

Economic Development Strategy



2020

'A City of Opportunity; Prosperous, Connected and Growing'



CITY OF
Port Adelaide Enfield

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Whilst this document sets an economic framework for the City of Port Adelaide Enfield, we invite any ideas or suggestions that business or the community has to grow our economy. Contact us with any ideas by phoning (08) 8405 6600 or emailing ecodev@portenf.sa.gov.au

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Peace and Welcome Garden, Kilburn

I. Foreword



Gary Johanson - Mayor City of Port Adelaide Enfield

This Economic Development Strategy provides a framework for our Council's long term economic prosperity. It identifies the strengths, challenges and opportunities whilst providing clearly defined actions to achieve our goals.

Our economy has seen significant changes over the last few years and we can no longer rely on traditional market drivers. As a region we must embrace innovation, technology and creative thinking and invest in intellectual capital, whilst supporting traditional industries.

This strategy provides a point of difference for the City of Port Adelaide Enfield, making the Council more business friendly and supportive of business through streamlining processes and creating an environment that fosters and attracts business to the region. Bold thinking and a more personalised approach to business will create a place where entrepreneurship will thrive and investor confidence will be high.

The Strategy highlights the importance of thinking strategically about who we attract to the region and how we do that to create a strong and sustainable economy into the future. The City of Port Adelaide Enfield has strength and resilience, the Strategy looks to build on the competitive advantage we have as a region, whilst identifying new opportunities and attracting new industry to the region to support future job growth.

As Mayor, I am committed to seeing the City of Port Adelaide Enfield prosper and for our residents to have access to a wide range of employment options and for our businesses to enjoy working in an area that provides a financially rewarding return for them.

The Council region is on the verge of some exciting times and I encourage everyone to work together to achieve our potential as a leading part of the South Australian and Australian economy.

September 2016

Vision 2030

“A city that values its diverse community and embraces change through innovation, resilience and community leadership.”



Port Adelaide Civic Centre, Port Adelaide

2. Background

The 2020 Economic Development Strategy has been created to provide a framework for increasing the economic prosperity of the Council region.

This strategy sits under the Council City Plan 2030 and supports the economic intent of a “City of opportunity”.

The Economic Development Strategy will:

ECONOMY

- Support a prosperous, connected and growing economy through the implementation of the Economic Development Strategy and Cultural Tourism Plan, provide support for the Northern Economic Plan and active participation in the Building Western Adelaide program.

COMMUNITY

- Foster healthy, inclusive and cohesive community through library and community facilities, partnerships with sporting clubs, implementation of the community engagement framework and youth development programs.

ENVIRONMENT

- Care for our distinctive, adaptable and sustainable environment including waste management, stormwater capture, community program and implement priority actions for the environment, climate change, biodiversity and energy plans.

PLACEMAKING

- Build a place where people want to live and work through strategic place making, enhancement of our precincts and community hubs, investment in capital works and improvements to transport and transport assets and services.

LEADERSHIP

- Cultivate confidence in our strategic, accountable and engaged leadership approach by development of a customer focussed culture, robust governance and review and management of our strategies, policies and systems.

The City of Port Adelaide Enfield in partnership with government, community and business are pursuing this major policy program of strategic economic development and community renewal. Significant place-based and land use projects have been identified that will provide new opportunities to attract investment, businesses and trade and enhance the liveability features of the community.

The Economic Development Strategy will further inform the direction and actions needs to support these important projects and to help ensure that PAE is an attractive and positive destination for economic investment and development.

The Economic Development Strategy is broken into key areas, being identification of the current economic environment, challenges, opportunities and the actions required to make the Strategy a reality.

This Strategy is a living document. Whilst the actions and strategies contained provide a road map for enhanced economic outcomes for the community who live and work in it, this Strategy doesn't exclude any future opportunities that may present themselves during the life of this document.

The Economic Development Strategy also links into other key Council documents including but not limited to, the Environmental Strategy and the Festivals and Events Strategy and will play a key role in shaping the framework for the future Placemaking and Tourism Strategy.

ECONOMY

What it looks like

- Prosperous
- Connected
- Growing

A city of opportunity

Indicator

gross regional product
proportion who feel that they can easily access information and organisations
number of local jobs

2.1 Structure of the report

The report is structured under the following themes:

- Overview of the project region;
- Role and function of local government and PAE in the delivery and management of economic development services;
- Background context including key economic drivers, economic, social and other capital features, policy and strategy and economic characteristics;
- Data analysis (historical, current and forecast) including population, demographics, workforce, industry sectors and profiles and industry performance;
- Identification of existing and / or needed economic assets and their role and contribution to economic development;
- Assessment of existing assets and economic capital that can be further developed including heritage, tourism and place-making; and
- Levels of business confidence and national and international investments and business development opportunities.

2.2 Purpose and intent

The City of Port Adelaide Enfield's Economic Development strategy provides the direction and framework to become a leading Council in Australia for people to live and work. The aim of this Plan is to create the framework for a region that is recognised for its lifestyle, choice of employment options and innovative industries.

To underpin the challenges facing the City of Port Adelaide Enfield, it is critical that we maintain and support existing business and encourage new businesses to the region. We need to create the environment for emerging industries to choose this Council area to establish and build business and investor confidence. Our objective is to have a viable and sustainable economy and drive job opportunities in the region. Council places high value on fostering and supporting our existing business owners and operators and the growth opportunities they represent. If just 25% of our existing businesses were to create one new job, this would equate to nearly 2,000 employment opportunities for our community.

The strategy also helps to prioritise economic opportunities to deliver the following outcomes:

- A business friendly Council that encourages business and investment and supports business diversity to reduce economic shocks and risks.
- Increased training, education and learning opportunities.
- Increased trade and export opportunities for businesses within the Council region.
- Attraction of new industry and innovation to the area.
- Promotion of the area as a tourist, arts, cultural and festival destination.
- Employment and increased business and investor confidence.

This approach along with encouraging new business and investment to the region creates a strong economic framework for job growth.

Traditionally the Council area's economic prosperity has been driven by traditional sectors, including manufacturing, logistics and labour led job fields. Whilst traditional manufacturing in the State as a whole is becoming more challenging, there are opportunities around the introduction of advanced manufacturing and innovation to make traditional fields of manufacturing more sustainable. There is no doubt the Council will continue to see manufacturing well into the future, especially with the Council being the export hub of the State for sea cargo.

Major established brand names and growing businesses and employers include the San Remo Macaroni Company, Coopers Brewery, ASC, Adelaide Brighton Cement, Council, Flinders Ports and many other successful businesses and organisations.

Home to the Port Adelaide Football Club, one of the AFL's Premiership teams and proud of its maritime and economic history, PAE is looking to grow and support its businesses and industry and to attract new investment and employment to continue its importance as a hub of economic, cultural and socially diverse community.

The encouragement of new industries to support existing sectors will be critical to the long term viability of the region's economy. New industries identified that will contribute to the future economy include but are not limited to; education and training, tourism, retail and services, aged care and disability support and professional services.

The intent of this plan is to look at ways of creating the right environment for existing businesses to grow and employ additional staff, whilst attracting new industries and investment to the region that creates new jobs and opportunities. Diversity of employment, affordable housing and an array of activities for people to participate in will see the Council area grow and become a leader in the State for a robust and sustainable economy.

With a diverse range of suburbs covering an area of 97 km², the Council boasts city fringe living, traditional family blocks of land, right through to beachside housing and industrial zoned areas. The City of Port Adelaide Enfield is one of the most diverse and unique Council regions in Australia.

This strategy will review the area's competitive advantages, review industry trends and identify opportunities for sustainable economic growth.

The Strategy identifies a range of actions, all of which are defined by a timeline and evaluation, to ensure this strategy delivers economic benefit for the region and its residents.

2.3 Methodology

Extensive research and consultation has been undertaken in developing the content and direction of this strategy. This has included an evidence based economic analysis of the international, national and local economic environment and its impact on the region's economic future.

A range of consultation has also been undertaken with the business community through one on one meetings, workshops and forums. The qualitative feedback along with the evidence based data informed the identification of key issues, opportunities and the strategy actions.



Port Adelaide Event

2.4 Study area

The Economic Development Strategy has a primary focus on the local government area of the City Port Adelaide Enfield, but also assesses economic activity and policy within the broader regions of Northern Adelaide (namely the councils of PAE, Playford and Salisbury), Western Adelaide (PAE, Charles Sturt, Holdfast Bay and West Torrens) RDA Adelaide Metropolitan and South Australia as a whole. This provides a picture of the “State of the Economy” and has informed many of the future actions contained in the document.

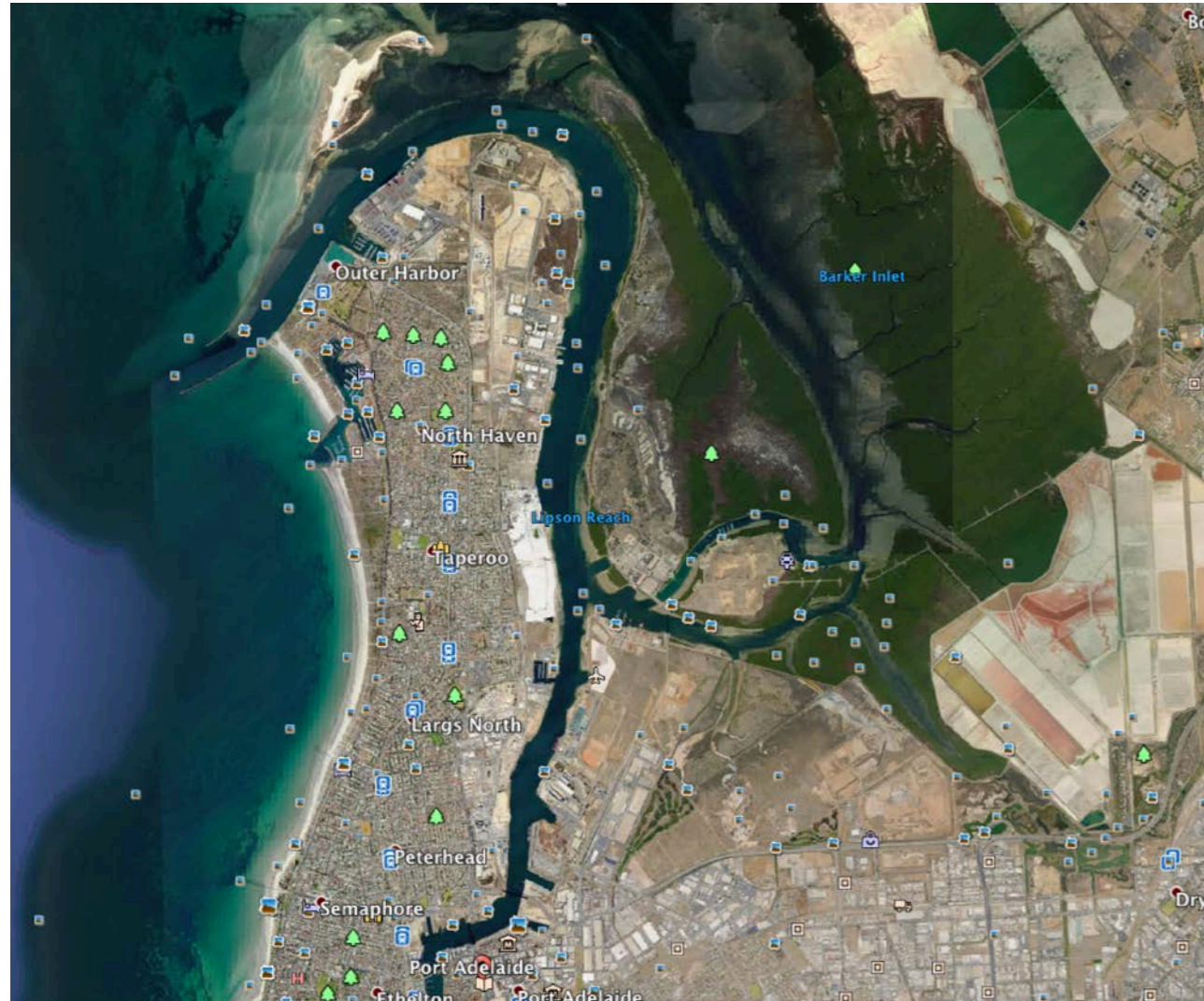


Figure 1 - Aerial view of Port Adelaide Enfield Region. Source: Google Earth.

The region comprises of a number of community centres and suburbs including Semaphore, North Haven, Port Adelaide, Wingfield, Enfield, Greenacres and Klemzig. Beachfront, riverside, inner city, industrial and commercial centres present diverse economic, liveability and community features with good access to Adelaide CBD, Adelaide International Airport and other parts of the Capital.

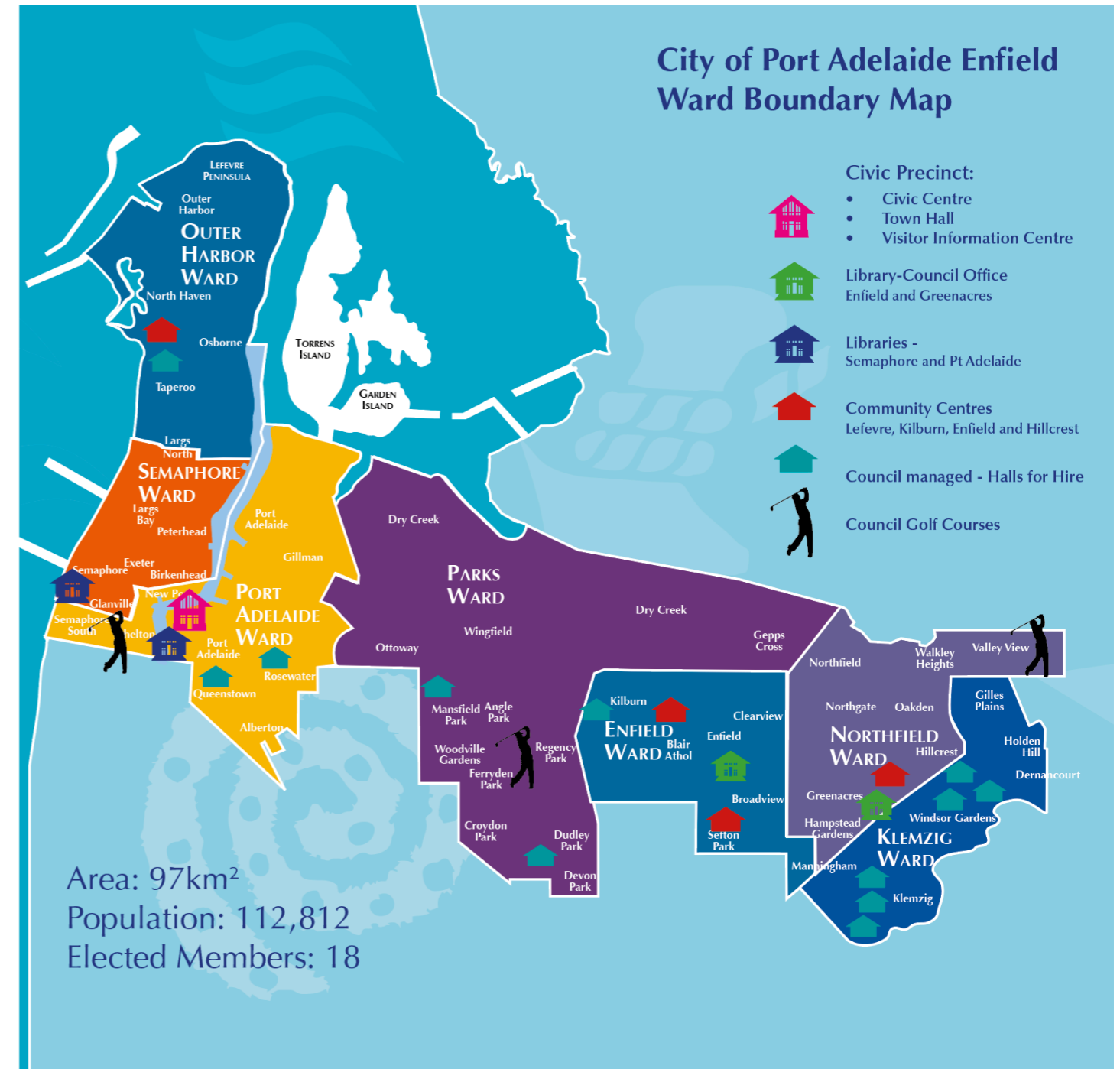


Figure 2 - Port Adelaide Enfield Ward and suburbs map. Source PAE.

3. Context

The City of Port Adelaide Enfield (PAE) was established in 1996 following the amalgamation of the Cities of Port Adelaide and Enfield and is Adelaide's third largest metropolitan council in population terms. Located in the north western suburbs of Adelaide, the capital of South Australia, PAE is home to an estimated 124,000 residents.

The City of Port Adelaide Enfield's contribution to local Economic Development has previously been exclusively provided through an annual contribution to the Adelaide Business Hub (head quartered in Todd Street Port Adelaide).

The Adelaide Business Hub facilitates business growth and jobs by providing advice and operating a globally recognised Business Incubator.

The City of Port Adelaide Enfield has a strong relationship with the Adelaide Business Hub and this Strategy will further strengthen the links between Council and the Adelaide Business Hub in providing support, advice and information to businesses in the Council region.

The community has been an industrial and trade hub for the economy of the City and the State in the areas of manufacturing, services, retail and transport and logistics associated with the Port.

This historical trading activity is reflected in the many fine heritage industrial buildings and features that have been adapted for a variety of civic, commercial and community purposes over the years.

The area has developed from a community with an industrial foundation to one that today has a focus on being an economically modern and culturally vibrant location. Covering nearly 92k² features and developments include:

- 30% of Adelaide's industrial land and over 10% (\$7.6bn) of Greater Adelaide's GRP, 8.2% of the total GSP which has grown by 23% 2006-2014.
- Nearly 7,700 businesses (2013) providing over 71,000 local jobs (2014) with a local jobs growth rate of 8.8% 2006-2015.
- Employed residents as a percentage of total jobs (2006-2011) has occurred primarily in health and social assistance (↑3.4%), public administration (↑2.2%), accommodation and food services (↑1.8%) and construction and education both up 1.6%.

- Forecast population growth of 15.7% over the next 15 years with 143,500 people estimated to be living in the community by 2031.
- A positive working age profile for residents of PAE (67.8%) when compared to Greater Adelaide (66.8%) and South Australia (65.9%).
- Announcement of the construction of 12 new submarines at ACS by French company DCNS through a \$50 billion contract with the Australian Government. Up to 2,800 jobs to be created including 1,700 at ASC.
- Attraction of 500 State Government sector jobs and over \$214 million of building approvals 2014-2015 and increase of 34.6% 2006-2007.
- Strategic economic infrastructure including the Port facilities, industrial land, commercial and retail precincts and tourism assets, including a museum precinct.
- Infrastructure investments including the \$1 billion Northern Connector project linking the Northern Expressway and Port Wakefield Road to the Port River Expressway and South Road Superway, \$24m for implementation of key projects in the Look North Northern Economic Plan and multi-billion defence contracts.
- The implementation of the 2014 Port Adelaide Renewal Precinct Plan and other local development plans which provide the land use frameworks for the community.
- Further development of Techport Australia into a maritime and defence hub and expanding employment centre.
- Increase in trade and commodity movements through the Port including one million container movements and over 27 million tonnes of non-containerised freight by 2033.
- Land proposed for large scale greenfield residential development in Northern Adelaide accounting for 50% of Greater Adelaide's residential land supply including release of 40 hectares for mixed development in Port Adelaide.
- Activation of the Gillman Industrial precinct with forecast creation of a significant number of new jobs in a range of sectors including renewable energy, logistics and industrial services.



Tasty Bread Bakery, Prospect Rd, Kilburn

4. Challenges

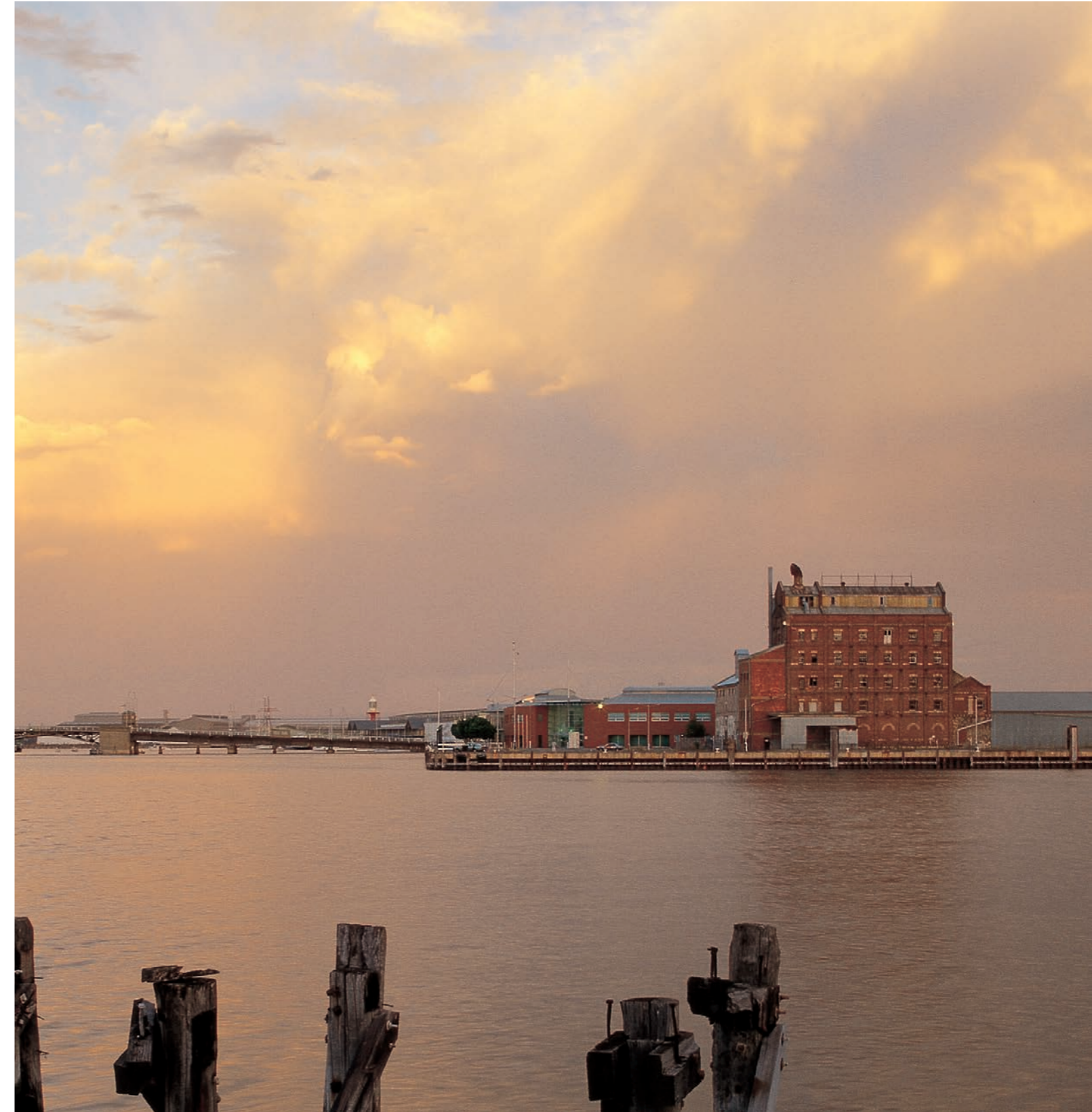
PAE faces a number of economic challenges in the short to medium term. These include:

- Impact on employment and workforce participation from the closure of regional car manufacturing.
- Attraction of new investment in new industries and businesses in a competitive business investment environment.
- Provision of affordable housing in communities that have access to good services and liveability characteristics.
- Improving education attainment rates and ongoing learning and training for the workforce including work opportunities for young people.
- Development of a tourism destination within a competitive environment for the tourism spend and increased volatility of tourism markets.
- Creation of sufficient jobs and housing to meet future population growth.
- Ensuring that infrastructure investment keeps pace with the needs of industry and business.
- Rising trends in unemployment and workforce participation rates.
- Areas of social disadvantage that will be impacted by imminent changes in employment and industry structures.
- Providing business and industry with information and support to support business growth and build business confidence.
- Utilisation and uptake of vacant property and land for economic and investment opportunities, particularly in primary retail and commercial precincts.

5. Opportunities

The Economic Development Strategy will support and progress economic opportunities for our businesses and residents including:

- Diversification of the economy from more traditional industries to future industries and innovation including services, creative industries, digital technology, green technology and tourism.
- Significant investment in urban renewal and infrastructure development projects by government and the private sector.
- Supply of industrial and residential development land and redevelopment of existing buildings and assets.
- Access to export markets and local and regional supply chains.
- Building on the successful arts and cultural background of the council area and museum precinct of Port Adelaide.
- Positive population growth within younger groups and residents from diverse multi-cultural backgrounds.
- Building on the profile of Adelaide as an affordable place to live, work and invest and providing a positive and active approach by the organisation to economic development services.
- Development of international relationships and investment based upon the export focus of our industries and our diverse multi-cultural community.
- Partnerships with State government and adjoining councils and agencies to create an active and connected approach to economic activity within the framework of the Northern Economic Plan and Western region.



