

BUILDING WESTERN ADELAIDE



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Intro— duction

The Western Region of Councils comprises the Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens. A map of the region is included on page page 8.

The purpose of this strategy is to highlight the significant projects that are occurring and are proposed in the Western Region over the next 10 to 15 years. These projects are currently creating and will continue to create significant employment opportunities. A list of projects on which the Councils can collaborate to grow local jobs on a regional basis has been outlined in this document. The projects have been aligned to the State Economic priorities thereby aligning Local and State Government priorities.

The strategy can be used to advocate to the State and Commonwealth Government to secure funding and support for the projects. It can also be used to advocate for government policy reform.

Western Adelaide is home to a number of iconic South Australian businesses including: Adelaide Airport, Coopers, West End, Arnott's, Vili's, Rossi Boots, San Remo, Smiths and Australian Submarine Corporation.

Role of Local Government in Economic Development

Governments on their own don't drive economic development, business investment, innovation and entrepreneurship drive growth. Governments are enablers, facilitators and enhancers of economic growth.

All three levels of government play critical roles in economic development and it is important that they are complementary and developed and implemented in a coordinated approach.

Councils are widely acknowledged to be of fundamental importance to building and sustaining strong, cohesive and resilient communities. Much of what Councils do as part of their core functions affect local economic activity.

Councils can have a substantial impact on the business investment appeal of a local area. They are also, participants in the early stages of business development through their role in:

- » Assessing development applications
- » The provision of local infrastructure that facilitates business activity
- » The provision of business development assistance through, for example, support for business advisory services, marketing and promotion of their local areas and tourism attraction.
- » Supporting Main Street Business Associations to encourage investment, growth and vibrancy of local retail precincts eg Jetty Road Mainstreet Management Committee, Glenelg.

Councils at a regional level can collaborate to drive and shape the strategic focus for economic development. They can also work with the State and Commonwealth Government to deliver economic development initiatives and local employment outcomes.



Creation of a Western Alliance

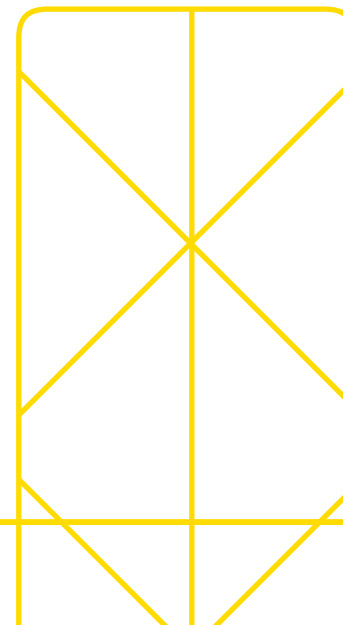
In February 2015, the Chief Executive Officers and key staff from the four Councils met to explore the potential of a Western Alliance for economic development matters.

The Building Western Adelaide Strategy was subsequently endorsed and a Memorandum of Understanding (MoU) for Regional Collaboration and a Western Alliance for Economic Development was signed by the four Councils in November 2015. The MoU has a number of objectives which seek to facilitate local employment opportunities and economic development outcomes for the Western Region.

Western Region Economic Strategy

There is a need to formally engage with the State and Federal Governments to develop a Western Region Economic Strategy.

It is proposed to provide this Building Western Adelaide document to relevant agencies and businesses including: Western Business Leaders, as well as Local, State and Commonwealth Government as a first step in developing a Western Region Economic Strategy.



Western Business Leaders

The Western Business Leaders (WBL) group was formed in 2013 by the City of Charles Sturt working with local businesses.

It consists of 40 businesses in the sports, recreation, tourism, health and manufacturing sectors located in the Western Adelaide region.

The WBL meets three times a year to discuss issues of major

importance to business and holds policy focused business lunches and business breakfasts including: New Directions for South Australian Tourism Commission, Sports for Export and Invest in the West.

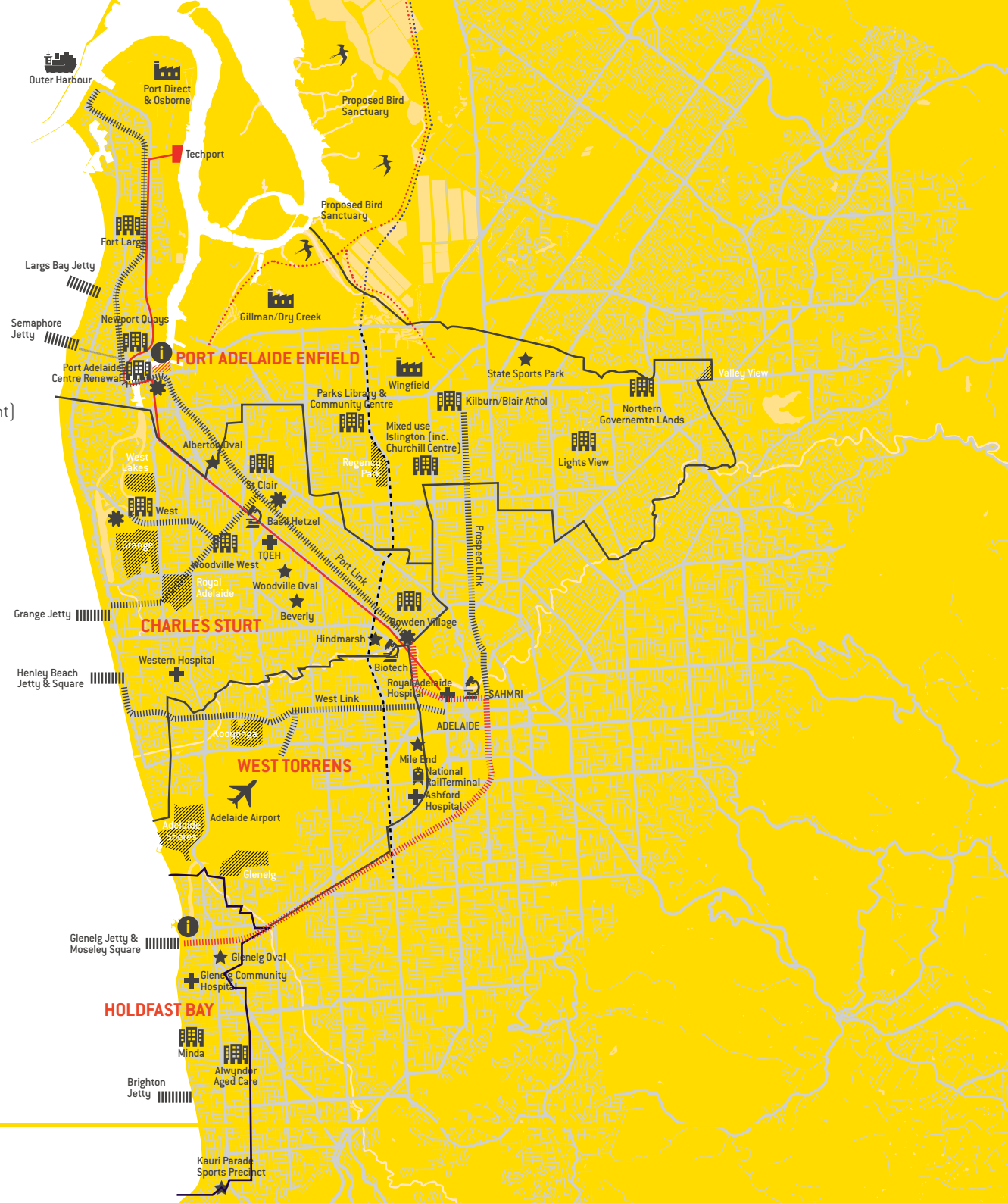
Adelaide Business Hub

The Adelaide Business Hub is based in Todd Street, Port Adelaide and provides a business incubator and support services for businesses in the Western Adelaide Region and beyond.



