

BUNBURY

Geographe

Western Australia's lifestyle region where everything connects.

Regional Growth Plan

**PART ONE
STRATEGY**

FINAL REPORT OCTOBER 2016



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In completing this growth plan, the Growth Plan Partnership acknowledge the Noongar people, their elders and country, and welcome opportunities for Noongar economic development.



Koombana Bay, City of Bunbury



Peppermint Grove Beach, Shire of Capel



Ferguson Valley, Shire of Dardanup



Harvey Hills, Shire of Harvey

FOREWORD

The world is getting smaller, more connected and increasingly competitive. Digital disruption is re-defining the rules of trade and commerce; and creating new opportunities for business in all corners of the world to overcome the tyranny of distance. Bunbury Geographe is re-positioning itself to be part of this new, dynamic economic reality and become a global citizen.

The preparation of the Bunbury Geographe Regional Growth Plan has been made possible through funding from the State Government's Royalties for Regions Programme but has, ultimately, been driven by the passion, enthusiasm and commitment of the local community to embrace the future.

The growth planning process has provided an opportunity for government, industry and the community to work together to design a roadmap for creating wealth, employment and prosperity. The Plan empowers industry and community to take the lead role with government acting as a facilitator. This new collaboration is designed to bring an end to erstwhile fragmented methodologies in favour of a more unified and cooperative approach to international trade and selling into global markets.

Through this collaboration, regional competencies and opportunities for competitive advantage and cooperation have been identified and initiatives developed that will focus on, and enhance, our traded economy. Many transformative projects are already underway.

Over the years, Bunbury Geographe has been many things to many people. Today, it is more than a gateway, more than a hub; rather, a convergence of commerce, industry, lifestyle and community. Ultimately, Bunbury Geographe is the

place 'where everything connects' and it is this role that will define the region moving forward. New branding, worthy of a global citizen, will reflect this positioning and acknowledge the relationship between City and region.

The Growth Plan is delivered in four separate volumes:

- **Part One:** A Strategy to guide the way forward;
- **Part Two:** A Program of Action focussed on priority initiatives;
- **Part Three:** A Background Report summarising the work which has been undertaken, as well as short audio visual presentations on key aspects of the plan; and,
- **Part Four:** A Prospectus highlighting investment opportunities in Bunbury Geographe.

The growth planning process has prompted a new way of thinking and stimulated an exciting period of change for the region. Through collaborative governance and the establishment of industry-based sector committees, we are already moving forward, embracing the future and the opportunities it promises.

The journey doesn't end here. The Growth Plan is a live process presenting ongoing opportunities for the community, industry and government.

On behalf of the Steering Committee a sincere thank you is expressed to all involved in developing this Growth Plan Strategy. We look forward to working together to create a diverse, creative, engaged and vibrant region that is internationally recognised for its quality of life, environmental sustainability and support for business initiatives.

Cr. Michael Bennett

Chair, Bunbury Geographe Growth Plan Partnership Steering Committee
Shire President, Shire of Dardanup



Creative connections: Maker + Co, Bunbury CBD

A NEW WAY OF DOING BUSINESS

BEYOND THE TYRANNY OF DISTANCE

There is a new energy about doing business in the Bunbury Geopraphe region. Situated on the west coast of Australia, a scenic two hour drive to both Perth and the Margaret River wine appellation, regional assets including minerals, clean and green agriculture, lifestyle and creative industries are being traded with the world through a port, future international airport, broadband network and the ability to do business in the same time zone as the growing Asian economies. The tyranny of distance historically limiting economic opportunities is gone.

FOCUSING ON OPPORTUNITIES

The Bunbury Geopraphe Regional Growth Plan is informed by the strategic positioning provided in the South West Regional Blueprint and the evolving needs of industry and business. It is this combination of top down and bottom up analysis that provides an innovative approach to economic planning. Strategic research has identified new or enhanced opportunities that have the capacity to contribute to the traded economy, adding wealth and prosperity to the region.

The opportunities are:

- Agriculture and Agribusiness
- Brand and Lifestyle
- Emerging and Transforming Industries
- Health and Education
- Transport and Logistics

MOVING BEYOND STATUTORY BOUNDARIES

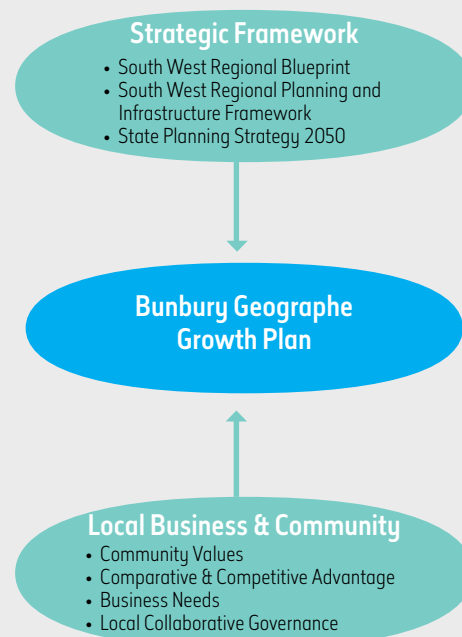
While notionally focussing on the administrative districts of the City of Bunbury, and Shires of Capel, Dardanup and Harvey, the Plan acknowledges that business and community influences, such as the port and city centre, extend well beyond the region and embrace a wider, more flexible view of what constitutes the Growth Plan boundary. The Plan seeks to be complementary to the adjoining regions of Perth-Peel and Busselton-Margaret River, building an outwardly focussed view to encompass Asia and the world.

INDUSTRY LED

The Growth Plan empowers business to identify and pursue opportunities through the establishment of non-statutory, industry-led committees that have the capacity to address the particular research, marketing, education and infrastructure interests of industry sectors. These committees will be coordinated by a Steering Committee that has equal industry and government representation, allowing the plan to be 'industry led and government enabled'.

BUILDING A PARTNERSHIP

The Growth Plan is building a partnership that embraces business, community, government, and academia; a partnership responsible for owning, developing and implementing the Growth Plan and its brand on behalf of the region; a partnership that is embracing a new way of doing business.



VISION

“ By 2050 Bunbury Geographe will be a diversified, creative, vibrant and connected region, internationally recognised for its quality of life and environmental sustainability; “a good place to do business”. ”

Achieving this vision will generate the following benefits by 2026, beyond business as usual:

- 2,500 jobs
- \$400 million Gross Regional Product
- 12,000 residents

Values

INCLUSIVE GROWTH

Supporting balanced, sustainable economic growth that delivers prosperity and rewarding jobs for everyone.

SUSTAINABLE

Valuing the unique environmental wealth that defines our region and pursuing a sustainable future that builds on this wealth.

CREATIVE

Embracing a culture that nurtures and rewards creativity, innovation and continuous learning.

CONNECTED

Pursuing a globally engaged future, outwardly focused, and digitally connected.

COLLABORATIVE

Working together across the community where all citizens are respected and the pursuit of reconciliation with the Noongar people is ongoing.

The Grand Design

WESTERN AUSTRALIA'S LIFESTYLE REGION; WHERE EVERYTHING CONNECTS.

Looking forward, we see Bunbury Geographe internationally recognised as Western Australia's Lifestyle Region: Where Everything Connects.

Bunbury will be the South West's flourishing capital and Western Australia's Second City: a focal point for commerce, industry and international trade that complements and connects with its neighbours in Perth-Peel and Busselton-Margaret River.

A capital for a region of 300,000 people connected to the world. This design will be achieved by focusing on Priority Goals and Growth Drivers.

