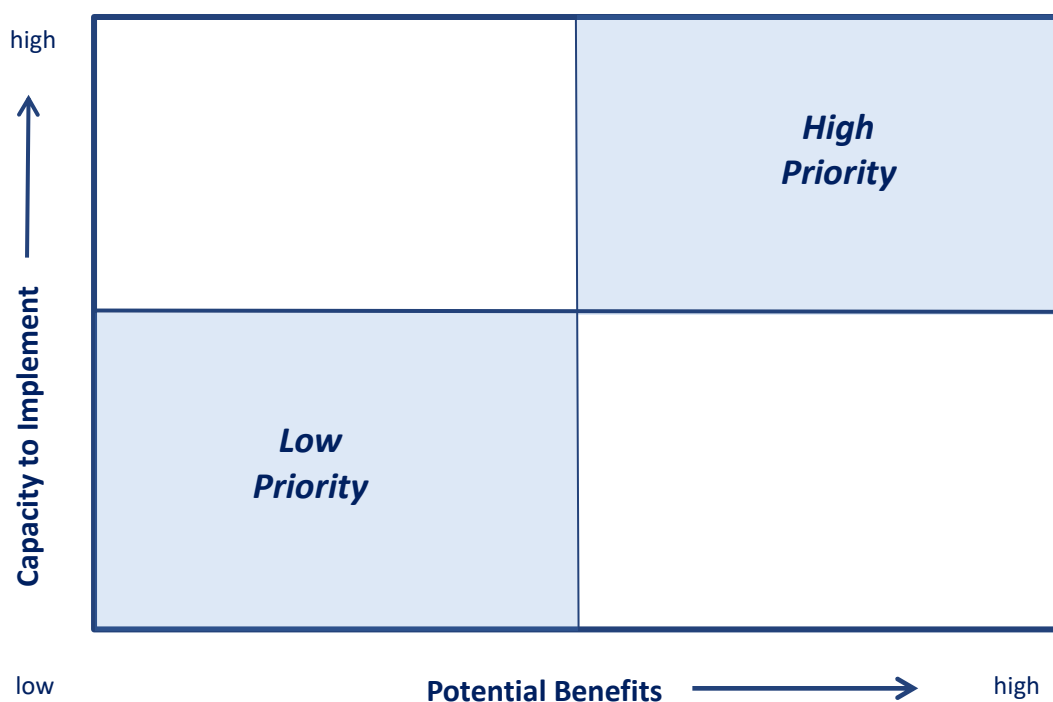
4.1 Assessing and Prioritising Actions

The challenges and opportunities presented in this Economic Growth and Investment Strategy have been determined as a result of the findings from comprehensive research and data analysis coupled with targeted consultation with selected stakeholders.

While all of the recommended actions are considered valid and worthwhile, it is acknowledged that resource constraints will make it impossible for RDAFN, the OCA, Roxby Council and their partners to act on all issues and opportunities immediately. This makes it necessary to prioritise activities for short-term implementation.

The prioritisation of actions is guided by two broad sets of assessment criteria – *benefit assessment* and *capacity to implement*, as outlined below.

Figure 11. Opportunity Assessment Matrix



Source: SC Lennon & Associates

Using this criteria, it can be determined to what extent the project or activity in question concerned is a high priority. It is acknowledged that other criteria can also be applied with the use of local knowledge and consideration of other related objectives.

Potential Economic Development Benefits

1. Does the opportunity build on the Roxby Downs Region's existing business and employment profile, capabilities and comparative advantages?
2. Does the opportunity demonstrate the potential to support endogenous growth factors (e.g. increase in the number of viable businesses, jobs and expenditure within the region)?
3. Is the opportunity likely to help create more jobs in the Roxby Downs Region's 'focal industries'?
4. Is there a ready market for the opportunity's product or service?

Capacity to Implement

1. Do we, as a region, have the capacity (funds, people, skills, technology and the programs in place) to facilitate and/or drive the opportunity?
2. Is the infrastructure available to enable the business opportunity to develop (or can the infrastructure in question be realistically built / accessed)?
3. Does the opportunity / business proposal have the political will and the support of local communities?