Western Region Map

- ★ TOD (Transit Oriented Development)
- South Road Superway
- ▨ Golf
- ✚ Hospital
- 🏥 Medical Research
- 🏢 Urban Development
- 🏭 Employment Lands
- SABRENet
- 🚢 Outer Harbour
- ★ Sports Stadiums
- ▤ Proposed Light Rail
- ▤ Existing Light Rail
- North Connector Road
- North Connector Rail
- ▨ State Heritage Area
- 📍 Visitor Information Centre



Current Status of the Western Region Economy

The population of the Western Region is 322,320 (2014) which represents just over a quarter of the total Greater Adelaide population.

In the four Western Adelaide Councils in 2008 there were a total of 23,756 businesses. By 2012 the total number of business had increased by 1,297 to 25,053 businesses. The City of Charles Sturt had the largest number of businesses with nearly 8,500 (figure 1).

Manufacturing Decline

Figure 1: Total Businesses in Western Adelaide from 2008 – 2012



The Western region has seen a reduction in manufacturing industries, particularly since the decision to close the Holden manufacturing plant at Elizabeth.

In mid 2014, two automotive companies in Royal Park: Techalloy and Custom Coaches closed. This is indicative of the decline in manufacturing in Australia and particularly Western Adelaide. Department of Employment data indicates that employment in the manufacturing sector in Western Adelaide has reduced by 1000 jobs in the previous four year period.



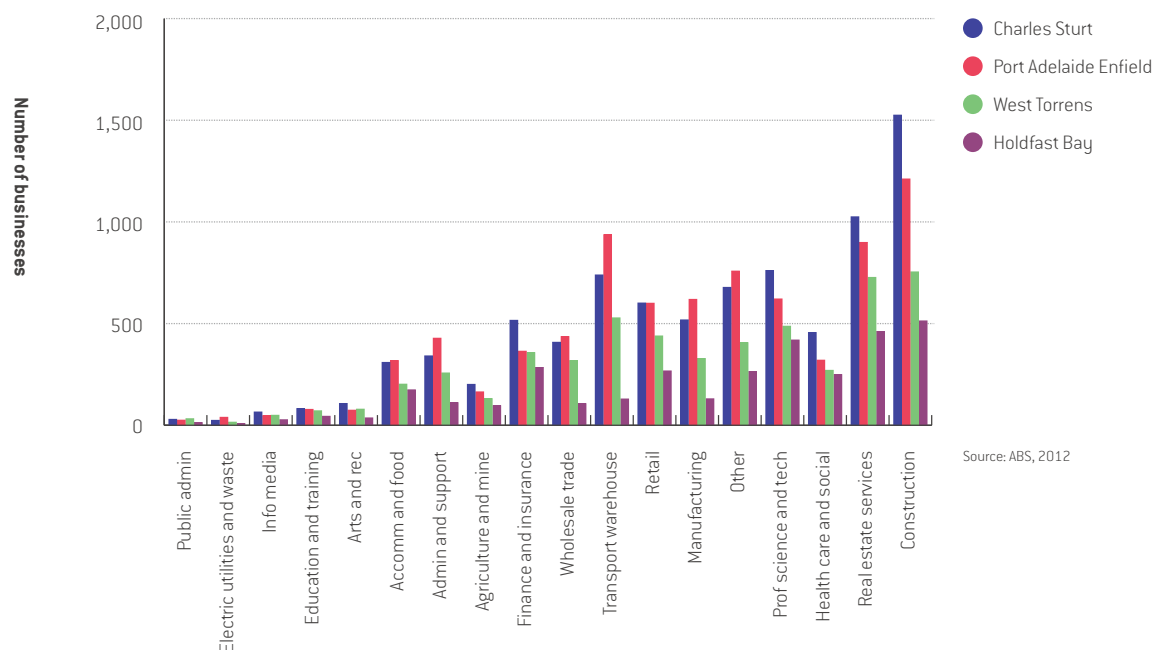
Tourism Sector

Tourism is a growing economic priority for Western Adelaide, directly employing 9,537 people (6% of total employment) and supporting 4,669 businesses (19% of all businesses).

Cafe and restaurant sector jobs account for the largest proportion of tourism jobs, followed by jobs in retail, and in the air, water and other transport sectors. The geographical spread of tourism employment, the fragmented nature of industries involved in

providing goods and services to visitors, and the high proportion of small businesses illustrate the importance of government support for marketing, investment in demand-driving infrastructure, and policy settings which improve the industries' competitiveness.

Figure 2: Businesses in Western Adelaide by Industry Sector





Economic Growth

Western Adelaide's proximity to the City, Airport, Port of Adelaide, transport networks (road and rail) and the beach underscore the strength of its sporting and entertainment facilities and services.

The recent Western Business Leaders Sport for Export Business Breakfast highlighted the opportunities for economic growth based on the region's assets and competitive advantage.

The Western Region also contains significant defence (Techport), logistics and tourism infrastructure which can provide future economic development and growth opportunities.

The region's recent employment growth sectors include:

- » Health Care and Social Assistance
- » Education and Training
- » Construction
- » Professional, Scientific and Technical Services
- » Transport, Postal and Warehousing

Further details on the growth sectors statistics are included in Appendix 1.

Small business formation in decline

The Western Business Leaders group is actively identifying and promoting business opportunities in the West.

Critical to jobs and business growth is the number of small businesses that start up each year and the number that exit. Figure 3 below provides an analysis of small business start-ups and exits in the four Councils.

New business entries in all four Councils areas declined over the five years between 2008 to 2012. The total decline in new business start-ups over the five year period was 11.4%. In the same period business exits have been stable or in decline. The most marked trend is in Charles Sturt where in 2012 the number of new business start-ups exceeds exits by only seven businesses.