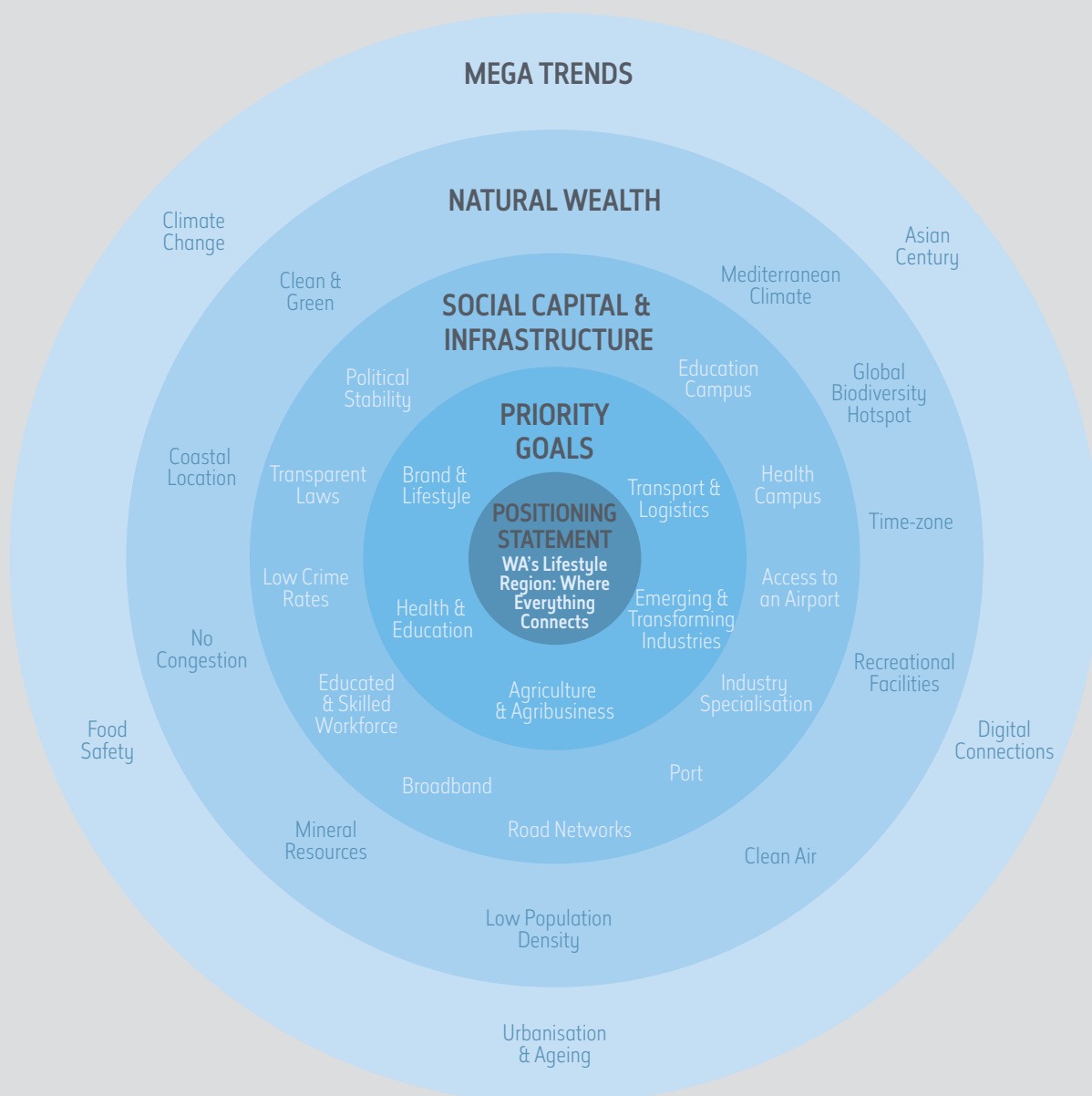
POISED FOR PROSPERITY

Bunbury Geographe is a region positioned at the right place and the right time; poised to capture opportunities created by megatrends, with a strategic competitive advantage founded on natural wealth, social capital and infrastructure, and industry specialisation. These opportunities are expressed in Priority Goals that will enable Bunbury Geographe to become WA's lifestyle region: where everything connects.

Bunbury Geographe is a coastal region located on the Indian Ocean and complemented by a diverse and productive hinterland. The region boasts the best of both worlds, situated between Western Australia's capital city of Perth-Peel and the expansive South West, an international biodiversity hotspot and popular tourist destination.

The region has a coastal city clustered about the Port of Bunbury, offering residents and visitors a diversity of water based amenity and lifestyle choices. The coastal city is surrounded by a ring of inland towns just a 30 minute drive away. These towns and the wider rural estate offer an alternative lifestyle and are closely linked to the region's agriculture, timber and mining activities.

Bunbury Geographe - Opportunities and Priority Goals for Growth



Megatrends: the waves of change

Bunbury Geographe stands at the shore of enormous changes brought about by megatrends, which are waves of change on a global scale. Each wave presents opportunities that, if seized, will create and sustain growth in the region.

ASIAN CENTURY

Asia is set to dominate the world economy in the 21st Century. By 2030, two thirds of the World's middle class will reside in Asia. The growth in population and wealth is generating a massive demand for goods and services, including protein-rich and 'clean and green' foods, tourism experiences, and health and education services. Rapid income growth in Asia and, to a lesser extent, South America and Africa will see billions of people transition out of poverty and into the middle class. The powerhouses of the new world economy will be China and India. This economic shift will build new export markets, trade relations, business models and cultural ties for Australia.

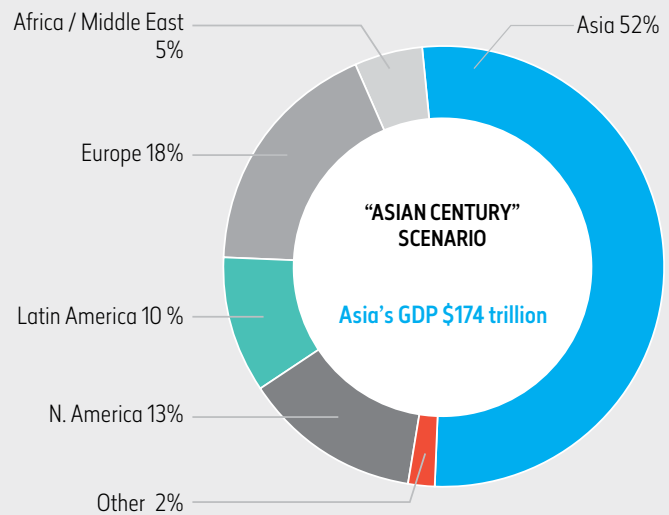
The Asian century presents incredible opportunities for Bunbury Geographe. Bunbury Geographe is not only ideally placed to respond to Asia's needs but, also, has the advantage of sharing business time-zones that will enable efficient and effective business communication. High quality food, sustainable timber products and mineral resources will help Asian cities grow. As the middle class of Asia grows so too will investment and ideas flow into Australia's economy and society.

URBANISATION AND AGEING

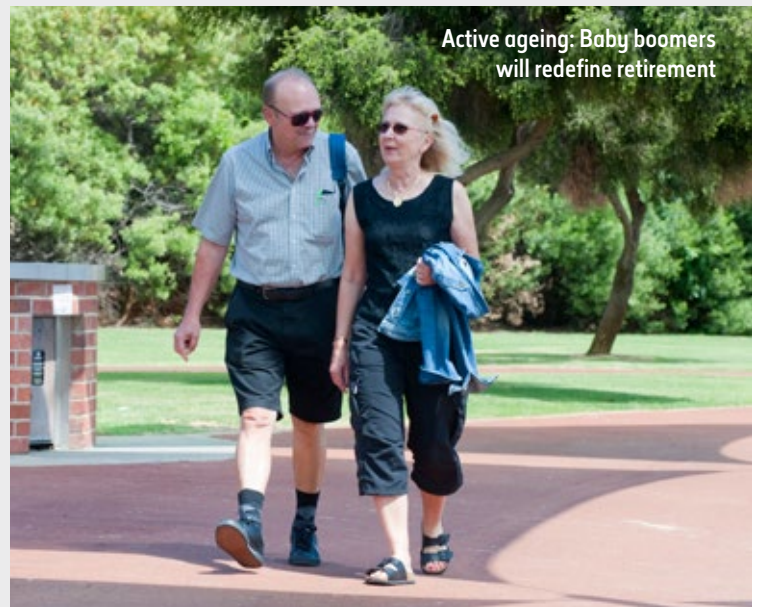
Australia is set to undergo an unprecedented demographic transformation. The 'baby boomers' (people born 1946 – 1964) are the first generation of Australians with enough savings to afford an active, lifestyle-focused retirement. Many baby boomers are expected to embark on a 'sea change' or 'tree change' to a lifestyle region within a few hour's drive of a major city, freeing up equity in their city properties to fund a new demographic of active ageing. Australians are increasingly embracing higher density living within expanding urban centres. This phenomenon is driven by lifestyle choices for proximity to services and employment, as well as for affordability and the social change from outdoor to indoor entertainment.

The trend in urbanisation and ageing presents the opportunity for increased lifestyle and retirement based migration from Perth-Peel and overseas. The region's natural wealth, social capital and infrastructure provide a foundation for the development of internationally recognised amenity, health and education services that entice a new generation of migrants.

Gross Domestic Product (GDP) Forecast by Region in 2050



Source: Asian Development Bank, "Asia 2050: Realizing the Asian Century"



DIGITAL CONNECTIONS

Digital technology has transformed the way we communicate and do business. High capacity broadband access, particularly increased upload capacity, is now a key part of both domestic and business infrastructure. A fourth industrial revolution is now underway, built on the connection of billions of people to mobile devices that go beyond national borders, with exponential growth of processing and storage capability. Digital connection is driving the emergence of digital disruption, which allows individuals or small companies to compete with large established industries to deliver services, provide information and online retail services. Remote online working also has the potential to dramatically change how and where work is performed.

The trend in digital connection presents the opportunity to grow the region's international trade through online marketing, services and transactions. Digital connections have potential to entice 'e-change' migrants and businesses from Perth-Peel and overseas to live, work and invest in Bunbury Geographe, including Government decentralisation such as the recent decision to relocate the headquarters of the Department of Parks and Wildlife to Bunbury.

CLIMATE CHANGE

Climate change is forecast to affect landscapes, ecosystems, food security and economic growth on a global scale. Within Western Australia, climate change will produce a drying of the landscape, resulting in Perth's climate transitioning to resemble that of the drier central coast region between Perth and Geraldton. The effects of climate change on Perth-Peel will be exacerbated by the intensifying urban heat island as Perth-Peel expands, leading to increasing heat waves.

Climate change presents the opportunity for increased lifestyle migration and tourism from Perth as a consequence of the Bunbury Geographe climate remaining cooler, wetter and greener than Perth and reminiscent of Perth's past climate and landscape.

Natural wealth

Bunbury Geographe has a clean and green environment, with a high level of biodiversity, natural amenity, and environmental and health regulation. This clean and green environment can be branded internationally to appeal to a rising demand for clean and green food and tourism products.