Harts Mill, Port Adelaide

6. Business friendly Council

The purpose of economic development is to foster and provide services and strategies that build economic capacity and opportunity and should be viewed as an integral and integrated part of local government function and purpose.

As an overarching principle, becoming a business friendly organisation is something Council can directly control and influence. Business friendly will also improve the way business interacts with Council.

What is economic development?

The primary function of economic development is to support the prosperity and economic opportunities for business and communities.

It requires a range of policy, strategy and actions that reflect and build upon the economic, social and environmental assets that contribute to economic growth for business, localities and regions.

Although the terms “economic development” and “economic growth” can be interchangeable, there are key differences between them.

Economic development is generally the policy, strategy and supporting actions set by governments and communities to enhance economic and social prosperity. It is the process and strategy by which governments and development agencies can support and foster economic growth.

Economic growth is the measure of economic activity such as output, productivity, employment and community prosperity that results from economic strategy. It is achieved through understanding local and regional conditions and via partnerships between government and industry.

Local government plays an important and strategic role in setting a positive economic development environment to attract business and investment.

These can be categorised under three key elements:

- Principles: the value, culture and approach that Council will adopt for economic development.
- Planning: Understanding the challenges and opportunities within the local, regional and international economy.
- Policy: The strategies and processes that will be used to deliver responsive and active economic development services.

Economic development practice is not limited to local business development – although this is still important. It also incorporates:

Strategic land use and asset planning that provides the blueprint for growth and investment through integrating land and asset use planning with economic outcomes.

Identifying regional and international partnerships that enable market opportunities for businesses.

Planning and promoting economic opportunity that provides social and community outcomes as well as economic ones.

Forecasting and data management to provide an evidence base for investment and strategy.

Ensuring that interaction with business is based on partnership, knowledge and collaboration.

Being actively engaged with business and embedding economic development thinking across Council business units.



Experience Cafe, Kilburn

Outcome: A Council that encourages business growth and is a place that business wants to invest in.



Figure 3 - PAE business friendly framework

A key process to guiding and informing local government action on economic development is the provision of an Economic Development Strategy. The implementation of economic strategy should not be seen as being the sole responsibility of one unit within Council but should have an organisation wide approach to creating a business friendly environment and service offer. It should also represent a partnership with other government entities and agencies, the business community, investors, developers and residents.

The role of local government is to support economic activity in their community and be active in investment attraction and business development opportunities.

Whilst acknowledging that our capacity to influence certain economic conditions will have limitations, understanding the drivers of the economic environment is critical.

The principle way this can be achieved is by ensuring the foundations necessary for economic growth are present, planned and promoted. This requires building an organisational policy and culture that is responsive and receptive to opportunities.

The establishment of the economic development unit within Council is a positive step for building the linkages and services to support local and regional businesses. It reflects the importance the organisation places on encouraging economic development for community prosperity and opportunity and to promote and extend the competitive advantages of our community as a place to live, work and invest.

An important part of this process will be sourcing information that provides a current profile of what is happening in our economy and what the implications are for our services and strategies and how as an organisation, we work with businesses and organisations.

6.1 Partnerships

PAE will continue to build strategic partnerships with other councils, State government and industry and business networks in the region. This process is an important part of supporting economic development capacity and confidence. This approach reflects our focus on supporting collaborative and connected economic regions.

Why is this important for PAE?

It means that we are thinking beyond our region and building local advantage based on the market and supply chains of our businesses that extend beyond our municipal boundaries. Economic regionalism focuses on the structure and nature of economic and sector frameworks.

Access to markets through physical assets such as roads, rail and ports, mobile human capital through skills and expertise and connection through technologies that move and share information means that our approach to economic development strategy needs to:

- Identify and understand what exists both within and external to a region;
- Recognise how and where a region's economy and its businesses interact outside its boundaries; and
- Develop strategy and partnerships that build on broader thinking around economic regions and value chains.

Our partnerships including our municipal neighbours, key State and Federal Government agencies and departments, business operators, industry associations, investors and community groups. Each of us has a role to play to helping to provide a confident and innovative economic future for our community. PAE can and will continue to have a pivotal role in promoting our economic aspirations and our economic futures.

6.2 Role and responsibility

Regional leadership must act in unison and have a shared understanding of the economic direction adopted. Two concepts are critical:

- Alignment - leaders must continue to be aligned under the shared vision of the 2030 City Plan and have common understanding, act and think cooperatively and collaboratively to address the competitive challenges and opportunities within PAE.
- Linking and leveraging - this ensures investments are coordinated, work together and maximise economic outcomes and opportunities. Linking is undertaken through formal and informal partnerships, whereas leveraging assets requires making investment commitments that mutually reinforce each other. Such investments have the potential to generate higher economic returns than investments made in an uncoordinated manner.

The development of the Economic Development Strategy shows an important commitment by the organisation to supporting our businesses and industries, creating employment opportunities and making our diverse communities liveable and prosperous. This will take a whole of organisation approach and strengthening of our partnerships.

A key success factor for the management and implementation of the Economic Development Strategy is understanding the roles and responsibilities of the various stakeholders. It is not envisaged that this responsibility sits solely with PAE, although we will have a significant part to play.

Rather, the document recognises that the resources, skills and expertise of governments, business, communities and agencies all have an opportunity under the strategy to support economic and social change and be part of a collaborative and flexible effort.

6.2.1 Leadership

PAE has the primary function of providing strategic leadership as the local governing authority. This includes ensuring that there is broad awareness and understanding of the Strategy, its objectives and actions, as well as having open dialogue with partner stakeholders and communities on mutual and 'individual' responsibilities.

There will be strategic areas of the Economic Development Strategy where other agencies or communities of interest will have a leadership role; in these cases, PAE or other parties can provide advocacy or support.

6.2.2 Advocacy

Advocacy is where an organisation or collective work together under a common cause or purpose that is of importance to individuals or communities. This may be around local or regional policy, government strategy, funding or promotion of the region within key markets. It is built on partnerships, collaboration and bipartisanship.

6.2.3 Support

This is where organisations and communities support the actions and direction of a project or agency that is not directly their responsibility and which may be being undertaken by other entities or groups. The nature and level of support will vary depending on the initiative in place and the contribution it makes to the Economic Development Strategy and overall community good.

6.2.4 Facilitation

Facilitation is where groups and individuals have a major part in the overall planning, establishment and management of activity or action. It implies a level of responsibility and provision of resources but should still build collaboration and support with other partners.

6.2.5 Implementation

Implementation is applied when an organisation or group has a clear and direct role in delivering actions and resources. This can include planning, management and delivery of projects, developing policy and making decisions for and on behalf of (but in partnership with) stakeholders and communities.



Local Artist at the Port Festival 2015

7. Policy and strategy context

Governments at all levels have developed a range of strategic development plans to support the economic growth of regions. A focus has been placed on the utilisation of a skilled workforce, development of smart, innovative enterprises and to provide the impetus for investment in infrastructure that will support business and economic activity.

Policy at a Federal level has been subject to significant change and upheaval over the past few years. Changes in leadership and the emergence of significant economic and social policy agendas have been challenging. In addition, the major shifts in the economic structure of not only Australia but the global economy has been marked by opportunity and also testing conditions. Signing of free trade agreements, roll-out of the National Broadband Network (NBN), the announcement of the Innovation Agenda, the implementation of the National Insurance Disability Scheme (NDIS), longer-term fiscal management debates, transition within the resources and manufacturing sectors and a diversity of infrastructure renewal imperatives have been headline issues for some years.

Regional and local economic policy has had to adopt agile responses to national as well as local conditions. At the core is the need to ensure that communities have the infrastructure and services that will best serve current as well as future jobs, residents and industry.

The challenge for communities such as City of Port Adelaide Enfield is to ensure that where possible, economic strategy and business development support aligns to the broader policy position and that the partnership with between local and State Government is robust and functional.

The Economic Development Strategy has considered a range of State, regional and local strategic plans, industry sector plans and development action plans. This review has highlighted a range of themes, issues and opportunities that the Economic Development Strategy needs to align and respond to.

The South Australian Government and the PAE economic region have had to respond to and plan for some major economic change. This has led to an extensive program of regional and local development planning to help secure a positive economic future in testing and uncertain times.

The State Government has developed a strategic plan for the South Australia that includes the following 10 economic strategic priorities:

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

The priorities reflect the need of communities to adapt to economic and social change with a focus on building connections, infrastructure and partnership that will help drive growth.

For PAE, food and horticulture, export including international trade and inward investment, learning and education attainment, tourism, innovation and small enterprise and business development have particular relevance given our economic assets and commercial base.

The arts and creative industries will also provide a platform for economic growth and contribute to attracting people to the region.

The State Government have identified China, India and South-East Asia as primary markets for international trade and investment and with our growth in new residents from these countries and existing trade links, we see opportunities to enhance our international partnerships into these regions.



Kite Festival, Semaphore

With the recent continuous ship building announcement made by the Federal Government there will also be strategic trade links that develop with France.

Diversifying our economic base also aligns to State priorities in the areas of defence, food and horticulture, advanced manufacturing, tourism and small business. To support these priorities and opportunities our strategy, partnerships and economic development services will have a focus on:

- Opening up opportunities for food value-add through processing and niche manufacturing;
- Ensuring the capacity of the Port is protected and enhanced;
- Developing and strengthening links between education and the needs of industry and business now and into the future;
- Strategic development of our tourism markets, arts and events will contribute to making PAE a welcoming and interesting place to visit and stay;
- Fostering innovation in our businesses through skills and technology;
- Planning our neighbourhoods and precincts so that business and residents are attracted to invest and live in our community and we support construction and urban renewal; and
- Building partnerships with government and agencies to support international business and investment opportunities.

7.1 Regional and local policy

Increasingly local governments and regional agencies are working together to identify the economic opportunities that regions can deliver. Understanding what these opportunities look like and how our communities complement one another has been the focus of a number of regional and local development strategies. PAE has been and will continue to be an active partner in the implementation and future development of these opportunities.

7.1.1 PAE City Plan 2030

The 2030 City Plan is Council's key strategic Plan that sets the direction for Council. The 2020 Economic Development Strategy sits under the City Plan's Economic Pillar "A city of opportunity".

This Strategy also covers other key pillars of Council's 2030 City Plan including Community "A city supporting community wellbeing", Environment "A city which cares for its natural environment and heritage, Place Making, "A city where people love to be" and Leadership, "A city confident in its leaders".

7.1.1.2 Look North: A shared vision for Northern Adelaide

- Development of a 50 Year plan for the Port.
- Construction of a new office facility for 500 State Government workers.
- Port Adelaide Renewal Projects including six priority commercial and residential precincts ready for redevelopment and renewal.
- Delivery of the Northern Connector road to link major transport routes with the Port.
- Implementation of the NDIS including new employment, training and job opportunities.
- Defence shipbuilding and supply services.
- Housing renewal programs and supportive liveable communities.
- The Gillman employment lands precinct that aims to provide industrial allotments near Port Adelaide and the upgraded road infrastructure to cater for a range of industries.

7.1.2 Building Western Adelaide

- Development of a Western Region economic development plan and enhance tourism opportunities through regional destination planning.
- PortLink - deliver a new tram service to Outer Harbour, Port Adelaide and Grange and construction of a new tram line to West Lakes and Semaphore.
- ProspectLink - New light rail line to better connect the areas along Prospect Road to the City.
- Defence shipbuilding and supply services.

7.1.3 Port Adelaide Precinct Plan (January 2014)

- A "living port" that celebrates its maritime past as well as a future innovation and development.
- Achieve urban renewal in the various precincts in a manner that does not sanitise the Port's character.
- Creatively regenerate its inner harbour and water's edge with new buildings and spaces.
- Focus upon the historic precincts and heritage of Port Adelaide.
- Realise the Port's potential for pedestrian friendly and inspirational spaces.
- Emphasise environmental sustainability in all future activity.
- Respect the cultural beliefs and existence of Aboriginal people and the values they share.

7.1.4 Port Adelaide Centre: Vision and Framework

- Development of Port Adelaide's Regional Centre that actively connects with the Port River.
- Improvements to city streets including green space, trees and new street furniture and promenades and streets for people to enjoy.
- Celebrate the diverse and rich community and respect for indigenous heritage.
- History that comes alive to frame a modern, progressive city and creates a family-friendly destination and a range of visitor and resident experiences.
- Through transport links and encouragement of investment in tourism businesses, develop a region is an easily accessible centre and a tourist destination.

7.1.5 PAE Festival and Events Strategy 2015-2018

- The region supports a portfolio of strong regional festivals and events and will host at least one hallmark event by 2018.
- Secure and distribute festival and event funding that supports the growth and diversity of our event portfolio.

- Grow the capabilities of festivals and events to support and sustain them.
- Through good planning and activation, ensure our key festival and event precincts are improved and vibrant.

7.1.6 Port Adelaide Enfield Environmental Strategy

- The Draft Environment Strategy (in preparation) includes a large section titled "Environment and the Economy" which discusses the significant role of the newly emerging "Green Industries" sector in the region, and other activities which Council can support to realise the employment and economic potential of supporting these goods and services in the region. This focus looks at preserving the environmental attributes of the region, whilst leveraging diversification of the region's economic and employment base.
- Sections in the draft Environmental Strategy that link to economic development include; new waste management industries and infrastructure, renewable and alternative energy development, research and monitoring services, and in the water and 'clean tech' sectors.
- Nature-based tourism (including the Adelaide International Bird Sanctuary) is also included as a key focus in the Draft Environment Strategy. A study into the potential for 'Blue Carbon' commercial benefits is also called up in the Draft Environment Strategy.
- Urban planning actions including a study regarding the Urban Heat Island effect in the region, and the future strategic approach to increasing tree canopy cover and other greening strategies are already underway, and are supported in the Draft Environment Strategy - and will also be a key element of Council's Place -Making Strategy (in preparation 2016-2017).

8. People and skills

PAE has experienced significant population growth in the past ten years despite a national downturn in the manufacturing and resources sectors (industries that have traditionally been major sources of employment and economic activity) and general economic softening across the State.

Located on the northern fringe of Adelaide's central business district (CBD), PAE is well placed geographically to accommodate for young professionals working locally, in the CBD or other suburbs. However, encouraging a supply for affordable housing particularly for younger singles and families close to services and service centres will help support sustainable longer-term population growth.

The following section outlines both historic and future demographic trends, presenting the implications they will have on the Economic Development Strategy.

8.1 Population characteristics

PAE is experiencing positive population growth with annualised rate of 1.7% 2014-2016. The estimated population in 2016 is 124,053 residents and by 2031, the resident population is forecast to be 143,565 people and increase of 15.7% on 2016 estimates and an additional 19,512. Of this increase 17% will be in the 25-44 year age bracket. In 2011 the only net migration gain for PAE was within the resident group aged 18 to 34 (913 residents).

	2011	2016	2021	2026	2031	Growth	% inc	Avg annual
PAE	116,492	124,053	131,143	138,013	143,565	27,073	19%	1.2%
Greater Adelaide	1,345,080	1,416,420	1,488,821	1,560,468	1,628,083	283,003	17%	1.1%
South Australia	1,639,614	1,715,299	1,791,767	1,866,715	1,936,812	297,198	15%	0.9%

Table 1 – Forecast population growth rates

With an average household size of 2.36 person (2011), PAE will need to plan for an additional 8,300 homes that will most likely be a mix of infill, greenfield and conversion developments. This development strategy will also need to ensure that there is sufficient affordable housing provided to meet the needs of new younger residents and the growing migrant population. These new residents will be important to our future growth and workforce aspirations.

2011 Census data shows that 30% of the resident population were born overseas (34,445 people) with over 10,200 of these (29.7%) arriving to PAE between 2006 and 2011. This makes PAE the most culturally diverse community within the comparison locations. The largest multi-cultural increase between 2006 and 2011 has been from migrants from India and China who collectively represented 40% of total overseas migration during this period. 24% of the 2011 resident population were from non-English speaking backgrounds, the highest percentage within the comparison areas.



Aboriginal and Torres Strait Islander Awards musicians

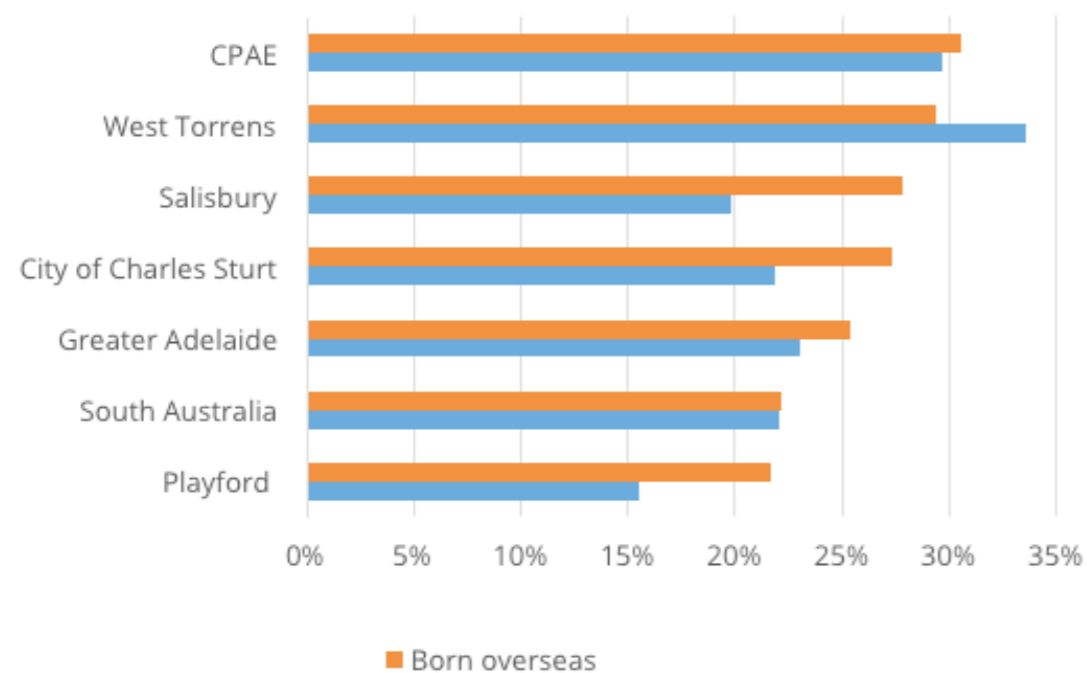


Figure 4 - Cultural diversity comparison (Source: profile.id)

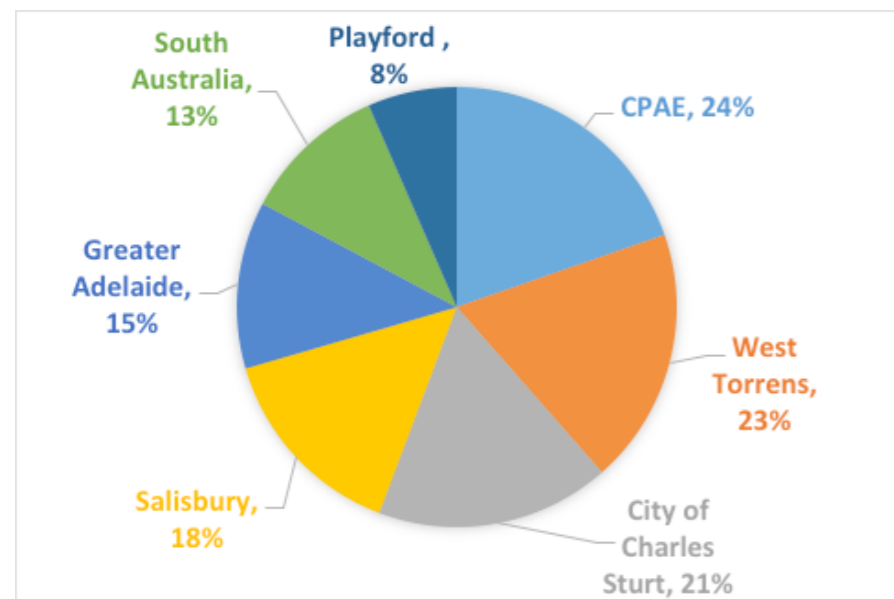


Figure 5 – Residents from non-English speaking backgrounds (Source: profile.id)

A further feature of the PAE's population forecast is the number of residents who will be aged over 65 years in 2031 which is below State and Greater Adelaide averages and the second lowest percentage of the other municipalities. By 2031, the number of people aged over 65 in PAE will rise from 18,715 in 2016 to 24,794 (↑6,079 persons). The dependency ratio (the number of people of non-working age being supported by those of -working age) will rise from 48.9% to 54.3% due to the rise in people aged over 65 years. Some estimates put this 2031 dependency ratio for Greater Adelaide at 66%. Additional skills will be needed in the area to address this decline.

8.1.1 Regional and local conditions

During 2014, PAE had an estimated resident population of 122,204 and experienced an average annual growth rate of 1.7% between 2004 and 2014. Over the ten year period, the population increased by an extra 18,679 people (18%), with a particularly high influx of residents between 2006 and 2008 seeing the growth rate peaking at 2.2% in 2008.

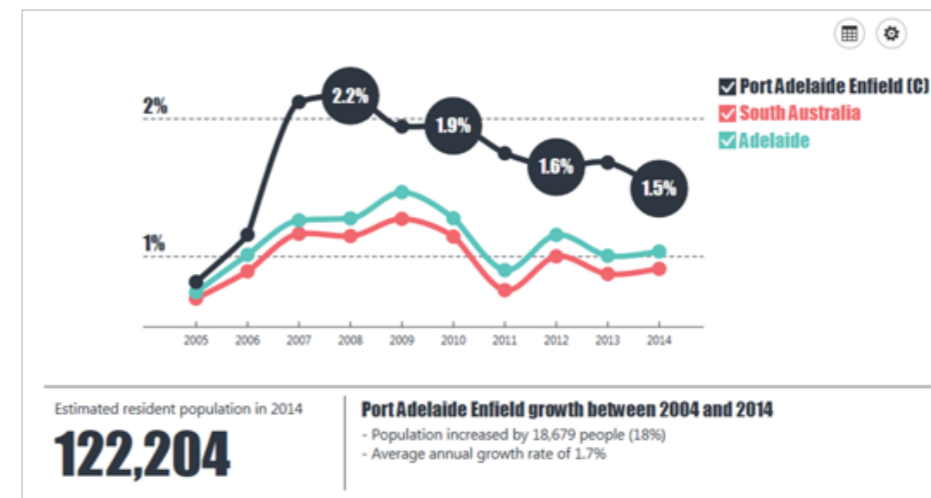


Figure 6 - Summary population trends (Source:ABS Census)

PAE's has a younger age structure when compared to the State and Greater Adelaide, with a higher proportion of residents aged between 25 and 44.

Percent of population aged between 25 and 44

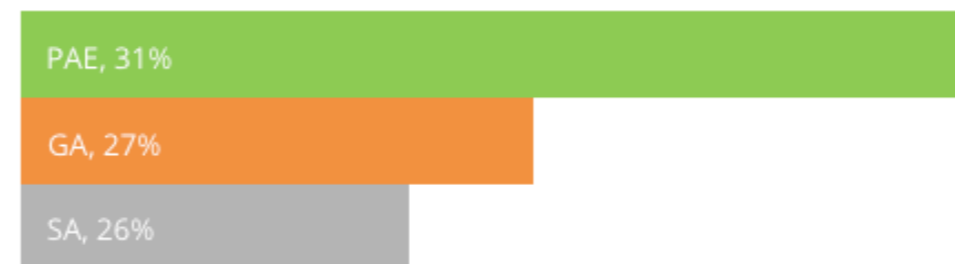


Figure 7 – Comparison of residents aged 25 to 44 years (Source:ABS cat no. 3235)

This younger age profile for PAE whilst forecast to decrease by 2031, will still remain higher than Greater Adelaide and South Australia and represents a positive growth opportunity for our region.

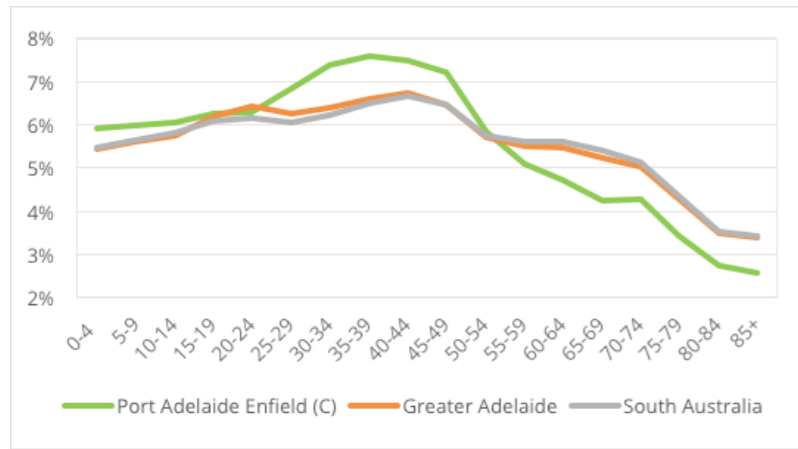
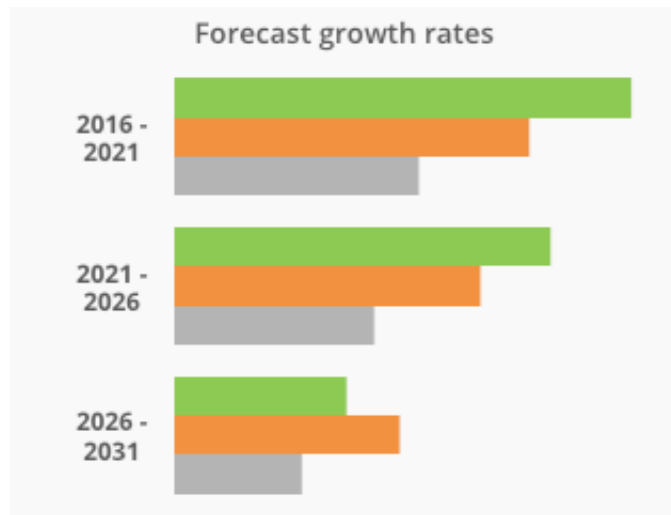


Figure 8 - Age trend comparison 2031 (Source: DTPI February 2016)

Population forecasts indicate that by 2031 PAE will grow by 19% to 143,565 residents, experiencing an estimated average annual growth rate of 1.7% between 2011 and 2031. The total number of new residents (2016-2031) will be nearly 20,000 people.