Organisational Fit / Role

1. Does the opportunity align with the charter / mission of Roxby Council, the OCA and RDAFN?
2. Does the opportunity align with broader government policies and funding priorities?
3. What role should Roxby Council, the OCA and RDAFN take in progressing the opportunity (management, lobbying / advocacy, awareness raising, partnering, funding, training, etc.)?
4. Which agency or organisation (other than RDAFN, the OCA or Roxby Council) should have lead responsibility for this opportunity?
5. Who else should be involved?

Other Considerations

Environmental Benefits

Creates environmental benefits through:

1. Reducing greenhouse gas emissions through adoption of renewable energy sources and through energy conservation.
2. Conservation and enhancement of native flora and fauna.
3. Conservation of cultural heritage.
4. Conservation of water resources.
5. Conservation of land resources.
6. Enhancing urban and rural liveability.

Social Benefits

Creates social benefits through:

1. Creating a more inclusive and cohesive community.
2. Addressing housing affordability.
3. Improving education and training outcomes (links to economic benefits).
4. Higher quality recreational and cultural facilities.
5. Enhances comfort and lifestyle.
6. Improves quality of social support services.

Applying the assessment criteria and effectively 'rating' and 'ranking' each action determines those which are considered the highest priority and which, as a result, are short-term actions to be progressed over the next one to three years. The assessment outcomes are shown in the table below.

Figure 12. Summary of Action Assessment Outcomes

Action	Benefit Assessment	Capacity to Implement	Overall Assessment
Support Development of Roxby Downs as a Sustainable Community			
1.1 Roxby Council, BHP Billiton and the Roxby Downs Community to work together to facilitate an updated vision for Roxby Downs that is aspirational beyond its current ties to the Olympic Dam mine and the spatial bounds of the Roxby Downs township	High	High	High
1.2 Review and update Roxby Council's key land use and strategic plans to reflect the updated vision as part of a broader regional spatial framework and networked hierarchy of centres and towns	High	High	High
1.3 Work with BHP Billiton and local businesses on opportunities for local supply of goods and services associated with the current planned expansion and ongoing operation of the Olympic Dam mine	High	Medium	Medium/High
1.4 Continue to deliver business development services to build the capacity and sustainability of individual businesses in the Roxby Downs Region	Medium	Medium	Medium
1.5 Investigate place-based community development opportunities to promote the region's smaller towns as locations of choice for working and living beyond mining, with a focus on Andamooka as a pilot project	Medium	Medium	Medium
Support Growth and Development of Mining			
2.1 Work with BHP Billiton on current expansion plans to gain an understanding of workforce requirements; map skills requirements against existing training available in the Roxby Downs Region and identify opportunities for additional training programs to support local employment opportunities	High	Medium	Medium/High
2.2 Work with BHP Billiton and the Roxby Downs Area School and Roxby Downs TAFE to explore opportunities for school-based apprenticeships and traineeships associated with the current planned expansion of the Olympic Dam mine	Medium	Low	Low/Medium
2.3 Work with BHP Billiton and local businesses on opportunities for local supply of goods and services associated with the current planned expansion and ongoing operation of the Olympic Dam mine	Medium	Low	Low/Medium
2.4 Continue to deliver business development services to build the capacity and sustainability of individual businesses in the Roxby Downs Region	Medium	Medium	Medium
Support the Development of the Roxby Downs Region's Visitor Economy			
3.1 Work with key agencies, communities and tourism operators to develop and promote local tourism packages to link the Roxby Downs Region more explicitly into The Explorers Way. Consider geo-tourism and other potential product/experience linkages	High	High	High
3.2 Undertake a cost-benefit analysis and pre-feasibility study on options to re-align the Borefield Road to incorporate Andamooka	High	High	High
3.3 Prepare a wayfinding strategy for the Roxby Downs Region as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region	High	High	High

Action	Benefit Assessment	Capacity to Implement	Overall Assessment
3.4 Work with staff and volunteers from VICs and other visitor information points to build their understanding and capacity to cross-promote towns and regional visitor products to facilitate a 'One Outback' visitor experience	Medium	High	Medium/High
3.5 Work with APOMA to develop and fund a program of works to support visitor access to and experience of Lake Torrens, including an all-weather road, directional and interpretative signage and walking and viewing infrastructure	Medium	Low	Low/Medium
3.6 Work with Arid Recovery on options for accommodation development and associated tourism packaging opportunities in the region	Medium	Medium	Medium
3.7 Ensure a positive climate for private sector investment in new and upgraded accommodation in the Roxby Downs Region through supportive planning, development assessment and approvals processes	Medium	Medium	Medium
3.8 Continue to work with local communities to develop and implement Community Park Plans across the Roxby Downs Region and the Outback	Medium	Medium	Medium