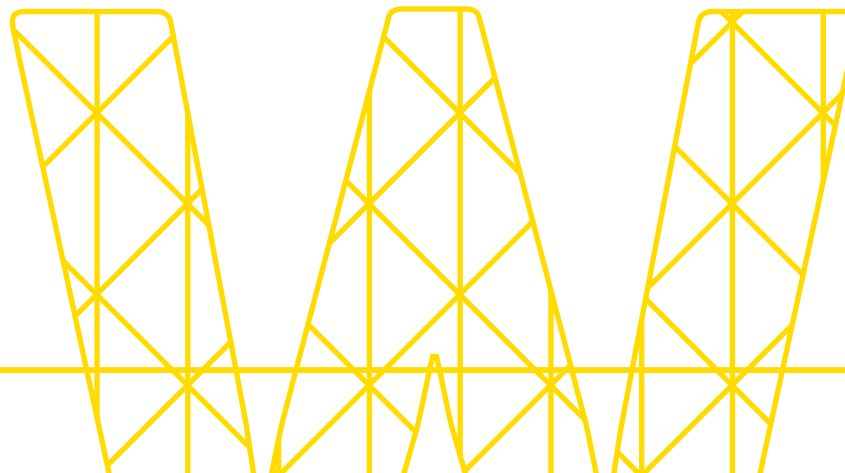
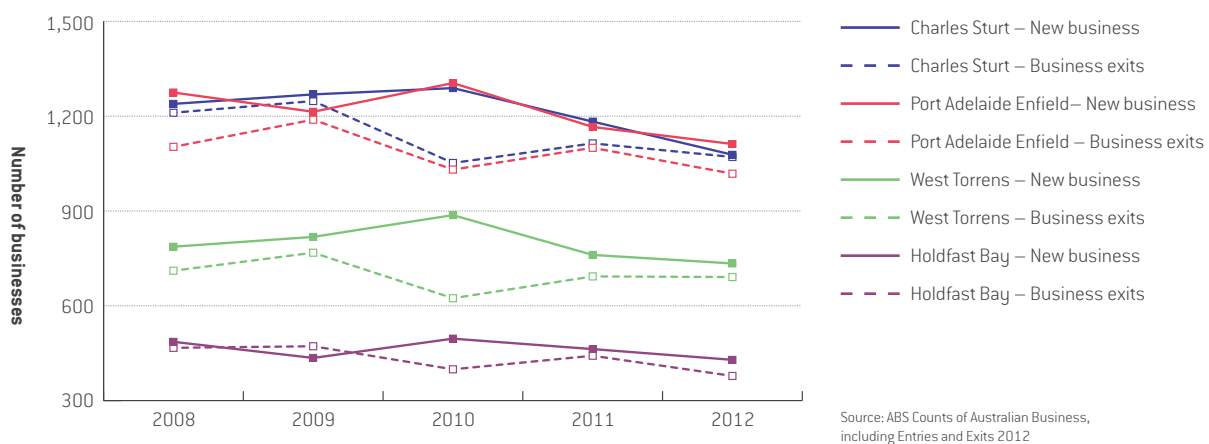


Figure 3: Small business start-ups and exits in Western Adelaide 2008 – 2012



To address this decline a number of initiatives are proposed to promote small businesses including development of:

- » Small business support including a business hub in the inner west and development of an innovation and export network
- » Health sector cluster and promoting bio innovation
- » Tourism (eco-tourism, heritage and culture) and sport initiatives.

Job creation and labour force participation in Western Adelaide

The 30 Year Plan for Greater Adelaide (2010) sets ambitious targets for jobs growth in Greater Adelaide over the next 30 years to meet the Government’s population targets for 2040.

The 40,500 new jobs targeted in the Western Adelaide region as part of the 30 Year Plan creates a challenge for us. The Western region is in transition from a manufacturing and automotive based economy to a service based economy and needs to foster new growth sectors and job creation initiatives.

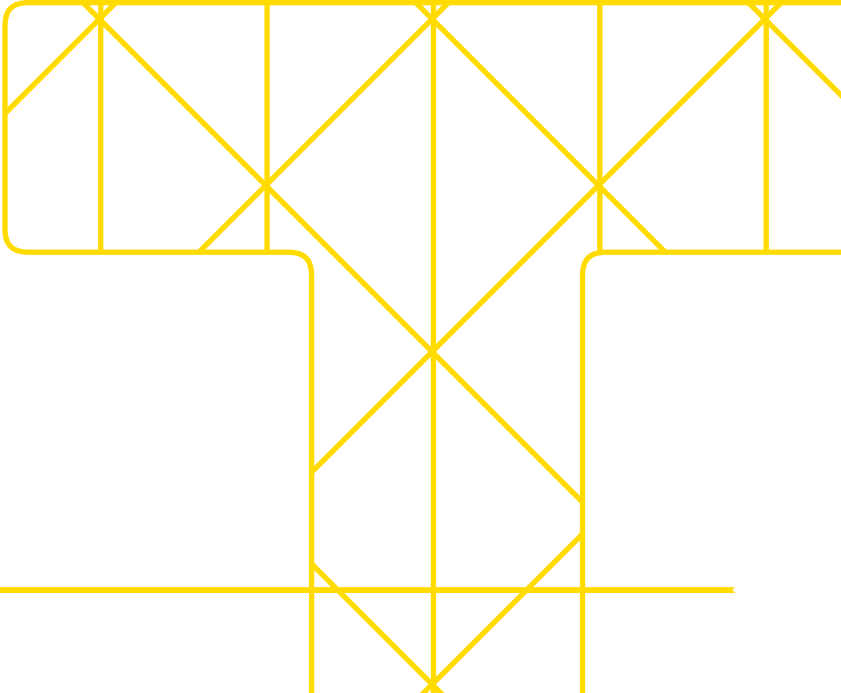
The region is responding, there has been a 3.9 percent increase in the labour force participation rate across Western Adelaide over the last 12 months. The largest increases have been in the Cities of Charles Sturt and West Torrens. This has occurred against the state-wide trend of a slight decrease in labour force participation. Since 2011 the Western region has generally experienced a positive increase each year.

Table 1: Labour force participation in the Western Adelaide Region and South Australia, 2011 to 2014

Year (ending June 30)	Western Adelaide Region		South Australia	
	Number	% change	Number	% change
2014	171,098	+3.9	857,644	−0.21
2013	164,703	−0.8	859,444	+0.56
2012	166,043	+2.4	854,677	+0.39
2011	162,033	—	851,358	—

Source: Australian Government, Department of Employment 2014 <http://lmip.gov.au/default.aspx?LMIP/SALM>

Over the four years (2011 to 2014), the largest growth in employment sectors have been the health care and social assistance sectors followed by construction, education and training. At the same time the region experienced a drop in the number employed in the manufacturing and administrative and support services sectors.



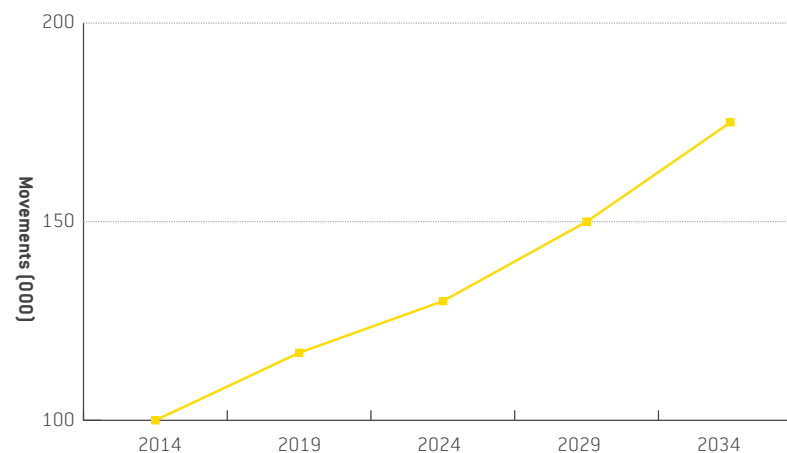
Adelaide Airport growth

Adelaide Airport is a major driver for investment and growth. Adelaide Airport is the single largest employer in South Australia directly employing 8,726 people and indirectly employing an additional 9,000 people.

In 2013 the airport activities contributed \$1.9 billion to the State's economy and represented 2.1 percent of the Gross State Product. It is estimated that by 2019, almost 10 million passengers per annum will pass through the airport.

International inbound freight volumes are estimated to grow between 42 percent and 62 percent over the next five years. The total number of international, national and regional flight movements are estimated to grow to approximately 175,000 per annum by 2034.

