



INVEST AUSTRALIA

A Case

Making

**Investment Potential in
the Upper Spencer Gulf**

June 2000

Making A Case

Investment Potential in the Upper Spencer Gulf

**Preliminary Report Presented to the Upper Spencer Gulf Common
Purpose Group and Implementation Team**

**A Project of the Invest Australia Regional Australia Investment
Strategies Team**

By Rebecca Gordon

June 2000

This report was prepared by Invest Australia (Australia's national investment agency) at the request of the Upper Spencer Gulf Implementation Team.

This preliminary strategy report is intended to identify some specific investment opportunities for the Upper Spencer Gulf and provide a foundation for community input to the development of a comprehensive investment strategy for the region.

This report has undertaken predominantly to present the views of those parties interviewed in the Upper Spencer Gulf region and contributing organisations and departments. It therefore does not necessarily represent the views of Invest Australia or any other Commonwealth department. The report is intended to provide the basis for community and other stakeholder consideration as part of an ongoing process of investment strategy development.

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Summary

This report was prepared by *Invest Australia* (Australia's national investment agency) following discussions within the Upper Spencer Gulf Implementation Team (USGIT), the implementation arm of the Upper Spencer Gulf Common Purpose Group (USGCPG).

The specific aims of the report are to:

- a) identify the existing assets in the region (related to investment opportunities); and
- b) provide a basis for identifying and developing investment opportunities based on those identified assets with particular attention to the needs and aspirations of the communities involved.

The Upper Spencer Gulf region in South Australia includes the three cities of Port Pirie, the southernmost city, Port Augusta at the northern point of the Gulf and Whyalla on the western side of the Gulf.

This region has undergone a number of challenges common to many regional communities in Australia. Employment and population decline in the region has occurred largely due to significant industry restructuring and rationalising, especially in the predominantly industrial cities of Whyalla and Port Pirie, and the service city of Port Augusta.¹ This prolonged decline in industry and population has created additional challenges across a broad spectrum of areas and services common to each city. Recent Centrelink customer figures show 32,136 people receiving some sort of Centrelink administered benefit. This equates to just over 49% of the total regional population serviced by each of the councils (65,000) receiving some form of benefit. While figures include Austudy and the Seniors Health Card, other forms of support include age pension, carers pension, child care assistance, child disability allowance, disability support pension, farm family restart, a range of family payments including family, newstart (includes mature age) and youth allowance.²

This report was prepared by a representative of *Invest Australia* travelling in the region and living in each of the cities in the Upper Spencer Gulf on a week by week basis for three months. When required, time was spent in both Adelaide and Canberra. The timeframe for the project was six months: December 1999 – June 2000 (Attachment A).

The report is presented as a preliminary investment strategy to USGIT to encourage community discussion about further opportunities for sustainable economic and social development utilising the existing assets within the region. It is hoped that it will offer a pathway to develop investment opportunities by identifying possible broad but integrated investment strategies and some options to further each of these (including the identification of important wider community issues) in the Upper Spencer Gulf. The report is followed by a reference guide after each investment strategy (and at the end of the report) together with a list of available information.

The report is predominantly based on the views expressed in interviews of 170 people representing business, industry, economic associations, government, educational institutions (mainly in vocational and tertiary education), services and some wider community associations. It also draws on earlier studies and findings dating back to 1974, including forum discussions and workshops.

This report is divided into three main sections:

1. City Overview

A summary of each of the cities, giving a context for the investment strategies by presenting an overview of each city's existing infrastructure and reference to some of the assets.

¹ The South Australian Centre for Economic Studies (1997) Provincial Cities: A Statistical Overview of Socio-Economic Trends 1986-1996 p.9

² Centrelink, Current Customers From English and Non English Speaking Backgrounds By Office and Service Reason As Of 03/12/99

2. Investment Potential for the Upper Spencer Gulf and Draft Investment Attraction Strategies

Based on the existing assets in the communities, eight draft strategies have been identified. These are: defence and aerospace; education and training; fisheries and aquaculture, health services, resource processing; sustainable development; tourism; and transport and services. These eight are all connected and have a number of synergies with each of the other strategies. These are based on the existing assets in the region and include a range of opportunities that blend public and private investment; opportunities within the control of the region; labour intensive strategies; others that are more technology or capital intensive, and opportunities largely outside the control of the region.

During the consultation process, a range of issues and concerns outside the scope of this report were raised. These are listed as red flag issues and are 'flagged' but not discussed in the report. While many of these issues could have an impact on the overall investment climate, they are not region specific and are generally matters of a broad policy nature.

3. Ways Forward

This section contains a possible way forward for broader strategy making based on community reaction to this report.

This report, primarily generated through consultations in the region, has identified preliminary potential investment opportunities based on the existing assets in each of the cities. It is understood, especially by USGIT, that these strategies are broad and are intended to provide a basis for further community and stakeholder consultation as part of the process of building an integrated and comprehensive investment strategy for the region.

Section 1

Building From Assets: City Overviews

Introduction

Although it is convenient to jointly brand the three cities in the Upper Spencer Gulf (Port Pirie, Port Augusta and Whyalla) as a trilogy of cities – or, as sometimes referred to, ‘the Iron Triangle’, each city has its own identity, its own view of where it sits in the region based on its assets, aspirations and focus for investment.

Though the cities are geographically quite close, each one has developed around different industries and grown independently, with their respective identities closely associated with the major industry of each city. In Whyalla, steel making and related industries, Port Pirie, lead smelting and value adding services including shipping and in Port Augusta, a town primarily based on the provision of public service through the former Commonwealth Railways and power generation, has a reputation linked to the rail and servicing industry.

There is a commitment within the cities, largely reflected by the civic and traditional leaders, to form a group with a ‘common purpose’. The USGCPG was established in February 1999. Its charter is to ‘turn around the economies of the region by 2010’. The Common Purpose Group is supported by the USGIT, responsible for the further refinement and implementation of the strategies of the Common Purpose Group.

Within the communities themselves, there are significant moves to build closer links and establish lasting partnerships. Core community needs such as retail services already cross over city boundaries and demonstrate opportunities through a closer connection across the region. Conversely, there is competition in a range of areas from business to sport between each of the cities and the existence

of three Councils and three Regional Development Boards servicing the three cities further encourages this competitiveness. This demonstrates that, while regional links can be made, the cities generally operate separately but have identified the need for a broader regional approach.

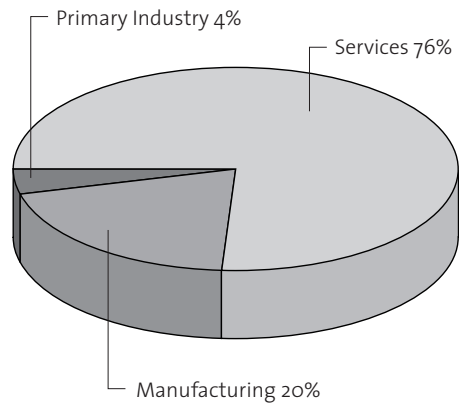
The Common Purpose Group’s main strength appears to lie in its capacity for advocacy. Combined, the Group represents 65,000 people, including the surrounding regions serviced by the three Councils. While relatively young, its networks include local businesses, associations and industries, the South Australian State Government and agencies within the Commonwealth Government. The Common Purpose Group has the opportunity to further develop these relationships and establish long term partnerships within and outside the region. In order to meet its stated ambition to ‘turn around the economies of the region by 2010’, the USGCPG requires clarity and focus on the strategic economic and wider issues faced in the region and an appreciation of the Upper Spencer Gulf’s position in a globalised economy.

While the Common Purpose Group offers the overarching strategy, each of the cities, through their Regional Development Boards and Councils, assist at a local level to attract investment first to their respective cities, then the region.