	2016 - 2021	2021 - 2026	2026 - 2031
SA =	4.5%	4.2%	3.8%
GA =	5.1%	4.8%	4.3%
PAE =	5.7%	5.2%	4.0%

Figure 9 - Forecast 2016 - 2031 population growth (Source: DTPI February 2016)

During the 2012-13 financial year PAE's estimated mean total personal income was below both State and Greater Adelaide's mean total.

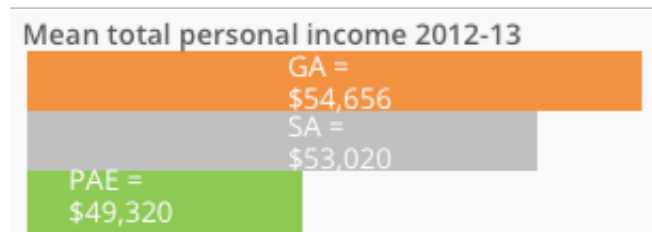


Figure 10 - Mean total personal income (Source: ABS cat no. 6524.0.55.002)

Further analysis of personal income shows that PAE has higher numbers of residents earning less than \$52,000 per year and lower numbers earning above this amount compared to Northern Adelaide and South Australia as a whole. This income level will have a bearing on overall community advantage and disadvantage.

The Economic Development Strategy should therefore look to ways to attract higher value employment and businesses and support small business and entrepreneurship to create job opportunities.

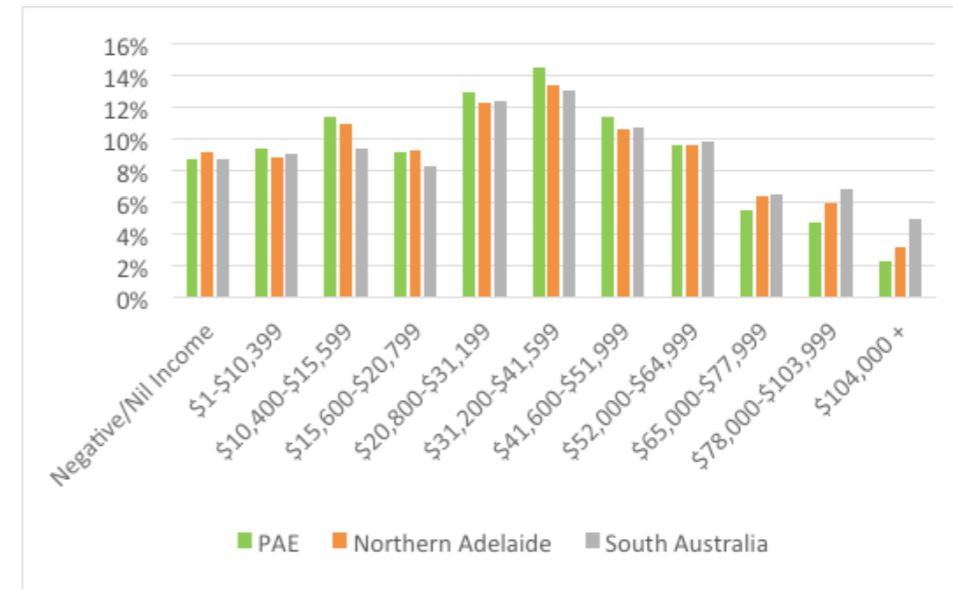


Figure 11 - Personal income comparison (Source: ABS cat no. 6524.0.55.002)

The 2011 census records 44,653 households in PAE, of which 64% were family households, 32% single or lone person households and 5% were group households. Of the 29,044 families, 40% comprised of families with children, and 39% were couple families without children, both proportionately lower than that for the State and Greater Adelaide. Supporting a housing market that is affordable for families and younger residents are opportunities for our community.

PAE recorded a marginally higher proportion of one parent families at 31%, compared to 27% for South Australia and 27% for Greater Adelaide.

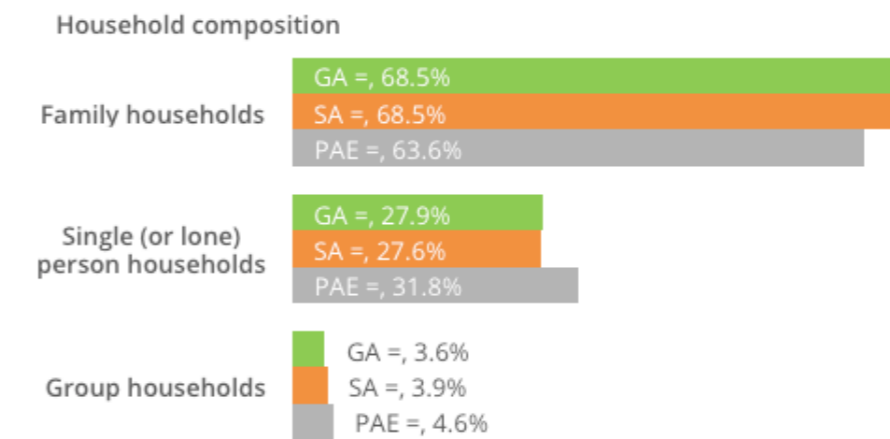


Figure 12 - Household type comparison (Source: ABS Census 2011)

With distinct pockets of advantage and disadvantage PAE scored 929.7 on the Index of Relative Socio-economic Advantage and Disadvantage indicating an overall greater disadvantaged population than both Greater Adelaide and South Australia. In comparison to the States other 71 Local Government Authorities PAE ranks the 20th most disadvantaged.

Twelve of PAE's suburbs had scores lower than the State score with the Kilburn - Blair Athol area the most disadvantaged. Four suburbs received scores greater than the State with Northfield - Northgate the most advantaged.

The 2015 Dropping off the Edge Report (DOTE) published by the Jesuit Social Services and Catholic Social Services Australia shows that excluding North Haven, Port Adelaide Enfield is one of the most disadvantaged communities in South Australia. Unemployment, including long-term unemployment, unskilled workers, disengagement of young adults and housing stress all show significant levels of disadvantage. However compared to previous years of DOTE reporting, there has been some improvement in disadvantage levels.

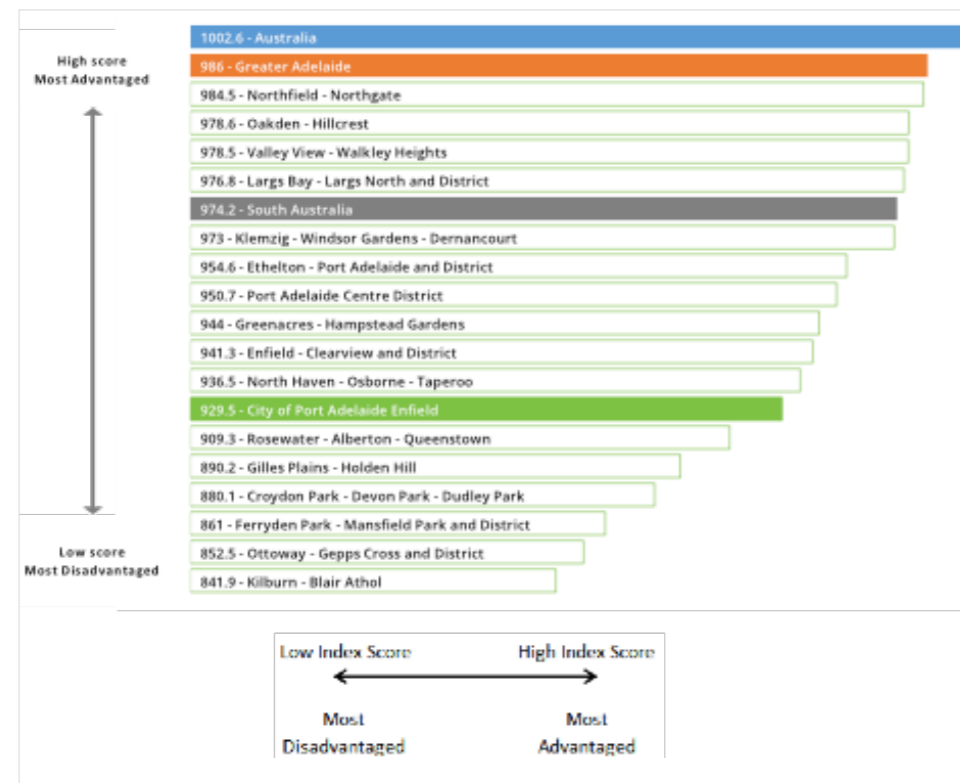


Figure 13 - SEIFA index comparison (Source: atlas.id)

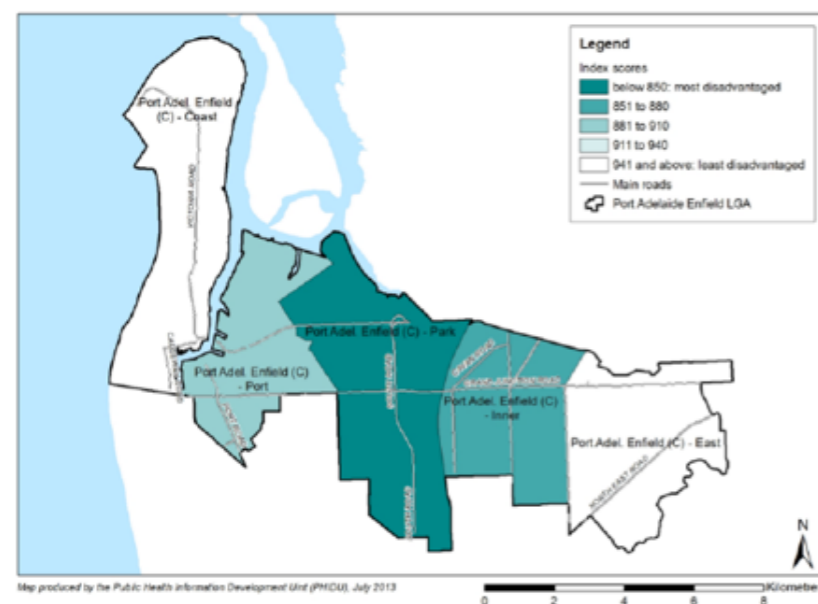


Figure 14 - PAE areas of relative social-disadvantage (source - PAE 2015-2020 Public Health and Community Wellbeing Plan)

8.2 Skills and the workforce

Changes to the economic structure has led to changes in our workforce. Whilst our workforce numbers have grown by 6% over the past five years, our unemployment rate has also risen.

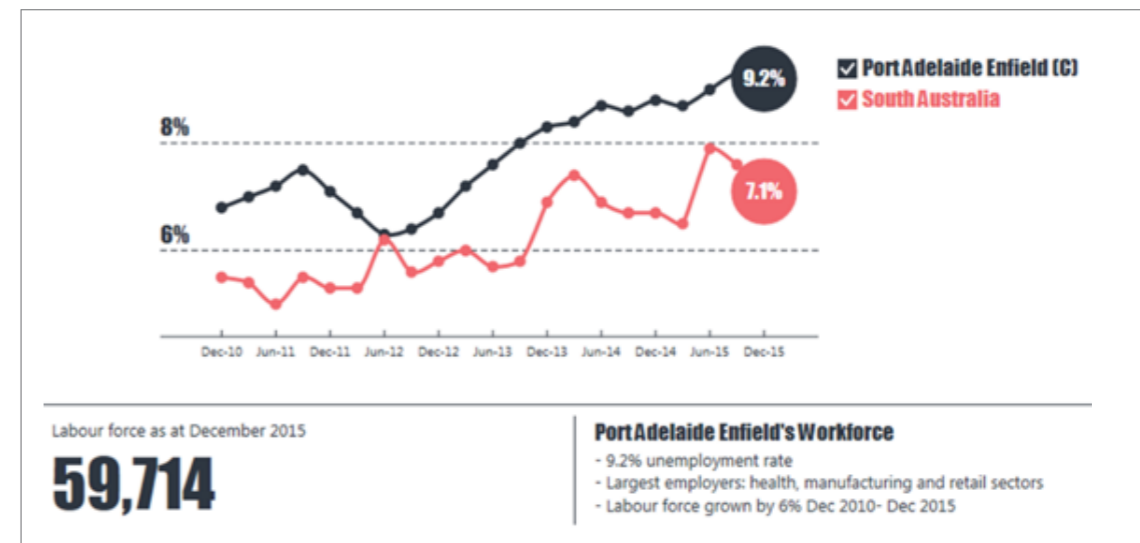


Figure 15 - Summary workforce trends

Whilst it is anticipated that the unemployment rate may worsen in the short term (one to two years), given recent announcements in government defence contracts and other investments, there are now opportunities to start building workforce skills development and job readiness programs and ensuring continued support for existing businesses.

Our region's business and industry employ over 56,000 people (Census 2011) with manufacturing, transport, retail, health and wholesale our leading employments sectors.

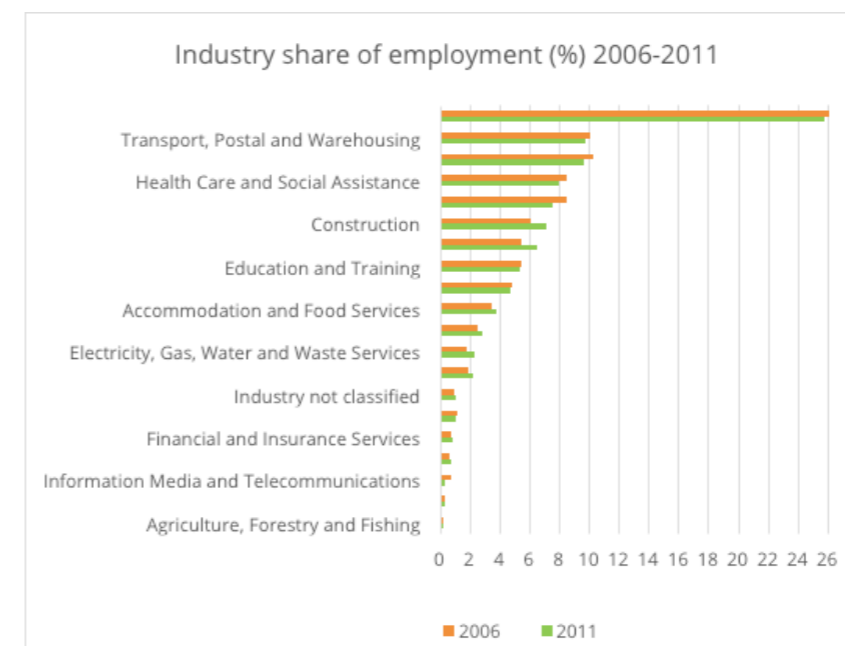


Figure 16 - Industry share of employment (%) 2006-2011. Source: ABS Census

Manufacturing remains the dominant industry for employment at just over 25% in 2011. Interestingly, manufacturing has largely maintained its share of the employment market when in many other regions across Australia, manufacturing employment shares have been falling. Employment growth has occurred in construction, public administration, accommodation and food and professional business services.

The industries that residents work in have changed between 2006 and 2011 and shows a shift in the economic and workforce base of PAE with falls in the percentage of the residents working in the manufacturing and retail sector and growth in the sectors of health, public administration and accommodation and food. This indicates a shift from a traditional industry employment base to a more service based employment profile for residents.

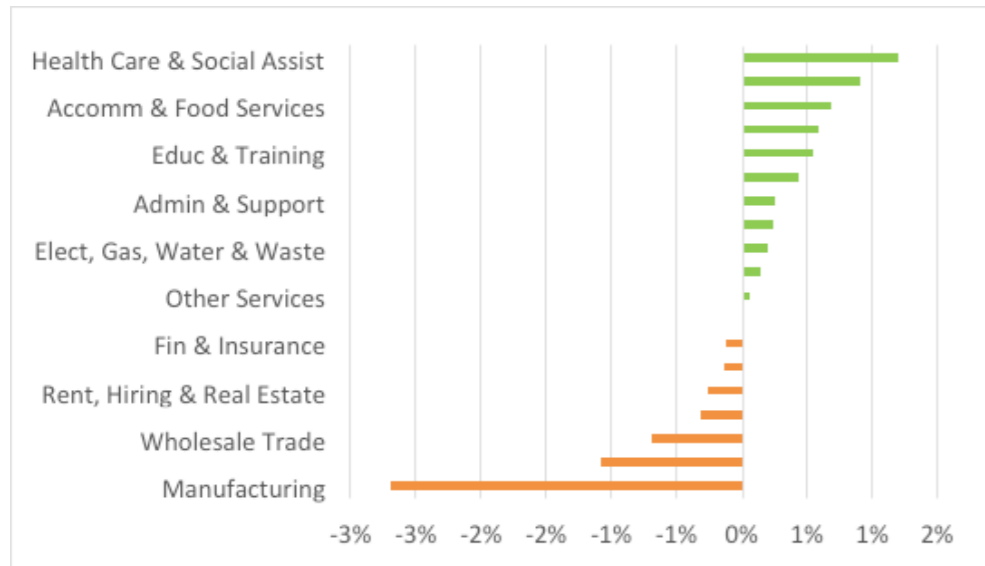


Figure 17 - Changes in resident employment by industry (Source:ABS Census)

However manufacturing and retail remains as a significant employment sector for residents even though health care and social assistance is the main employer for residents.



Figure 18 -2006-2011 industry of employment (Source:ABS Census)

The workforce is relatively skilled in comparison to other regions in areas of Year 12 attainment rates, degree, diploma and higher certificate levels.

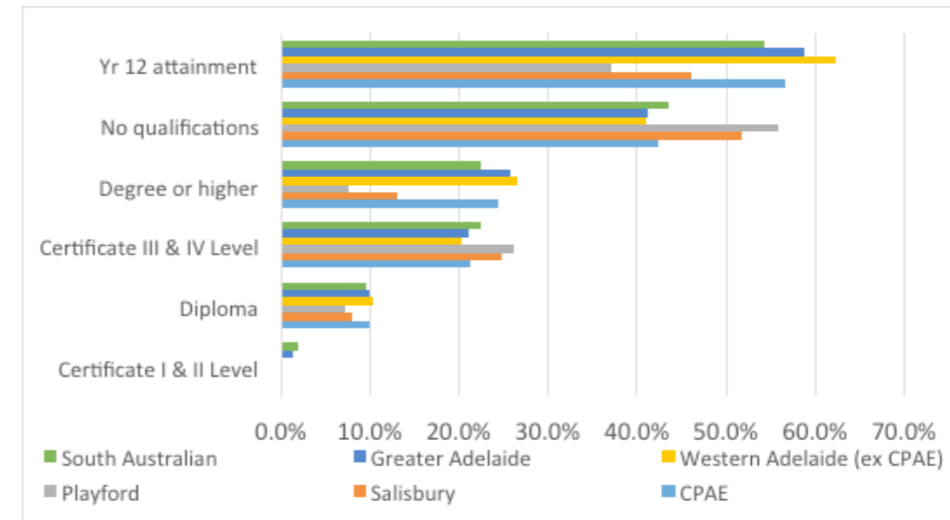


Figure 19 - Qualification comparison (ABS Census)

PAE also ranks well in professional occupations and performs at or around benchmark comparisons except in the area of managers and sales.

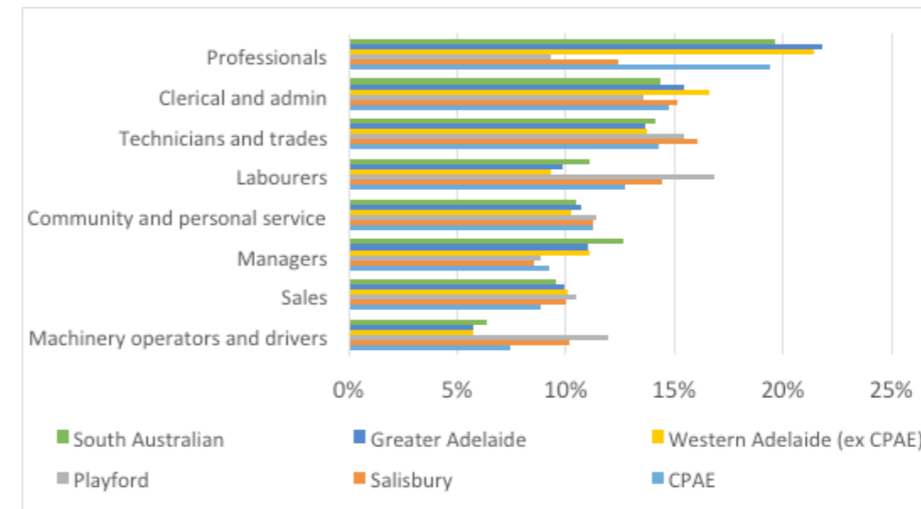


Figure 20 - Occupation comparison (Source:ABS Census)

In 2014, 833 people commenced apprentices and trainees in the region, a decline of 30.8% on the previous year. This decrease was also consistent with other key regions. The main industry sectors for commencing apprentices and trainees in 2014 is shown in Figure 21.

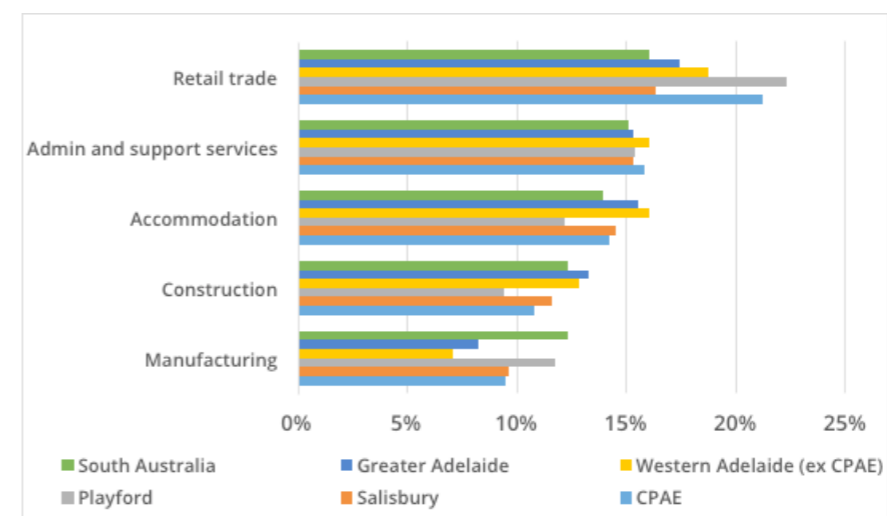


Figure 21 - Industry sector apprentice and trainee commencements 2014 (Source Workforce SA)

8.2.1 Implications for the Economic Development Strategy

- PAE and the region are forecast to experience positive and solid population growth. This provides economic opportunities for businesses. A key factor of this growth will be ensuring a sufficient supply of new jobs, training, community and other services for this population.
- Given the workforce participation rate of 53.5% in 2011, the growth in population numbers 2016 – 2031 of 19,512 residents will require the creation of over 11,000 new jobs.
- The attraction of younger residents and families will help address the anticipated widening dependency ratio and provide demand for new housing and services. Provision of a range of housing stock and employment will be critical to support the retention of the population over the longer term.
- Overseas migration will also be a key feature of population growth for the community and make a positive contribution to the economic and social structure of the community.
- Attraction and creation of higher value jobs through new industries and skilling the workforce will reduce, to some extent, comparative social disadvantage. Supporting small business, entrepreneurial enterprises and development to the tourism sector will contribute to this development of the economic value of work and jobs.
- Working with industry and training providers on strengthening learning and education pathways, expanding the education offer available in the region and addressing the decline in apprenticeships should be a focus of the Economic Development Strategy as a skilled workforce is a primary driver of regional economies and prosperity.



Local trainee

9. The economy

The economic history of PAE had a major focus on manufacturing and trade based on its location and assets. Over the years, the transition of industry and communities towards a knowledge-based and service economy and the reduction in manufacturing jobs has challenged communities such as PAE to rethink and restructure their economic base. The structure of the PAE economy is still linked to trade but the development of high tech manufacturing, defence industries, health, professional services, retail, education and tourism are becoming the mainstays and the future of the local economy and resident employment.