Bunbury Geographe shares time zones with Asia, enabling efficient and effective business communications and minimal jet lag for tourism and business travel. As Bunbury Geographe is in the Southern Hemisphere and Asia is in the Northern Hemisphere, the region provides counter-seasonal food and tourism opportunities for Asian consumers. The region has a high level of amenity and liveability founded upon a mild-Mediterranean climate and coastal location, with a low population density, good air quality and absence of congestion. This positions the region to offer a premium lifestyle and tourism brand that attracts residents, travellers and investors; and sustains a capable, skilled workforce.

The region retains mineral reserves, including mineral sands and bauxite, which enable continued mining and mineral processing for export..

THE LIFESTYLE ADVANTAGE

Bunbury Geographe is well positioned to be Western Australia's lifestyle region. The region is closer to Perth-Peel than all other regional centres in Western Australia, being a two-hour drive from Perth's CBD. This has substantial benefits in terms of access to services and other resources from a large metropolitan centre, while enabling ease of access to the wider South West region. The recent development of the Forrest Highway has substantially improved the time and safety of travel from Perth-Peel.

The region has a mild Mediterranean climate, with clean air and readily accessible coastal, rural and forested landscapes. The appealing location and natural qualities are further augmented by the region's well developed health, education and recreational facilities.



High scenic amenity: Ferguson Valley

Social capital and infrastructure

Bunbury Geographe enjoys the benefits of Australian society, being politically stable with transparent laws and low crime levels.

Bunbury Geographe has an educated and skilled workforce with education levels typical of regional centres within the State. 50.4% of adults possess vocational certificates and 28.4% possess tertiary and post-graduate degrees. The existing workforce provides a foundation for expansion and value-adding of export industries and economic diversification across the region.

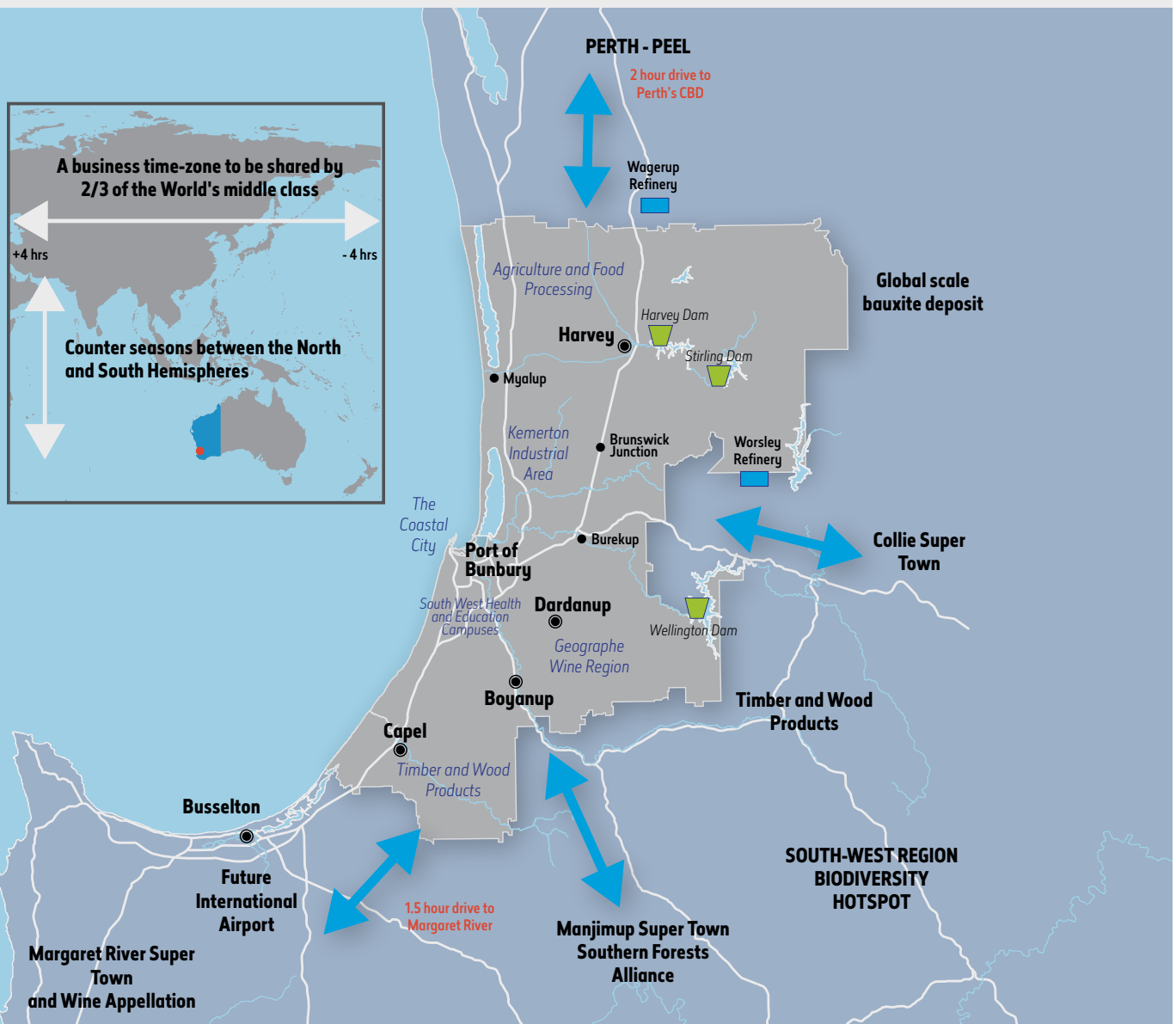
Bunbury Geographe is a highly attractive region with a dynamic community comprising approximately half the population of the South West region. The current estimated population of 93,000 people has grown by 32% in the past ten years, outpacing all other regional centres in the State.

Prior to European settlement, Bunbury Geographe was inhabited by the Noongar people, who now number 2% of the population and continue to retain cultural and heritage links to places in the region.

The Aboriginal reconciliation movement is Australia-wide and has gained momentum since the 1967 Commonwealth referendum. Reconciliation aims to building unity, respect and equity between Indigenous and non-Indigenous Australians. The landmark South West Native Title Settlement resolves native title claims across the South West region, including Bunbury Geographe in exchange for a package of benefits for the Noongar nation.

The region hosts a hub of high quality health, educational and recreational facilities reflecting its role as a service centre for the wider South West Region. Facilities include a co-located Health and Education Precinct comprising Bunbury Regional Hospital, St John of God Hospital, Edith Cowan University, Manea Senior College and South Regional TAFE. Recreational facilities include the South West Sports Centre, the Bunbury Regional Entertainment Centre, and a network of sporting fields and safe waterways for leisure activities.

Bunbury Geographe - Natural Wealth, Infrastructure and Industry Specialisation



Bunbury Geopraphe is a connected region, centred around a deep water port and a freight network that connects with the world and particularly with Asia. The Port of Bunbury has extensive capacity for expansion, is well connected to a rail freight network, and lies close to industrial precincts with the ability for substantial growth. Industrial land is available at Kemerton, Preston and (in future) Waterloo.

The region is a 40 minute drive from Busselton-Margaret River Regional Airport, which is fully funded for expansion for interstate travel, with funding being sought to expand to international freight. The roll-out of the national broadband network is well underway in both rural and urban areas of the region and will unlock unprecedented opportunities for international communication and trading.

Strategic competitive advantage

Bunbury Geopraphe has a compelling strategic competitive advantage to respond to the opportunities created by megatrends.

This competitive advantage is founded upon the region's natural wealth, social capital and infrastructure, and industry specialisation.

INDUSTRY SPECIALISATION

Bunbury Geopraphe is a \$5 billion economy supporting an estimated 37,800 jobs. The region benefitted from a construction boom in 2011, as occurred elsewhere in Western Australia. Construction aside, the region's economy is diverse with substantial contributions from manufacturing, mining, transport and logistics, retail trade, health care and social assistance, finance and insurance, and education and training. The major traded sectors in the region are currently mining and manufacturing, which includes food processing such as abattoirs and dairies.

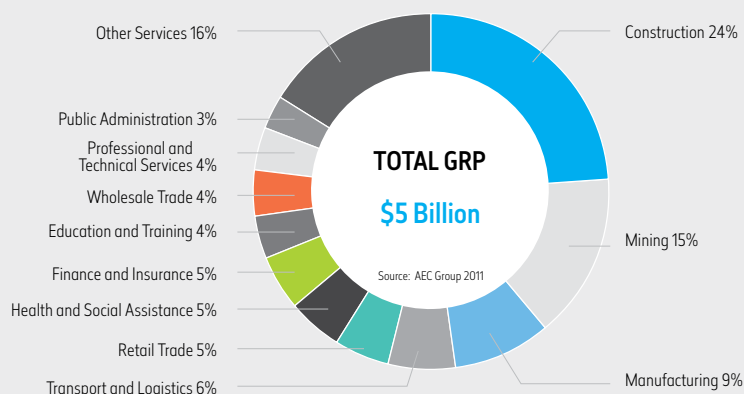
The region has industry specialisations of state significance, reflected in a high employment concentration factor (ECF) for forestry, wood products and livestock processing (e.g. abattoirs). Employment in these industry sectors is proportionally higher (by a factor of 1.67 to 5.22) than the average across Western Australia, reflecting their relative importance to the region's economy.