Classification	No. of people
Intermediate Clerical, Sales and Service	799
Trades and Related Workers	772
Intermediate Production and Transport	764
Professionals	632
Elementary Clerical, Sales and Service	607
Associate Professionals	556
Labourers and Related Workers	552
Manager and Administrators	391
Advanced Clerical and Service	121
Other	183
Total	5,377

Industry Sector	No. of people
Manufacturing	1,065
Retail Trade	899
Health and Community Services	606
Education	397
Property and Business Services	288
Construction	268
Accommodation, Cafes and Restaurants	257
Transport and Storage	229
Personal and Other Services	224
Agriculture Fisheries and Forestry	192
Wholesale Trade	170
Government Administration and Defence	161
Communication Services	128
Cultural and Recreational Services	125
Finance and Insurance	117
Utilities	42
Mining	26
Non-classified/ not stated	183
Total	5,377

Industry Sector (percentage)



Wages and Salaries

The mean taxable income in Port Pirie is \$28,604 per annum with an effective rate of tax at 23%.⁹ In addition to salaries, a number of employee benefits and on-costs are paid by the employer. In comparison, State and National average wages (based on ordinary time and averaged male and female wages between 1997-99) are \$34,662.90 and \$31,389.80 per annum respectively.¹⁰

In Port Pirie’s significant manufacturing industry, hourly contract rates (both for workshop and remote locations) for tradespeople range between \$17 - \$22 for unskilled, \$20 - \$29 for semi skilled, \$22 – \$32 for skilled and \$27 - \$34 for specialist trades.¹¹ These figures do not include transport and accommodation.

Industrial Relations

Port Pirie has established a good industrial relations reputation. While a number of unions are represented within workplaces, Enterprise Bargaining Agreements (EBA) are also in place in Port Pirie. At Pasmenco’s Port Pirie Smelter a revised EBA was finalised in December 1999 establishing a two-year agreement.

⁹ <http://www.ato.gov.au/content/corporate/downloads/98112.pdf>

¹⁰ Australian Bureau of Statistics, 2000 Year Book Australia p.135 and South Australian Year Book 1999 p.180

¹¹ Contributed by Port Pirie Regional Development Board and Advance Labour Hire

Infrastructure

Utility Infrastructure

Electricity

Flinders Power, located at Port Augusta is a coal generated base load power station which supplies the State with 30% of its power needs. Flinders Power provides 520 MW of electricity with additional production by the adjacent Playford power station when required of 220 MW (at peaking rates). Average commercial/ industrial costs for electricity range up to around \$40/ MW hour plus regulated delivery charges for transmission, distribution and market fees.¹²

Gas

Gas is provided to Port Pirie via the Moomba to Adelaide Pipeline and diverted to Port Pirie by the Port Pirie lateral which continues to Whyalla. The pipeline is owned and operated by Epic Energy on behalf of the Cooper Basin Producers. The total capacity of the Moomba to Adelaide pipeline is 418 TJ/day, all of which is pre-sold at capacity. The pipeline's capacity at the Port Pirie lateral is 24 TJ/day of which 3 TJ/day is used in Port Pirie and the remaining 21 TJ/day is piped to Whyalla.¹³

The gas is fully contracted at capacity (24 TJ/day), however, additional resources may be provided to meet peak demand through an 'interruptable gas supply'. The average consumption on the Port Pirie to Whyalla lateral is 16-18 TJ/ day, totalling 6 PJ/annum. The delivered cost to Port Pirie is approximately \$3.10/ GJ (including transport and lateral charges).¹⁴

Water

Water is supplied by SA Water from the Murray River through the Morgan to Whyalla pipelines. The nominal design capacity for the system is 66,000 ML/year and parts of the system are at near capacity for about one month of the year depending on the severity of the summer.¹⁵ In 1998/99, 4,090 ML was used in Port Pirie, of that, approximately 1,000 ML was supplied to Pasmenco's Port Pirie Smelter.¹⁶ Potable water charges are considered moderate.¹⁷

Transport Infrastructure

Airport Infrastructure and Services

Port Pirie's air service and infrastructure (Aerodrome Reference Code 2C) includes:

Runways:

08/26	1,043 m x 18 m sealed (total 30 m wide)
17/35	1,069 m x 18 m unrated gravel
03/21	672 m unrated gravel

Aircraft Capacity:

Mid size regional aircraft can land at Port Pirie aerodrome, for example up to DHC-8/100 and Cessna 550. Larger aircraft can be limited by the length of the runway.¹⁸

Services:

Use is mostly through charter operators as no commercial flights are scheduled. The airport is six kms from the city centre.

¹² Flinders Power Pty Ltd, Port Augusta and Adelaide

¹³ Stephen Timms Consulting Pty Ltd

¹⁴ Stephen Timms Consulting Pty Ltd

¹⁵ SA Water, Crystal Brook

¹⁶ Approximations provided by SA Water, Crystal Brook

¹⁷ SA Water, Crystal Brook

¹⁸ Transport SA

*Port Facilities and Infrastructure*¹⁹

Authority	Ports Corp of South Australia, 153 Ellen Street, Port Pirie SA 5540
Pilotage	Compulsory. Boarding ground – 1.5 nautical miles west-northwest of the light beacon at the northern end of the eastern shoal
Tidal Data	Mean high water springs: 2.72 m Mean high water neaps: 1.74 m
Ship Limitations	Maximum length overall Daylight (in and out) 185 m Darkness (in and out) 180 m (these limitations may be varied)
Depth in Approach Channels	Entrance channel harbour 6.4 m Swinging base 6.4 m
Berth Space and Depth Alongside	No. 1 Berth: Fishing and recreational vessels (Length 152 m, width, 30 m, depth 7.3 m) No. 2 Berth: Bulk loading (Length 190 m, width 30 m, depth 8.2 m) No. 3 Berth: Oil (Tug Berth) T Head jetty with dolphins each end (Length 198 m, width 30 , depth 7.3 m) No. 4 Berth: Tugs (Length 107m, width 25 m, depth 5.8 m) No. 5, No.6, No. 7 Berths: Ore (Length 526 m, width 30 m, depth 8.2 m) No. 8 and No. 9 Berths: Pasminco (Length 180 m, width 30 m, depth 8.2 m)
Nature of Bottom	Clay
Mechanical Cargo Handling Equipment	Pasminco: Five wharf cranes Safe working load – 7.5 tonnes Maximum outreach from wharf edge – 27.4 m
Bulk Cargo Handling Equipment	No. 2 Berth: Five identical slewing loading booms with spouts, maximum outreach from wharf edge – 17.2 m, gross loading rate – 800 tph (one boom 400 tph), boom clearance at wharf edge – 19.9 m above chart datum No. 5 and No. 6 Berths: Zinc and lead concentrates – a gantry loader from stockpile, gross loading rate – 600 tph, discharge slinger clearance – 12.8 m above chart datum
Ballast Facilities Shore Tankage	Not available
Road and Rail Access	Road access to wharves, rail system connected
Potable Water	Available at all berths (rate of flow – 15 tph) international ship-to-shore connection available
Tugs	Tempest – bollard pull 23 tonnes, Ungarra – bollard pull 12 tonnes Launch available to run lines
Tug Companies	Ritch and Smith, Port Lincoln Tugs
Bunker Facilities	Light diesel oil is available by road transport
Ship Repair Services	Machinery repairs can be undertaken
Stevedoring Companies	Port Pirie Stevedores, P&O Ports Using ships gear approximately the equivalent of 6 containers per hour are loaded. Labour costs are provided on a contract basis considering labour, equipment and overheads.
Principal Commodities Handled	Imports: Coal, limesand and lead concentrate (Other products unloaded include yachts and steel) Exports: Lead and zinc ingots, concentrates and grain. Wheat is loaded at a fixed price/ tonne
Quarantine Limitations	Available (serviced from Adelaide). Restrictions exist for import Size of storage, depth of channel, porous wharf surface at Berth No. 5,6 and 7

¹⁹ Ports Corp, South Australia's Regional Ports

Public Transport Infrastructure

The Port Pirie Bus Service offers public transport on nine main routes around the city. From Monday to Friday services start from around 7am and conclude before 6 pm. A restricted service is offered on Saturday from around 9 am to 12 noon and there is no service on Sunday.