Figure 4: Estimated Flight Movement at Adelaide Airport 2014 to 2034

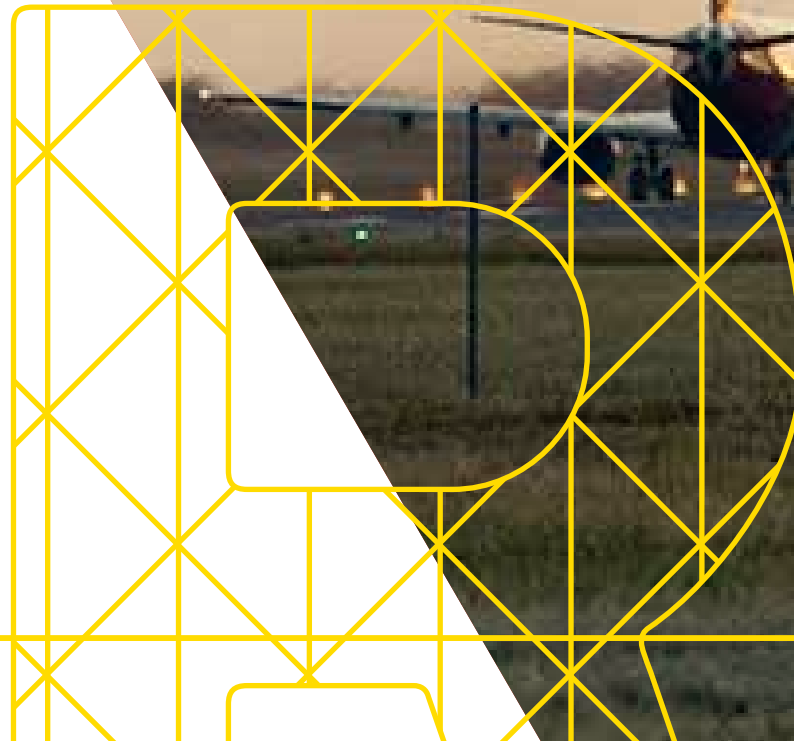


Source: Adelaide Airport Preliminary Draft Master Plan 2014

China Ready Program

A five step China Ready Program has been developed by the City of Charles Sturt to assist businesses in their preparation to export to China and seek investment. A key component of the program involves working with the University of South Australia to prepare businesses for engaging and doing business with China including developing a business pitch.

Over 100 businesses from the Western Region have participated in the program and in May 2015, 10 Western Adelaide businesses travelled to Shandong Province to explore export opportunities. This was followed by an inbound China business mission that visited Adelaide in September and was supported by a further delegation of businesses accompanying the Premier to China in April 2016.

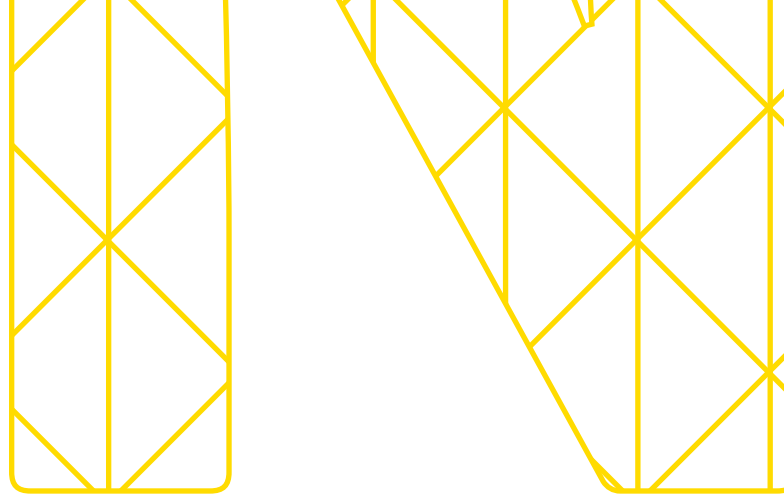


Major Infrastructure and Development Projects in Western Adelaide

Western Adelaide has almost \$13 billion in major projects underway or in the pipeline over the next 10 years. These projects are outlined in the following table.

Table 2: Key infrastructure, major development and employment projects

Project	Time frame	Value	Estimated Jobs (direct / supply chain)
Infrastructure			
Torrens to Torrens Project, South Road	2015–18	\$896 million	2,150 / 358
Northern Connector Road	2016–20	\$985 million	2,364 / 394
Henley Beach Police Station development	2015–16	\$5.1 million	7 / 4
Henley Square redevelopment	2015	\$8.4 million	11 / 7
Water Proofing the West – stormwater recycling	2012–15	\$71.5 million	100 / 64
Glenelg Town Hall rejuvenation project	2016–17	\$6 million	8 / 5
Glenelg Jetty redevelopment – tourism and economic hub	? – 2020	\$280 million	392 / 252
Adelaide Airport expansion – Stage 1: Terminal 1 expansion, hotel, office park	2015–19	\$1 billion	1,400 / 900
Stage 2: Further terminal expansion, expanded freight facilities, office park expansion, car park expansion	2020–34	\$1 billion	1,400 / 900
Sub total		\$4.25 billion	7,832 / 2,884
Major Developments			
Bowden Village development	2013–22	\$1 billion	1,400 / 900
The Square, Woodville West redevelopment	2012–18	\$130 million	182 / 117
St Clair, Cheltenham Racecourse development	2010–17	\$500 million	700 / 450
AAMI Stadium redevelopment	2015–27	\$1 billion	1,400 / 900
Industrial and commercial developments (various projects)	–	\$1.2 billion	1,680 / 1,080



Project	Time frame	Value	Estimated Jobs (direct / supply chain)
Lightsview development	2008–20	\$1.05 billion	1,470 / 945
Port Adelaide Centre Renewal Project	2015–18	\$2 billion	2,800 / 1,800
Quest Apartments, Port Adelaide	2015–16	\$9 million	13 / 8
The Parks redevelopment, Library & Community facility	2013–17	\$33.7 million	47 / 30
Blair Athol / Kilburn (Housing SA redevelopment) – stage 1	2015–17	\$23 million	32 / 21
Woodville Gardens (Housing SA redevelopment)	2015–18	\$34 million	48 / 31
Inner North Government Lands redevelopment (Oakden, Gilles Plains & Enfield High School)	2016–26	\$350 million	490 / 315
Fort Largs redevelopment	2016–19	\$90 million	126 / 81
Gilman, Dry Creek & Wingfield Employment Lands	10 yrs*	\$755 million	1,057 / 680
Port Direct & Osbourne Employment Lands	2015–25	\$100 million	140 / 90
Techport Employment Lands	2015–25	\$32 million	45 / 29
7 screen cinema complex & car park, Glenelg	2015	\$17 million	24 / 15
12 Storey Hotel, Glenelg North	2016–18	\$110 million	154 / 99
Kauri Parade Sporting and Community Precinct, Seacliff	2015–16	\$11 million	15 / 10
Minda Retirement Village & redevelopment, North Brighton	2014–?	\$200 million	280 / 180
Sub total		\$8.64 billion	12,103 / 7,781
Total		\$12.89 billion	19,935^{iv} / 10,665^{iv}

* subject to funding being provided, start date unknown.

Significant Council Projects

Other significant Council projects include: Brighton Caravan Park upgrade (\$3 million), Glenelg Foreshore playspace redevelopment (\$2 million), Brighton to Kingston Coast Park (\$2 million), Taperoo Reserve upgrade (\$6 million), Roy Marten Reserve (\$5 million) and St Clair Recreational Precinct (\$20 million).

Government Policy Reform

In consultation with business, the following were identified as priorities.

Payroll tax reform

The State Government has halved the payroll tax rate for businesses with a taxable payroll of less than \$1 million. The maintenance and advancement of this reform is an essential incentive to small business to keep and place additional people on the payroll.