The significant agriculture, forestry and associated processing sectors supply dairy, beef, vegetables, wine and wood/timber products (e.g. particle board) for domestic consumption and increasingly for export markets. These sectors are well positioned to respond to demand for premium food products and sustainable timber products from a rising Asian middle class.

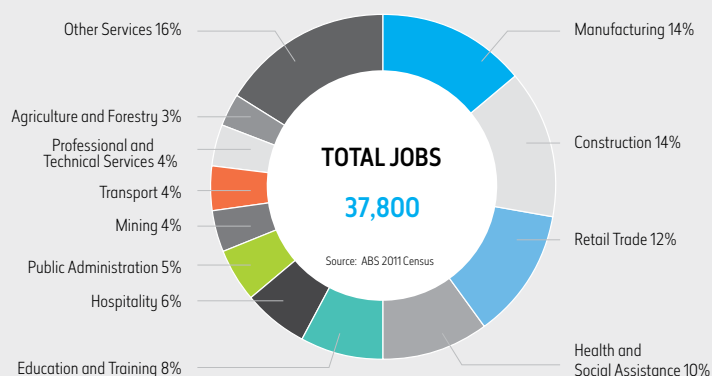
Tourism is a small but growing part of the economy, with the Geopraphe Wine Region a growing destination for wine and food experiences and the Bunbury Waterfront proposed as a major drawcard for residents and visitors alike.

Apart from traded sectors, the region's economy has strong representation in health care, social assistance, education and training and retail trade, reflecting the region's role as a service centre for the wider South West. Although not traded at present, these sectors can support lifestyle and tourism branding for the region and future growth of traded lifestyle, health and education products for the region.

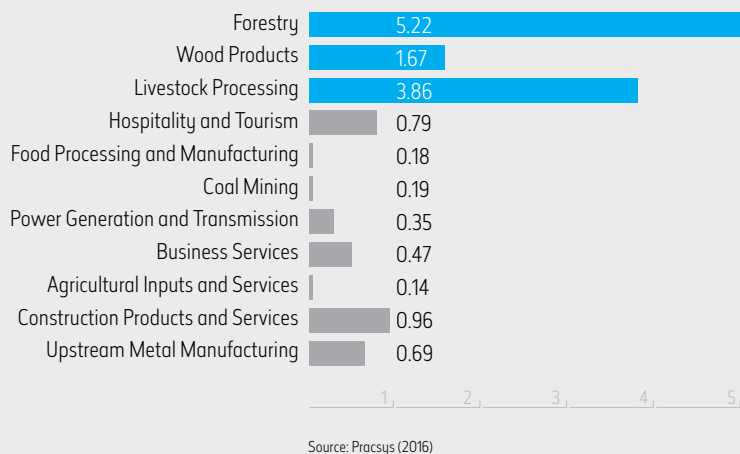
Bunbury Geopraphe - Gross Regional Product (GRP)



Bunbury Geopraphe - Employment by Sector



Bunbury Geopraphe - Employment Concentration Factor (ECF)



Bunbury Geopraphe - Strategic Competitive Advantage

REGIONAL ASSETS	COMPETITIVE ADVANTAGE
Natural wealth	
Clean and green environment	Potential to command a premium price for food products to meet rising international demand for food security and safety. Also, potential to command premium price for tourism products.
Timezone	Sharing a business time-zone with Asia enables efficient and effective business communications to reduce transactional costs and facilitate market penetration.
Southern hemisphere	Potential to command a premium price for counter-seasonal food and tourism products for Northern Hemisphere (including Asian) consumers.
Global biodiversity hotspot	Global biodiversity hotspot and natural landscape amenity supports lifestyle, tourism and research and development products.
Mineral resources	Well-established foundation for continuation of mining and mineral processing as a traditional industry base for the region.
Mediterranean climate Coastal location Low population density, clean air and no congestion	High quality amenity with potential to command a premium price for traded lifestyle and tourism products, and attract and retain a skilled workforce base that supports expansion of value adding export industries and economic diversification.
Social capital and infrastructure	
Political stability Transparent laws Low crime rates	Reduced investment risk and premium price for traded lifestyle and tourism products.
Educated and skilled workforce	Existing workforce base supports expansion of value adding export industries and economic diversification.
Health campus Education campus Recreational facilities	Existing facilities support expansion of services to command a premium price for traded lifestyle, education and health products; and attract and retain a skilled workforce base that supports expansion of value adding export industries and economic diversification.
Port	Deep water port with capacity for expansion is well connected to road and rail network, which reduces the cost for international freight and creates potential to support freight for Perth-Peel.
Future international airport	Ease of access to Busselton-Margaret River Regional Airport reduces the cost for freight of premium food products and traded lifestyle and tourism products.
Road networks	Efficient road networks reduce cost of freight and enhance regional productivity.
Broadband network	Expanding broadband network enables international marketing, services and transactions, and growth of creative industries.
Industry specialisation	Skilled workforce, established transport and logistics networks, and supporting service industries that support expansion of agriculture, agribusiness and sustainable timber products as cornerstone industries that target growing international trade opportunities.

Priority Goals

The strategic research into megatrends and the region's strategic competitive advantage paints a clear picture of a raft of opportunities for Bunbury Geopraphe to meet its desired vision. Unlocking this potential and achieving the vision requires addressing five Priority Goals:

- Agriculture and Agribusiness
- Branding and Lifestyle
- Transport and Logistics
- Health and Education
- Emerging and Transforming Industries

These Priority Goals are necessary for bridging the gaps between the identified opportunities and the future economic success of the region.

AGRICULTURE AND AGRIBUSINESS

The Asian century megatrend and the region's competitive advantage build a compelling case for investing in the region's agriculture and agribusiness. A Priority Goal is therefore to actively capitalise on this opportunity and build an export-oriented cornerstone industry for the region.

BRANDING AND LIFESTYLE

The Asian century, ageing and urbanisation megatrends all point towards a future where a high amenity lifestyle is increasingly sought after as a trade commodity, either through migration or in conjunction with tourism. A Priority Goal is to foster this valuable lifestyle amenity and develop a brand that showcases the region's amenity and clean and green qualities to promote a range of products including tourism, food and timber products.

TRANSPORT AND LOGISTICS

Efficient transport of products to market is critical to maintaining and enhancing a competitive advantage in traded goods. A high Priority Goal is to ensure that transport and logistics networks are developed to their full capacity so the region is both connected and hardwired to Asia's growing markets.

HEALTH AND EDUCATION

The Asian century, ageing and urbanisation megatrends point towards a rising demand for health and education services and the region has strong health and education facilities due to its role as a service centre for the wider South West region. A Priority Goal is to transform these existing strengths into a tradeable industry through support of the lifestyle brand, and traded health and education products for international and domestic markets.

EMERGING AND TRANSFORMING INDUSTRIES

The Asian century and digital communications megatrends present the opportunity to grow a range of industries that can maintain the region's diversity, build resilience and support inclusive growth. A Priority Goal is thus to foster emerging industries such as creative industries and the arts, and transformation of traditional industries such as timber and mining.



An export oriented
cornerstone industry



A high amenity lifestyle brand



Maritime freight expansion, Port of Bunbury



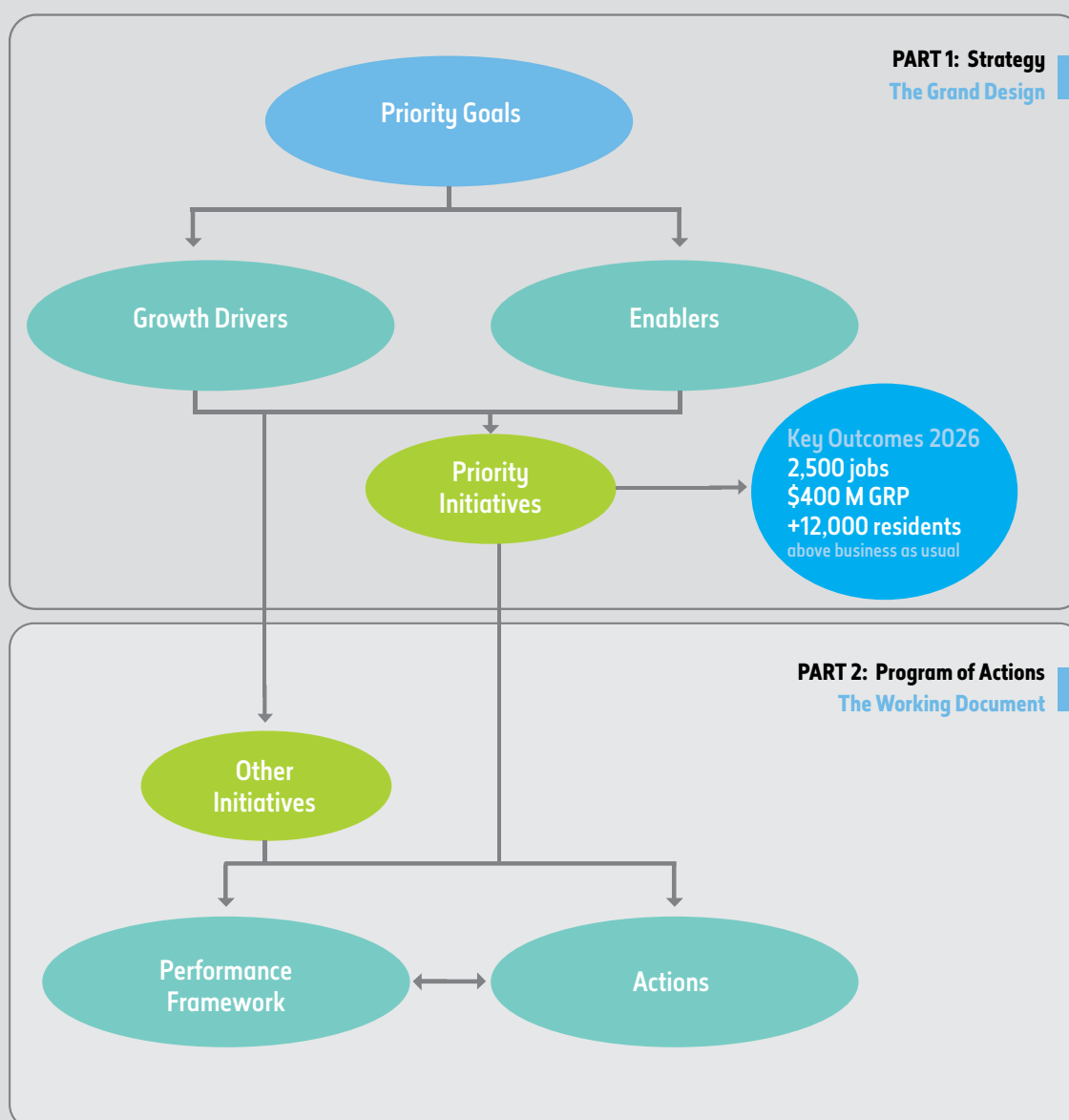
Education delivery, building human capital.