For charter service, Spencer Gulf Coaches has five coaches (including one 22-seat mini coach).²⁰

Intrastate services from Port Pirie are provided by Premier Stateliner Coachlines and Pioneer Greyhound Coachlines.²¹

Rail Infrastructure

The standard gauge track from Adelaide to Port Augusta connects to Port Pirie and is managed by The Australian Rail Track Corporation (ARTC). The line into Port Pirie is used for freight and the yards are managed by Australian Southern Railroad. The yards are divided into three main areas, subsidiary, main and Pasmenco. In the subsidiary (or entrance yards) there are six main tracks and branch lines leading into the main yards with three main tracks and branches. The Pasmenco yards extend from Ellen Street to the Pasmenco site with one main line and then branches into 6 main tracks servicing the area including out to the former rare earth site. There are 17 ore trains in and out each month. The average size of the train is 57-62 wagons.²² In addition to ore trains, grain is moved to the grain wharf with wagons coming in from Crystal Brook, Jamestown and other towns close to Port Pirie and, while less frequently, steel is sometimes brought from Whyalla for loading at Port Pirie.²³ The interstate passenger trains, The Ghan and the Indian Pacific stop at Coonamia, 4 km east of Port Pirie.

ARTC owns and manages the Adelaide to Port Augusta and Kalgoorlie, Port Augusta to Whyalla, Tarcoola to Alice Springs and Broken Hill to Crystal

Brook corridors. Over these corridors, the ARTC is responsible for selling access to train operators, capital investment in the corridors, management of the network and infrastructure maintenance.

Charges are levied in two parts for train operators. One is for occupying capacity on the network and the second is for mass distance times the distance travelled (based on gross tonnage of the train).

Currently, eleven operators have access arrangements with the ARTC providing intrastate and interstate freight and passenger services. These include: Australian Southern Railroad, Countrylink, FreightCorp, Freight Victoria, National Rail, Great Southern Railway, Great Northern Rail Services, Patrick Rail, Silverton Tramway, Specialised Container Transport and Toll Rail.

Road Infrastructure

Port Pirie is serviced by a national highway, state and local roads (including primary local, secondary local, local access, minor access and tourist routes) providing fast transport for goods and passengers. Vehicle movements into Port Pirie from the south are approximately 2,000 vehicles per day (with between 22-25% commercial). Travelling north from Port Pirie, there are about 1,200 vehicle movements per day (with 22-25% commercial).²⁴ Vehicles not making the detour into Port Pirie, heading north on Highway One are 3,200 per day and south 3,950 per day.²⁵

Telecommunications

Infrastructure

Telecommunications services in Port Pirie for voice and data transmission are regarded as adequate. Optical fibre cabling extends from the intercapital fibre optic cable passing through Port Augusta, suggesting the capacity is high. Currently, however, this is underutilised because of the uncommissioned capacity. The 'last mile'

²⁰ Port Pirie and Southern Flinders Ranges Masters 2000 Games Submission p.4

²¹ Port Pirie and Southern Flinders Ranges Masters 2000 Games Submission p.4

²² Australian Southern Railroad, Port Pirie

²³ Australian Southern Railroad, Port Pirie

²⁴ Transport SA, Crystal Brook

²⁵ Transport SA, Crystal Brook

infrastructure (from the exchange to the property/house) is a nationally recognised impediment which can restrict access and capability for data transmission.²⁶

Services

Services including video conferencing, mobile coverage and Internet access are available. Under the Universal Service Obligation, Internet access is available at a local call rate. Costs for telephone calls between each of the other cities and to the closest capital city, Adelaide, are all charged at STD rates.

Values: Property and Land

Residential and commercial rates are considered moderate with three main price ranges for residential buyers from around \$40,000, then the \$60,000 - \$100,000 bracket and for executive housing, over \$100,000. The South Australian Housing Trust has 1,056 residential properties in Port Pirie.²⁷

Port Pirie has a range of vacant residential land and depending on lot size and location, prices range from around \$5,000 up to about \$25,000. Further information of the availability of commercial property and vacant land can be sourced from the local real estate agents, Council and the Regional Development Board.

Services (select)

Health Care

Port Pirie is serviced by the Port Pirie Regional Health Service. This includes the hospital, community health, youth services, mental health, dental and specialist services.

Education and Training

Vocational training is provided by the Port Pirie campus of the Spencer Institute of TAFE. Pathways to further qualification from certificate level course have been established with the University of South Australia's Whyalla campus. Courses offered by the Port Pirie campus of the Spencer Institute of TAFE include: Aboriginal Studies; Business Studies; Community Services and Health; Engineering; Hairdressing and Cosmetology; Horticulture and Rural; Tourism; Travel and Recreation; Transport Engineering and Vocational Preparation.²⁸ Courses are run on-campus and through an established flexible learning program administered by the Spencer Institute of TAFE.

Under the public school education system, Port Pirie has six kindergartens, five primary schools and one high school. A private college offers education from reception (kindergarten) to Year 12.

Financial

Branches of the Bank of South Australia, Commonwealth Bank of Australia, National Australia Bank, Westpac Banking Corporation and the Australian Central Credit Union together with other financial services including superannuation and taxation consultants are available.

Short term Accommodation

Port Pirie has 29 accommodation venues including hotels, motels, bed and breakfast style, cabins and a caravan park. The total number of available beds is 822.²⁹

²⁶ Networking the Nation, South Australia

²⁷ South Australian Housing Trust

²⁸ <http://www.tafe.sa.edu.au/institutes/spencer/ptpirie.html>

²⁹ Port Pirie and Southern Flinders Ranges Masters 2000 Games Submission p.35

People and Place

Port Pirie, with its backdrop of the Southern Flinders Ranges, prides itself on the quality of life it can offer with a relatively low cost of living. Services available, other than those already listed – education, financial, health and accommodation – include shopping (the city has three shopping areas) youth, aged care, disability and legal services, recreation facilities, support groups, emergency services various government departments and information centres including a public library with Internet access.

Its strong sporting culture has won the city the 2000 and 2002 Regional Masters Games utilising its extensive sporting facilities, its international reputation – Port Pirie holds the Womens' International Tennis Competition hosting players from up to 24 countries around the world – and experience in hosting major events. The bid to host the Masters Games also met other aims of the city to 'regenerate interest for the ageing population in sporting activities' and 'to affirm Port Pirie's position as the sporting hub for North and Mid North regional South Australia'.³⁰ Port Pirie is known as the 'City of Friendly People'.³¹

³⁰ Port Pirie and Southern Flinders Ranges Masters 2000 Games Submission p.2

³¹ Port Pirie and Southern Flinders Ranges Masters 2000 Games Submission p.2

City Overview: Port Augusta

Key Points

- Existing infrastructure includes airport, rail and road facilities
- Expertise in remote area servicing especially in schooling and health services
- Focus and commitment to supporting existing business and industries and seeking investment opportunities
- Focus on establishing a significant intermodal transport facility
- Known as the 'Crossroads of Australia'
- Mediterranean climate
- Service centre for retail and commercial and industrial needs
- Significant cultural meeting place for the Aboriginal community
- Significant work force experience and expertise in retail servicing, health and transport
- Utilities include electricity and water

Overview

Port Augusta is 318 km north of Adelaide on National Highway One. Although Matthew Flinders explored the Gulf in 1802, it was not until 1852 that Port Augusta Harbour was discovered and two years later, the site of the township was surveyed.³² The town was named after Lady Augusta Young, the Governor's wife. At that time, Port Augusta was a transport centre servicing the mainly pastoral industries. In common with the other two cities, Port Augusta is supporting existing and emerging industry and business and,

in doing so, is seeking to reestablish itself as an intermodal transport centre utilising its existing infrastructure and expertise.

Port Augusta was proclaimed a city in 1963 and currently has a population of 13,853, however, locally this is considered to be closer to 15,000 over 1,152.5 km². Port Augusta is a significant place for the Aboriginal community for 'the exchange of gifts and stories' as it is where the Flinders Ranges, Gawler Ranges and the Spencer Gulf meet.³³

Climate

Port Augusta's climate is considered Mediterranean with hot dry summers and mild winters. Weather readings have been recorded since 1860 at the Post Office and since 1958 at the Power Station. More recently, weather readings have been recorded at the Australian Arid Lands Botanic Garden. The average maximum temperature ranges from 32°C in January down to 17 °C in the cooler winter months of June and July. The minimum temperatures are around 19°C and 7 °C respectively.³⁴ Port Augusta's average annual rainfall is 242 mm.³⁵

Work Force, Infrastructure and Services

The Work Force

From the most recent series of Australian Bureau of Statistics reports, it is estimated that Port Augusta's workforce is 5,114.³⁶ The classification of professions and employment in the industry sectors for Port Augusta are:

³² Billett and Arnold (1988) I Live in Port Augusta

³³ Davenport Community

³⁴ http://www.bom.gov.au/climate/averages/tables/cw_o21043.shtml

³⁵ http://www.bom.gov.au/climate/averages/tables/cw_o21043.shtml

³⁶ Australian Bureau of Statistics, 1999 Integrated Regional Database

The airport is 5 km from the city centre. A taxi service and pre-arranged hire car service is available from the airport.