Stamp duty concessions

Stamp duty concessions have been provided for off the plan apartments in the inner metropolitan area. This includes Bowden, Croydon, and Thebarton. This should be extended to all apartment developments in Western Adelaide as a way to stimulate the housing industry. In particular the redevelopment of the land around the West development, Port Adelaide land releases and Lightsview would benefit from off the plan concessions for apartments being geographically broadened to include Western Adelaide.

Reducing red tape

There is strong support from Western Business Leaders to reduce red tape and the resulting costs to businesses to make it easier to start, operate and expand.

Commonwealth, State and Local Government could examine the regulatory framework, for example the development assessment system, to be more effective and efficient and be outcome and jobs focussed rather than on process. Further exploration and lobbying to reduce red tape is a priority.

Buy local and Australian made

The benefits of buying local and Australian made are recognised and strongly supported by local businesses. Buying locally made products and services supports local jobs and stimulates the local economy. Buy local campaigns and promotions have been successful in promoting and fostering support for local businesses.

The Australian Made logo is a widely recognised symbol that supports growers, processors and manufacturers in Australia by clearly identifying their product as

genuinely Australian. The logo has received a 98 percent recognition and 88 percent trust rating in recent surveys (Roy Morgan, 2012) and is a powerful marketing tool. There is an indisputable link between the logo and Australian industry, local employment, opportunities and skills training which helps to drive economic development and prosperity for Australian communities. Further exploration of a buy local and Australian made is a priority.

Projects for Jobs and Business Growth

The creation of 40,500 new jobs in Western Adelaide (as identified in the State Government's 30 Year Plan for Greater Adelaide) over the next 25 years should be the focus of economic initiatives.

This will include initiatives to foster greater levels of cooperation between business, government and research institutions. In particular, the focus should be on mobilising local resources toward key regional and State projects that build on the

region's key assets. Fundamental to jobs growth will be support for small business and development of projects in the following sectors: tourism, sports, health and advanced manufacturing including defence.



State Economic Priorities

The State Government has recently released ten economic priorities along with the vision 'South Australia is the place where people and business thrive'.

The vision and actions have evolved from the economic development strategy which seeks strong partnerships between business, government and the community.

The project descriptions include the relevant links to the State economic priorities. The priorities are outlined below.

Priority 1	Unlocking the full potential of South Australia's resources, energy and renewable assets
Priority 2	Premium food and wine produced in our clean environment and exported to the world
Priority 3	A globally recognised leader in health research, ageing and related services and products
Priority 4	The Knowledge State – attracting a diverse student body and commercialising our research
Priority 5	South Australia – a growing destination choice for international and domestic travellers
Priority 6	Growth through innovation
Priority 7	South Australia – the best place to do business
Priority 8	Adelaide, the heart of a vibrant state
Priority 9	Promoting South Australia's international connections and engagement
Priority 10	South Australia's small business have access to capital and global markets

Defence Projects

The defence industry is a significant employer in South Australia. The Australian Submarine Corporation (ASC) based at Osborne is the focus for maritime defence construction and maintenance. The ASC undertake maintenance for the Collins Class Submarines and construction of the Air Warfare Destroyers.

The Federal Government are considering a range of options for the replacement of the existing Collins Class Submarine fleet. Economic analysis of the future submarine program considered two scenarios:

1. Building 12 submarines overseas and providing light maintenance in Australia.
2. Building 12 submarines in Australia and providing maintenance over the life of the 40 year project.

The analysis showed a stark difference in employment and economic outcomes between the two scenarios. The overseas build (scenario 1) could expect the loss of 6,600 jobs every year over 40 years and a negative impact of \$29 billion on Australian GDP. The build in Australia (scenario 2), is expected to result in 3,000 jobs being saved per year over the 40 years and have a negative impact of \$8.2 billion. This represents a saving of \$21 billion compared to scenario 1.

At a local level the impact of building submarines in Australia is estimated to have the following positive impact on the Gross Regional Product and jobs over 40 years (by Council area): Port Adelaide Enfield \$5.18 billion, 14,753 jobs; West Torrens \$388 million, 4,256 jobs; and Charles Sturt \$541 million, 10,303 jobs.

The Federal Government recently announced that Future Frigates will be built at Osborne from 2020 and will sustain 2500 jobs and a further fleet of Offshore Combatant Vessels will be built from 2018.

Other potential future defence projects include the construction of 150 to 210 Light Armoured Vehicles (Land 400).

Overview of Projects

The Western Business Leaders have identified the following projects to generate employment growth. The potential for the creation of direct employment and the flow on effects into support and ancillary businesses as a consequence of these projects are very important.

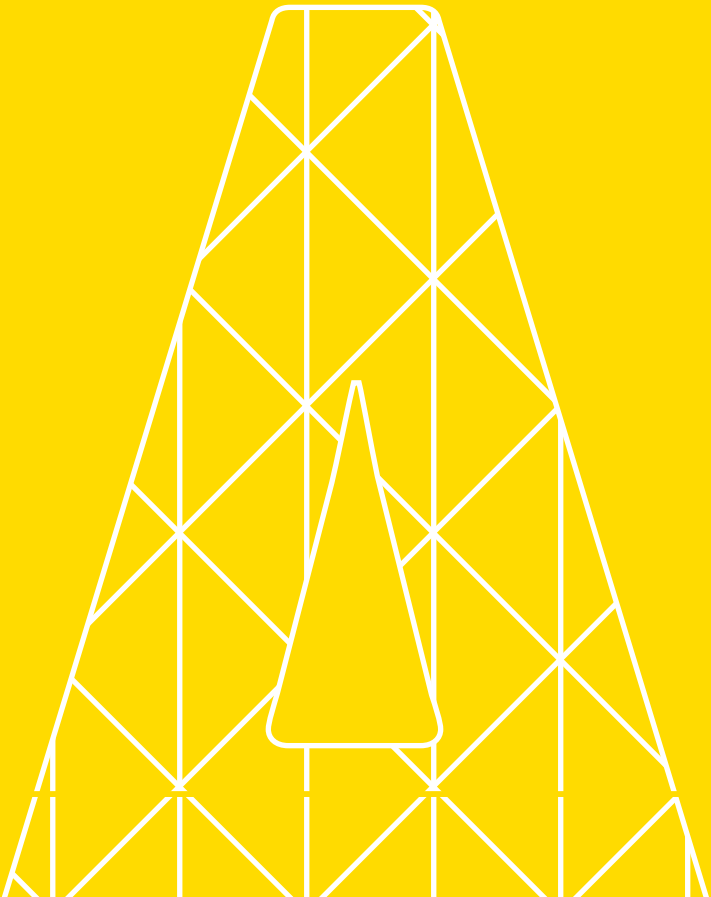


Table 3: Key Projects in Western Adelaide

Sector and Project	Indicative Value	Estimated Jobs (direct / supply chain)
Tourism and Recreation		
1. Women's Australian Open – Golf	\$4 M	
2. Western Region Tourism Destination Action Plan	\$100 k	
Sub total	\$4.1 M	
Small Business Development		
3. Inner West Business Hub	\$500 k	877
4. Western Region Economic Development Plan	\$100 k	
5. Western Adelaide Innovation and Export Network	\$30 k	
Sub total	\$630 k	877
Health		
6. Bio Innovation Accelerator Building	\$40 M	200
7. Health Business Collaboration for Commercialisation	\$85 k	
8. SAHMRI Stage 2 – The John Chalmers Centre for Transforming Healthcare	\$280 M	392 / 252
Sub total	\$320.1 M	592 / 252