THE STRATEGY: GOALS INTO ACTION

This Growth Plan adopts a coherent strategic framework for translating the Priority Goals identified for Bunbury Geographe into a program of actions. The strategic framework is based on 'Growth Drivers', 'Enablers', and 'Priority Initiatives' that will deliver key economic outcomes for the region. The priority and other initiatives inform a comprehensive program of actions and a performance framework that are presented in detail in the Growth Plan Part Two: Program of Actions.

The growth planning process has incorporated strategic research into the form of economic activities that could drive sustainable economic growth for the region. This included investigating the potential for industry 'clusters', which are groups of associated, non-competitive industries that collaborate to drive business performance and economic growth. Research indicated a limited presence of industry clusters in the Bunbury Geographe region. Consequently, the growth planning process adopted an alternative approach, based on consultation with industry sector committees to identify 'Growth Drivers'. These committees will enable collaboration between industries and offer potential for future development of clusters in the region.

Bunbury Geographe Growth Plan: Strategy Framework



Overview of the Strategic Framework

GROWTH DRIVERS ARE KEY INDUSTRY ACTIVITIES AND ARE CONFIRMED BY OBJECTIVE RESEARCH

The Growth Drivers identified by the industry sector committees comprise a combination of unique initiatives that will anchor or catalyse the growth of a new industry, or several initiatives within a sector that together will strengthen and diversify the economy. Growth Drivers will result in economic growth faster than business as usual, leveraging the region's competitive advantage and targeting a growing global market.

There are a total of eleven Growth Drivers structured within the five high Priority Goals for identified Bunbury Geopraphe. Each of the Growth Drivers will be delivered by a combination of Priority Initiatives and other initiatives, and will be made possible through the effect of Enablers.

ENABLERS MAKE THE DRIVERS POSSIBLE

Enablers are the social, technological and economic preconditions vital for success of the Growth Drivers. They are at the heart of the region's community and business interactions, and they work across all of the Growth Drivers and Priority Initiatives:

- **Leadership and governance** that empowers informed local decision-making in industry, government and the community, and encourages entrepreneurship.
- Being **digitally aware** to assist in overcoming the tyranny of distance and enhancing global business connectivity.

- Being **regionally engaged** through cooperation with neighbours and becoming a responsible global citizen.
- **Capital and resources**, including financial capital, land and water resources.
- **Infrastructure**, including freight links, communications, power and water.
- **Social capital**, which includes networks together with shared norms, values and understandings that facilitate co-operation.

PRIORITY INITIATIVES FOCUS OUR EFFORTS

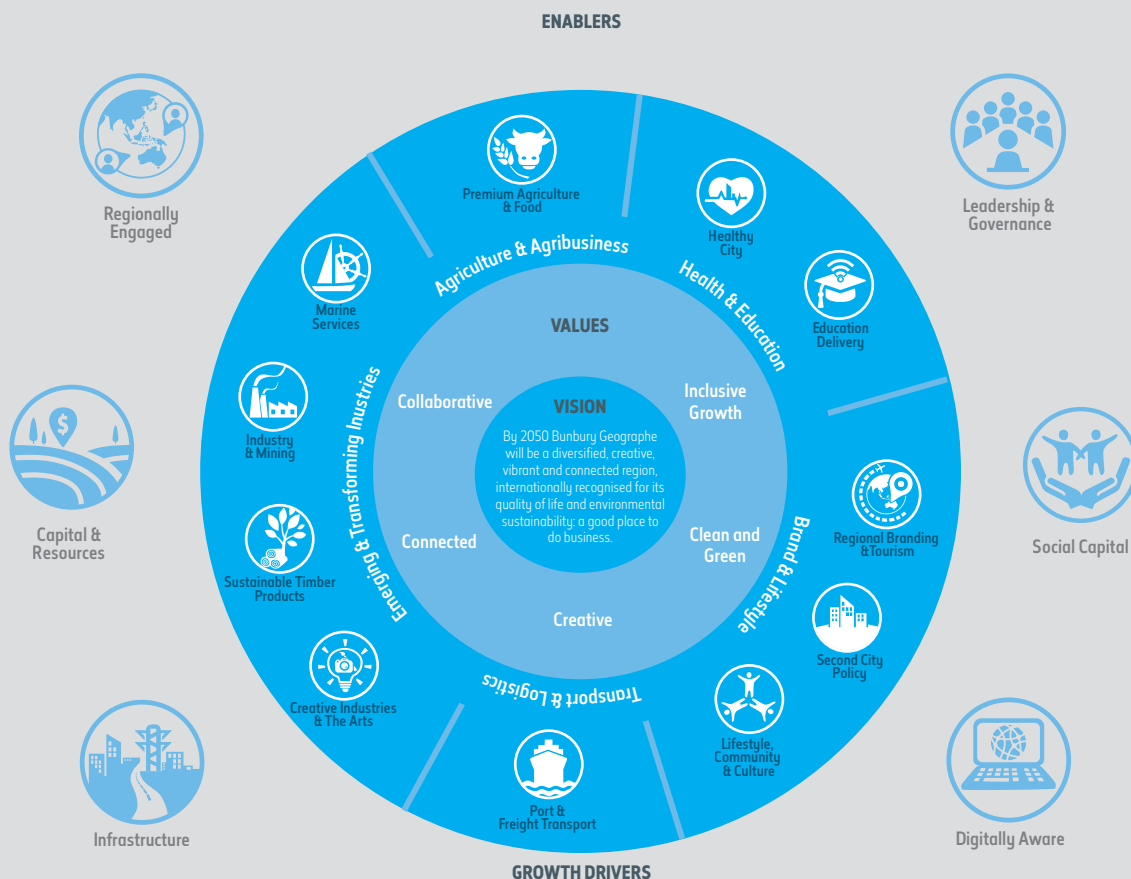
Priority Initiatives are those initiatives that represent an optimum balance between short-term and large-scale economic benefits and demand a focus of resources and effort to ensure their success.

SUPPORTING INITIATIVES COMPLEMENT THE PRIORITIES

The Priority Initiatives are complemented by a host of supporting initiatives that together drive economic growth in the region. These initiatives also implement the Enablers, building the region's social capital and ensuring that growth is in line with our values of inclusivity, sustainability, creativity and connection.

The supporting initiatives under the Growth Plan are presented in the Growth Plan Part Two: Program of Action

Bunbury Geopraphe Growth Plan: Components and Connections



The Growth Drivers

Eleven Growth Drivers have been identified for Bunbury Geopraphe, reflecting the strength and diversity of the region's economy and its role as a regional centre. The Growth Drivers are based on a partnership between industry, government and the community, and respond to the identified megatrends as well as the region's strategic competitive advantages.

PRIORITY GOAL: AGRICULTURE & AGRIBUSINESS

Growth Driver: Premium agriculture and food production

Global food demand is set to rise under the Asian century, urbanisation and climate change megatrends and Bunbury Geopraphe is well placed to service a boutique, premium food market overseas.

There are a number of factors reinforcing agriculture and food production as a key export opportunity for the region. The region currently exports produce, including to Asia, enjoying a strong reputation for providing safe food that is 'clean and green' and fulfils a key customer demand. The region is in similar time zones to Asia, facilitating business communications, and yet is located in the Southern Hemisphere therefore offering counter-seasonal fruit and vegetable goods.

Efficient supply chains together with modern processing and packaging technologies will assist delivery of premium produce in a timely and reliable manner. International freight opportunities may be augmented through the Busselton-Margaret River Regional Airport upgrade and future containerisation at Bunbury Port.

A key factor to unlocking agricultural production is securing future water supplies, as reflected in the Priority Initiative identified for the driver.



PRIORITY GOAL: BRANDING & LIFESTYLE

Growth Driver: Regional branding and tourism

Bunbury Geopraphe is well placed to service the rise in regional and international tourism forecast under the Asian century, urbanisation, ageing and climate change megatrends. A wave of baby-boomers from Perth-Peel and an expanding Asian middle class will seek authentic tourism experiences in an environment that continues to be cool and green compared to an increasingly urbanised and drying Perth-Peel.