Public Transport Infrastructure

Public Transport provided by the City of Port Augusta services three main routes, Port Augusta West, Augusta Park and Willsden and Stirling North outbound and inbound. Monday to Friday buses start from 8.00 am through to 6.30 pm and a restricted bus service on all routes on Saturday runs from 8.00 am to 12.30 pm. There are no services on Sunday.⁴⁸

Intrastate services from Port Augusta are provided by Premier Stateliner Coachlines.⁴⁹

Rail Infrastructure

Freight and interstate passenger services are provided by a standard gauge track to and from Port Augusta. The Australian Rail Track Corporation (ARTC) owns and manages the Adelaide to Port Augusta and Kalgoorlie, Port Augusta to Whyalla, Tarcoola to Alice Springs and Broken Hill to Crystal Brook corridors. Over these corridors, the ARTC is responsible for selling access to train operators, capital investment in the corridors, management of the network and infrastructure maintenance.

Charges are levied in two parts for train operators. One is for occupying capacity on the network and the second is for mass distance times the distance travelled (based on gross tonnage of the train).

Currently, eleven operators have access arrangements with the ARTC providing intrastate and interstate freight and passenger services. These include: Australian Southern Railroad, Countrylink, FreightCorp, Freight Victoria, National Rail, Great Southern Railway, Great Northern Rail Services, Patrick Rail, Silverton Tramway, Specialised Container Transport and Toll Rail.

Spencer Junction is the main marshalling yard, approximately 2 km in length and 16 tracks wide. Between eight and nine trains at any one time can be marshalled in the yards. Railway engineering and track maintenance companies are connected to Spencer Junction.

Trains are approximately 1,800 m long and have clearance on the Adelaide to Perth corridor and return journeys to haul double stack container wagons of 6.6 m in height.

Road Transport

A network of national highways (Port Augusta – Port Wakefield, Sturt and Eyre highways), state and local roads (including primary local, secondary local, local access, minor access and tourist access) connect with Port Augusta providing fast transport for goods and passengers. Vehicle movements into Port Augusta each day include 4,000 from Adelaide (approximately 21% of vehicles are commercial), 790 vehicles from the Eyre Highway (with approximately 25% commercial) and on the Stuart Highway, 1,500 (with 22% commercial).⁵⁰

An upgrade of the Port Augusta to Port Wakefield national highway will increase the number of passing lanes by 10 in each direction providing one overtaking lane every 20 km. The widening of the Eyre Highway to 8 m, starting 25 km west of Port Augusta at Lincoln Gap is currently five years into its eight-year upgrade program.⁵¹

Telecommunications

Infrastructure

Telecommunications services for voice and data transmission is regarded as adequate in Port Augusta. Optical fibre cabling extends from the intercapital fibre optic cable and passes through Port Augusta suggesting the capacity is high but underutilised because of the uncommissioned capacity. The 'last mile' infrastructure (from the exchange to the property/house) is a nationally

⁴⁸ City of Port Augusta

⁴⁹ Port Augusta New Residents Guide November 1999

⁵⁰ Transport SA, Port Augusta

⁵¹ Transport SA, Port Augusta

recognised impediment which can restrict access and capability for data transmission.⁵²

Services

Services including video conferencing, mobile coverage and Internet access are available. Under the Universal Service Obligation, Internet access is available at a local call rate. Costs for telephone calls between each of the other cities and to the closest capital city, Adelaide, are all charged at a STD rate.

Values: Land and property

Residential and commercial land and property prices are considered moderate, however, commercial rental is regarded as high. Residential prices start from \$40,000 and for executive housing move over the \$100,000 price range. The South Australian Housing Trust has 1,260 residential properties in Port Augusta, both in the east and west area, providing between 18-20% of the housing for the city.⁵³

Port Augusta has a range of vacant residential and commercial land in its three main areas, Port Augusta West, Port Augusta and Stirling North. Depending on lot size, location and zone, prices range from around \$5,000 up to about \$30,000. Further information on the availability of commercial property and vacant land can be sourced from local real estate agents, Council and the Regional Development Board.

Services (select)

Education and Training

Vocational training is provided by the Port Augusta campus of the Spencer Institute of TAFE. Pathways to further qualification from a certificate level course have been established with the University of South Australia's Whyalla Campus. Courses offered at the Port Augusta Spencer Institute of TAFE include: Aboriginal Studies, Building and

Furnishing, Business Studies, Community Health and Services, Engineering, Hairdressing and Cosmetology, Horticulture and Rural, Hospitality, Travel and Recreation, Tourism, Transport Engineering and Vocational Preparation.⁵⁴ Courses are run both on campus and through an established flexible learning program administered by the Spencer Institute of TAFE.

Under the public school education system Port Augusta has five kindergartens, seven primary schools, one high school and one special school. One private college offers education from reception (kindergarten) to Year 12. Students on remote stations utilise the services from Port Augusta for School of the Air.

Financial

Branches of the Bank of South Australia, Commonwealth Bank of Australia, National Australia Bank, Westpac Banking Corporation, CPS and Power State Credit Union together with other financial services including superannuation and taxation consultants are available.⁵⁵

Health Care

Port Augusta is serviced by the three-year-old \$20 million public Port Augusta Regional Hospital and associated community services.⁵⁶ Port Augusta is also the base for the Royal Flying Doctor Service servicing South Australia and the southern region of the Northern Territory.

Short Term Accommodation

Port Augusta has a range of accommodation venues including hotels, motels and a cabin and caravan park.

⁵² Networking the Nation, South Australia

⁵³ South Australian Housing Trust

⁵⁴ <http://www.tafe.sa.edu.au/institutes/spencer/ptaugusta.html#vp>

⁵⁵ Port Augusta New Residents Guide November 1999

⁵⁶ <http://www.sa.gov.au/information/saybhist&chron.pdf>

People and Place

Port Augusta prides itself of the quality of life it can offer with its natural capital of the Flinders Ranges and the Gulf supported by the region's infrastructure offering a relatively low cost of living. Services available, other than those already listed – education, financial, health and accommodation – include retail centres (the city has one commercial centre and two industrial estates) youth, Aboriginal, aged care and nursing facilities, disability and legal services, recreation facilities, support groups, emergency services, various government departments and information centres including a public library with Internet access.

Port Augusta is a natural transport corridor for east-west and north-south passengers and freight. Its substantial expertise in rail and its access and servicing of northern South Australia including heavy industry, resource processing and defence related industries support its existing business and industrial base. Other significant industries contributing to its economy include the newly established Centrelink Call Centre, the Port Augusta Prison and Flinders Power.

With its close proximity to the Flinders Ranges and its connections to three national highways, the city sees itself as having significant opportunities for further tourism development. This is supported by the Pichi Richi Railway and the Original Ghan Restoration project based in Quorn. By utilising and accessing the region's existing assets, Port Augusta can build on its claim to be 'The Crossroads of Australia' and continue its industry and business diversification offering a range of services and facilities.

City Overview: Whyalla

Key Points

- Existing infrastructure includes airport, deep sea port, rail and road facilities
- Expertise in fabrication and construction especially in the resource processing and value adding industries
- Focus and commitment to supporting existing business and industries and seeking investment opportunities
- Mediterranean climate
- Multicultural society
- Service centre for surrounding rural communities
- Significant education and health services with supporting infrastructure
- Substantial industrial and resource processing background
- Utilities include electricity, natural gas and water
- Well serviced for retail and commercial/ industrial needs

Overview

Whyalla is 393 km north west of Adelaide on the western side of the Spencer Gulf. As with the other two cities in the Upper Spencer Gulf, it was explored by Matthew Flinders in 1802. During the exploration it was named Hummock Hill on 9 March 1802 and was later, renamed Whyalla when the town was officially proclaimed on 16 April 1914.⁵⁷ Whyalla has had a long association with industry, mostly through steel making (including shipbuilding) and value adding with the BHP (now

One Steel Limited) plant utilising the ore from the nearby Middleback Ranges. In 1958 Whyalla was proclaimed a city and in 1967, the suburbs of Whyalla were officially named Whyalla, Whyalla Playford, Whyalla Norrie and Whyalla Stuart.