Sector and Project	Indicative Value	Estimated Jobs (direct / supply chain)
Transport (Light Rail)		
9. WestLINK – Henley Beach to Adelaide Airport	\$657 M	855 / 495
10. PortLINK – Hindmarsh to Port Adelaide, West Lakes and Semaphore	\$450 M	1,248 / 722
11. ProspectLINK – Grand Junction Road to the City	\$295 M	561 / 325
Sub total	\$1.4 B	2,664 / 1,542
Defence		
12. Twelve Submarines	\$50 B	200 to 3,000
13. Air Warfare Destroyers	\$2 B	2,500
14. Future Frigates	\$20 B	(ongoing employment of the above)
15. Light Armoured Vehicle Fleet	\$14 B	300 to 500
Sub total	\$86 B	3,000 to 6,000
Total	\$87.7 B	10,133 to 7,133 / 1,794

Description of Projects

Tourism and Recreation

Women's Australian Open – Golf

Project description	Host Women's Australian Open – Golf
Project aim & outcome	<p>The women's golf tournament in February 2016/17/18 will provide great exposure for the western region and SA.</p> <p>The tournament is broadcast into 40 countries including New Zealand, United Kingdom, Asia and South Africa. The event is co-sanctioned by the United States Ladies Pro Golfing Organisation and Golf Australia.</p> <p>150 golfers are expected to compete in the four day event. Around 10,000 spectators are expected on the weekend of the tournament, 3,000 to 5,000 during the week. 30 percent visitation is expected from interstate. Economic impact estimated by Golf Australia, \$3.7 million direct and total \$7.8 million per annum. Event to be held over three years.</p> <p>This major event will provide opportunities for tourism exposure and promotion while creating local jobs in accommodation, meals and visitation to local facilities.</p>
Project partners	Royal Adelaide Golf Club, Grange Golf Club, Kooyonga Golf Club, SA Golf Clubs, Golf Australia, State Government
Investment	\$3.5 to 4 million over 3 years. \$1.5 million per annum
No of Jobs	TBD
SA Economic Priority	5 and 9

Small Business Development

Western Region Tourism Destination Action Plan

Project description	Preparation of a tourism action plan to showcase key destinations in the Western Region.
Project aim & outcome	The project aims to make the western region a key destination to stay and experience. The plan will identify and promote key tourism assets and highlights eg beaches, vibrant public places, leisure activities, heritage and cultural places, museums and eateries to increase visitor numbers and tourism dollars spent in the region. The overall aim of the Tourism Destination Action Plan is to increase employment in the tourism sector.
Project partners	South Australian Tourism Commission, Adelaide Airport, Adelaide Shores, Adelaide Business Hub, South Australian Tourism Industry Council, Main Street Business Associations eg Jetty Road Mainstreet Management Committee, Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens.
Investment	\$100 k
No of Jobs	Anticipated to increase networking between tourism businesses and lead to employment growth in the tourism sector.
SA Economic Priority	5 and 9

Inner West Business Hub

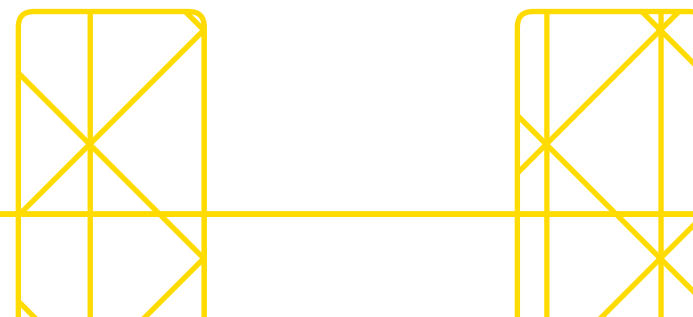
Project description	Establish a business hub to create co-working space in the inner west
Project aim & outcome	A business hub will provide co-working spaces to provide opportunities for new, and existing businesses to collaborate, grow, thrive and become sustainable. Co-workspaces enable emerging businesses to access mentoring, business skills education, support and business opportunities, all of which provide an environment that contributes to successful and sustainable business. Co-workers are generally from a range of industries and sectors but they tend to favour professional and creative industries known as advanced business services. The hub will assist in attracting businesses to the inner west area and support businesses in Western Adelaide. There is potential for spin off from the hub to commercial and retail space in Bowden, Brompton, Hindmarsh and more broadly into the Western Region including Port Adelaide, Glenelg and West Torrens. The creation of a hub will assist in the growth of business and employment opportunities and encourage innovation and collaboration.
Project partners	State Government, Adelaide Business Hub, Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens.
Investment	\$500 k from State Government
No of Jobs	877 ^{IV} over 15 years
SA Economic Priority	10

Western Region Economic Development Plan

Project description	Prepare a Western Region Economic Development Plan
Project aim & outcome	In collaboration, the four Councils of the region will prepare an Economic Development Plan. The plan will provide a framework that will outline the focus for business investment and attraction for the region including a vision, goals and objectives. The strengths of the region will be highlighted along with opportunities for economic development. A key outcome of the plan will be an action list and identification of possible funding opportunities. The plan will enhance the economic development of the region, increase employment opportunities and provide a platform for seeking funding for regional projects.
Project partners	Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens, and State Government
Investment	\$100 k
No of Jobs	Anticipated to encourage greater level of business networking, collaboration and business growth.
SA Economic Priority	10

Western Adelaide Innovation and Export Network

Project description	Host six to eight business networking events every year for three years. Use keynote speakers under umbrella of Western Business Leaders.
Project aim & outcome	The project aims to raise the aspirations of businesses and to promote new initiatives. It will provide an opportunity for businesses to network and promote their own businesses and develop business to business networks in Western Adelaide. At present there is no Chamber of Commerce to cover the broad Western Adelaide area. Events will be hosted at different venues across Western Adelaide. Databases of the four Councils, Adelaide Business Hub (ABH) and Australian Institute of Management (AIM) would be shared to promote events. The project may also provide the platform for a regional business newsletter for Western Business Leaders. This would promote a wide range of events in Western Adelaide including government programs.
Project partners	Adelaide Business Hub, Port Adelaide Chamber of Commerce, Australian Institute of Management, Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens, and State Government.
Investment	\$20 k – Innovation Network \$10 k – China Ready Program. Both delivered for 3 years.
No of Jobs	Anticipated to encourage greater level of business networking, deepen supply chains and improve exporting opportunities.
SA Economic Priority	10



Health

Bio Innovation Accelerator Building

Project description	BioSA Accelerator Building in the Thebarton Technology Hub
Project aim & outcome	<p>The vision for the Accelerator Building is to provide laboratory/production, office and shared services space for SME's. The building's concept is based around flexible spaces for tenants ranging from 250 m2 to 500 m2 of laboratory, office and production space over three floors, with an undercroft accommodating the shared services and car parking.</p> <p>The project delivers on the Thebarton Technology Hub Master Plan (2013), adopted by City of West Torrens.</p>
Project partners	State Government, Bio Innovation SA and City of West Torrens
Investment	\$40 million from State Government
No of Jobs	200 ^v
SA Economic Priority	3