There is opportunity to grow the tourism industry in Bunbury Geopraphe to levels seen in the wider South West and in other Australian states. With its waterfront location, Dolphin Discovery Centre, Bunbury CBD and the Geopraphe Wine Region in the hinterland, Bunbury Geopraphe has a great deal of potential as a tourism destination. Tourism also offers the opportunity for inclusive growth consistent with our values, including Aboriginal economic development, job intensity and population servicing industries that benefit a broad range of the region's residents.

Growth Driver: Lifestyle, community and culture

The increasing urbanisation and ageing in Perth-Peel will drive a wave of baby-boomer retirees, active ageing professionals, younger families and youth seeking a high quality lifestyle close to coastal and natural environments, housing affordability and access to services.

Lifestyle and community growth creates jobs and population growth through retail and hospitality activity, construction, education and health. As lifestyle quality and sense of community grow, so does the population and number of service-related jobs.

Greater lifestyle quality increases the likelihood of attracting enterprises reliant on higher skilled workers, which are also less likely to suffer a net negative downturn in total jobs as a consequence of automation over the next few decades. This means that the Growth Driver has important flow-on benefits to most of the other Growth Drivers: tourism, creative industries and even agribusiness, timber and mining and industry.



Growth Driver: Second city policy

A bold, interventionist Second City Policy is proposed to generate a step change in decentralising Western Australia's economy. This policy will facilitate Bunbury becoming the State's second major city with the necessary economies of scale and social depth to be a genuine urban alternative to Perth-Peel. The policy responds to the trend in urbanisation in Perth-Peel and facilitates the growth of alternative, diverse lifestyle options and improved housing affordability.

The Second City Policy will direct the decentralising of over 200,000 people from Perth-Peel to generate a regional population of 300,000 and provide a major impetus for the development of Wanjoo and other towns in the region.



PRIORITY GOAL: TRANSPORT AND LOGISTICS

Growth Driver: Port and freight transport

The development of Bunbury Port is another key economic opportunity for the region, reducing the costs of international freight and facilitating the growth of mining, agriculture and associated processing. Growing the role of the Port will also support a range of other industries in transport services, engineering, design and construction and subsequent jobs in the wider economy.

The growth of Bunbury Port is already in hand with preparation of a Structure Plan and Strategic Public Environmental Review to pave the way for future development.

Bunbury Port's operations will complement that of Fremantle, with containerisation to service Perth-Peel's freight demand, and well connected to road and rail freight routes that eliminate congestion and connect with industrial precincts in the hinterland.



PRIORITY GOAL: HEALTH AND EDUCATION

Growth Driver: Healthy city

Bunbury Geopraphe is poised to become 'Australia's Healthiest City', prioritising physical and mental health and supporting health based research, education and service professionals. The region will become cycling and walk friendly, with a network of active recreation areas that build on and showcase its outstanding amenity and natural environment values.

As Australia's healthiest city, Bunbury Geopraphe will attract and retain a skilled workforce and its pervasive healthy environment will enable a high level of workforce participation and productivity. In addition, the healthy environment will be a strong attractor and support for the generational wave of baby-boomer retirees and lifestyle visitors that are set to move to the South West over the next 20 years, as well as appealing to migrants and investors from overseas who seek an alternative to increasingly intensive urban environments, particularly in Asia.



Growth Driver: Education delivery

Education delivery is both a Growth Enabler and Growth Driver. It is critical to growing and retaining a skilled workforce to support other growth drivers, as well as appealing to migrants from Perth-Peel and internationally, therefore encouraging investment and growth from outside the region. With the Asian century and urbanisation megatrends there will be demand for high quality lifestyle alternatives to intensive urban living. Provision of high quality education services is critical to attracting migrants to Bunbury Geopraphe rather than another lifestyle region in Australia.

Education delivery can be augmented to integrate the region's environmental qualities, such as coastal science and biodiversity, while responding to the ageing megatrend through active aging study opportunities. International studies can be attracted through a similar time zone to most of Asia, as well as the lifestyle, affordable accommodation and cultural experience available in the region.

The socialised 'People's Place' CBD provides an opportunity to deliver education services beyond the historic campus model, in line with changing generational expectations. There is also opportunity to link regional education to regional industries set to grow under this Plan, particularly agriculture.



PRIORITY GOAL: EMERGING AND TRANSFORMING INDUSTRIES

Growth Driver: Creative industries and the arts

Digital connections are redefining the way Australians work, trade and communicate. This creates an unprecedented opportunity for growth in the creative industries, arts and culture.

Creative industries and the arts have potential to attract a diversity of workers, invariably highly capable and often with skills that are transferable into a range of employment settings. Creative industries extend beyond the arts and cultural sector and include different forms of design, fashion and a range of professional services and manufacturing.

Bunbury Geographe will host an intensively socialised CBD and range of high amenity towns unlike any other region in the State, which can attract creative industries and arts and support the Lifestyle, Community and Culture, Healthy City, and Education Delivery drivers.

Growth Driver: Marine services

The Transforming Bunbury's Waterfront initiative is expected to stimulate growth in marine industries, in addition to supporting the Lifestyle and Community and Regional Branding and Tourism drivers.

Providing space and infrastructure will support boat sales, repairs, maintenance and storage, as well as flow-on effects in accommodation, hospitality and retail. This will leverage under-used waterfront space which sets Bunbury apart from many other coastal towns in the South West.

Addressing unmet demand for boating facilities, as well as catering to expected growth in recreational marine activity, will underpin this Growth Driver. This also creates jobs in manufacturing and other services; two industries with comparatively high job multipliers. A thriving marine industry will also catalyse investment in tourism, residential and retail development. It may also support activity for cruise and naval ship visits, both of which can inject considerable expenditure into the local economy.

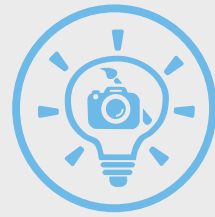
Growth Driver: Industry and mining

Mining and mineral processing has underpinned the economic development of the region and will continue to play an important role. The scale of investment in mineral processing to fuel the expanding renewable energy sector (e.g. in silica and lithium) is likely to remain high for some time to come. Development of Bunbury Port, freight routes and access to water resources remain key opportunities to grow and sustain the industry and mining sector.

Growth Driver: Sustainable timber products

The Asian century and urbanisation megatrends will continue to drive demand for sustainable timber products. The timber industry is an important regional employer, particularly wood products manufacturing. Increased local use of timber and wood products in the building industry has the potential to create jobs and there is opportunity to increase export of wood products from the region.

A key prospect for job creation lies in wood products processing, as well as growth of the forestry sector.



The Priority Initiatives

There are nineteen Priority Initiatives identified for Bunbury Geographe in this Growth Plan. These initiatives focus on the region's efforts and resources to achieve the biggest impact on the economy in the short to medium term.

The Priority Initiatives are presented spatially across the region in the diagram below, with their respective linkages to the Growth Drivers. The Priority Initiatives have been subject to a robust evaluation of economic benefits including job creation, additional population, employment multiplier, and scoring using a Multi-criteria Assessment (MCA) tool. The MCA scoring is preliminary and will be reviewed and refined as the Growth Plan initiatives are implemented. Details of the Priority Initiatives and the economic evaluation are presented in Part Three: Background and Context, with supporting initiatives and actions presented in Part Two: Program of Actions.