Whyalla has a population of 23,650 with a further 293 people in the unincorporated area of Whyalla across an area of 13,496 km². It has a long history of multiculturalism with 63 nationalities living in the city. The Whyalla Multicultural Communities Centre offers services including English classes, multicultural services, programs and cultural celebration. Multicultural communities represented include Vietnamese, Italian, Croatian, Spanish, Russian, Maltese, Serbian, Polish, Indian, Sri Lankan and Greek.⁵⁸

Climate

Whyalla's climate is considered Mediterranean with hot dry summers and mild winters. Weather readings have been recorded since 1906 in what is now called Whyalla Norrie and since 1945 in Whyalla. The average maximum temperature ranges from 29°C in January down to 17°C in the cooler winter months of June and July. The minimum temperatures are around 18°C and 7°C respectively.⁵⁹ Whyalla's average annual rainfall is 270 mm.⁶⁰

⁵⁷ <http://www.whyalla.sa.gov.au/history/history2.htm>

⁵⁸ Whyalla Multicultural Communities Centre

⁵⁹ http://www.bom.gov.au/climate/averages/tables/cw_021043.shtml

⁶⁰ http://www.bom.gov.au/climate/averages/tables/cw_021043.shtml

Work Force, Infrastructure and Services

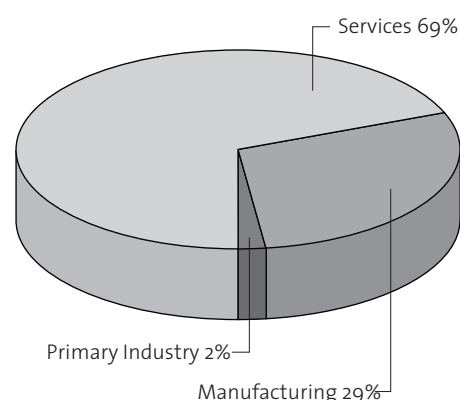
The Work Force

From the most recent series of Australian Bureau of Statistics reports, it is estimated that Whyalla's work force is 9,137.⁶¹ The classification of professions and employment in the industry sectors for Whyalla are:

Classification	No. of people
Trades and Related Workers	1,580
Intermediate Production and Transport	1,369
Professionals	1,347
Intermediate Clerical, Sales and Service	1,188
Labourers and Related Workers	913
Associate Professionals	912
Elementary Clerical, Sales and Service	746
Manager and Administrators	532
Advanced Clerical and Service	240
<i>Other</i>	310
Total	9,137

Industry Sector	No. of people
Manufacturing	2,651
Retail Trade	1,205
Health and Community Services	927
Property and Business Services	766
Education	700
Construction	600
Accommodation, Cafes and Restaurants	339
Wholesale Trade	293
Transport and Storage	282
Personal and Other Services	269
Government Administration and Defence	198
Finance and Insurance	159
Mining	129
Cultural and Recreational Services	107
Communication Services	94
Agriculture Fisheries and Forestry	49
Utilities	29
<i>Non-classified/ not stated</i>	340
Total	9,137

Industry Sector (percentage)



Wages and Salaries

The mean taxable income in Whyalla (across all suburbs) is \$33,566.75 with an average rate of tax at 25%.⁶² In addition to the salary, a number of employee benefits and on-costs are paid by the employer. In comparison, State and National average wages (based on ordinary time and averaged male and female wages between 1997-99) are \$34,662.90 and \$31,389.80 per annum respectively.⁶³

With one of Whyalla's significant industry sectors being manufacturing, an example of hourly contract rates (both for workshop and remote locations) for tradespeople range, on average, between \$17 - \$22 for unskilled, \$20 - \$29 for semi skilled, \$22 - \$32 for skilled and \$27 - \$34 for specialist trades.⁶⁴ These figures do not include transport and accommodation.

Industrial Relations

Whyalla has established a good industrial relations reputation. While a number of unions are represented within workplaces, Enterprise Bargaining Agreements have been established in the region.

⁶¹ Australian Bureau of Statistics, 1999 Integrated Regional Database

⁶² <http://www.ato.gov.au/content/corporate/downloads/98112.pdf>

⁶³ Australian Bureau of Statistics, 2000 Year Book Australia p.135 and South Australian Year Book 1999 p.180

⁶⁴ Contributed by Port Pirie Regional Development Board and Advance Labour Hire

Infrastructure

Utility Infrastructure

Electricity

Flinders Power, located at Port Augusta, is a coal generated base load power station which supplies the State with 30% of its power needs. Flinders Power provides 520 MW of electricity with additional production by the adjacent Playford power station when required of 220 MW (at peaking rates). Average commercial/ industrial costs for electricity range up to around \$40/ MW hour plus regulated delivery charges for transmission, distribution and market fees.⁶⁵

Gas

Gas is provided to Whyalla via the Moomba to Adelaide Pipeline and diverted to Whyalla by the Whyalla lateral (under the Spencer Gulf) which also services Port Pirie. The pipeline is owned and operated by Epic Energy on behalf of the Cooper Basin Producers. The total capacity of the Moomba to Adelaide pipeline is 418 TJ/day, all of which is fully contracted at capacity. The lateral's capacity is 24 TJ/day of which 21 TJ/day is used by Whyalla – mostly One Steel – and the remaining 3 TJ/day is used in Port Pirie.⁶⁶

The gas is fully contracted at capacity (24 TJ/day), however, additional resources may be provided to meet peak demand through an 'interruptable gas supply'. The average consumption for the Port Pirie-Whyalla lateral is 16-18 TJ/ day, totalling 6 PJ/annum. The delivered cost to Whyalla is approximately \$3.30/ GJ (which includes transport and lateral charges).⁶⁷

Epic Energy also maintains and operates the Moomba to Port Bonython Liquids Pipeline on

behalf of Santos and the Cooper Basin Producers. The pipeline transports crude oil, condensate and liquid petroleum gas to Santos' Port Bonython Fractionation Plant. The line, commissioned in 1983, is 659 km in length with a diameter of 350 mm. The operating pressure is 10 Mpa with a capacity of 600 barrels per day.⁶⁸

Water

Water is supplied by SA Water from the Murray River through the Morgan to Whyalla pipelines. The nominal design capacity for the system is 66,000 ML/year and parts of the system are at near capacity for about one month of the year depending on the severity of the summer.⁶⁹ In 1998/99, 7,580 ML was used by Whyalla, of that, approximately half was supplied to One Steel.⁷⁰ Potable water charges are considered moderate.

Transport Infrastructure

Air Service and Infrastructure

Whyalla's air service and infrastructure (Aerodrome Reference Code 3D) includes:

Runways:

17/35	1,686 m x 45 m sealed
05/26	1,408 m x 30 m unrated gravel

Aircraft Capacity:

Mid to larger regional aircraft and up to small airline jets are able to land at the Whyalla aerodrome. Representative aircraft for the smaller airline jets include F27, DC9 and BAe146.⁷¹ Some airline jets maybe limited by pavement loading because of the softness of the runway. Whyalla has been used for B737 diversions from Adelaide in the past.⁷²

⁶⁵ Flinders Power, Port Augusta

⁶⁶ Stephen Timms Consulting Pty Ltd

⁶⁷ Stephen Timms Consulting Pty Ltd

⁶⁸ http://www.epic.com.au/dhtml_noflash_default.htm

⁶⁹ SA Water, Crystal Brook

⁷⁰ Approximations provided by SA Water, Crystal Brook

⁷¹ Transport SA

⁷² Transport SA

Services:

Whyalla airport is used for commercial passenger, charter and freight services. In 1998 there were 50,718 scheduled airline passenger movements. A total of 4,756 scheduled regional airline movements left Whyalla. The scheduled regional airline freight/mail movements were 42.5%, up by nearly 6% compared with the previous three years.⁷³

Commercial scheduled passenger services are offered by Whyalla Airlines and Kendell Airlines to and from Adelaide. Flying time is approximately 45 minutes.