Western Adelaide Health Business Collaboration for Commercialisation

Project description	Preparation of a Western Adelaide Health Business Collaboration for Commercialisation Plan
Project aim & outcome	<p>The project aims to develop a greater knowledge of the health business supply chain in Western Adelaide. Improved access for local businesses to the health supply chain will be facilitated through working with key businesses in the local health sector and hospitals.</p> <p>The plan will encourage commercialisation of research and new product development. It will identify opportunities to enhance business growth and identify health projects to promote jobs.</p> <p>A key outcome will be employment growth in the health and health supply businesses.</p>
Project partners	Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens, SA Health, Department of State Development, Bio Innovation SA, Western Hospital, health sector businesses and suppliers.
Investment	<p>\$35k – Scoping Study (stage 1)</p> <p>\$50k – Implementation (stage 2)</p>
No of Jobs	Anticipated to encourage greater level of business networking and deepen supply chains.
SA Economic Priority	3



Transport – Light Rail

SAHMRI Stage 2 – The John Chalmers Centre for Transforming Healthcare

Project description	Construction of the second stage of the South Australian Health and Medical Research Institute (SAHMRI) building
Project aim & outcome	<p>Centre for Transforming Healthcare to contain the following facilities:</p> <ul style="list-style-type: none"> » Clinical research, clinical spaces and analytics support » Clinical imaging technologies » Proton therapy to establish a national service for cancer treatment » Research and teaching space for clinicians, researchers, economists, policy makers and the community. <p>The project is not located in the Western region, however given that it is close to the boundary there is the opportunity to capitalise on positive economic flow on effects for Western Adelaide.</p>
Project partners	Flinders University, SA Health
Investment	Approx. \$280 million
No of Jobs	392 direct, 252 supply chain ^{vi}
SA Economic Priority	3

WestLINK – Henley Beach to Adelaide Airport and City

Project description	Construction of a new tram line from the CBD to Henley Beach and a branch line to Adelaide Airport.
Project aim & outcome	New tram line to better connect western suburbs and airport to the CBD. The new line will promote further investment in residential and commercial development and strengthen local jobs growth.
Project partners	State Government, construction companies
Investment	\$450 million from State Government
No of Jobs	855 direct, 495 supply chain ^{vi}
SA Economic Priority	5

PortLINK – Hindmarsh to Port Adelaide, West Lakes and Semaphore

Project description	Conversion of the Outer Harbour train line to deliver a new tram service to Outer Harbour, Port Adelaide and Grange and construct a new tram line to West Lakes and Semaphore.
Project aim & outcome	<p>Integrated tram network and better connection for West Lakes and Semaphore areas. The new line to West Lakes will link the shopping centre and major development on the AAMI Stadium site to the CBD. The new line to Semaphore will provide a link to the Semaphore Road precinct. The upgraded network will promote further residential and commercial development and strengthen local jobs growth.</p> <p>Light rail is a key element in promoting the revitalisation of the Port Centre.</p>
Project partners	State Government, construction companies
Investment	\$657 million from State Government
No of Jobs	1248 direct, 722 supply chain ^{vi}
SA Economic Priority	5

ProspectLINK – Grand Junction Road to City along Prospect Road

Project description	Construction of a new tram line from the CBD to Grand Junction Road along Prospect Road and O'Connell Street.
Project aim & outcome	New tram line to better connect the areas along Prospect Road to the City. The new line will promote further investment in residential and commercial development and strengthen local jobs growth.
Project partners	State Government, construction companies
Investment	\$295 million from State Government
No of Jobs	561 direct, 325 supply chain ^{vi}
SA Economic Priority	5



Defence

Twelve Submarines

Project description	Design, build and deliver 12 new submarines, infrastructure and integrated support logistics
Project aim & outcome	<p>Construction of a submarine fleet that will have new and more potent defence capabilities including greater range, longer patrol endurances and increased capability compared to the existing Collins Class submarine.</p> <p>The level of support and infrastructure needs will depend on the capability option and acquisition path that is chosen by the Government. All options from military off the shelf to a new design are being examined.</p> <p>It is estimated that the submarines could be operational by 2025/26 to 2026/27.</p>
Project partners	Potentially: Australian Submarine Corporation, heavy industry and shipbuilding companies, marine system companies and supply companies.
Investment	\$50 billion plus from Federal Government
No of Jobs	If built in Australia, up to 3000 direct jobs, if built off-shore 200 to 300 jobs ^{vii}
SA Economic Priority	6

Air Warfare Destroyers

Project description	Acquisition and build of three Hobart Class Air Warfare Destroyers
Project aim & outcome	<p>Construction of three Hobart Class Air Warfare Destroyers and associated logistic support. Construction of the lead ship commenced in March 2010 and is forecast to be delivered in 2015. Total project cost is \$8.5 billion, the investment for South Australia is approximately \$4 billion, however the project is half completed and estimated balance of the project is \$2 billion.</p>
Project partners	Australian Submarine Corporation, Air Warfare Destroyer Alliance, Navantia, Raytheon
Investment	\$2 billion from Federal Government
No of Jobs	3000 ^{vii} direct jobs
SA Economic Priority	6

Future Frigates

Project description	Acquisition of a fleet of eight new Future Frigates
Project aim & outcome	<p>The 2009 White Paper stated that a fleet of eight new Future Frigates will be acquired. They will be larger than the ANZAC Class and be designed and equipped with a strong emphasis on anti-submarine warfare.</p> <p>A timeline for the start of construction has been identified as 2020.</p>
Project partners	Australian Submarine Corporation, heavy industry and shipbuilding companies, marine system companies and supply companies.
Investment	\$20 billion from Federal Government
No of Jobs	Continued employment of Air Warfare Destroyers workforce (2500 ^{viii} direct jobs).
SA Economic Priority	6

Light Armoured Vehicle Fleet (Land 400)

Project description	Deliver 150 to 210 light armoured vehicles for the Army
Project aim & outcome	<p>Existing vehicle fleet is due to reach the end of life by 2020 to 2025. The project will deliver a balanced system of vehicles that will provide the major component of the Army's future Combined Arms Fighting System.</p> <p>Vehicles are expected to be operational by 2022/23 to 2023/24.</p>
Project partners	Defence manufacturing and supply companies.
Investment	\$14 billion plus from Federal Government
No of Jobs	300 to 500 ^{vii}
SA Economic Priority	6





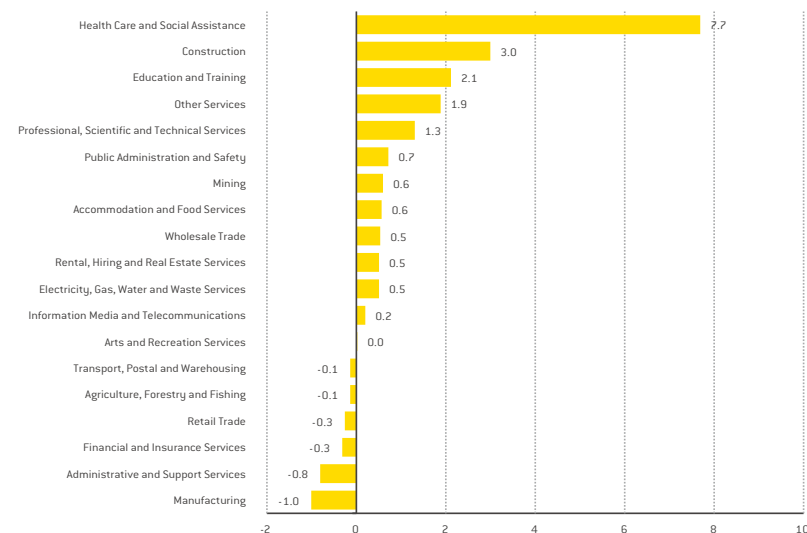
Appendix 1

Western Adelaide Commonwealth Department of Employment Statistics

Employment Growth in the Last Five Years

The Department of Employment statistics detail that of the total 22,100 jobs growth in Greater Adelaide, 17,000 jobs have been in Western Adelaide over the last five years (2010 to 2014).