Ensuring that there is a sufficient supply of land and infrastructure, a skilled and adaptable workforce and supporting community services and facilities to create a preferred location to invest, work and live will be priority strategies for PAE to retain and grow its competitive economic advantage.

9.1 Economic indicators

The economy of the PAE is worth nearly \$15bn in total output. Output is a measure of the total sales of each industry sector in the economy. Over the past 10 years, this output has fallen slightly (↓2.2%) which would appear to be primarily from a fall in exports (↓8.4%) and likely rises in underlying business costs associated with wages and materials (Table 2). The output fall has largely occurred within the last two to three years, which is reflective of economic change and transition across a number of sectors in the economy.

The contribution the region makes to the state economy has also remained constant, in line with slowing growth rates in the wider economy.

Positive indicators for the economic are the rises in employment, value-add and worker productivity. They show a level of business confidence (employment creation), competitive business practices and greater localised economic growth through higher value-add.

Economic Measure	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	70,070	9%	63,538	9%	↑6532
Output/ Total Sales (\$m)	14,940	9%	15,276	10%	↓336
Value add (\$m)	6,821	8%	5,879	9%	↑942
Exports (\$m)	6,477	9%	7,069	11%	↓593
Imports (\$m)	5,829	8%	5,717	9%	↑112
Local Sales (\$m)	8,463	9%	8,206	17%	↑257
Worker productivity (\$ per worker)	97,341	n/a	92,523	n/a	↑4818

Table 2 – Headline CAPE economic indicators. Source: economy.id

A headline analysis of sectors show the following pattern of employment and output growth in percentage growth terms (Figure 22).

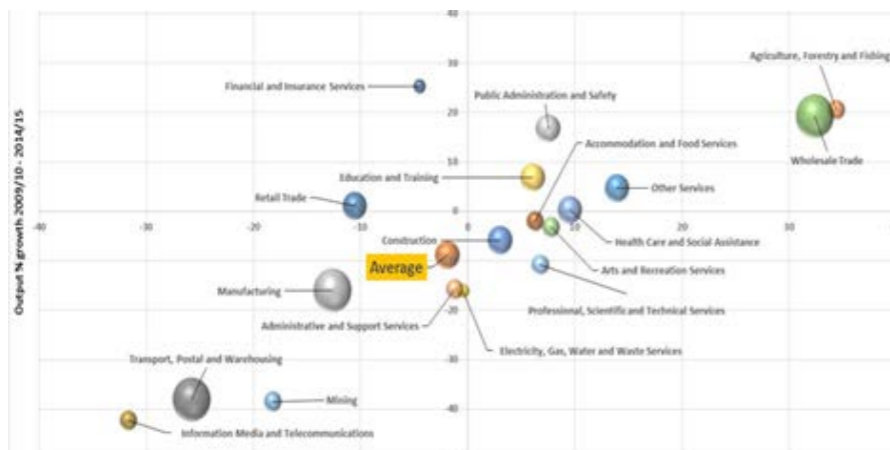


Figure 22– Sector performance analysis 2009/10 – 2014/15. Source: economy.id



Coopers Brewery

The propulsive sectors of the economy over the past 5 years in terms of output and employment growth have been, wholesale trade, agriculture, public administration, education and training, and other services.

Response – Sector planning, support and retention.

Sectors showing emerging opportunities to create jobs and increase output include health, construction, accommodation, arts and professional services.

Response - mitigate barriers to growth and enable employment activation.

There is a trend of medium to high output growth in the tertiary sectors of retail trade, finance and insurance and rental and real estate services with opportunities to convert to more employment.

Response - monitor barriers to growth and enable employment outcomes.

Sectors that are showing a combined transition in employment and output include manufacturing, transport, administration, ICT and utilities related, and the mining sector.

Response - facilitate transition and activation investment.

Given the challenging economic times in recent years, the overall average performance of the economy indicating a relatively marginal fall, shows there is economic resilience in the region.

Barring unforeseen economic shocks, with new investments in major projects and industry coming on stream in the next few years, we would anticipate some improvement in these performance figures.

The size of bubble in Figure 22 reflects the number of jobs created (or lost). The average growth rates reflects the overall performance of the economy in terms of output and employment percentage growth rates.

However this data needs to be considered in relation to the total \$ output value to the economy of industry sectors (Figure 23), which also shows the percentage output decline over the trend period.

The data clearly shows the continued economic importance of manufacturing, construction, wholesale trade and transport to the overall performance of the economy.

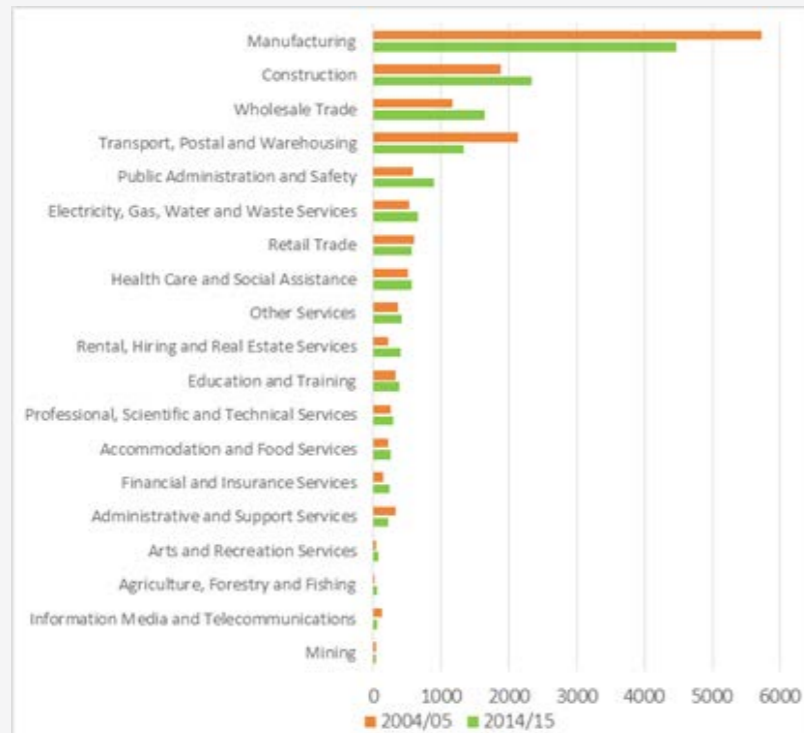


Figure 23 - \$m sector output contribution trend 2004/05 – 2014/15. Source: economy.id

9.2 Economic transition

Gross Regional Product (GRP) for PAE has grown by 22.2% (2006-2015) second only to Playford (32.1%) in the region and well above the State average of 15.1%. GRP is a measure of size or net wealth generated by the local economy.



Figure 24 - Growth in GRP (Source: economy.id)

The closure of automotive manufacturing in the Northern Adelaide Region by the end of 2017 will have impacts on economic activity and prosperity in the region. In addition to the loss of a total estimated 3,000 direct jobs, some analysts predict many more thousands of jobs may be at risk across the South Australian economy.

This will deliver short-term economic and workforce challenges for PAE.

To help redress economic activity, the Federal and State Governments have set aside millions of dollars of industry and workforce transition funding support. South Australia has contributed \$12m towards the \$155m Next Generation Manufacturing Investment Programme (NGMIP).

Under round one of the NMGIP over \$28m was provided to South Australian businesses to assist with business restructuring and investment in R&D and growth strategies.

The Northern Economic Plan announced in January 2016 provides a further \$24 million in State Government funding for significant economic projects in the Northern Adelaide region with the aim to create 15,000 new jobs over the next decade.

Together with the Building West Adelaide Strategy and other current and proposed investment projects, direct benefits to PAE could include:

- \$2 billion contract (balance remaining from \$4 billion) for Air Warfare Destroyers (3,000 direct jobs) and \$20 billion over 30 years for Future Frigates from 2020 providing for 2,500 direct jobs.
- Port Adelaide Renewal that has planned the redevelopment of 40 hectares of waterfront land for commercial, retail, residential and light industry growth. Total project valued at \$740 million and create over 500 new jobs.
- 50 Year Port Strategy for South Australia due for completion 2016.
- Relocation of 500 State Government jobs to a new civic facility creating 228 new jobs and valued at \$45 million.
- Creation of 1,700 new jobs across Northern Adelaide from the roll-out of the NDIS in 2017-18.
- Development of the Port as a tourism and cultural destination and link to nature-based and environmental assets to the north.
- \$10 million region-wide small business fund.

9.3 Housing

There are two factors that need to be considered in relation to housing – demand and supply. The balance and relationship between these two factors directly influence affordability, availability and housing tenure, meaning ownership and rentals.

A 2013 report commissioned by Renewal SA (Housing Affordability Demand and Supply by Local Government Area) shows the following characteristics of housing in our community and impacts on affordability.

9.3.1 Housing demand

- Levels of low to moderate income households (39.1% in PAE compared to 33.1% for Greater Adelaide);
- Increased number of households up by 6.6% 2006- 2011 in PAE and 5.5% for Greater Adelaide and mobility of the population with 36.1% living at different address in 2006 compared to 2011.
- The number of people aged over 60 who are listed as being the head of the household. In 2011 this figure for PAE as 29.8% and for Greater Adelaide 32.1%. In effect, this means that there are more younger people and families requiring housing than older persons. However, older residents will at some stage look for housing options that best serve their needs and allow for ageing in place.
- Between 2006 and 2011 nearly 19,000 PAE households changed address. Interestingly for PAE, nearly 44% of these were classified as having a high household income. This would further increase pressure on housing affordability.
- PAE are seeing increased applications in areas like Lightsview and other infill developments where dwelling size is smaller.

9.3.2 Housing supply

- The average annual growth in median property values in Adelaide over the past 15 years has been 8.1% for houses and 8.3% for apartments.
- Port Adelaide Enfield was the highest performing Adelaide area over the last 15 years at 9.2% followed by Salisbury (9%), Campbelltown (8.8%), Marion (8.8%), and Onkaparinga and Playford both at (8.5%).
- Only 3.8% of house sales were affordable to low income householders in PAE between 2006 and 2012 and 18.9% of sales were affordable for moderate incomes households. The percentage of new housing that were flats, units and apartments (2008-2012) was 20.2% in PAE and 26% in Greater Adelaide.
- Nearly 64% of total housing stock in PAE comprised of 3 to 4 bedrooms reducing the availability of affordable and suitable housing for younger people and singles.
- Nearly 26% of Greater Adelaide's social housing stock is located in PAE (7,441 households in 2012) and represents 16% of PAE's housing stock.

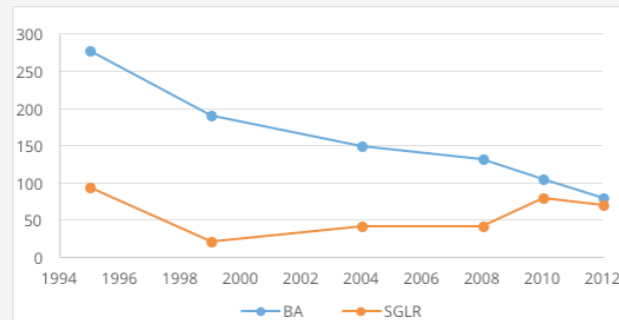


Figure 25 - Residential land availability trend. Source: Department of Planning, Transport and Infrastructure

The latest Department of Planning, Transport and Infrastructure land supply data (2012) shows that there was nearly 80 hectares of residential broad acre (BA) supply in PAE and 70 hectares of State Government Land for Release (SGLR). The supply of BA significantly decreased over the period 1995 to 2012. SGLR land supply will fluctuate over time.

9.4 Housing development projects

Under an extensive urban renewal program, Renewal SA currently underway and planned a number of development for the PAE region that include plans for a suite of residential development projects.

Facilitated by Renewal SA who has a focus on supporting the development of affordable housing in communities these projects include working with developers, local government, community associations and residents. This includes a range of programs to provide affordable housing in new developments and programs that open up housing options for low to moderate income earners.



Figure 26 – Our Port development plan. Source: Renewal SA

Project	Land size	Value	No of dwellings
Dock 1	4 ha	\$70 million	250
Port Approach	19 ha	\$50 – \$100 million	180 - 360 plus light industry, commercial and mixed-use
North West	7.7 ha	\$125 – \$260 million	290 – 460
Fletcher's Slip	7.5 ha	\$120 – \$250 million	450 - 900

Table 3 - Summary of residential plans for Our Port. Source: Renewal SA.

Other Renewal SA housing development and housing access projects include:

- Enfield High School site – 8 hectares and 130 dwellings;
- Parks Community Centre site – 6.5 hectares and 200 dwellings;
- Fort Largs 7.4 hectare development site for up to 200 dwellings;
- Lightsview at Northfield with 2,700 dwellings on 103 hectares with over 1,250 allotments sold;
- Shared Value Affordable Homes program for low to moderate income households;
- The Better Neighbourhoods Program that help to create sustainable, diverse communities by redeveloping areas with high numbers of aged social housing ; and the
- Kilburn redevelopment.



Figure 27 –Master Plan for Lightsview at Northfield. Source: Renewal SA.

9.5 International trade and investment

South Australia has trade, business and cultural links with many nations across the globe. International exports, trade imports, migration, education and subsidiaries of large corporations provide South Australia and its businesses with opportunities to harness and build global trade and investment.

The South Australian Government has developed a program to support international partnerships with China, India and South East Asia seen as primary market opportunities. These global partnerships are being fostered through an extensive program of trade missions and a range of relationship building programs. The State Government is also keen to see local Councils and businesses foster these relationships through participation in trade missions and development of local export capability in the following regions and economic areas:

- China - mining expertise, education, agribusiness and food production, innovation and business solutions and tourism.
- India – Aerospace and defence, energy, natural resources and environmental management, education, clean technologies, food and wine and tourism utilising clusters of industry and business expertise.
- South East Asia – education, research and development education, infrastructure and professional services, defence, mining and tourism.
- France - defence, agribusiness, clean technologies innovation.

International trade also focuses on attracting businesses and inward investment in infrastructure and sector development into Australia. National projects and partnerships already exist in tourist accommodation, wine, food and agribusiness, shipping, airlines, real estate, utilities and telecommunications. South Australia and PAE are keen to see the share of this investment grow in the State from current levels of 2% of total national inward investment to support local and regional economies and business.



Port Festival 2015

9.5.1 Implication for the Economic Development Strategy

- Continued partnerships with the State Government and other agencies on progression of trade and international relations should be a primary focus of the Economic Development Strategy strategy.
- Gathering an understanding of the capabilities of local businesses and organisations including export relationships will help to inform targeted and strategic entry into competitive and complex export markets.
- Building the export capacity of existing businesses should focus on the primary markets identified by the State Government and on businesses who have capability and commitment to develop export and inward investment partnerships.
- Cultural as well as economic relationships through sister city and other cultural initiatives are strategic mechanisms that have been successfully used by other municipalities and provide openings to networks, communities and governments. Inclusion of local residents and business owners from overseas regions are also highly beneficial to this process.



10. Industry sector activity

The following provides a summary of key industry sectors for PAE. This includes existing industries and sectors that represent growth and development opportunities for the community and region.

10.1 Agribusiness (food and horticulture)

Including primary production, food processing, beverage manufacturing and product wholesaling, the agribusiness sector is worth nearly \$258 billion to the Australian economy. Over the past five years the sector has grown by a yearly average of 2.6% with forecast annual growth of 2% over the next five years.

Industry yield, income and performance along the diverse supply chain are influenced by a range of factors including climatic conditions, exchange rates, domestic grain and meat prices, global food demand and quality of produce and commodities.

Governments in Australia are placing a high focus on the opportunities of increased agricultural output including diversification and value-add. Escalating global demand for food and changes in food and beverage consumption particularly for premium products within Asian markets are seen as having strong export potential for Australian agribusiness.

Innovation in production, processing and value-add are key areas for industry growth coupled with heightened interest in Australia as an overseas agribusiness investment location. Diversification and productivity gains through irrigation improvements, undercover production, intensive farming, aquaculture and uptake of on-farm technologies represent economic development opportunities for rural and increasingly, urban and metro regions.

10.1.1 Regional and local conditions

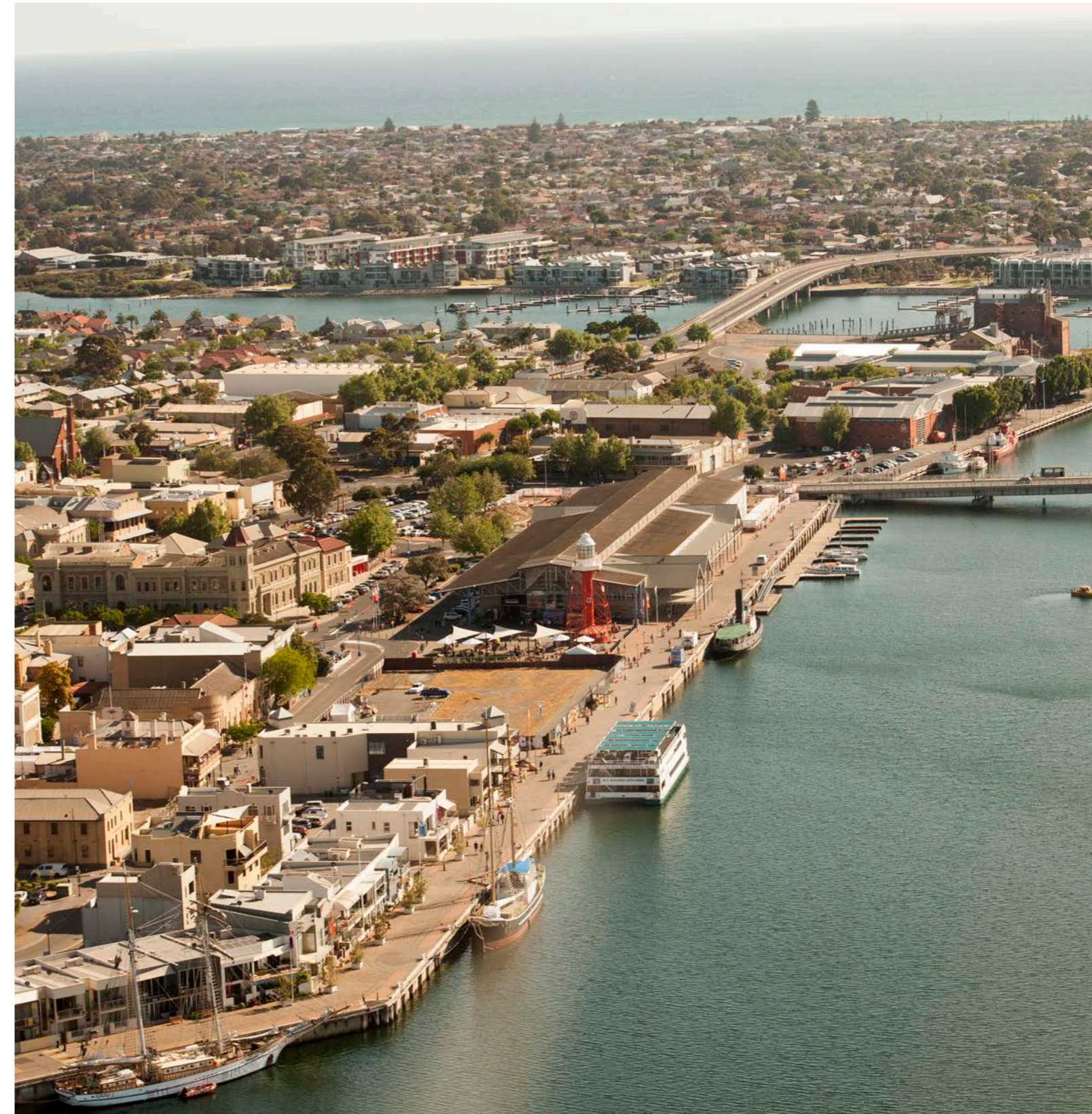
Port Adelaide is a major logistics hub for the export and import of primary produce including grains, vegetables and legumes and containerised food products. Export of non-containerised bulk food products account for nearly 45% of total freight movement through the Port (Source Flinders Ports 2014).

Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	3040	17%	2481	17%	↑559 (+22.5%)
Output/ Total Sales (\$m)	944	17%	975	17%	↓31 (-3.2%)
Value add (\$m)	309	17%	240	17%	↑69 (+28.7%)
Exports (\$m)	664	23%	781	22%	↓117 (-15%)
Imports (\$m)	603	7%	213	8%	↑390 (+183%)
Local Sales (\$m)	279	10%	193	9%	↑86 (+44.5%)

Table 4 – Headline Agribusiness economic indicators. Source: economy.id

As shown in Table 4, over 3,000 people are employed in agriculture, food processing and value-add industries including bakery, meat, grains and beverages in PAE.

Whilst exports have declined, this has been partially offset by increases in local sales and a rise in the value of goods produced in the region. Imports of products and services have risen substantially indicating potential opportunities to address economic leakage through opportunities for import replacement within the local market.



The development of horticulture to the north of Adelaide has created significant economic and employment opportunities through the production and processing of vegetables, plants and flowers and associated businesses such as seed growers, wholesalers and distributors. The area is covered by over 700 hectares of greenhouse production. Investment in the Northern Adelaide Food Park at Parafield Airport on the northern borders of PAE and just 15 minutes from the Port, will further add to the regions credentials in quality food production.

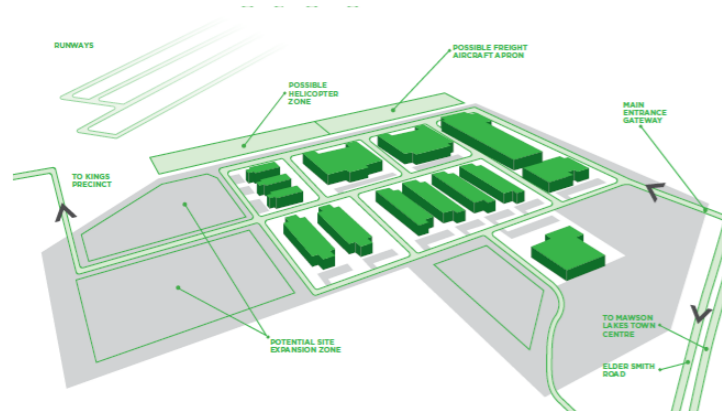
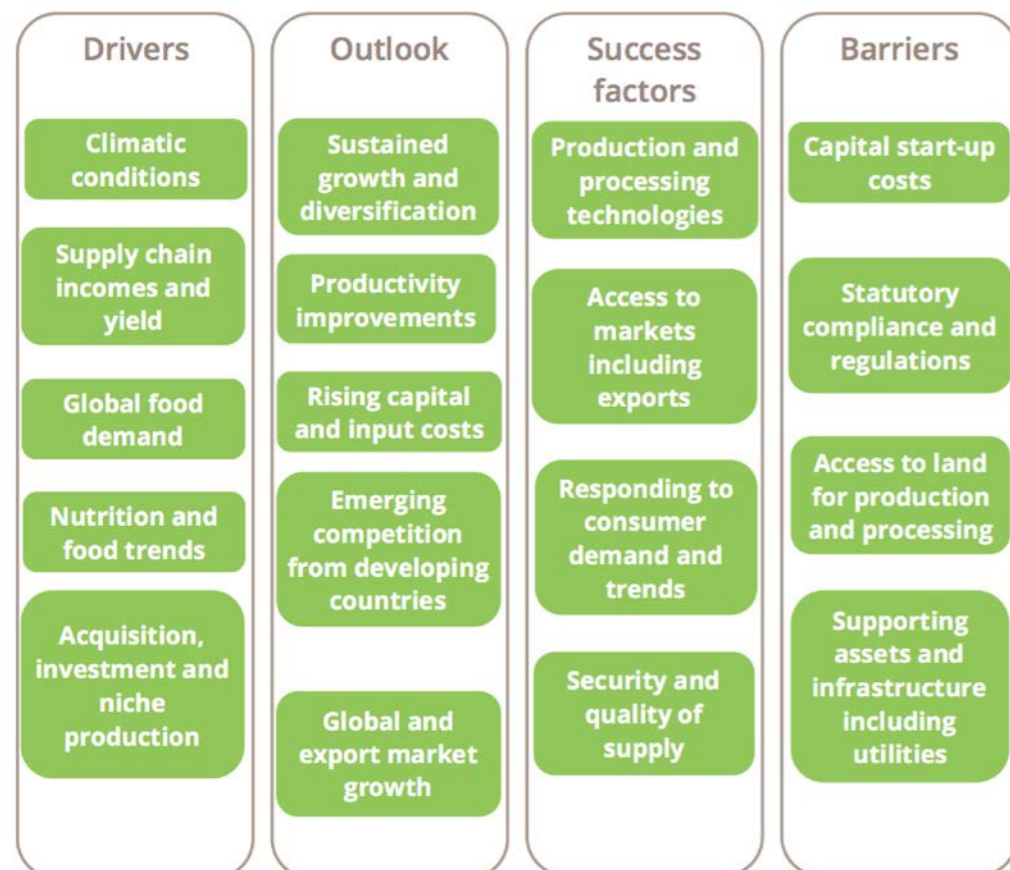


Figure 28 - Northern Adelaide Food Park site plan

Whilst employment in the sector is low for PAE residents, the opportunities of this sector to provide jobs across a range of skills and occupations along the supply chain from production to distribution is significant.