Source: SC Lennon & Associates

4.2 Priorities for Action – Informing a Year 1 Work Plan

As noted above, resource constraints will make it impossible for RDAFN, the OCA, Roxby Council and their partners to act on all issues and opportunities immediately. Priority projects and activities for implementation as part of a Year 1 work plan are identified based on the application of the above broad set of assessment criteria. They reflect priorities that RDA Far North, the OCA and Roxby Council should advance (in association with identified partners where relevant) as short-term priorities.

The Year 1 priorities are:

1. Roxby Council, BHP Billiton and the Roxby Downs Community to work together to facilitate an updated vision for Roxby Downs that is aspirational beyond its current ties to the Olympic Dam mine and the spatial bounds of the Roxby Downs township.
2. Review and update Roxby Council's key land use and strategic plans to reflect the updated vision as part of a broader regional spatial framework and networked hierarchy of centres and towns.
3. Work with key agencies, communities and tourism operators to develop and promote local tourism packages to link the Roxby Downs Region more explicitly into The Explorers Way. Consider geo-tourism and other potential product/experience linkages.
4. Undertake a cost-benefit analysis and pre-feasibility study on options to re-align the Borefield Road to incorporate Andamooka.
5. Prepare a wayfinding strategy for the Roxby Downs Region as part of a broader Outback wayfinding strategy, with an emphasis on consistent, branded signage throughout the region.

In progressing these actions, cultivating collaborative partnerships for effective implementation will be key.

4.3 Continuing Collaborative Partnerships for Effective Implementation

Collaborating to cultivate regional economic development partnerships is key to successful strategy implementation. Civic leadership and partnerships, what is otherwise known as ‘collaborative governance’ is a theme underlying all matters concerning the sustainable economic development of the Roxby Downs Region.

A fundamental enabler of regional growth, it is characterised by collaborative and cooperative approaches to research, community engagement, knowledge-sharing, planning, project design and implementation of strategies for the good of the region and its communities.

While RDA Far North, the OCA and Roxby Council will take the lead in addressing priority actions as articulated in this document, collaboration will be fundamental to the successful implementation of this Economic Growth and Investment Strategy. Promoting economic growth and investment in the region therefore, requires both leadership and the formation of partnerships.

In progressing the Strategy, RDA Far North will pro-actively engage with other key agents of change. Some existing working relationships will need to continue to be progressed in light of this Strategy, as a priority. The work of South Australian Arid Lands Natural Resource Management (SAAL NRM), in terms of its funding, participatory projects and consultation, incorporates a broad range of stakeholders that cross-over with those of RDA Far North.

These activities include working with government, pastoralists, mining and petroleum companies, tourism groups, progress associations, non-government organisations and other community groups. The SAAL NRM Board also holds important regional relationships with Aboriginal communities through partnership projects on Aboriginal managed lands and with National Parks South Australia.

The strong linkages between the environment and the Roxby Downs Region’s culture, history, economy and society, coupled with the cross-over of objectives between RDA Far North, the OCA, Roxby Council and SAAL NRM, highlights the importance of these three organisations working together at a planning and implementation level. While relationships between each function well at a project officer level, there is scope for more proactive, strategic level integrated planning and implementation of partnership projects between these three organisations.

Using this Economic Growth and Investment Strategy as a plan of action, RDA Far North, the OCA and Roxby Council will take the lead, working together with other stakeholders to address opportunities for improved integrated planning and management concerning matters arising from the interface of natural resources management, economic development and community wellbeing.

The Economic Growth and Investment Strategy guides the efforts of RDA Far North, the OCA and Roxby Council, working together and with others, to facilitate opportunities for investment to support the region’s long-term growth. Importantly, using the evidence base from the economic stocks and flows analysis and intelligence gathered through targeted consultation and engagement, it informs a plan of action to support the region’s engagement with both State and Federal Governments on matters of significance.

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