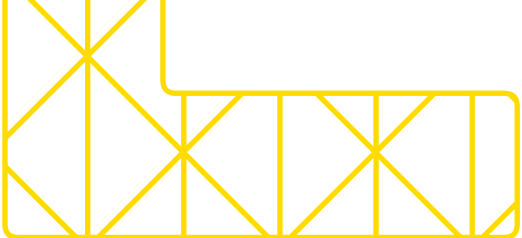
**Figure 1 –
Western Adelaide – Employment Sector Growth | 5 years to Nov 2014 ('000)**



As a comparison, in the same period the Southern region lost 10,300 jobs, the Northern region gained 4,900 jobs and the Central and Hills region gained 10,600 jobs.

**Figure 2 –
Greater Adelaide – Employment Sector Growth | 5 years to Nov 2014 ('000)**

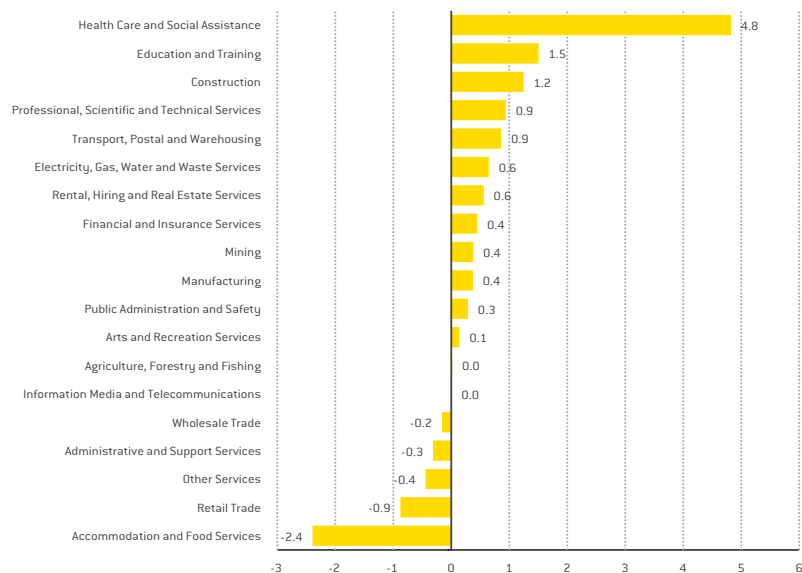




Western Adelaide Employment Sector Growth in the last 12 months

In the past 12 months, health care and social assistance, education and training and construction have been the largest growth employment sectors.

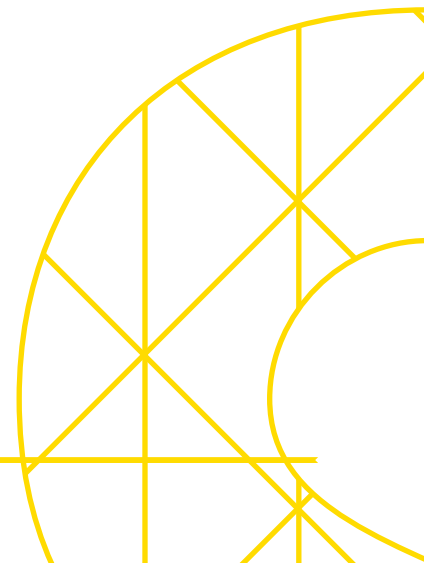
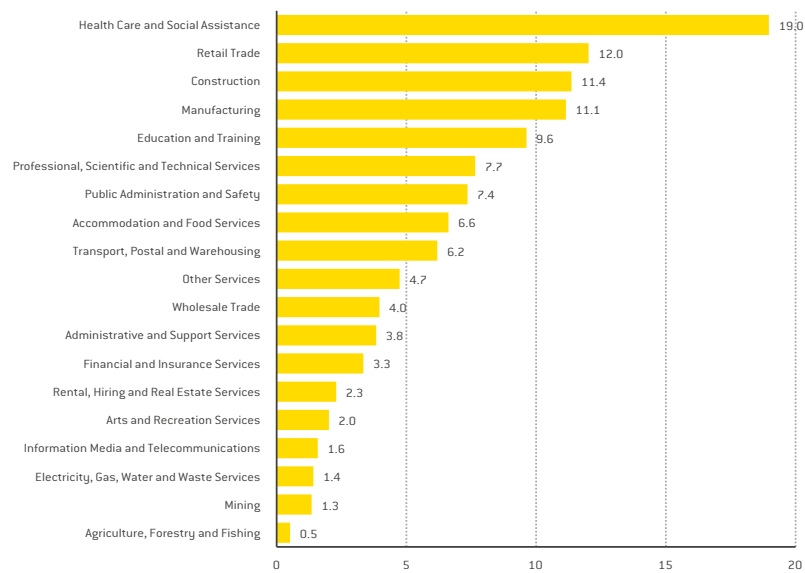
**Figure 3 –
Western Adelaide – Employment Sector Growth | 12 months to Nov 2014 ('000)**



Employment Numbers by Sectors

Health care and social assistance, retail trade, construction, manufacturing followed by education and training are the largest employment sectors in Western Adelaide.

**Figure 4 –
Western Adelaide – Employment by Sector | 12 months to Nov 2014 ('000)**



Appendix 2 –

Consultation on draft strategy

Andre Stuyt, Renewal SA, 3/10/14

Lyn Hay, Adelaide Business Hub 8/10/14

Pat Slater, Inner West Business Enterprise Centre, 10/10/14

Carol McDonald, City of Holdfast Bay 15/10/14

Andrew Gay, Royal Adelaide Golf Club and Barry Linke, Grange Golf Club 17/10/14

Debbie Constable, Business SA 20/10/14

Western Business Leaders workshop 2/12/14

Building Western Adelaide Council workshop 23/2/15

CEOs and Senior Staff from:

- » **West Torrens**
- » **Port Adelaide Enfield**
- » **Holdfast Bay**
- » **Charles Sturt**

References

- I. 2010-11 Tourism Satellite Account consistent with TTF's National Tourism Business Count & Employment Atlas.
- II. Commonwealth Department of Employment, Regional Employment by Industry, November 2014
- III. Economic Analysis of Australia's Future Submarine Program, Economic Development Board South Australia, October 2014
- IV. Bowden Business Hub, May 2013 p13
- V. Job figure estimate provided by Bio Innovation SA
- VI. Estimates of direct and supply chain FTE employment numbers based on multiplier effect analysis DPTI, 2014
Disclaimer: These figures are estimates only, the figures are associated with the project's construction phase only.
- VII. Job figures full time equivalent (FTE) estimates provided by Defence Teaming Centre
- VIII. Job figure included in press release by Prime Minister Tony Abbott, 4 August 2014

An aerial photograph of Western Adelaide, Australia, showing a mix of residential housing, industrial areas with large storage tanks, and a waterfront area with a pier. A large yellow geometric shape, resembling a stylized bridge or a series of triangles, is overlaid on the left side of the image. The text 'BUILDING WESTERN ADELAIDE' is centered in a bold, yellow, sans-serif font. The letters of the text are filled with a yellow-to-white gradient and have a white truss-like pattern overlaid on them. The text is flanked by two horizontal yellow lines.

BUILDING WESTERN ADELAIDE