Over 130 food manufacturers and processors are located in the Northern Adelaide region. The development of the food and agribusiness sector provide sustainable and innovative growth and employment opportunities for PAE.

10.1.2 Industry environment



10.1.3 Economic Development Strategy implications

- Identification of opportunities to attract investment to support food and agribusiness development.
- Ensuring good road and rail connectivity to key producers, suppliers and distribution points including the Port.
- Planning for the future power, water and technology needs of high-tech and innovative manufacturing.
- Ensuring sufficient supply of development land in proximity to transport assets and a skilled and productive workforce.

10.2 Manufacturing and industry

Manufacturing is worth approximately \$100 billion to the Australian GDP and has a workforce of 900,000 employees. Manufacturing has strong supply chain linkages throughout the economy including inputs of raw materials, commodities, technologies, distribution networks and construction and provision of wide range of products for domestic and overseas markets.

External factors such as the rise of new global economies, exchange rates and the adoption of advanced technologies in product development and manufacturing have had significant impacts on the domestic manufacturing sector. In order to respond to these challenges, the sector is seeing a transformation from traditional manufacturing to high tech- high value products that can be competitive in global markets. The sector is responding to these challenges through:

- Innovation and R&D on which the sector now spends on average over 25% of total expenditure;
- Reducing costs through improved productivity, smaller but skilled workforces, niche and knowledge intensive manufacturing, partnerships and expansion into new markets; and
- Strengthening of supply chains and supply chain management.

Federal government policy towards manufacturing is non-interventionist with car manufacturing, steel production, clothing and textiles and even defence being case in points. Increasingly, State Government and regional economies are having to build local capabilities and to ensure that the right economic environment is provided to support manufacturing growth and competitiveness.

10.2.1 Regional and local conditions

Growing advanced manufacturing is one of the South Australian Government's seven key priorities. Under the Manufacturing Works strategy, the State Government has identified four key pillars to transition the manufacturing sector namely:

1. Enhance the capacity of manufacturers to innovate;
2. Upgrade the leadership, knowledge and skills of the South Australian workforce;
3. Capture future markets and opportunities; and
4. Address infrastructure and policy gaps.

In addition to the range of direct responses to the imminent closure of car manufacturing in the region, government and local councils have partnered to support regional economic growth and to transition manufacturing to be high value and competitive. This has led to the opening up of land for new industry development, ensuring that there is investment in transport and logistics infrastructure, providing skill development and retraining opportunities for workers and reducing red-tape and costs to business.

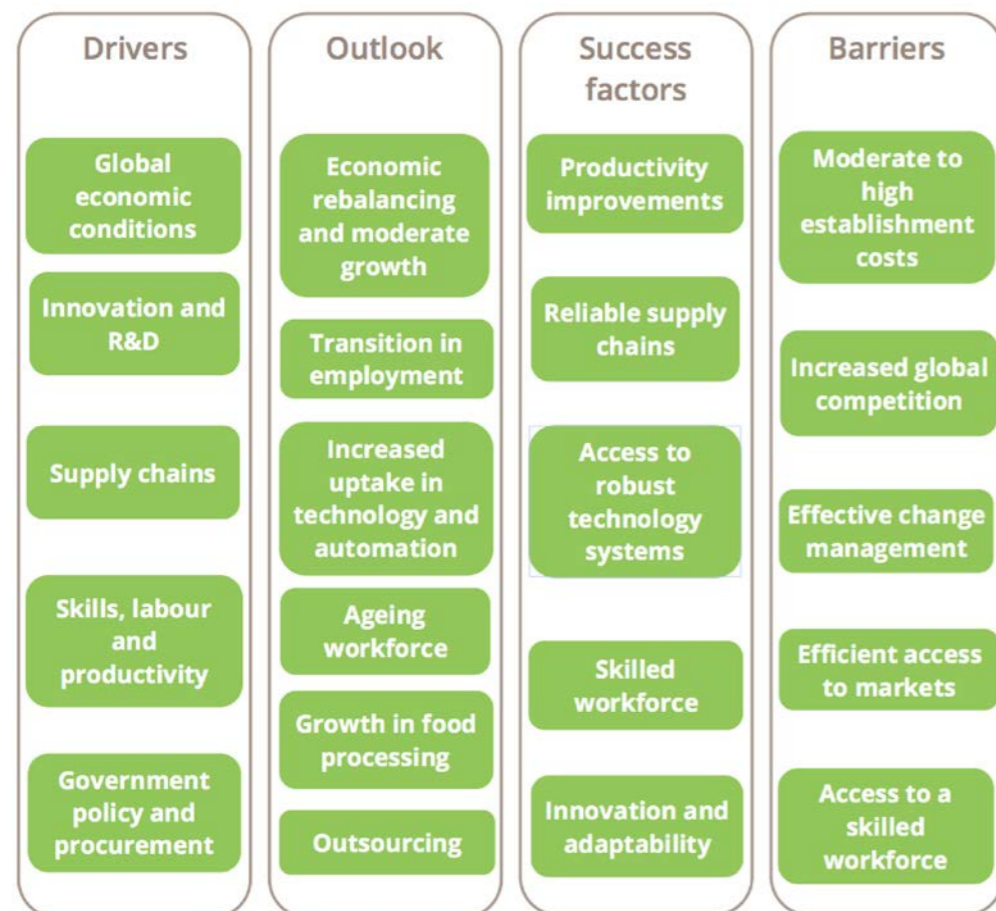
Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	15,635	21%	17892	20%	
Output/ Total Sales (\$m)	4467	21%	5322	20%	↓856 (-16.1%)
Value add (\$m)	1521	21%	1597	20%	↓76 (-4.7%)
Exports (\$m)	3608	25%	4260	22%	↓652 (-15.3%)
Imports (\$m)	1931	8%	2208	9%	↓277 (-12.5%)
Local Sales (\$m)	859	14%	1063	13%	↓204 (-19.2%)
Worker Productivity (\$)	97,255	n/a	89,265	n/a	↑7990 (+8.9%)

Table 5 Headline manufacturing economic indicators. Source: economy.id

The sector has experienced a challenging economic environment, which is reflected in overall declines in economic indicators. Manufacturing, represented by over 620 companies, remains the most important sector to the economy in terms of employment, value-add, output and exports. Imports are relatively high in comparison to output so like the agribusiness sector, opportunities may exist to address economic leakage through import replacement and local business development initiatives.

PAE is home to number of world-class manufacturing businesses in the areas of defence, technology systems, fabrication, food processing and construction. The supply of the new submarines through the partnership of the Australian Government and the DCNS in France provides new opportunities to support our existing and develop new manufacturing enterprises and capabilities. This further builds on manufacturing capabilities alongside our freight and logistics assets, a growing workforce and investment in industry and business clusters.

10.2.2 Industry environment



10.2.3 Economic Development Strategy implications

- Ensure that local industry is aware of government policy and industry support programs including innovation, workforce development, export development and sources of business growth funding.
- Promotion of PAE as place to invest and support the growth of existing businesses.
- Provision of serviced industrial land with good access to transport and distribution infrastructure.
- Support for local industry with workforce development planning and access to skills and training.
- Promotion of export and trade initiatives including overseas trade missions.
- Opportunities to foster education and training courses in key skills and occupations in partnership with local training providers.
- Development of clusters of integrated businesses provide for higher level skills, specialisation, productivity and import replacement benefits.

10.3 Maritime defence services

Maritime defence services for the purposes of the Economic Development Strategy comprise companies in the industry primarily involved in the manufacture or repair ships with displacement of 50 tonnes or more. Firms that manufacture submarines and major components for ships and submarines are also included in the industry.

Currently worth over \$4 billion to the Australian economy, the sector has experienced an annualised growth rate of 6.6% (2011-16) and forecast growth of 2% (2016-2021). However, given the recent announcement of the contract for Australia's next fleet of submarines to be largely built in Adelaide and Western Australia, these forecasts will be subject to review. The industry employs nearly 11,000 people nationally in areas of dry dock operation, hull cleaning, ship repairing

and maintenance, shipbuilding, shipwrecking, submarine construction and submarine component manufacturing.

The sector is highly influenced by government defence policy and expenditure and the timelines for maritime asset manufacture and renewal. Major contracts over the past few years and the replacement submarine contract provide significant economic and employment opportunities for major suppliers, subcontractors and supply companies.

10.3.1 Regional and local conditions

The shipbuilding industry is a large contributor to the PAE regional economy. Location, strategic assets and the development of industry capability has long seen Port Adelaide a major national and global player in this sector.

Major players in the sector include ASC who built and maintain the Collins Class submarine fleet and will collaborate with DCNS on the new fleet of 12 submarines for the Australian government. The company currently employs around 1,700 workers at the Osborne site, although the company is forecasting transitional job losses (estimated to be 640 workers) over the next 18 months as the Air Warfare Destroyer project slows and the commencement of the Offshore Patrol Vessel project in 2018.

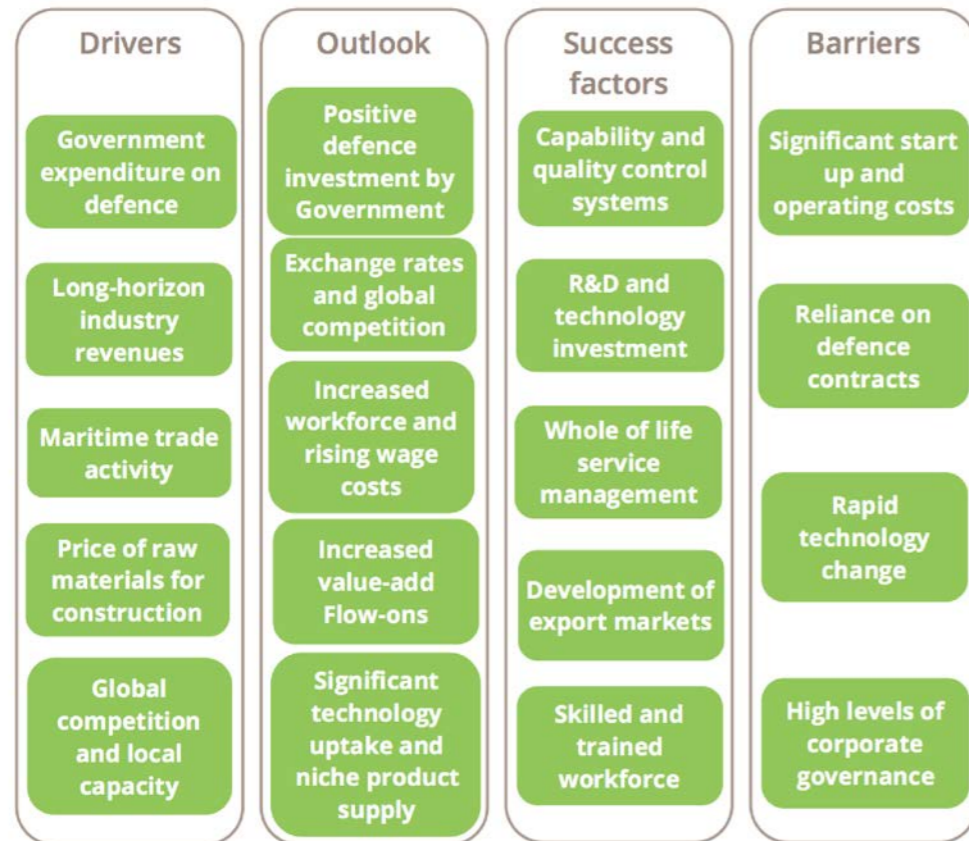
DCNS have stated that they will require the construction of a new facility in Adelaide which will provide employment opportunities for the construction sector in the region. DCNS is currently preparing to duplicate its Cherbourg operations in Port Adelaide with designers and engineers expected commence work on this new construction project at Techport in 2017.

SA Economic Development Board has indicated a significant technological "spillover" into the rest of the economy as knowledge and training in Port Adelaide from DCNS is put to work in other industries.

Direct employment from the submarine project is estimated in the order of 1,700 jobs with a further minimum 600 jobs created in the wider community.

The future submarines project builds on the announced initial construction of 12 patrol boats from 2018. Completion of these vessels will transfer to Western Australia in 2020 when the Adelaide shipyards will start making frigates as part of a \$30 billion contract.

10.3.2 Industry environment



10.3.3 Economic Development Strategy implications

- PAE to be proactive partners with the State and Federal governments and leading industry players in the future of shipbuilding in the region.
- Working with industry on land, asset, workforce, logistics requirements over which PAE have a facilitation or advocacy role. This includes the extension of the proposed light-rail network to Port Adelaide.
- Identifying opportunities for supporting and development local supply capabilities and development of training programs with the industry and local training providers.
- Identification and development of further bi-lateral trade and business opportunities leveraged through the partnership with the French company DNCS.

10.4 Tourism, arts, culture and hospitality

Servicing domestic and international visitors, the tourism sector is worth \$118bn to the Australian economy. Despite less than favourable exchange rates, the sector has experienced a 2.9% annual growth rate over the past five years and a forecast yearly growth rate of 1.9% 2016-2021.

Exchange rates have encouraged Australians to undertake record numbers of overseas travel with overseas travel rates doubling over the past 10 years. This has been somewhat offset by rising numbers of inbound visitors from Asia with China and India becoming major visitor markets.

Natural and climatic events such as flood and fire are also anticipated to shift travel and tourism patterns. There has also been an increase in popularity for short stay and weekend breaks in the domestic market. Ecotourism, regional produce and festivals and event experiences have been key drivers of this shift of which Victoria and Tasmania have been market leaders.

Domestic tourism has remained relatively static, but changes in travel and holiday preferences are seeing more overseas trips being made by Australians. This has resulted in limited growth in domestic visitor numbers in recent times.

Nearly 2,000 workers are directly and indirectly employed in the tourism and hospitality sector in PAE (Table 6), with employment numbers showing a strong increase over the trend period (59%). The sector is a strong performer in the local economy across available economic indicators.

Visitation numbers are also performing well in all markets with yield particularly positive in the high value segments of domestic and international visitor nights.

Economic indicator	2014-2015		2009-2010		Change 2010 to 2015
	CPAE	% of total industry CPAE	CPAE	% of total industry CPAE	
Employment total (no)	1877	2.7%	1178	1.7%	↑698 (+59.2%)
Output/ Sales total (\$m)	285	1.9%	139	0.8%	↑146 (+105%)
Value added total (\$m)	145	2.1%	70	1.0%	↑74 (+105.7%)

Table 6 – Headline tourism economic indicators. Source: economy.id

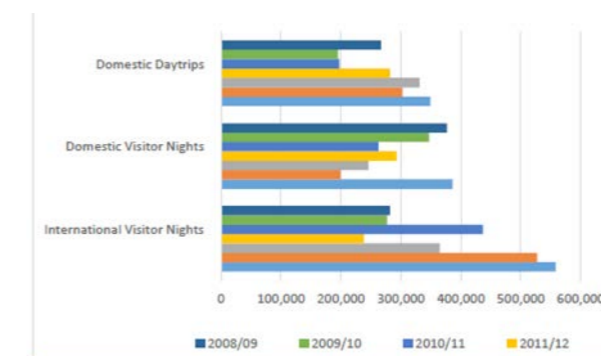


Figure 29 - Visitation trends by type. Source: economy.id

Port Adelaide is home to three museums, of State significance, namely the; Railway, Aviation and Maritime museums. These museums along with the maritime precinct of the inner harbour are home to the One & All, Falie, Nelcebee, Yelta and City of Adelaide Clipper Ship. These attractions play a key role in the current tourism offering and a strong base to expand future tourism opportunities in the region.

The Port River is also home to the Dolphin Sanctuary. This offering as well as other eco-tourism opportunities and cultural trails provide a real point of difference for the region.

Council will work with tourism providers to further market the region and promote the eco-tourism opportunities and experiences that exist in the Council region.

The South Australian Government has invested significant time and resources (through the SATC) to attract cruise ships to South Australia. With the majority of these ships berthing at Outer harbour, there is significant opportunity to capitalise on these tourists and promote the Port Adelaide Enfield region as a tourism destination and not just a berthing location for ships.

A standalone PAE Tourism Destination Plan is being developed in 2016 to highlight the opportunities and actions required to enhance the Council Region as a Destination and to increase overnight stays in the region. Eco Tourism and the opportunities that exist in this area will be further explored in this document, along with working with existing tourism providers including museums, Tall Ships and any other business or service provider who is currently associated with the Tourism sector or who wishes to be.

Further to the localised PAE Tourism Destination Plan the “Building Western Adelaide Economic Group” (Councils of Cities of Charles Sturt, West Torrens, Holdfast Bay and The City of Port Adelaide Enfield) will be delivering a Western Adelaide Regional Tourism Plan towards the end of 2016. This Plan will identify ways for tourism providers and Council’s in the western region of Adelaide to work collaboratively together and explore strategies to work off the strengths of each Council area to keep tourists in the western region of Adelaide longer. This will encourage greater opportunities for business and growth in the tourism sector.

The Council area has a rich arts and cultural sector which can be further developed and supported to create economic benefit. Many professional and established artists and arts organisations call the area home; arts and culture generate jobs in the area, create a city environment which attracts residents, contribute to low-cost community development and can also drive future tourism opportunities.

PAE has a unique combination of well-loved arts organisations engaged in contemporary cultural expression as well as heritage buildings, history and natural assets. This provides significant opportunities to develop and promote a vibrant and interesting destination for domestic and international visitors

It is a priority for PAE to maintain and grow the area’s cultural infrastructure and continue to be a home for arts organisations and artists

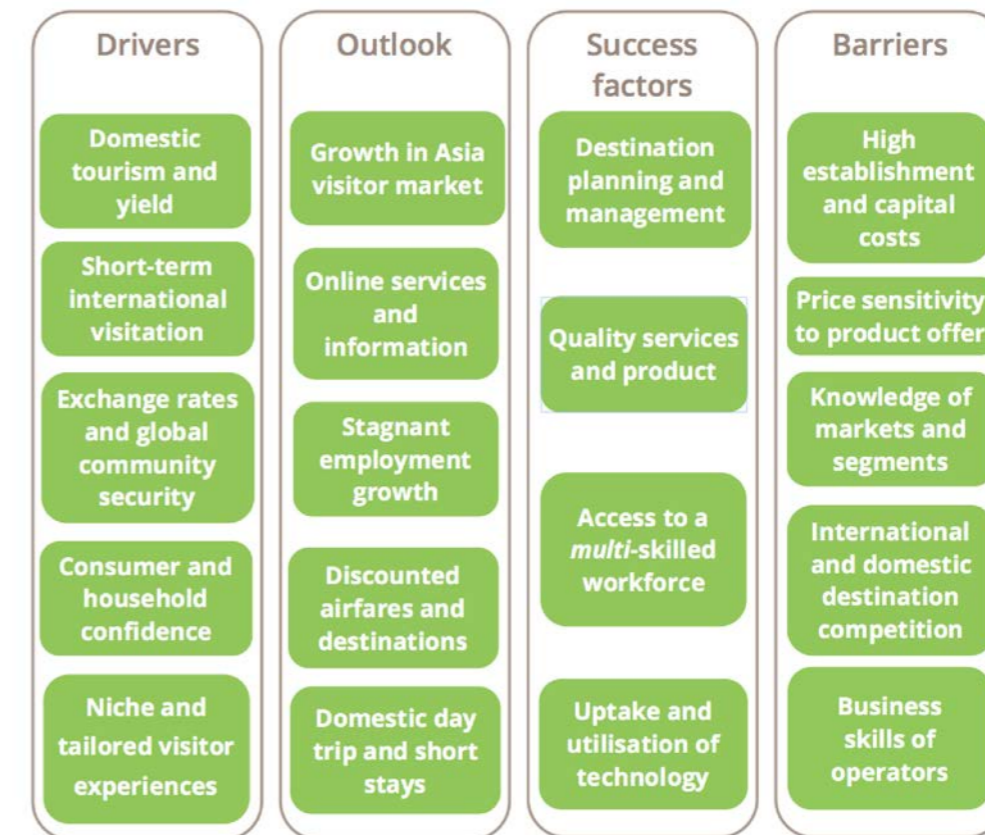
10.4.1 Regional and local conditions

PAE has a relatively underdeveloped tourism product. Given the many heritage buildings, history and natural assets of the community, there are significant opportunities to develop a vibrant and interesting destination for domestic and international visitors.

The growing multi-cultural profile of the community has seen the growth in the establishment of multi-cultural food outlets. This provides opportunities to create a point of difference as a destination and the development of food related events and activities.

A key gap in the local tourism product would appear to be the supply of accommodation including premium, mid-range and family focussed accommodation options. This reduces the yield that can be achieved from visitation to the region including day trips, short breaks and packaging of product around festivals and events and visitation to the region. The development of over 100 Quest apartment accommodation units at Fisherman’s Wharf is a positive economic step to improve the tourism offer and increase visitor yield.

10.4.2 Industry environment



10.4.3 Economic Development Strategy implications

- Development of a tourism strategy and regional destination plans to enhance the tourism product and visitor experiences.
- Capture of visitor spend and yield through attraction of investment in accommodation options and packaging of events, food and experiences.
- Promotion of our significant and diverse indigenous and maritime history and heritage including museum trails, experiences and information.
- Providing a range of cost-based experiences and options for visitors from a range of tourism segments and markets.
- Support for tourism and operators and supporting service businesses in relation to tourism opportunities, services and value.
- Improving access and connectivity to our tourism assets through public transport, technology adoption, information and wayfinding.
- Leveraging and utilising our significant but unsung natural and environmental features including the river, Adelaide Dolphin Sanctuary, coastal areas and open space.
- Capture and analysis of local tourism trends, visitation rates, yield and improvement strategies.
- Promotion of the Port as a welcoming, interesting and cost effective destination for cruise ships to diversify and develop our tourism industry.
- Building on strengths of arts and culture including events, creative industries etc.

10.5 Health and medical

The health services sector is worth over \$123bn to the Australian economy. Between 2011 and 2016 the sector grew by 4.2% per year, with an annual growth forecast of 3.3% between 2016 and 2021. Services include general hospitals, general practices and physiotherapy clinics, and auxiliary service providers such as pathology and diagnostic imaging.

Demand for health services will rise with an older and longer living population (forecast growth in aged residential services is 6% 2016-2021) and the as the rate and degree of chronic health conditions increases.

The sector will require a skilled workforce whilst looking to technology to drive efficiencies and improved health outcomes. Government policy associated with sector funding and funding structures, the rise of private health provision and high costs for aged services will be particularly challenging for service users and providers.

PAE is home to many health and medical providers, ranging from small GP and health providers through to the Hampstead Centre and many disability service providers.

10.5.1 Regional and local conditions

The health sector employs nearly 5,700 residents in residential care services, social assistance services, hospitals and allied health services and contributes \$565m of output to the local economy. Employment value-add and local sales have, not surprisingly, been positive performers for the sector. The industry is also relatively self-sufficient in the region with low levels of imported products and services. Worker productivity levels are on par with state standards.

Training at Certificate, Diploma and Bachelor level courses in community services, health and wellbeing, nursing, complementary health and mental health and drug education are available at Port Adelaide TAFE SA campus.

Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	5696	5%	5202	5%	↑495 (+9.5%)
Output/ Total Sales (\$m)	565	5%	563	5%	↑2 (+0.4%)
Value add (\$m)	425	5%	392	5%	↑33 (+8.4%)
Exports (\$m)	159	3%	183	4%	↓24 (-13.1%)
Imports (\$m)	143	4%	150	5%	↓7 (-4.7%)
Local Sales (\$m)	406	6%	380	6%	↓26 (+6.8%)
Worker productivity (\$ per worker)	74,647	n/a	75,388	n/a	↓741 (-1%)

Table 7– Headline health care/social assistance economic indicators. Source: economy.id

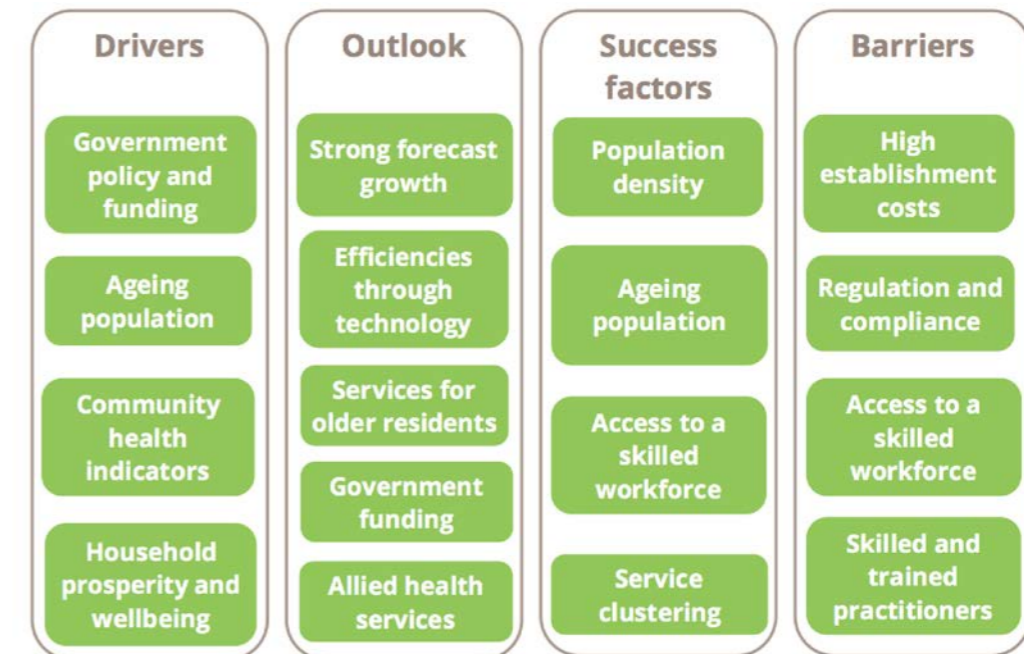
Nearly 4,000 people work in the education and training sector schools, tertiary and adult and community education services in PAE and the sector is showing good economic performance across all indicators (Table 7). Imports have significantly increased which may indicate use of external contractors for services and construction and opportunities for increased local supply into the sector. Local sales and exports are also showing steady performance.