Scheduled passenger flight times for Whyalla Airlines are:

Day	Departure Location	Times
Monday – Friday	Adelaide	8.50 am/ 3.45 pm/ 6.15 pm
Saturday – Sunday	Adelaide	10.20 am
Saturday	Adelaide	7.15 pm
Sunday	Adelaide	8.35 pm
Monday – Friday	Whyalla	7.30 am/ 11.15 am/ 5.00 pm
Saturday – Sunday	Whyalla	9.00 am
Saturday	Whyalla	6.00 pm
Sunday	Whyalla	6.30 pm

Scheduled passenger flight times for Kendell are:

Day	Departure Location	Times
Monday – Saturday	Adelaide	6.50 am/ 2.40 pm
Thursday	Adelaide	9.05 am
Friday and Sunday	Adelaide	10.00 am
Tuesday to Sunday (excl. Saturday)	Adelaide	5.00 pm
Monday – Friday	Whyalla	6.45 am
Monday – Saturday	Whyalla	7.55 am
Monday – Thursday	Whyalla	10.00 am/ 3.45 pm

Friday and Sunday	Whyalla	11.00 am
Friday	Whyalla	11.35 am
Tuesday – Saturday	Whyalla	6.00 pm

The airport is seven km from the Whyalla city centre. A taxi service and pre-arranged hire car service is available from the airport.

Port Infrastructure (deep sea)

The deep sea port at Whyalla is a custom built port, owned and operated by One Steel for its Long Products Division. There are two locations, the inner harbour wharf which has loading and unloading facilities and the jetty which has loading capacity only. The channel to the inner harbour is dredged to 10 m and the berths, 10.7 m (below datum). Vessels of up to 40,000 tonnes deadweight unload up to 35,000 tonnes of limestone, dolomite or coal in the inner harbour. The channel to the ore jetty is 10.7 m and the berth is 11.6 m (below datum) respectively. Vessels of up to 65,000 tonnes deadweight load up to 50,000 tonnes of iron ore at the ore jetty. Land access to both the ore jetty and the inner harbour basin are across One Steel property.⁷⁴

Facilities for loading and unloading include a stockbridge owned and operated by One Steel to handle bulk raw materials in and out of the hold, mobile equipment and ships' gear. Examples of other types of cargo occasionally loaded and unloaded at Whyalla include locomotives and Mirage aircraft. Access to port facilities is discussed and agreed on arrangement, according to guidelines, with One Steel. Every effort is made by One Steel to meet reasonable requests that add value to the region and can be managed through the port facilities without disrupting One Steel's production and shipping schedule. Mobile unloading and loading services available in Whyalla include hydraulic mobile cranes from 8 – 90 tonnes, forklifts with a capacity of 3 – 12 tonnes, loaders (series 920 –988) and trucks.⁷⁵

⁷³ Transport SA, 1999 SA Aviation Market Summary (1999 regional statistics were unavailable)

⁷⁴ <http://www.wedb.com.au/infrastructure.html>

⁷⁵ Brambles, Whyalla

Public Transport Infrastructure

Whyalla City Transport services the city with three main routes (both west and east bound). Monday to Friday services start at 8.00 am and end around 6.00 pm. On Saturday a restricted service operates from 8.40 am to 12.30 pm. There are no services on Sunday.

Services for schools (both east and west bound) run from Monday to Friday at 7.50 am and again from 3.15 pm – 3.40 pm. Services for One Steel from Monday to Friday have two morning runs, at 6.40 and 7.15 am and one afternoon run at 4.20 pm.

Rail Infrastructure

Whyalla is connected to the national rail corridor in Port Augusta for freight service by a standard gauge rail line. A narrow gauge system also operates but is specifically for servicing One Steel's mines. The standard gauge track to and from Whyalla is managed by The Australian Rail Track Corporation (ARTC).⁷⁷ Other corridors owned and operated by ARTC include the Adelaide to Port Augusta and Kalgoorlie, Tarcoola to Alice Springs and Broken Hill to Crystal Brook. Over these corridors, the ARTC is responsible for selling access to train operators, capital investment in the corridors, management of the network and infrastructure maintenance.

Charges are levied in two parts for train operators. One is for occupying capacity on the network and the second is for mass distance times the distance travelled (based on gross tonnage of the train).

Currently, eleven operators have access arrangements with the ARTC providing intrastate and interstate freight and passenger services. These include: Australian Southern Railroad, Countrylink, FreightCorp, Freight Victoria, National Rail, Great Southern Railway, Great Northern Rail Services, Patrick Rail, Silverton Tramway, Specialised Container Transport and Toll Rail.

Australian Southern Railroad recently signed a five-year renewable agreement with One Steel for the operation of two narrow gauge iron ore lines to Iron Duke and Iron Knob and in-plant shunting operations at Whyalla. The lease includes the 190 km of mainly narrow gauge track, a fleet of 113 ore wagons and eventually will also include One Steel's existing fleet of eight diesel locomotives.

The main Whyalla marshalling yard is approximately 2 km in length and 8 tracks wide.⁷⁸

Road Infrastructure

Whyalla is serviced by a national highway and state and local roads providing fast transport for goods and passengers. Vehicle movements into Whyalla from the north are around 1,500 vehicles per day (with 22% commercial) and leaving Whyalla heading south towards Port Lincoln, approximately 530 vehicle movements per day (22% commercial).⁷⁶

Telecommunications

Infrastructure

Telecommunications services for voice and data transmission are regarded as adequate in Whyalla. Optical fibre cabling extends from the intercapital fibre optic cable passing through Port Augusta suggesting the capacity is high but underutilised because of the uncommissioned capacity. The 'last mile' infrastructure (from the exchange to the property/house) is a nationally recognised impediment which can restrict access and capability for data transmission.⁷⁹

Services

Services including video conferencing, mobile coverage and Internet access are available. Under the Universal Service Obligation, Internet access is available at a local call rate. Costs for telephone calls between each of the other cities and to the closest capital city, Adelaide, are all charged at a STD rate.

⁷⁶ Transport SA, Port Augusta

⁷⁷ <http://www.artc.com.au/>

⁷⁸ <http://www.artc.com.au/>

⁷⁹ Networking the Nation, South Australia

Values: Land and property

Residential and commercial rates are considered moderate. Residential prices start from around \$40,000 and for executive housing are over \$100,000. The South Australian Housing Trust has 3,500 residential properties in Whyalla, of which 3,000 are double units.⁸⁰

For commercial, industrial and business, a variety of properties are available in areas including Whyalla Norrie, the ABC Shopping Centre and Whyalla. Depending on lot size, location and zone, prices range up to about \$30,000 with some properties available for rent. Further information on the availability of commercial property and vacant land can be sourced from the local real estate agents, Council and the Regional Development Board.

Services (select)

Education and Training

Tertiary and vocational training are provided by the Whyalla campus of the University of South Australia and the Spencer Institute of TAFE's Whyalla campus. A pathways program from school to TAFE and University level courses has been developed and increasingly these links are accessible to other campuses of the Spencer Institute of TAFE.

TAFE courses provided by the Whyalla campus of the Spencer Institute include: Aboriginal Studies, Building and Furnishing, Business Studies, Community Service and Health, Engineering, Expressive and Visual Arts, Hairdressing and Cosmetology, Mining Operations, Tourism, Travel and Recreation, Transport Engineering and Vocational Preparation.⁸¹ Courses are run 'on campus' and through an established flexible learning program administered by the Spencer Institute of TAFE.

Tertiary studies at the University of South Australia include access courses, undergraduate, graduate and postgraduate courses.

Undergraduate studies include: Bachelor of Arts (Communication and Media Management); Bachelor of Business; Bachelor of Computer and Information Science; Bachelor of Computing and Information Science and Bachelor of Business; Bachelor of Early Childhood Education; Bachelor of Nursing (Pre-registration); Bachelor of Social Work; Bachelor of Social Work and Bachelor of Business; Diploma in Business; Diploma in Computer and Information Science

Graduate and Postgraduate studies include: Graduate Certificate in Administrative Studies; Graduate Diploma in Administrative Studies; Master of Administrative Studies and Doctor of Philosophy.⁸² The University of South Australia has a substantial flexible learning program. An example is the current nursing undergraduate course, where eight Aboriginal students undertake the course through a managed program with on campus and flexible learning, enabling them to live in their home communities as much as possible.⁸³

Under the public school education system Whyalla has six kindergartens, nine primary schools (including one junior primary), three high schools and one special school. Three private primary schools offer education from reception (kindergarten) to Year 7 and there is one private college for Years 8 to 12.