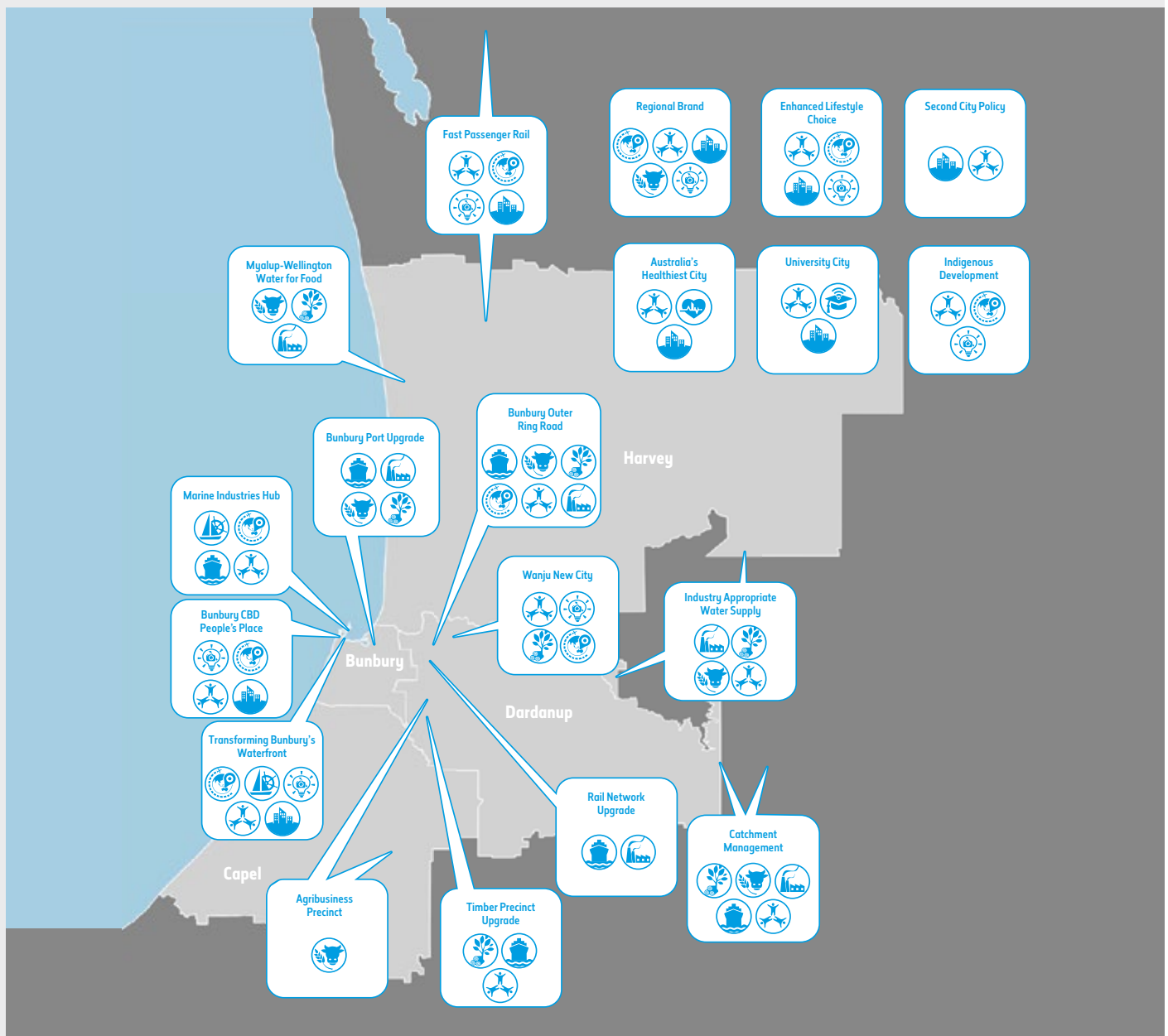
Analysis of the Priority Initiatives indicates that in combination they will generate the following benefits, above business as usual, by 2026:

- **2,500** additional jobs
- **\$400** million additional Gross Regional Product
- **12,000** residents additional to the WA Tomorrow forecast

These benefits are greater than the sum of the individual Priority Initiatives presented in the table below, and demonstrate the cumulative, integrated effect of developing a diverse range of projects for the region.

The Priority Initiatives are presented in the table in alphabetical order and are not in order of priority.

Bunbury Geographe Growth Plan: Priority Initiatives



PRIORITY INITIATIVE	DESCRIPTION	ESTIMATED ECONOMIC BENEFITS BY 2026				
		Gross Regional Product (\$m)	Direct job impact	Additional population	Employment multiplier	Part Two Ref ¹
Agribusiness Precinct	A designated precinct for food processing to promote private sector investment in industries that support and add value to agricultural products.	38.8-50.2	300	n/a ²	1.32	1.2
Australia's Healthiest City	Prioritised physical and mental health, research and education, a cycling and walk friendly region, active recreation areas and a model for inter-generational and active ageing.	n/a	n/a	n/a	n/a	7.1
Bunbury CBD People's Place	A civic and cultural precinct to foster diverse activity and nightlife in the Bunbury CBD, and attract inner urban residential development.	18.7-19.8	190	375	1.56	6.1
Bunbury Outer Ring Road	Improved safety and efficiency through separating passenger from freight vehicles and enhancing port access.	11.4-34	200	n/a	11	2.2
Bunbury Port Upgrade	Containerised ship loading to allow an increase in volume and value of mineral exports and set a pathway for future imports.	28.1-39	100	n/a	1.14	2.1
Catchment Management	Reforestation and thinning of Wellington Dam catchment to reduce salinity and improve yield.	8.1-10.5	80	n/a	1.06	11.2
Enhanced Lifestyle Choice	Improve reputation as a desirable regional centre offering a strong sense of place, community and culture; lifestyle choice and a distinctive range of affordable housing options	n/a	n/a	n/a	n/a	4.1
Fast passenger rail link	A fast rail line to attract greater residential development in line with a Second City Policy.	7.1-8.3	5-10	400	4.14	5.2
Indigenous Development	Establishing an Aboriginal Economic Development Network to advance Aboriginal economic, social and cultural development	n/a	n/a	n/a	n/a	4.2
Industry-appropriate Water Supply	Affordable fit-for-purpose water supplies for mineral processing.	18.6-28.9	120	n/a	1.23	10.1
Marine Industries Hub	Upgrading the outer harbour to meet the growing demand for recreational boating and provide a range of opportunities for marine industries.	9.9-13.8	150	400	1.1	9.1
Myalup-Wellington Water for Food	Piping the Collie irrigation district and recharging groundwater at Myalup using desalinated from Wellington Dam to increase water availability and improve quality for agricultural users.	181-215	1560	153	1.07	1.1
Rail Network Upgrade	Increase capacity in rail line where freight trains from Collie and Worsley join the main line, facilitating greater freight efficiency and lower export costs.	10-16	100	n/a	1.08	2.3
Regional Brand	Development of a regional brand to capture and promote the unique identity and essence of Bunbury Geopraphe.	5.3-6.1	20-25	n/a	1.22	3.2
Second City Policy	Interventionist 'Second City' decentralisation policy to divert a portion of Perth-Peel's forecast population growth to 'Bunbury-Geopraphe @300,000'	n/a	n/a	n/a	n/a	5.1
Timber Precinct Upgrade	Designated timber precinct to promote private sector investment in industries that support and add value to timber products.	30.3-35.6	250	n/a	1.13	11.1
Transforming Bunbury's Waterfront	A tourism focal point, contributing to local liveability through active recreation, and creating opportunities for commercial and residential development.	11.2-12.8	100	370	1.22	3.1
University City	Investigating Bunbury as a university city with a futuristic university, international campus and biodiversity research centre.	n/a	n/a	n/a	n/a	8.1
Wanju New City	Development of around 20,000 dwellings, focused on sustainable design principles to attract people seeking a sustainable lifestyle alternative to capital city living, and driving job growth through a range of industry sectors.	4.6-10.2	100	50	4.14	5.3

1. The priority initiatives marked with 'n/a' are identified as having a priority initiative value for the region, however additional information is required as this time to quantify their economic benefit.
2. Refer to Program of Initiatives Table contained in Part Two: Program of Actions.



TEDxBunbury, community leadership in action

LEADERSHIP AND COLLABORATION

The Bunbury Geopraphe region has an extensive network of government and industry bodies with a role in economic development. In addition, the State Government is in the final stages of negotiating a Native Title Agreement which is focussed on future economic opportunity for Aboriginal people.

The growth planning process has created a more structured dialogue within industry sectors, between local and state government and across the public and private sector, than has occurred in the past. It was identified early in the process that due to the already busy economic development landscape, there was not a desire to create an additional layer of governance, but instead to draw on the existing strengths. A number of these organisations are in a phase of transition, exploring opportunities to collaborate and coordinate their efforts in economic development. To allow that process to unfold naturally, an interim governance structure has been established for the Growth Plan Partnership.

The philosophy of collaborative governance has been used as a foundation of the growth planning process enabling the community, industry and government to co-design the Growth Plan. In line with that philosophy comes the notion of shared funding. In order for all parts of the economy to value the Growth Plan, shared resourcing of its implementation is required.

In its transition phase the Bunbury Geopraphe Growth Plan Partnership will comprise the following members:

- President of the Bunbury Chamber of Commerce & Industries
- Chairman of the Bunbury Wellington Economic Alliance
- CEO or delegate of the Southern Ports Authority
- Presidents of the Shires of Capel, Dardanup and Harvey
- Mayor of the City of Bunbury
- CEO of the South West Development Commission

Additional members may be co-opted over time to represent other key sectors such as agriculture, arts and culture and Aboriginal Economic Development Network.

A Terms of Reference has been established to govern the work of the Growth Plan Partnership. In the short term, the local governments will share the role of providing secretariat support for partnership meetings.

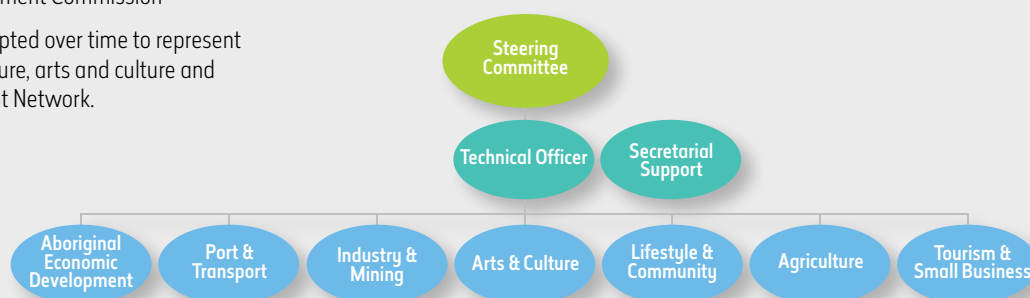
The backbone of the growth planning process was through the establishment of sector groups. The key to successful implementation of the Growth Plan is the potential evolution of those groups into industry clusters and the progression of identified initiatives to implementation. In order to support the Growth Plan development process, a Technical Officer has been resourced to:

- provide facilitation and coordination for sector groups to enable them to meet and progress shared initiatives through to implementation;
- connect with existing sector groups (eg Tourism association, Marine services working group, Chamber of Minerals and Energy)
- oversee roll-out of the Regional Brand;
- determine ongoing funding sources for Growth Plan implementation into the future;
- monitor the implementation of the Growth Plan; and
- report to the Growth Plan Partnership on all of the above matters.