Whilst there is no fully serviced public hospital in PAE, there are a number of medical and allied health clinics and services in the area. The region comes under the management oversight of the Healthfirst Network health division.

At an announcement made in January 2016 on implementation and funding support for the Look North Northern Economic Plan, \$4 million has been pledged by the State Government to support the development of a new Disability Employment Hub in the northern suburbs. The Hub will train former automotive workers, upskill existing workers and encourage students to work in the disability sector. This represents a major opportunity for residents and businesses to develop the skills and expertise to provide services under the NDIS model.

The National Disability Insurance Scheme (NDIS) is anticipated to create 6,300 new jobs in South Australia with 1,700 of these in Northern Adelaide.

10.5.2 Industry environment



10.5.3 Economic Development Strategy implications

- Provision of available development land and suitable premises for health and community service providers.
- Local workforce supply of skilled and trained employees.
- Understanding of the impacts, opportunities and transition strategies resulting from the NDIS on local providers and services users.
- Access to high speed and reliable telecommunication services.
- Understanding of population growth forecasts and demographic profiles for service need and land demand planning.
- Mechanisms to reduce establishment costs for investors and practitioners including government policy and through private and public sector partnerships.
- Integration with transport services and residential growth plans to provide for accessibility, liveability outcomes and local work outcomes.

10.6 Education and training

The education and training sector is worth over \$187bn to the Australian economy. The sector includes private and public sector preschools, schools, technical colleges, training centres and universities. Between 2011 and 2016 the sector grew by 5.1% per year, with an annual growth forecast of 4.5% between 2016 and 2021. Restructuring of funding and policy have led to a demand-driven system for higher education with government objectives focussing on employment outcomes.

International education is still seen as a growth opportunity for Australia although this is an increasingly competitive marketplace. Higher uptake of online and blended learning and contraction of tertiary learning into major metro campuses has led many post-secondary and higher education providers to rethink business structures and course delivery.

10.6.1 Regional and local conditions

PAE is home to campuses of TAFE SA, (located at Regency Park, Gilles Plains and Port Adelaide) which provide a range of courses and learning options in study areas including tourism, business services, health and community services, hospitality, retail, IT and foundation learning programs. These are reflective of local industry and business strengths and future growth opportunities.

Nearly 4,000 people work in the education and training sector schools, tertiary and adult and community education services in PAE and the sector is showing good economic performance across all indicators (Table 8). Imports have significantly increased which may indicate use of external contractors for services and construction and opportunities for increased local supply into the sector. Local sales and exports are also showing steady performance.

These are seen as critical to addressing issues for:

- Youth engagement with work and learning;
- Upskilling existing workers; and
- Providing pathways for those who are seeking or transitioning employment.

Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	3843	6%	3623	6%	↑219 (+6%)
Output/ Total Sales (\$m)	393	6%	368	6%	↑25 (+6.8%)
Value add (\$m)	288	6%	268	6%	↑20 (+7.5%)
Exports (\$m)	23	1%	21	1%	↑1 (+4.8%)
Imports (\$m)	130	6%	86	4%	↑44 (+51.2%)
Local Sales (\$m)	370	9%	346	9%	↑24 (+6.9%)
Worker productivity (\$ per worker)	74,975	n/a	73,918	n/a	↑1057 (+1.4%)

Table 8 – Headline education/training economic indicators.
Source: economy.id

TAFE and further education providers are important in the education and skills pathways that link our schools with business, and careers and higher and tertiary education. Partnerships between TAFE and schools that can support improvements to education attainment and employment outcomes.

The uptake of blended learning across the education sector through online, distance, on the job and classroom based delivery has changed the nature of access to education.

A key component of this model is the importance of reliable and high-speed technology that is accessible by residents, providers and businesses. If we are to support innovation within industry we need to support innovation within education. Learning and education providers are continuing to develop approaches to services that are responsive to the needs of local businesses and have an understanding of the future workforce and skills needs.

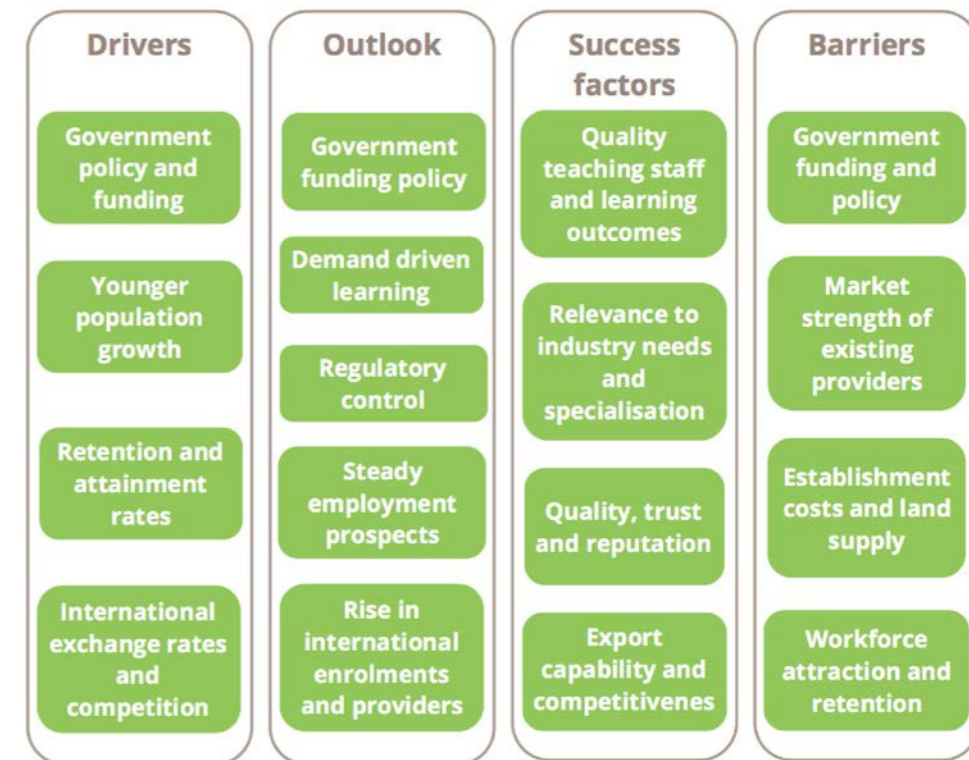
With the proposed developments along the waterfront of Port Adelaide, we are going to see an increase in supply in construction jobs and demand for workers. This represents opportunities to build partnerships between industry and learning providers to skill our workforce and support business and sector growth.

Given our sea and nautical advantages, the establishment of integrated training in maritime, fisheries and harbour training specialisation represent new opportunities for developing local capabilities and expertise.

There is currently a marine training centre at Port Adelaide which has identified the market for international boat operators, similar to domestic and international pilot training facilities in Australia.

An innovative model for expanding the learning and education provision is the development of multiversity centres in growing and economic diverse regions. These centres provide individual universities and learning providers with a cost-effective delivery model through shared services, facilities and staff and opens up new avenues to learning and education by communities.

10.6.2 Industry environment



10.6.3 Economic Development Strategy implications

- Retention and support for the development and growth of TAFE SA and other existing and potential education and learning providers in PAE.
- Ensuring that supporting infrastructure including technology, telecommunications, transport and learning hubs are provided to support access to education and development of learning specialisation to attract domestic and international students.
- Understanding and responding to the workforce and skills profile and the future needs of business and industry to build local capacity.
- Linking training opportunities and outcomes to future growth sectors.
- Address education attainment and youth engagement rates in the community.
- Advocating and fostering partnerships and between growth and future sectors including construction, maritime, tourism and health to develop the skills base and employment opportunities for residents.
- Identify opportunities for research and commercialisation in key industries and regional specialisations.
- Investigate opportunities and feasibility for attracting and establishing a multiversity-learning centre.

10.7 Integrated transport and logistics

Delivery and management of goods and products is a key driver of the economy. Road, rail and airfreight, storage and warehousing, infrastructure operators, customs and forwarding services all contribute to the integrated transport and logistics sector. Worth over 100 billion nationally, the sector has grown annually by 2.2% 2011-2016 and forecast yearly growth 2016-2021 is 2.7%. The sector intersects with nearly every industry and business along the supply chain of goods and services.

Imports due to the favourable exchange rates have boosted sector activity offsetting reductions from a decline in the manufacturing sector. Uptake of technologies and automation, process efficiencies and rationalisation by businesses to outsource logistics have increased sector productivity and output. This has reduced the number of operators as larger companies expand and increase their market share.

Investment in critical infrastructure including ports, road and rail and the development of integrated logistics hubs have assisted the sector to improve inventory management and greater integration through location and technology systems are forecast for the sector.

10.7.1 Regional and local conditions

Freight and logistics are a significant part of the local and regional economy. The Port of Adelaide is a major economic driver for trade and exports moving over 16 million tonnes of product and goods each year. This is supported by a significant supply chain in freight handling, transports, warehousing and government-based services.

The sector directly employs over 5,800 people in PAE including 3,800 in road freight transport services and nearly 1000 in transport support services. It is estimated that the Port indirectly supports a further 3,400 transport related jobs.

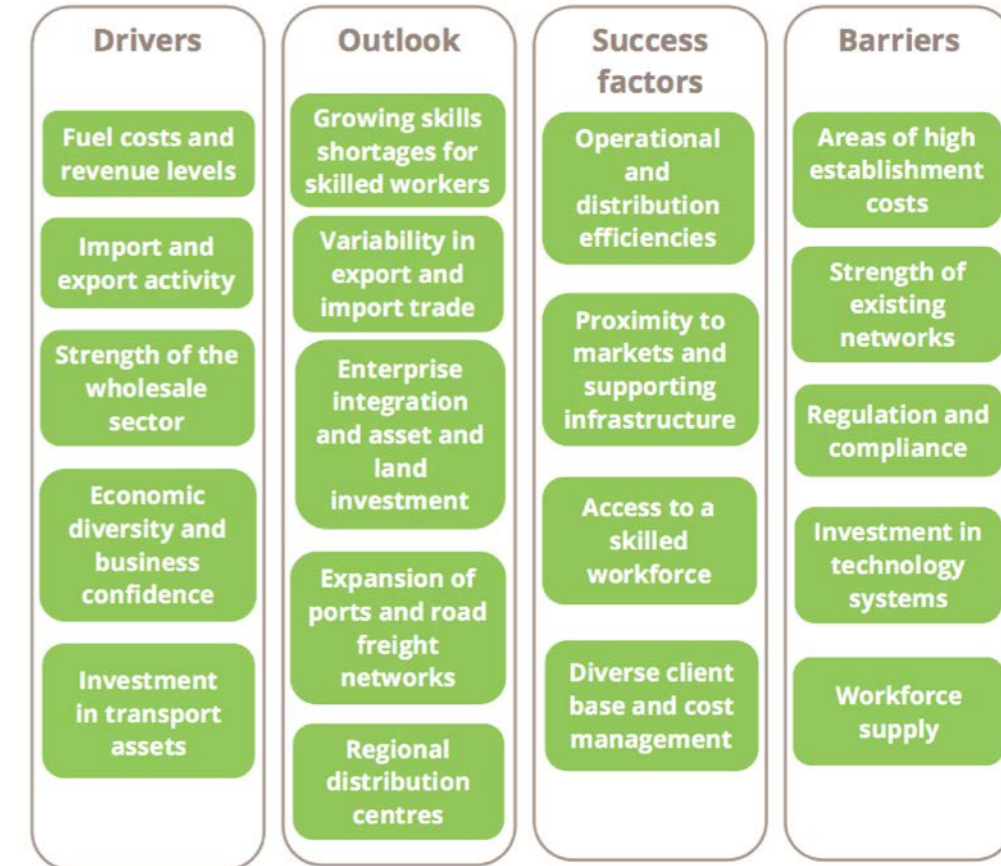
With its supply-chain links to manufacturing and retail, it is not surprising to see a comparative downturn in performance of the transport sector. In addition, rising operating costs, workforce supply and greater corporatisation of the sector be underlying reasons for the current downturn. Investments in road assets and the attraction of new investments and industry may provide the impetus to turn the performance of the sector.

Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	5849	13%	7881	23%	↓2032 (-25.8%)
Output/ Total Sales (\$m)	1334	14%	2152	22%	↓818(-38%)
Value add (\$m)	650	14%	976	23%	↓326 (-33.4%)
Exports (\$m)	642	14%	1294	32%	↓652 (-50.4%)
Imports (\$m)	130	4%	143	4%	↓14 (-9.8%)
Local Sales (\$m)	692	14%	858	15%	↓166 (-19.3%)
Worker productivity (\$ per worker)	111,086	n/a	123,800	n/a	↓12,714 (-10.3%)

Table 9 – Headline transport/postal/warehousing economic indicators. Source: economy.id

Development of road and rail infrastructure remain key to the productivity and efficiency for many businesses and industry and PAE are actively engaged with governments in planning and implementation of major transport projects. Growth in the agribusiness sector and project growth of exports will further support economic opportunities for this sector in the region.

10.7.2 Industry environment



10.7.3 Economic Development Strategy implications

- Continued support for the growth and development of the Port and road and rail freight assets and services.
- Ensuring sufficient land supply for future growth including appropriate buffers and protection for business operations and investment and management of liveability and amenity impacts on surrounding areas.
- Addressing emerging skills shortages for the sector that may constrain potential growth and development and opportunities to develop or attract local training services for the sector.
- Identification and linking business owners and operators with funding to support innovation and productivity.
- Construction of the new Northern Connector Project to increase traffic movement and efficiency.

10.8 Consumer goods retail

The high street face of retail has changed significantly over the past decade. The growth of big box brand name stores outside of community retail precincts and the growth of online shopping have all affected the consumer goods retail sector. Covering goods from clothing to furniture, appliances to pharmacy, footwear to hardware and gardening supplies, the sector is worth nearly \$167 billion to the national economy. Growth has been sluggish at 0.8% over the past five years, and is expected to experience a similar annual growth rate to 2021.

Sensitive to consumer and household confidence, the sector has struggled with a tough retail environment with consumers reducing discretionary spend.

Growth in the property market and sustained interest rates for the time being are expected to provide a boost to some areas of the sector particularly associated with household goods and products. Adoption of online retailing particularly by larger companies and online only stores have also created uncertainty for smaller operators. However, consumer interest in niche goods and products and a growing preference for locally made and supplied has led to an increase in niche retailers in smaller retail precincts.

10.8.1 Regional and local conditions

Port Adelaide Enfield is major retail hub for residents and visitors. Like many regional and metro centres, business confidence and sustainability has affected main street retailers with competition from major brands and the growth in online shopping. A vibrant and diverse retail sector is essential for not only to provide goods and services, but also making our community an attractive place to live and visit. Renewal and development plans for a number of precincts in the community include refurbishment of existing assets including streetscaping, parking and public transport that all support our retail businesses to flourish.

The sector employs over 5,700 people including supermarkets and grocery outlets, pharmacies, motor vehicles and electrical goods.

Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	5718	7%	6392	7%	↓674 (-10.5%)
Output/ Total Sales (\$m)	576	7%	570	7%	↑6(+1%)
Value add (\$m)	334	7%	344	7%	↓9 (-2.6%)
Exports (\$m)	116	6%	44	3%	↑72 (+163.6%)
Imports (\$m)	17	1%	30	2%	↓13 (-43.3%)
Local Sales (\$m)	460	7%	526	9%	↓66 (-12.5%)
Worker productivity (\$ per worker)	58,485	n/a	53,786	n/a	↑4699(+8.7%)

Table 10 – Headline retail sector economic indicators. Source: economy.id

Performance has been mixed, but it is encouraging to see growth in output, exports and productivity. Local sales have declined but with precinct renewal plans in place and the opening of new retail and hospitality outlets, this may improve in the medium term.

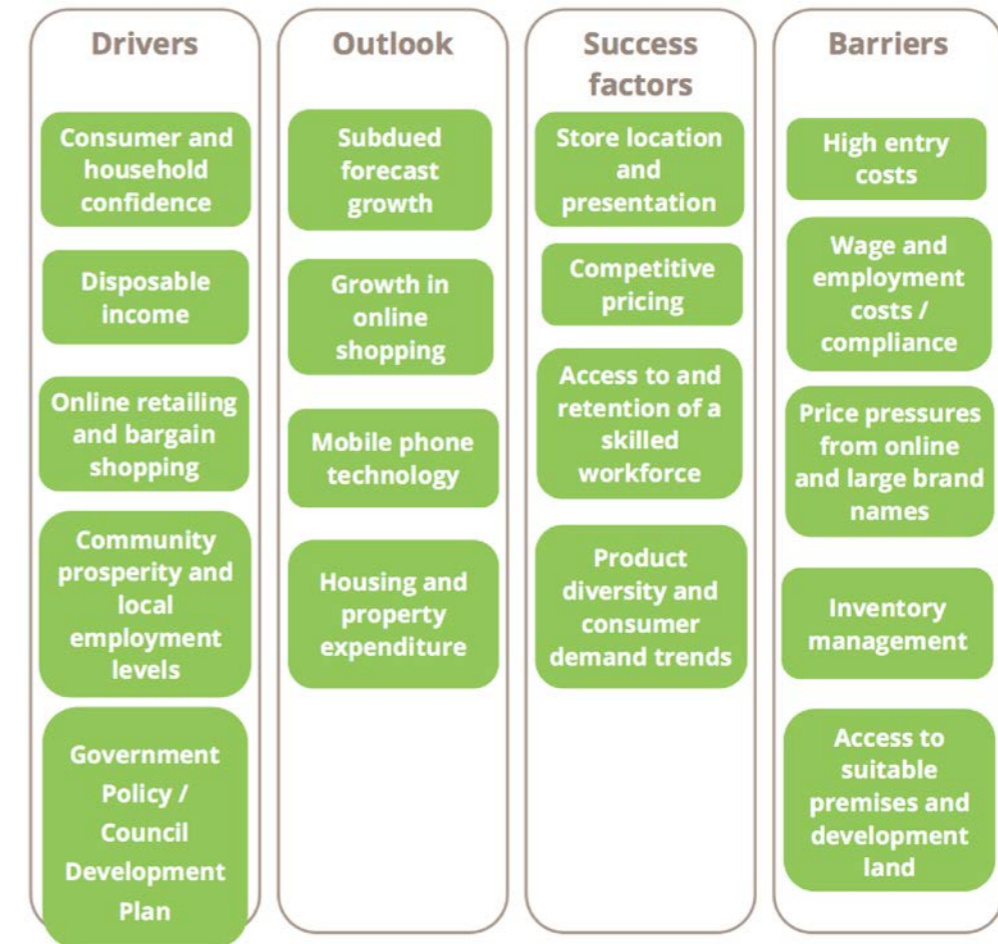
Rising costs associated with employment and tighter profit margins may have affected overall employment numbers.

The successful transformation of Semaphore Road into a vibrant precinct has seen economic and residential growth in this community and is an important drawcard for visitors and tourists. Prospect Road has seen a spike in new businesses built on the back of migration into the region, which includes a number of multi-cultural restaurants and specialised supermarkets.

Opportunities to create vibrant retail precinct along St Vincent's Street and wider hub in the heart of the Port will be supported by the development of the State Government administration centre, completion of the Quest Apartments building and the attraction of improved light rail public transport linking this area with the CBD and other parts of Adelaide. Opening up vacant premises and vacant land for complementary and value-adding economic activity will be viewed favourably by PAE.

The growth in cultural diversity has seen new businesses open up which provide services for a range of residents and which make an important contribution of our economy. Forecast population growth and investment in precinct and community development will provide opportunities to support and grow our retail businesses and provide entry level and flexible work, employment and training opportunities. The local SA TAFE campus provides a range of Certificate level courses in retail services and management.

10.8.2 Industry environment



10.8.3 Economic Development Strategy implications

- Promotion and marketing of the retail offer of PAE including local business, wayfinding, transport and parking information.
- Appropriate development of available land and release of vacant premises and buildings for business uses.
- Careful planning and management of large scale retail development that minimises impacts on smaller, local retail precincts and businesses.
- Ensuring that new development and community renewal projects incorporate neighbourhood retail and commercial precincts and link them with public transport systems and networks.
- Investment in streetscape upgrades and renewal to provide for vibrant, welcoming and safe retail environments and retention of local spend.
- Support for local trader and progress associations and facilitate their participation in local planning and development projects.
- Building links with the sector and training providers to provide for employment opportunities and to support business development.

10.9 Construction

The construction sector is worth over \$356bn to the Australian economy. Between 2011 and 2016 the sector grew by 2.7% per year, with an annual growth forecast of 0.9% between 2016 and 2021. The sector includes commercial and residential building and non-building markets such as transport, mineral and energy projects and infrastructure assets.

Whilst private sector investment has been positive for residential and economic projects, public sector assets construction has seen a downward trend in some areas as government's try to manage spending. Government construction investment can be a major economic stimulus for regions.

Historically low interest rates have contributed to strong uptake in personal and investment-based residential housing markets in most major centres that are experiencing positive population growth. Large industry investments particularly in the mining and resources sectors are expected to decline due to economic rationalisation.

10.9.1 Regional and local conditions

A strong construction sector is seen as critical to the growth of our community. Residential, commercial and civic projects rely on a skilled and stable industry and given our forecast growth and pipeline of major construction projects, this sector will be very important to our economic future.

The sector represents one of emerging opportunities for employment and output growth. Employment, value-add and productivity gains are positive indicators for the sector. Whilst local sales have declined, growth in housing and civil construction works should see this improve, given there is sufficient capacity with in the local construction sector to meet demand.

The sector saw one of largest employment growth figures between 2006 and 2011 in PAE, rising by over 800 workers to over 4,000, an increase of 27%. Main industries include building installation services, heavy and civil engineering, residential construction and building structure services.

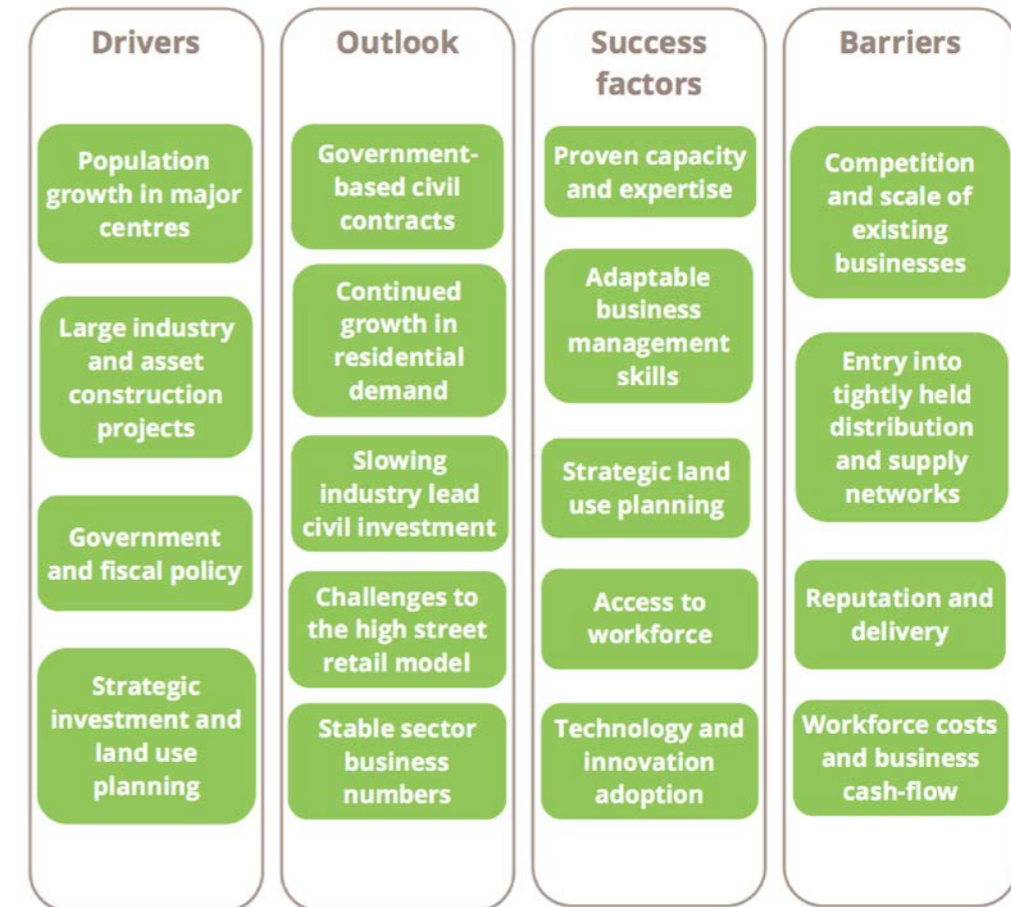
Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	7590	12%	7368	11%	↑222 (+3%)
Output/ Total Sales (\$m)	2330	11%	2474	11%	↓144(-5.8%)
Value add (\$m)	749	12%	615	11%	↑134 (+21.8%)
Exports (\$m)	0	0%	0	0%	0
Imports (\$m)	0	0%	0	0%	0
Local Sales (\$m)	2330	11%	2747	11%	↓144 (-5.8%)
Worker productivity (\$ per worker)	98,650	n/a	83,409	n/a	↑15,241 (+18.3%)

Table 11 – Headline construction sector economic indicators. Source: economy.id

Major renewal projects and the attraction of industry and new investment will provide significant opportunities for the growth of the local construction sector and the creation of entry level and skilled jobs and occupations.