Financial Services

Branches of the Australian and New Zealand Banking Group Limited, Bank of South Australia, Commonwealth Bank of Australia, National Australia Bank, Westpac Banking Corporation, NACOS and Australian Central Credit Union, together with other financial services including superannuation and taxation consultants are available.

Health Care

Whyalla is serviced by the public Whyalla Hospital and Health Services and associated community health services including child and adolescent health,

⁸⁰ South Australian Housing Trust

⁸¹ <http://www.tafe.sa.edu.au/institutes/spencer/whyalla.html>

⁸² <http://www.unisa.edu.au/discipline/bywhyalla.htm>

⁸³ Prof Jim Harvey, University of South Australia, Whyalla Campus

⁸⁴ 2000 Whyalla Family Services Directory

Section 2:

Investment Potential for the Upper Spencer Gulf and Draft Investment Attraction Strategies

Introduction

Based on the existing assets, company capabilities and broader community aspirations in Port Pirie, Port Augusta and Whyalla, eight possible investment strategies have been identified. The strategies selected have tried to 'look broadly at projects of state significance' as requested by USGIT rather than individual issues.⁸⁶ It should be noted that there are a range of existing operations and businesses in the region which, in this instance, are not mentioned in these eight strategies. Value adding and service industries that are not directly listed in the various tables of existing operations/ businesses are viewed as investment related assets and are highly valued contributors and employers in the region's economy. While they may not be specifically mentioned, their operations and businesses across the region, with their potential to support new investment, have helped in developing the eight broad preliminary investment strategies.

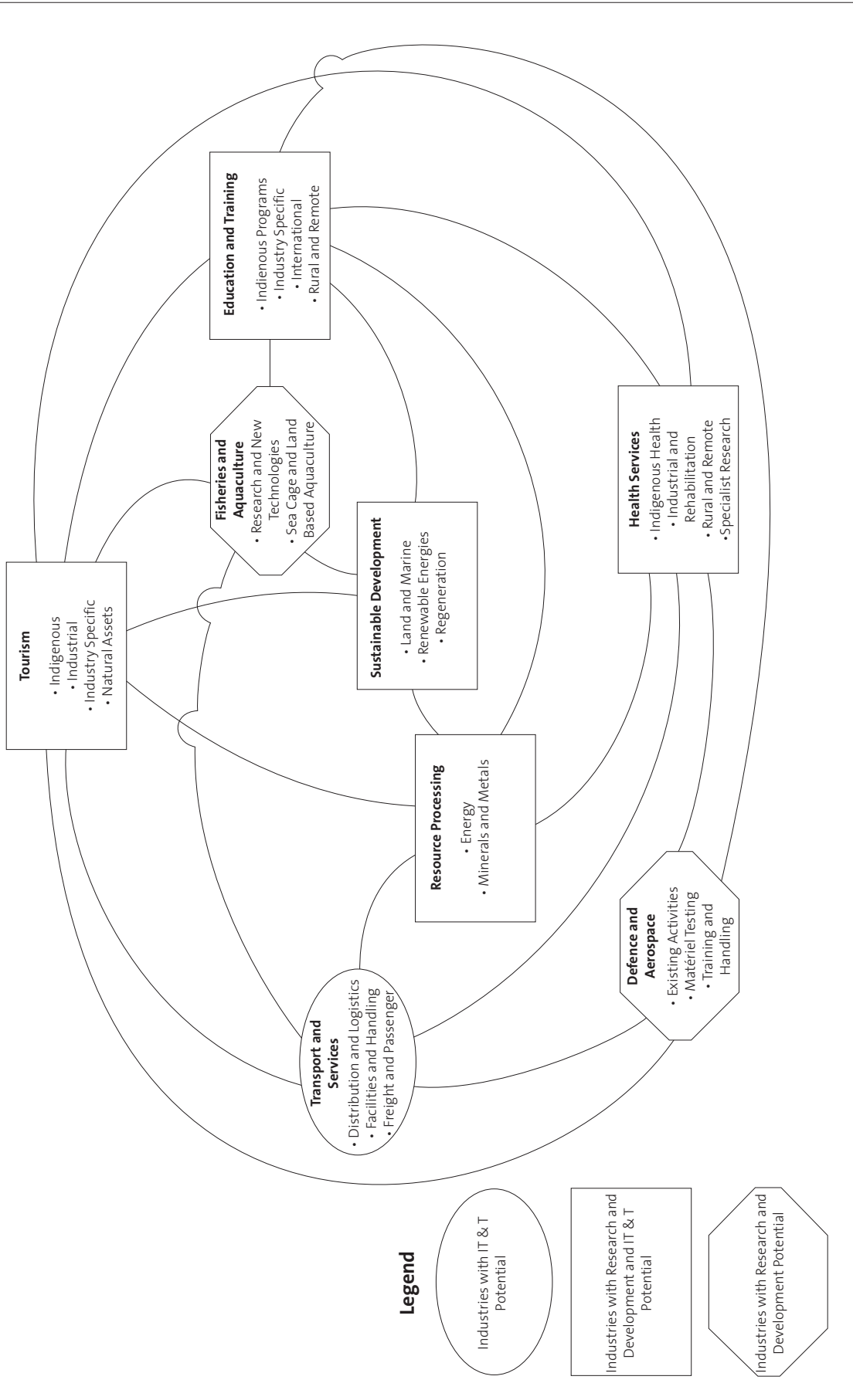
The eight possible investment strategies have a number of synergies. These are based on the existing assets in the region and include a range of opportunities that blend public and private investment; opportunities within the control of the region; labour intensive strategies; others that are more technology or capital intensive and opportunities largely outside the control of the region (Figure 1).

The possible investment attraction strategies aim to be a starting point for community discussions by providing some ideas and options for further action. Where possible, specific investment opportunities as identified throughout the study have been presented and nominally described within an approximate timeframe. It is understood that these strategies are broad and need further review, discussion and refinement and should be considered as a starting point. It is also recognised that they are by no means necessarily exhaustive of the investment potential of the region.

To support these preliminary strategies, six maps have been prepared to provide an overview of the current environment in the Upper Spencer Gulf. The six maps describe: base features, natural environment, operating environment, current zoning, infrastructure and a current asset map related to the draft investment potential as identified in this report. These maps should be read in conjunction with the eight proposed investment opportunities.

⁸⁶ Upper Spencer Gulf Implementation Team internal discussions

Figure 1. Investment Potential in the Upper Spencer Gulf



Existing Defence and Aerospace Facilities in the Northern Region of South Australia

Facilities	Location	Operation	Ownership	Product
El Alamein Training Camp and Cultana Range	Port Augusta/ Whyalla	Trials, testing and training	Public (Commonwealth Government)	Defence force training and trials
Woomera Prohibited Area	Woomera	Trials, testing and training	Commonwealth and State Crown	Trials, testing and training

New Developments

- A developed market brief for Woomera by the South Australian Department of Industry and Trade
- Commercial operator managing the Woomera Prohibited Area with the authority to attract overseas investment⁸⁹
- Development of a proposal for the Defence Integrated Distribution System to relocate the Defence National Supply Distribution Centre to South Australia (DNSDC) specifically to Port Augusta⁹⁰
- Planned \$20 million instrument range⁹¹
- Proposed \$400 million investment by Kistler Aerospace⁹²
- Proposed \$50 million investment in infrastructure by Spacelift Australia in Woomera⁹³

Developing A Draft Investment Attraction Strategy for Defence and Aerospace

The success of the defence and aerospace strategy as an investment opportunity will require considerable effort over a long time frame. This is in part due to the globalised nature of the industry, the high capital investment required, nation state sensitivities and competition from other states and countries seeking to attract the same investment. While the defence and aerospace strategy is suggested with potential investment opportunities, the proposed actions are reliant on cooperation between the Commonwealth, primarily the Department of Defence and the Department of Industry Science and Resources, and the appropriate South Australian State Government departments. Regular discussions are held between these organisations. The Commonwealth Department of Defence is responsible for a range of defence related matters including access and management issues. These include access to defence land and the Woomera Prohibited Area, proposed tenders for defence distribution and the commercial management of Woomera. While proposals and possible investment are conditional on normal commercial decisions, there appear to be opportunities for leveraging from existing operations and facilities which may attract other investment.