The Technical Officer has budget to access additional support to undertake this task as sector groups further develop.

Supported by the Technical Officer, the Growth Plan Partnership will meet on a quarterly basis (or as required) to ensure implementation is progressing as planned. Over time as sector groups strengthen and member organisations transition, it is intended that the governance structure will be reviewed and amended to complement the changing governance landscape.

Interim Organisational Structure



DELIVERING THE PLAN

Building resilience and enterprise for the future

This Growth Plan aims to build a progressive, modern economy that is defined by the unique characteristics, natural wealth and human capital excellence to be found in the Bunbury Geopraphe region. A modern-day economy is enterprising, responsive, balanced, diversified and resilient to future changes in Australia and internationally.

Robust and vibrant regional economies are created by: encouraging a healthy mix of small, medium and, where possible, larger enterprises with strong linkages between businesses of different scale and scope; a motivated and engaged workforce that is appropriately skilled; and a supportive local community that is unified, resolute and consistent in respect of its economic priorities and goals.

Bunbury Geopraphe's economic resilience will be built and maintained by the following:

- **Commonality of purpose** that is shared by all key stakeholders.
- **Global engagement and digital awareness** that foster a heightened surveillance, understanding and response to changing international markets.
- **Strong collaboration between industry, government** and the community that allows for effective response to changes as they occur, while leveraging the full strength of the economy.
- **Commitment to derive maximum benefits from, and add value to, existing areas of economic strength;** for example, agriculture, agri-business, timber processing and mining.
- **A new resolve to support emerging sectors and industries** that will consistently renew and revitalise our economic base; specifically, but not exclusively, health and education.
- **The desire to support economic clusters and embed Growth Drivers** that provide a broad platform for economic growth and avoid reliance on any one particular sector.
- **A commitment to build the necessary infrastructure for developing and retaining human talent** consistent with a modern, globally-responsive economy.
- **An unwavering resolution to build a distinct Bunbury Geopraphe regional brand** that attracts high level human capital and supports the uniqueness and excellence of our traded products and services.

Tracking progress: ensuring we get it right

The Growth Plan will be monitored by the Growth Plan Partnership with assistance from the Technical Officer. Success will be measured by the development of the sector groups and progression of initiatives to implementation. The following performance measurement will be used to monitor the Growth Plan over time and guide changes to implementation planning.

The Growth Plan will be subject to regular review to ensure that it remains on track to drive the desired outcomes for the region.

Part One: Strategy will be reviewed every five years by the Technical Officer working with sector groups and reporting to the Growth Plan Partnership.

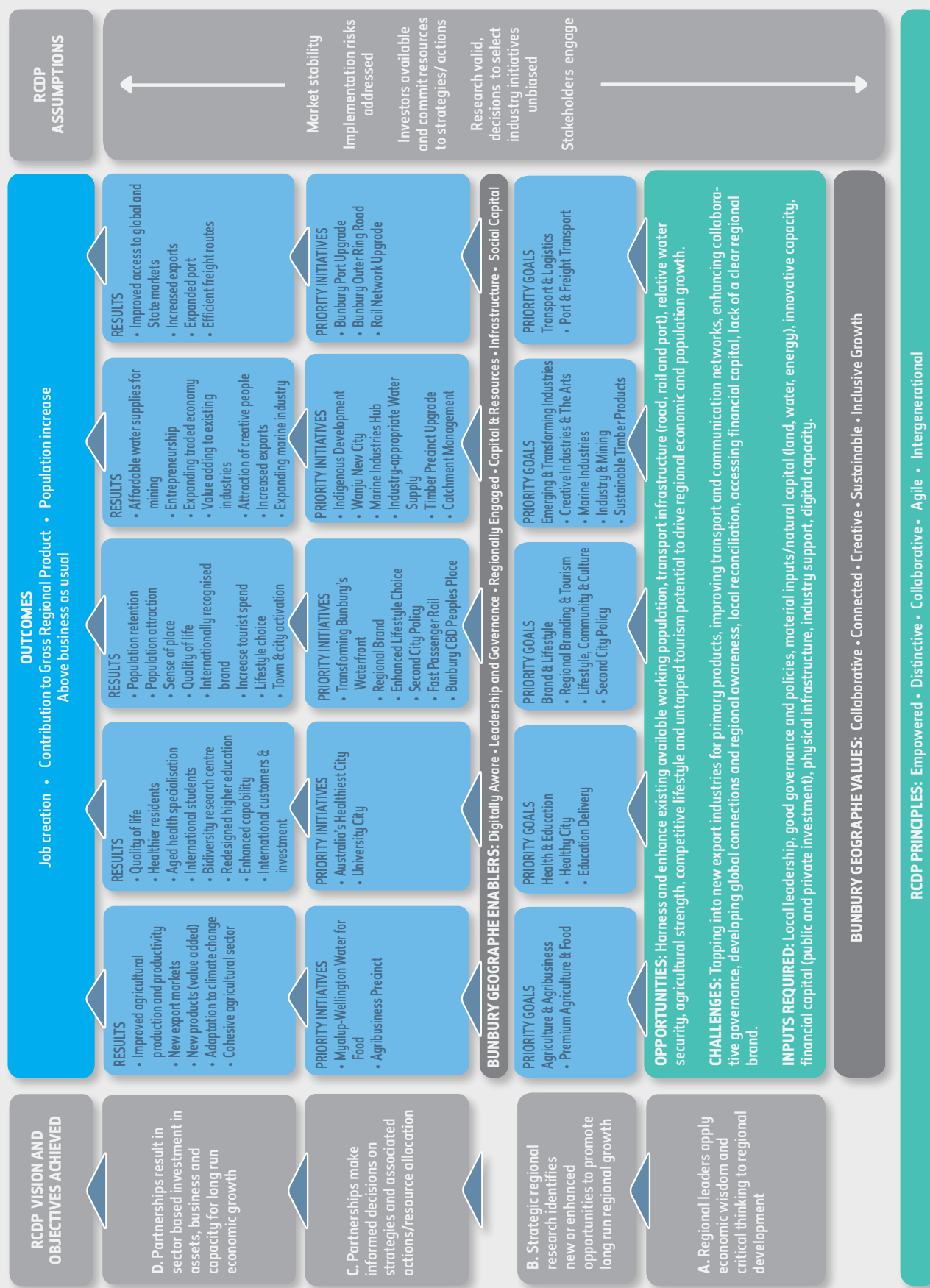
Part Two: Program of Action will be reviewed every year by the Technical Officer reporting to the Growth Plan Partnership.

The Growth Plan will be monitored by the Growth Plan Partnership with assistance from the Technical Officer. Success will be measured by the development of the sector groups and progression of initiatives to implementation. The following performance measurement will be used to monitor the Growth Plan over time and guide changes to implementation planning.

Theory of Change

A Theory of Change diagram is presented below, which provides a comprehensive outline of the step wise process for the region to achieve the Growth Plan outcomes. The Theory of Change has been developed consistent with the Western Australian Government's Regional Centres Development Program objectives.

Bunbury Geopraphe Growth Plan: Theory of Change



GLOSSARY

Aboriginal reconciliation	A social movement within Australia that aims to build unity and respect between Indigenous and non-Indigenous Australians. The movement values respect for Indigenous heritage and achieving justice and equity for all Australians.
Enabler	An essential condition for Growth Drivers and priority initiatives to be effective. An example is governance and leadership. Enablers underpin all of the growth drivers for the region.
Growth Driver	A combination of unique initiatives that may be the anchor or catalyst for a new industry, or several initiatives within an industry sector that together can strengthen and diversify the economy. An example is Premium Agriculture and Food Production. Growth Drivers will result in growth that is faster than business as usual.
Megatrend	A global change that affects societies, economies and governments over the long term. Megatrends if harnessed effectively can present major opportunities for economic and social growth.
Multi-criteria assessment (MCA)	An assessment involving review and consideration of multiple criteria to evaluate and prioritise a range of options. The MCA adopted for Bunbury Geographe was developed by Department of Regional Development and tailored to the region, with a preliminary score from 0 to 100 provided for each assessed initiative.
Priority Goal	One of five goals identified as necessary to unlock the opportunities for achieving the Growth Plan Vision.
Priority growth initiative	One of nineteen initiatives identified as having the greatest potential to catalyse further economic growth for Bunbury Geographe in the short to medium term. An example is the Transforming Bunbury Waterfront project.
National broadband network (NBN)	An Australia-wide open access data network comprised fixed line, wireless and satellite broadband connections sold to retail service providers, who then sell internet access and other services to consumers.
South West Native Title Settlement	A comprehensive native title agreement comprising full and final resolution of all native title claims in the South West region, including Bunbury Geographe, in exchange for a package of benefits to the Noongar people.
Theory of Change	A comprehensive outline of the step wise process for achieving the Growth Plan outcomes. The Theory of Change demonstrates how a series of results contributes to achieving the final outcomes.
Traded Economy	A collective term for those industry sectors whose goods or services are traded outside the region, including internationally, with Perth-Peel or elsewhere in Australia. An example of a traded industry sector is tourism.



Geographe

BUNBURY
Geographe