The sector is strong driver of local employment creation and provides opportunities for youth participation in the workforce and engagement with training and education. The industry is also relatively self-sufficient in terms of new business development and growth and provides important economic value in the community.

10.9.2 Industry environment



10.9.3 Economic Development Strategy implications

- Continuation of planning and investment in construction and renewal projects in the region.
- Support for local supply of construction services for civil projects supported by a local purchasing policy.
- Capacity of local supply to bid for and deliver on local and regional construction projects.
- Facilitation and support for business management and development programs for owners and operators.
- Provision of timely information on new and upcoming construction contracts in the region.
- Development of local training provision to support the sector and provide access to training for local young residents.
- Ensure efficient and customer-serviced focussed management of planning permits through the planning approval system.

10.10 Professional services

Worth over \$121bn to the Australian economy, the professional services sector has enjoyed a 1.4% yearly growth rate 2011 and 2016 and is forecast to grow by 3.2% per year between 2016 and 2021. The sector primarily provides services to other businesses and includes engineering and design, technology services, business management and marketing, legal and accounting, employment and administration.

Sector penetration tends to be very broad and includes domestic and well as international markets. Strong performance in the construction, resources and government services sectors have benefited professional service companies coupled with the need for businesses to improve efficiencies and productivity and to source new markets.

Uptake and utilisation by the sector and clients has significantly transformed the service offer and service management. Cloud computing, real time tracking, data sources and design processes have enabled businesses to provide customised and innovative services. Sector growth in most disciplines is anticipated to be strong over the next five years.

10.10.1 Regional and local conditions

Business and professional services have a direct role to play in increasing the value and productivity of other businesses and sectors. They provide a breadth of services that are important to business planning, management, recruitment, training, design and marketing. Attraction of professional services can be an important catalyst investment for local precinct development projects and often can serve as anchor tenants in business hub and precincts. TAFE SA supports the industry by providing courses in accounting, finance and administration.

The sector provides over 3,400 jobs in PAE in professional, scientific and technical services, rental, hiring and real estate, finance and insurance and information media and telecommunications.

Economic Indicator	2014-2015		2009-2010		Change 2009-2010 to 2014-2015
	CPAE	CPAE as a % of SA	CPAE	CPAE as a % of SA	
Employment (total)	3405	15%	3404	15%	↑1 (+0.03%)
Output/ Total Sales (\$m)	1004	12%	903	13%	↑102(+11.3%)
Value add (\$m)	446	11%	399	12%	↑47 (+11.8%)
Exports (\$m)	36	1%	34	1%	↑2(+5.9%)
Imports (\$m)	1619	42%	1667	46%	↓47(-2.8%)
Local Sales (\$m)	968	17%	868	17%	↑100 (+11.52%)

Table 12 – Headline professional services sector economic indicators. Source: economy.id

It should be noted that the data presented in Table 12 represents amalgamated data for the sectors listed above.

Key service strengths include architectural and engineering services, legal and accounting, goods and equipment rental, real estate services and banking. Whilst employment growth is somewhat static across the amalgamated data, other economic indicators show improving performance over the trend period

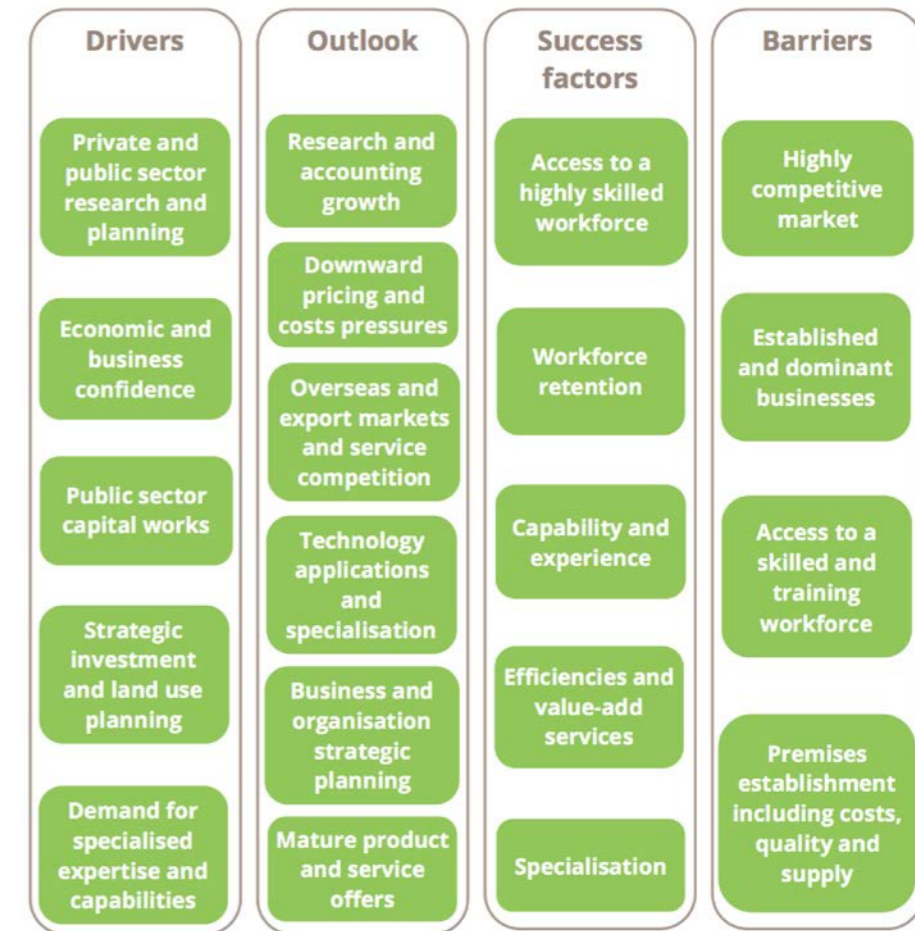
A key advantage for PAE is the availability of both greenfield and redevelopment sites that can accommodate medium to larger sized companies with good access to transport, living and retail services.

Compared to other parts of Adelaide and CBD locations in particular, PAE is competitive in terms of land, property and rental costs and given the drive to reduce business overheads within this sector there are opportunities to attract existing as well new business to the area.

The sector is also tends to have a cohort of single operators and micro to small businesses. These represent an opportunity to grow these firms through incubation projects and centres and to create multi-service business hubs.

The development of new and diverse housing stock in appealing localities will also act as an attractant for both companies and staff particularly in the areas of specialised business services including technology, business systems and strategic planning.

10.10.3 Industry environment



10.10.4 Economic Development Strategy implications

- Comparative affordability and availability of land and premises to attract medium to larger commercial operators or business clusters.
- Location and connectivity to economic hubs and transport systems to support business attraction.
- Liveability attributes and development of new housing stock to attract professionals and their families.
- Transition home-based businesses in to start-up and serviced business incubation centres and clustering of small businesses in commercial hubs.
- Development of service specialisation to support new industries, growth markets and business development programs.
- Regional strategic planning and advisory services to government and regional agencies to increase the strategic capability of organisations.
- Opportunities to link the sector and individual businesses with programs under the Federal Government's National Innovation and Science Agenda.

10.1.1 Business confidence

Businesses and government have had to adapt strategic thinking following the announcement of the closure of major automotive manufacturers in the region. Whilst significant planning and ongoing investment has been made to support regional business restructure and adjust, short-term growth prospects still remain relatively weak.

Possible lower exchange rates and continuation of low interest rates will go some way to support business and consumer confidence and the affordability of housing in the region provides for some positivity. The announcement of the significant submarine building contract should also help to shore up business confidence over the near future.

This will add significantly to confirmed shipbuilding contracts for offshore patrol vessels and frigates worth an estimated \$39 billion over the next 50 years and provide economic stability for our shipbuilding and maintenance companies and workers.

Opportunities for economic and business growth confidence for South Australia have been highlighted in the area of advanced manufacturing, food manufacturing, medical supplies, aerospace manufacturing and within the renewable energy supply chain.

In addition, the State Government have announced the removal of stamp duty for businesses and for commercial property investment and halved payroll tax which should help ignite investment and provide local governments with an investment attraction competitive edge over other regions. The spin-offs for the construction sector should be a positive if there is sufficient capacity to service the current and potential investment pipeline.

Data shows that whilst there are still new businesses opening up in PAE, there is a rising trend in the number of business exits (Figure 30). Over the 2009-13 period, there has been a net gain of 138 businesses mainly through stronger business retention for companies employing 1-4 staff.

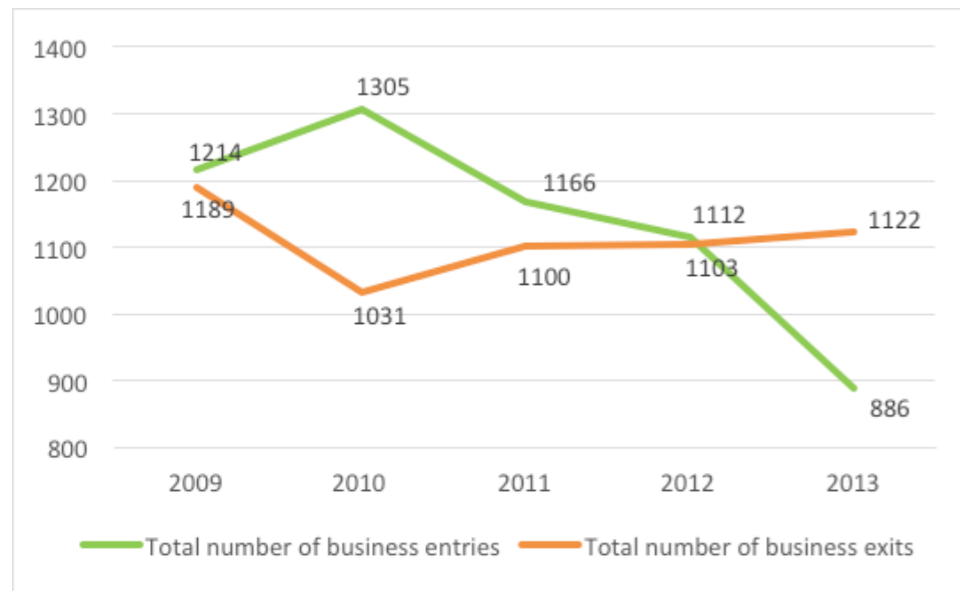


Figure 30 - PAE business entry and exits 2009-13 (Source: ABS Data by Regions)

This business retention issues will also be affecting employment activity. Whilst unemployment in PAE remains below regional averages, a key issue for regions in South Australia is the underlying upward trend in unemployment and sluggish job growth. It is anticipated that employment activity will remain low over the short-term with PAE showing a 7% overall increase in jobs between 2006 and 2014.

10.1.1.1 Economic Development Strategy implications

- Supporting business with access to business development training, and skills development is key role for economic development practitioners. Having access to information for a range of sources and distributing this information to business can support owners and operators with business improvement.
- The capacity of small businesses to generate employment and wealth should not be overlooked in the pursuit of large investments and projects. Sustaining small business through timely and supportive services, building partnerships with business organisations and trader groups and convening regular business forums and meetings can play dividends for local government and their economic development efforts.
- Inclusion of small business in economic and community planning can also foster positive outcomes for infrastructure projects and longer-term strategic development in communities.
- Incubation, fostering entrepreneurship and providing linkages to innovation knowledge and services are also key to driving local economic opportunities and increasing business confidence in the services of local government and their role in economic development.
- This process should include advocacy, leadership and development of maintenance of networks with business, agencies, major service providers and government departments.
- Working either as individuals or in cluster, large projects and government investment programs can provide real opportunities for small business to enter into new supply chains and build capability.
- Understanding the issues facing small business and their development and support needs through regular communication and annual business confidence surveys.

11. Economic assets and infrastructure

11.1 The Port

The Port of Adelaide is a mixed-purpose port, handling containers, motor vehicles and bulk commodities. Port Adelaide is the main maritime trading gateway for South Australia.

The Port which is privately managed by Flinders Ports Pty Ltd, handles over 16 million tonnes of imports and export each year including grains, building products, petroleum products, agricultural commodities, mineral sands, metals and containerised freight.



Figure 31 - Map of Port Adelaide (Source Flinders Ports Pty Ltd)

Comprising of a range of freight and transports assets and infrastructure, the Port area employs over 400 people and Finders Port Pty Ltd generates an estimated \$200 M in revenue through its facility.

Containerised freight is forecast to grow by 5.4% per year 2013-2033 increasing container numbers from 330,000 to 972,000. Non-containerised trade is also expected to increase over the same period by 4.6% per year from 11.2 million tonnes to 27.3 million tonnes. This growth will include exports of grain, iron ore, limestone, cement/clinker and mineral sands.

This growth in the volume of non-containerised is the largest of the five main capital city ports (Brisbane, Sydney, Melbourne, Fremantle and Adelaide).

Non-containerised trade is subject to a range of economic conditions including the amount of grain available export, global economies and demand for raw materials and resources. The closure of car manufacturing in the region is not anticipated to have a major impact on Port activity as most vehicles are shipped through the Port of Melbourne.



TechPort, Photo courtesy of Defence SA

The new motorway is expected to significantly improve freight access to the Port of Adelaide and the industrial areas of Adelaide's north and north-west. It will improve road safety and efficiency and reduce travel times for commuters travelling to and from the northern suburbs. The Northern Connector will better serve the industrial and commercial sectors along Port Wakefield Road and attract further investment in Greater Edinburgh Parks, Salisbury and Port Adelaide. Businesses on Port Wakefield Road will also benefit from improved traffic flow.

1.5 Light rail connections

As more people live and work in urban centres, providing reliable, integrated and cost effective transport options are vital to community liveability and economic productivity. The extension of light rail across the city of Adelaide will create a network of tram and light rail services that will link suburbs and the CBD and provide for improved mobility and connections for residents, businesses and visitors.



Figure 36 – Proposed new tram network. Source: AdeLINK

As part of the broader AdeLINK project, PortLINK will see the conversion of the Outer Harbour train line to deliver new tram services and the construction of new tram lines for West Lakes and Semaphore. The project has been listed as priority project by Infrastructure Australia and the State Government has invested \$4 M in a planning study for AdeLINK.

1.6 Industrial land

Supply of industrial land is key to economic growth for any community. Location, supporting infrastructure and access to markets all contribute to the uptake and longer-term utilisation of industrial land, and the retention and attraction of business.

Significant and well established industrial hubs include Outer Harbour, Port Adelaide, Wingfield and Gepps Cross. With excellent transport and logistics connections, these areas still represent economic growth and diversity opportunities. In addition, major projects and strategic planning by PAE, Renewal SA and neighbouring Councils have provided for a robust pipeline of industry land supply including:

- Port Approach with 20 hectares set aside for light industrial purposes;
- Fourteen hectares of expansion land associated with the Techport facility for new and support industries associated with shipbuilding;
- Release of 15 hectares of development land at the Grand Trunkway Estate in Port Adelaide; and
- The Gillman industrial land precinct
- Development land at Port Direct

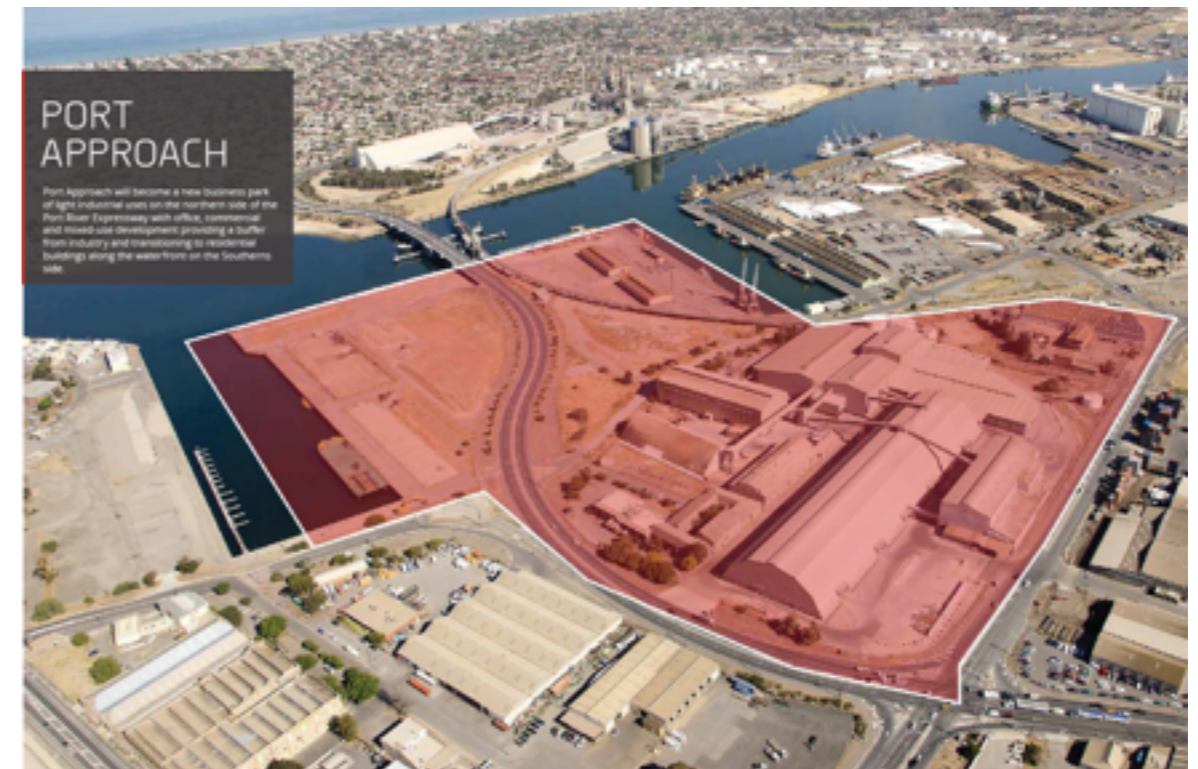


Figure 37 - Port Approach development. (Source: Renewal SA.)

Integrated planning for transport, housing and community assets and services are included in overall economic development strategy and provide for long-term sustainable growth.

11.7 Environmental assets

The City of Port Adelaide Enfield has some of the richest natural assets in the State. The marine waters and coastal wetlands of Barker Inlet and the Port River Estuary, on the eastern side of Gulf St Vincent, comprise one of the South Australia's largest and most ecologically productive estuaries. The area plays a critical role in maintaining coastal and marine biological diversity, in maintaining the stability of Gulf St Vincent, and in maintaining economically important commercial and recreational fisheries. It is therefore of enormous ecological and economic significance to this State. The area is also home to the Dolphin Sanctuary and world renowned International Bird Sanctuary.

The City of Port Adelaide Enfield enjoys a coastline spanning from Semaphore South through to Outer Harbour and the Port River. Much of this area is developed as passive recreation areas, including open lawned areas, barbecues, recreation paths, a shared bicycle/pedestrian path, boardwalks, landscaped areas and important areas of natural vegetation.

The Council area also has pockets of native reserves which have been identified as areas with significant bio-diversity.

With Council taking a very active role in environmental sustainability, there is a real opportunity for the region to take a lead in linking economic growth, sustainable development and ensuring the environmental asset is protected



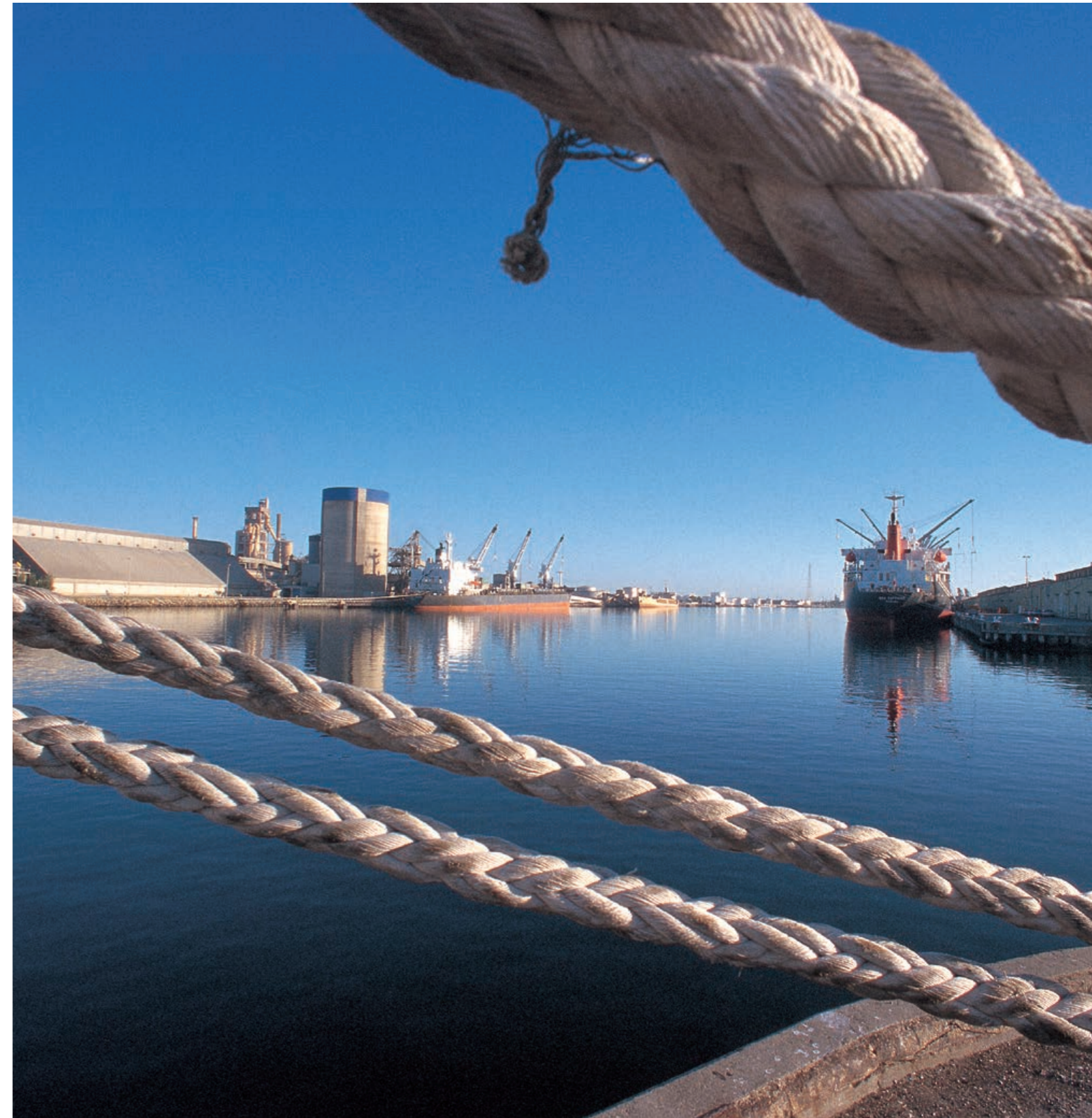
ENVIRONMENT *A city which cares for its natural environment and heritage*

What it looks like

- Distinctive
- Adaptable
- Sustainable

Indicator

proportion who say the city's heritage is effectively managed
status of regional climate change adaptation plans
proportion who say the city's natural environment is effectively protected



Port Adelaide

12. Urban renewal and placemaking

Sometimes described as 'place-based' economic development, developing economic strategy from a land use and asset foundation provides for a number of benefits.

- Develops thinking around the economic benefit and value that arises from assets and land development.
- Focus on investment and development that builds on existing strengths and assets of a locality or region including the built, people, cultural and connectivity features of a community
- Identifies potential gaps in infrastructure and assets that may hinder or constrain economic activity.
- Builds partnerships and participation opportunities from the idea through to implementation and provides avenues for collaborative investment.
- Attracts direct and tangible investment and be a catalyst for further investment and the attraction of more diverse community human capital.

The Urban Renewal Authority (Renewal SA) was established in 2012 as a statutory government agency to facilitate urban development through partnerships with the private, community and public sector.

Renewal SA has a focus on supporting the development of affordable housing in communities. This includes working with developers, local government, community associations and residents on programs to provide affordable housing in new developments and programs that open up housing options for low to moderate income earners.

Under an extensive urban renewal program, Renewal SA currently underway and planned a number of development for the PAE region that include plans for industrial, commercial, residential (including affordable housing options), cultural and environmental projects.



Laneway Festival, Port Adelaide



PLACE MAKING *A city where people love to be*

<p>What it looks like</p> <ul style="list-style-type: none"> • Belonging • Accessible • Creative 	<p>Indicator</p> <p>city net promoter score</p> <p>proportion who say they can easily access places and services across the city</p> <p>proportion who feel you had an opportunity to participate/experience local arts and cultural activities</p>
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The goal is to develop multi-function precincts within communities that provide a mix of residential, commercial, recreation and services to improve liveability, economic activity and environmental sustainability.

Renewal projects provide avenues for addressing social disadvantage, reinvigoration of retail precincts, integrated transport and stimulate the economy through the construction to eventual activation. Local government in partnership with the community have a pivotal role to play in this process.

A current example, the Our Port project being auspiced by Renewal SA, is a prime example of the scale, impact and investment drive that these projects can provide for communities. The Our Port initiative represents a multi-billion dollar development strategy for the community that will have wide ranging benefits across the municipality and involves public, private and community participation in its planning and implementation.

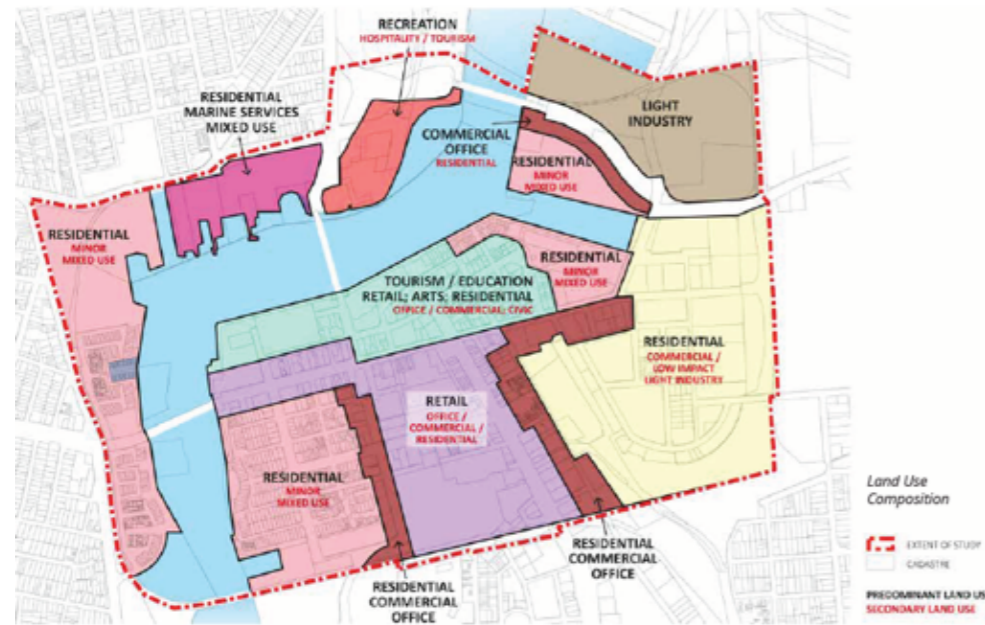


Figure 38 - Our Port development plan. Source: Renewal SA

- The Our Port project that will include 2,000 to 4,000 new homes for an additional 4,000 to 8,000 residents including a strategy for the delivery of affordable housing;
- Attraction of up to \$2 billion in private investment on 40 hectares of land;
- Provision of 1,000 to 1,500 construction jobs over the life of the project;
- Range of commercial, light industry, tourism and open space development plans; and
- Implemented under staged process of project development, land release and investment from the private and public sector.



Lightsview

13. Heritage and economic development

There is a strong and evidenced link between tourism and future product development opportunities in relation to cultural and heritage. One only has to look at international heritage sites and the success of regions and cities who have developed economic activity and social capital on their heritage assets.

The cultural history that heritage buildings and community history provide are major drawcards for visitors and new residents. Sympathetic development can transform industrial and civic buildings and assets into vibrant business, community and cultural hubs and are a major component of successful and cost effective urban renewal projects. Utilising existing buildings and transforming heritage precincts into hubs of business and community activity helps to address shrinking land supply and urban renewal outcomes. Add to the mix the growth in heritage tourism, preservation and sympathetic development of heritage assets can provide for new economic outcomes.

The 2008 study, Culture and Heritage Tourism Research in Forming Policy and Planning (Sustainable Tourism Cooperative Research Centre) summarise the benefits and processes to develop economic opportunities from heritage assets as being:

Cultural heritage managers sometimes assume that tourism can provide the economic basis for conservation. At the same time, the significance of cultural heritage is held to be greater than mere monetary value. However, many of these assumptions need further analysis. It is therefore important to investigate a number of economic issues, including:

- The nexus between heritage sustainability and economic benefits
- The role of cultural heritage within tourism growth areas
- Understanding cultural heritage tourism economic successes and failures

- Working with the Aboriginal community to leverage Aboriginal cultural heritage
- Measuring social capital in relation to cultural heritage tourism
- The experience economy of cultural heritage tourism
- Place marketing
- Workforce issues—for example, labour issues within cultural heritage tourism, the implications of high rates of volunteerism within the sector etc.
- Capacity building for viable and sustainable cultural heritage tourism.
- The study summarises key success factors from heritage-based economic development including:
- Cultural tourism as a growth area of Australian tourism, attracting increasing numbers of national and international tourists.
- Developing a better understanding of the dynamics of cultural landscapes and of the way the built environment is shaped by cultural practices and cultural minorities.
- The cosmopolitan nature of contemporary urban and rural Australia provides great potential for tourism in urban and rural areas in Australia, a potential that is untapped when compared to more traditional cultural tourist precincts.
- Festivals and major events provide key opportunities for the advertising, promoting and branding of cultural landscape tourist sites and communities.
- Development of multi-cultural precincts and other landscapes of multi-cultural heritage in Australia is a matter that local and state governments and communities should actively address.
- Heritage tourism need to be grounded within the local multi-cultural community so that the resulting tourist experience is authentic and credible to both locals and visitors.



'Yakkainna' Art installation, Exeter



ENVIRONMENT *A city which cares for its natural environment and heritage*

What it looks like

- Distinctive
- Adaptable
- Sustainable

Indicator

proportion who say the city's heritage is effectively managed
 status of regional climate change adaptation plans
 proportion who say the city's natural environment is effectively protected

14. Competitive strengths and comparative advantage

A variety of processes can be used to distil the range and scope of the information gathered to bring together the key research-based issues for the Economic Development Strategy. One process that has gained traction in strategic economic and development thinking is the 7 Capitals model of collecting and sorting information under seven key resource areas (capital) that exist within regions or communities as shown in Figure 39.



Figure 39 - 7 Capitals model

Assets represent the critical and strategic properties, resources and characteristics of a region. These assets can be described as the local capital that exists within a community or region (as shown in Table 13).

The following is a summary of the assessment of research and analysis outcomes against the 7 Capitals model for PAE.

Table 13 - 7 Capitals summary analysis

Natural	Context
Regional natural assets	Under-utilised and undeveloped natural landscapes
Regional agricultural land and agribusiness value-add.	River and water environments Tourism development opportunities Value of the sector to the PAE economy in relation to freight movements through the Port Investments in capital improvements and innovation associated with food transport and logistics



Palais Semaphore

Cultural	Context
Arts and culture	Aboriginal - Strong Aboriginal identity and cultural institutions supporting a high proportion of Aboriginal residents
Diversity of arts and cultural activities	Strong arts and creative industries
Cultural diversity	Strong continued growth and diversity and strong ties with various cultural groups
Growing cultural diversity ratios	High percentage of migrant population providing diverse skills base
Attracting new residents	Linking job opportunities to settlement programs and support
Ensuring a good supply of housing choice, suitability and affordability	Affordable housing options

Human and social	Context
Population growth and demographic change	Attraction and retention of younger population Emerging economic opportunities within aged care and specialist services and access to local health facilities Cultural diversity and strength of overseas migration
Education	Higher levels of year 12 attainment rates Good provision of primary and secondary education facilities Development of education and learning options to meet industry skills needs
Health and community services	Strategic planning for facilities to support the health needs of future populations including recognition/support within the planning scheme and strategic planning policy

Economic	Context
Skills base	Key employment sectors – health, manufacturing, retail, public administration, education, accommodation and food and construction. Availability of skills and attraction and retention of skilled professionals Positive levels of year 12 attainment rates
Workforce profile	Younger profile of residents provides for a future sustainable workforce pool Transition of traditional to service industries provides employment avenues for older workforce Sufficient time and resources to plan of workforce adjustment and succession planning Capacity to adapt to change and innovation

Business investment	Willingness to find local solutions and be self-sufficient Current and potential industry investments being implemented Large scale industry development plans subject to government policy and investment strategies
Economic	Context
Land and asset availability	Range of land use and precinct planning projects completed and in development Unique assets available in proximity to land parcels Areas of land and buildings available for redevelopment

Political	Context
Community leadership	Passion, commitment and aspiration to see communities prosper Focussed on creating economic and community prosperity through public and private sector partnerships Improved strategic engagement with industry and business Understanding of role within economic development – creating the environment and enabling investment
Policy and strategy	Proactive Council and regional partnerships Cross regional planning and strategic thinking Strong alignment to State policy

Financial	Context
Government investment	Major project investment and workforce transition allocations Investment ready land
Property values	Comparable levels of housing and land affordability Planning for inclusion of a minimum supply of 15% of affordable housing stock in Renewal SA development projects.

Built	Context
Port infrastructure	Major National and State asset with positive forecast growth Supporting industrial and commercial land assets and room for expansion and significant economic value-add opportunities
Road and rail assets	Important arterial network linking to State and National highways Strategic location between east and west coast markets
Utilities and IT	Critical component of the local economy particularly in service industries and accessing global and domestic markets
Heritage and buildings	Development and liveability opportunities and multi-purpose community uses. Tourism drawcard and product and a backdrop to events and public open space Opportunities to provide more multi-purpose uses
Housing	Housing affordability for entry market and young buyers Sufficient development land to meet housing needs and future planning for ageing in place
Community assets	Funding and resource capacity of Council and communities to maintain the range and number of facilities and assets Expansion of community assets and meeting places for culturally diverse community
Commercial and retail precincts	Precinct planning completed for some areas and development of neighbourhood retail precincts Adapting to the changing face and high street retail model
Arts and cultural	Built venues and open space and waterfront and port assets Festivals and events and community meeting places for culturally diverse community.

This model allows for the identification of the primary existing strategic assets under the 7 capital themes and how they contribute, constrain or detract from economic opportunity – normally described as competitive strengths and comparative advantages.

Economic Development Strategy Actions

The Following Actions have been identified to make this Economic Development Strategy a reality.

Each section of Actions is referenced back to Council's City Plan, with the symbol that represents the pillars supported by each group of Actions.

Regular reporting of these Actions will be made available to track the progress of the Economic Development Strategy and measure the impact the actions are having on economic growth.

City Plan Themes:



ECONOMY
A City of opportunity



COMMUNITY
A City that supports community wellbeing



ENVIRONMENT
A City which cares for its natural environment and heritage



PLACEMAKING
A City where people love to be



LEADERSHIP
A City confident in its leaders

Strategy: Business Friendly Council

City Plan Theme:



Activity	Responsibility	Target Date	Budget
Business Friendly Audit - Identify the touch points in Council for Business.	ED Officer / Advisor	November 2016	Staff time
Identify key staff in the organisation to become a first point of call for business.	ED Officer / Advisor	November 2016	Staff time
Undertake research with business to determine where the greatest gains can be made to improve business friendly performance.	ED Officer / Advisor	June 2017	\$5000
Review Council Policies, Plans and regulations with a view to reducing red tape and understanding their impact on business.	ED Officer / Advisor with assistance from Governance & Management Group	June 2017	Staff time
Review Planning processes, communication style and consistency of approach of dealing with business and development.	ED Officer / Advisor / Planning Manager	Sept 2017	Staff time
Transform Business friendly to Business as usual - review and determine what activities and tasks can be done to turn business friendly into business as usual.	ED Officer / Advisor / Customer service / Management Group / ELT	Ongoing	Staff time
Internal Communication to staff the benefit that business growth and economic development brings to their community and making staff aware of local and related challenges.	ED Officer / Advisor / Management Group / ELT	Ongoing	Staff time

Strategy: Business Support

City Plan Theme:



Activity	Responsibility	Target Date	Budget
In conjunction with the Cities of Playford & Salisbury and The State Government, continue to work on the deliverable outcomes from the Northern Economic Plan.	CEO / ED Advisor	As per Northern Economic Plan Milestones	To be endorsed by Council based on endorsed NEP Projects
In conjunction with the Cities of Salisbury and Playford, support and participate in the Northern Economic Leaders program.	ED Officer / Advisor	Ongoing	In kind support plus \$5,000 annual financial contribution
Establish a City of Port Adelaide Enfield Business e-newsletter. The newsletter will be a bi-monthly production.	ED Officer / Advisor / Marketing & Communications Team	October 2017	\$3,000
In conjunction with the Western Adelaide Alliance of Councils, deliver the outcomes from the Building Western Adelaide Plan.	ED Officer / Advisor	As per Building western Adelaide Targets	In Kind support
In conjunction with RDA Adelaide, promote opportunities for business, including training and grant opportunities.	ED Officer / Advisor	Ongoing	Staff time
In conjunction with Renewal SA, identify opportunities to grow economic activity, including joint events, & promotion of heritage buildings and cultural activities.	ED Officer / Advisor	Ongoing	Staff time plus contribution of financial support for events.
In collaboration with business and industry, support the creation of a new Business Association or Cluster Groups that are relevant to business needs.	ED Officer / Adelaide Business Hub	Ongoing	In kind support plus possible small financial contribution of \$5,000 annually.
Promote Council's new Disability Access Grant to Local Business.	Marketing & Communications Team / ED Officer	Annual promotion in January, May, August.	\$50,000 in Annual Disability Grant Fund.
Development of a new 'Buy Local' Policy to support Local Businesses having a weighting when tendering for Council work and supply opportunities.	Procurement Advisor / ED Advisor / ELT	December 2016	Staff time
In conjunction with The Department of State Development, support the "Northern Meet The Buyer Events" to promote the use of local businesses in Local and State Government Procurement.	ED Officer / Advisor / Procurement Advisor	As per Office of Industry Advocate Meet the Buyer Schedule	Staff time
On a weekly basis Economic Development staff to visit local businesses to understand industry, current conditions, challenges and ways in which Council can support business growth.	ED Officer / Advisor / Adelaide Business Hub	Ongoing	Staff time
Establish a Council Business Award.	ED Officer / Advisor	October 2017	\$2,000
In conjunction with Adelaide Business Hub, continue to grow the joint business database	ED Officer / Advisor / Adelaide Business Hub	Ongoing	\$2,500 annually
Support the PAE Young Entrepreneur Scholarship to encourage young business people to "Have a go"	ED Officer / Advisor / Adelaide Business Hub	April Annually	\$500 annually
In conjunction with Adelaide Business Hub, support the incubation of new start up businesses	ED Officer / Advisor / Adelaide Business Hub	Ongoing	\$110,000 annually

Strategy: Education & Innovation

City Plan Theme:



Activity	Responsibility	Target Date	Budget
Engage and align the Council with Universities, TAFE and RTO's to foster greater business/ tertiary education engagement	ED Advisor / ELT	Ongoing	Staff time
In conjunction with Defence SA & The Federal Government, encourage initiatives within the Council area.	ED Advisor	Ongoing	Staff time
In conjunction with Renewal SA, advocate for a percentage of training opportunities on the Port Renewal project.	ED Advisor/ CEO/ Renewal SA	March 2017	Staff time
In conjunction with Marine, Fisheries and education providers develop a blue print for making Port Adelaide a precinct for Marine / Harbor and Fisheries Training for local and International students.	ED Advisor/Renewal SA	December 2018	\$5,000
Engage with local High schools to promote the industries available in the Port Adelaide Enfield Council including Marine & Harbor, Fisheries and Logistics.	ED Officer / Advisor	October 2017	\$5,000
Encourage local High schools to provide certificate course in High school relevant to key industries within the Council area.	ED Officer / Advisor	February 2018	Staff time
In conjunction with Universities, education providers and innovation hubs, attract new innovative and trial industries to the Council region.	ED Officer / Advisor / Adelaide Business Hub	Ongoing	\$20,000
Investigate the feasibility of a "Multiversity Model" within the City of Port Adelaide Enfield	ED Advisor Adelaide Business Hub	August 2017	Staff time
In conjunction with the Adelaide Business Hub, attract appropriate businesses into the Todd Street incubator.	ED Officer / Advisor	Ongoing	\$110,000 (annual contribution)
Encourage schools and businesses to engage in a local mentoring program, where students can gain real life experience.	ED Officer / Advisor / Local Schools	February 2018	Staff time
In conjunction with Adelaide Business Hub, identify the needs of business via business diagnostic tools.	ED Officer / Advisor / Adelaide Business Hub/ Department of State Development	June 2017	\$5,000
In conjunction with Adelaide Business Hub, use business diagnostic results to inform the small business strategy.	ED Officer / Advisor / Adelaide Business Hub	September 2017	Staff time
Identify and grow S.T.E.M capacity in the City of Port Adelaide Enfield in partnership with Adelaide Business Hub, Schools and Education institutions.	ED Officer / Advisor / Adelaide Business Hub	February 2018	Staff time
In conjunction with "Our Learning Port" contribute to business mentoring and support with S.T.E.M Agenda.	ED Officer / Advisor / Adelaide Business Hub	February 2018	Staff time
To deliver the 'Our Learning Port' work with the Renewal SA, work on strategies to attract education and new innovation to the Council area.	ED Advisor/ Renewal SA	April 2017	Staff time
Investigate opportunities for increased business engagement and support activities in PAE libraries	ED Advisor/ Manager Libraries	April 2017	Staff time
Investigate ways in conjunction with Industry to grow the digital economy within the Council region	ED Officer	February 2018	Staff time
In conjunction with schools and universities promot projects and opportunities around the PAE Eco-System	ED Advisor/ Environmental Planner	Ongoing	Staff time

Strategy: Inward Business Investment (including International Investment)

City Plan Theme:



Activity	Responsibility	Target Date	Budget
Identify local businesses that currently export or have the ambition to export.	ED Officer / Advisor / TradeStart	December 2016	Staff time
Develop a Council and local business capability package for the region that can be used to promote export and investment opportunities for the region.	ED Officer / Advisor / TradeStart	March 2017	\$7,000
In conjunction with TradeStart and other industry bodies, conduct an Exporters meeting with information on proposed Trade missions and tips and tricks on cultural awareness training.	ED Advisor / TradeStart	Minimum One Event Annually	\$1,500
Host relevant International delegations and provide introductions to local business and promote investment opportunities.	ED Advisor / CEO / Mayor	As required	\$5,000
Participate in the Building Western Adelaide Exporters Hub activities, including hosting one event per annum in the region.	ED Officer / Advisor	On event per annum TBA	\$3,000
Participate in the SA Governments Shandong program including Council representation at Future Trade Missions.	ED Officer / Advisor / CEO / Mayor	As per State Government Calendar	TBA
Develop future Sister City Relationships that economically benefit the City of Port Adelaide Enfield - particularly with a French connection to support ship building opportunities.	ED Advisor / CEO / Mayor	December 2018	TBA
Council website to include a prominent page on "why invest in the region" to encourage investment opportunities.	ED Officer / Marketing & Communications Team	February 2017	Staff time
Facilitate round tables on export, business growth, workforce development and capital / finance as required to meet business needs.	ED Advisor / Adelaide Business Hub	As required by Industry	Staff time
In conjunction with DSD and Adelaide Business Hub, support the Indigenous Business Accelerator Program to encourage start up Indigenous business in the region.	ED Advisor / DSD / Adelaide Business Hub	December 2017	\$1,200
Create economic relationships with French business on the back of the shipbuilding contracts (business to business relationships)	ED Officer / Advisor / CEO / Mayor	August 2017	Staff time
In conjunction with the Defence Teaming Centre, hold one defence networking event annually within the PAE	ED Advisor / DTC	Annual Event TBA	\$1,000 (Annual)
Map the Defence sector and economic flow on's for PAE.	ED Advisor/Defence SA	December 2017	Staff Time
Promote the value and benefits of the Defence sector with PAE	ED Advisor / Marketing & Com's	Ongoing	Within Marketing Budget
In collaboration with the Cities of Salisbury and Playford, review green industry investment opportunities under the "Adapting Northern Adelaide Banner" Banner	ED Officer / Environmental Officer / Cities of Salisbury & Playford.	December 2017	Staff Time
Review the economic benefit of a Aboriginal Cultural Centre within PAE	ED Advisor / Aboriginal Cultural Diversity Officer	December 2017	Staff time

Strategy:
Placemaking ,Tourism, Arts and Culture

City Plan Theme:



Activity	Responsibility	Target Date	Budget
Develop a database of tourism operators and related businesses in the region.	ED Officer / Advisor /VIC	December 2016	Staff time
Review PAE of Arts and Cultural Grants to enhance economic outputs.	Arts and Cultural Officer / Community Development	December 2016	Staff time
Development of PAE Arts and Cultural Action Plan.	Arts and Cultural Officer	November 2016	Staff time
Development of PAE Placemaking Strategy.	City Development Team	June 2017	Staff time
Promote and distribute annual Placemaking Grants to activate key areas.	City Development Team	June/ Anually	\$50,000
Develop a Tourism Destination strategy.	ED Advisor	December 2016	Staff time
Development of a list of vacant buildings in Council area and work with land owners to activate.This can include repurposing opportunities	ED Officer / Advisor	September 2017	Staff time
Participate in industry and LGA Tourism Planning to ensure the Council region is promoted as part of broader tourism trails and campaigns.	ED Officer / Advisor /LGA / SATC	Ongoing	Staff time
Participate in the development of the Building Western Adelaide Tourism Plan.	ED Officer / Advisor/VIC/Western Adelaide Alliance	November 2017	Staff time
Promote the new Hop on Hop Off cruise ship Shuttle bus service and encourage Cruise Ship visitors to visit Semaphore and Port Adelaide.	ED Officer / Marketing & Communication Team /VIC	As per Cruise Ship Schedule.	\$2,500
Review transport options in the Port Adelaide precinct to promote easier access for tourists.	ED Officer / Advisor / Museums	December 2016	Staff time
Actively promote Aboriginal cultural tourism throughout the Council region, including trails, artists and significant areas.	ED Officer / Marketing & Communications Team / Aboriginal Cultural Development Officer /VIC	Ongoing	Staff time plus resources of \$3,000
Develop a strategy for the promotion of nature based tourism activities within the Council region.	ED Advisor / Marketing & Communications Team/VIC	September 2017	\$2,500
Update Council's Events and Festivals Strategy to attract and encourage tourism and economic activity on the back of events and festivals within the Council region.	ED Advisor / Events Coordinator	June 2017	Staff time
Identify events and activities that can be hosted in heritage building and locations within the PAE area.	ED Advisor / Events Coordinator	Ongoing	Staff time and event budgets
Review of Heritage Incentive Grants to encourage investment in heritage buildings	ED Advisor / Community Development Team	March 2017	Staff time
In conjunction with Rec Fish SA identify ways to promote PAE as a sustainable recreation fishing location to drive tourism	ED Officer / Rec Fish SA	December 2017	Staff time
Develop Marketing Collateral to promote ECO Tourism opportunities within the Council area (Dolphin Sanctuary, International Bird Sanctuary, etc.)	ED Officer / Marketing Team	August 2017	Staff time

Strategy:
Job Creation

City Plan Theme:



Activity	Responsibility	Target Date	Budget
Identify strategies that encourage local business to provide training opportunities for Indigenous people.	ED Officer / Aboriginal Cultural Development Officer	July 2017	Staff time
Develop a prospectus and promote the Council area as a place for Green Businesses to be based and grow.	ED Advisor/Marketing Team	October 2017	Staff time
Develop a promotional package of locations within the Council area for film and photography shoots and movie production.	ED Officer / Advisor /Marketing & Communications Team	December 2017	\$2,000
Develop strategies to encourage business and industry to provide work experience and volunteering opportunities for people to gain new skills and have a better chance of seeking employment locally.	ED Officer / Advisor	July 2017	Staff time
Promote Council vacancies and trainee programs to encourage indigenous community members to apply and work for PAE.	ED Officer / Human Resources	Ongoing	Staff time
Identify heritage buildings suitable for business repurposing – keeping the heritage theme.	ED Officer / Advisor/ Heritage Advisor	Ongoing	Staff time
In conjunction with Councils Environment Strategy, identify ways to promote green industries and support job creation in the region.	ED Advisor / Environmental Planner	Ongoing	Staff time
In collaboration with the Northern Green Industries Group, support the implementation of the Northern Green Industries Program	ED Advisor / Environmental Planner	Ongoing	Staff time
Advocate for universities and agencies to undertake more research on the value of the PAE environment and Eco-System and future job opportunities that support this sector	ED Advisor / Environmental Planner	Ongoing	Staff time

Appendix A: References

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Tasty Bread Bakery, Prospect Rd, Kilburn



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