Suggested strategies and actions to support the work already undertaken within the region to utilise existing resources and attract defence and aerospace investment include:

⁸⁹ Invest SA

⁹⁰ Invest SA, Department of Industry and Trade

⁹¹ Invest SA

⁹² Delta Electricity and Access Economics Investment Monitor Number 41 March 2000 p.93

⁹³ Delta Electricity and Access Economics Investment Monitor Number 41 March 2000 p.93

Aerospace

- Strategy:** Promote the region as a launch site, servicing and investment location for aerospace companies
- Actions:** Working with Invest SA and others to support the development of the Woomera and related investment briefs for marketing to attract national and international investment
- Assess existing infrastructure, including aerodromes in Leigh Creek and Woomera for suitability for fly in aerospace servicing

Defence Training and Equipment Testing

- Strategy:** Promote the region as a location for training of defence force personnel, evaluation of defence equipment and materiel and logistics handling
- Actions:** Form closer linkages (including the possibility of a defence related working party or taskforce) with the defence industry including research and development facilities, other existing defence related testing sites such as Port Wakefield, Salisbury and Gladstone, and with Government. This could include the Commonwealth Department of Defence, Invest SA, the Defence Science and Technology Organisation, industry representatives and *Invest Australia*. The South Australian Government has established a defence and SA Government working party
- Identify potential countries in the Asia Pacific region to offer sites for training facilities, location for testing defence equipment or to rent existing facilities
- Consider the option to establish an appropriate champions' network to support the expansion of the defence industries in the region including testing and trials (including defence vehicle testing)
- Provide relevant city/ regional information to the State Government to assist in the preparation of market briefs (as needed)
- Consider the proposed transport and services strategy with scope to broaden to include specialist defence related distribution and handling
- Utilise existing international defence industry networks including conferences and expos
- Assess existing infrastructure, including aerodromes, for suitability for fly in training and defence equipment testing for countries in the Asia Pacific region and domestic use
- Discuss with Invest SA any future opportunities in relation to the already started case for the relocation of the DNSDC to South Australia
- Support the Planned Amendment Review process (currently being undertaken across the region) and identify potential tracts of land that may be suitable for expansion and/or further investment including appropriate buffer zones and land use synergies
- Review transport and handling issues related to the movement of defence materiel (including State and Commonwealth legislative issues)

Relevant Studies for Further Information and Bibliography

Government of South Australia, Woomera Market

Brief, Department of Industry and Trade,
Adelaide

(Contact: Peter Neuhaus, Invest SA,
Tel 08 8303 2541)

Government of South Australia, Woomera

Australia, Government of South Australia,
Adelaide

(Available from: The Investment Manager,
Defence and Aerospace, Department of
Industry and Trade, GPO Box 1264, Adelaide SA
5000)

Invest SA (2000) State Government Support for the

Provision of Services to Woomera, Invest SA,
Adelaide

(Contact: Peter Neuhaus, Invest SA,
Tel 08 8303 2541)

Invest SA (1999) Defence Integrated Distribution

System Strategy Paper, Invest SA, Adelaide

(Contact: Peter Neuhaus, Invest SA,
Tel 08 8303 2541)

Tuohy, I., (1998) Paper: Aerospace Trials In The

Woomera Prohibited Area, presented at the 49th
International Astronautical Congress

Melbourne, 2 October 1998

(Contact: Peter Neuhaus, Invest SA,
Tel 08 8303 2541)

Upper Spencer Gulf Common Purpose Group (1999)

Strategic Directions, Discussion Paper, Upper
Spencer Gulf Common Purpose Group, Upper
Spencer Gulf

(Available from: Upper Spencer Gulf Common
Purpose Group, c/ Port Pirie Regional
Development Board, 85 Ellen Street, Port Pirie SA
5540)

Investment Potential: Education and Training

Strategy Rationale:

- Establishment of an education and cultural precinct in Whyalla
- Existing business incubator capacity in Whyalla
- Existing Indigenous-run Community Development and Employment Program
- Expertise and focus on mature age students and flexible learning for remote students
- International associations with overseas universities and students
- Links with major investment potential strategies (transport and services, health services, tourism, sustainable development, resource processing, primary industries, defence and aerospace)
- Significant research and academic focus involving health, sustainable development and aquaculture
- Synergies with existing industry sectors and individual businesses
- Well serviced with vocational and tertiary educational facilities within the region

Overview

The basis in developing this investment strategy is to work from existing assets already in the region and where possible, review associated assets from reports and submissions.

The concentration of TAFE campuses, the connections and established pathways linking TAFE with the University and specific industry training programs with the business and wider community

provide opportunities for direct investment and laying the foundation for attracting new investment into the region.

The Spencer Institute of TAFE has been awarded the 1999 Training Provider of the Year providing 'accessible and quality vocational education and training'.⁹⁴ The 17 campuses (three of which are in the Upper Spencer Gulf) and 22 study centres, located primarily in South Australia, attract over 10,900 students each year. In 1998, 971 interstate registrations were recorded with six from the newly developed international market. Approximately 40% of its programs are through flexible delivery and 'offers one of the state's broadest range of award courses'.⁹⁵

The University of South Australia in Whyalla is funded for 895 students, of that, close to 400 are studying off campus.⁹⁶ While meeting its core requirements of a tertiary education institution, it is establishing a consulting service especially in the area of health. As a result, the campus is likely to continue to attract a number of PhD students (currently 10.5) to the campus. This consulting and research focus furthers the University's reputation and also offers a source for income generation. It also potentially provides a basis for attracting new businesses to the region over the longer term. To develop closer international links, the University has established a student exchange program with Whyalla's sister city Ezhou in the Hubei region of China (with a second program planned for semester two this year) and has completed a training program for the Hubei Government.⁹⁷ The Whyalla campus has also undertaken some consultancy work with AusAid and the National Bank of Bhutan.⁹⁸

⁹⁴ Spencer Institute of TAFE

⁹⁵ Spencer Institute of TAFE

⁹⁶ University of South Australia, Whyalla campus

⁹⁷ University of South Australia, Whyalla campus

⁹⁸ University of South Australia, Whyalla campus

New Developments

- A processing certificate course for the mining industries to support the certificate in mining utilising the facilities in the region. This course is being developed with One Steel, WMC Limited, Flinders Power, Chamber of Mines and Henry Walker Eltin. The course intends to draw on the existing skilled pool of people in the region offering training for the mining industry both in Australia and overseas and will include practical training utilising the existing infrastructure assets and resources of WMC Limited pilot plant, Iron Baron and Iron Knob¹⁰²
- Establishment of a \$190,000 e-commerce centre at the University of South Australia's Whyalla Campus (funded through the Commonwealth Networking the Nation program)¹⁰³
- Preparation of the Whyalla IT Business Incubator project report reviewing IT industry options for Whyalla
- Building on the University of South Australia's Whyalla campus successful summer business school programs, the first winter business school in international business marketing will be held in 2000¹⁰⁴

Developing A Draft Investment Attraction Strategy for Education and Training

Education and training, and the associated industries of research, development, information technology and telecommunications are seen as an opportunity for both direct and indirect investment. The integration between schools, TAFE, the University and business and industry involvement utilising existing community assets, including the cities' sporting culture and facilities, further enhance the links for potential investment.

Consultancies	<p>Strategy: Establish a consultancy reputation for the University and TAFE to attract investment</p> <p>Actions: Source possible markets for consultancy work building on the existing resources of the University of South Australia's Whyalla Campus and vocational training programs through the Spencer Institute of TAFE. For example, consider consultancy work for aid agencies and others on specialist areas including rural and remote servicing and health</p> <p>Develop promotional material for national and international agencies and companies</p>
Engage Mature Work Force	<p>Strategy: Engage underemployed and unemployed mature age work force in the region</p> <p>Actions: Assess the existing skills and specialist skills in the region (especially specialist skills) Identify interest. While currently 399 people are receiving newstart mature age allowance in the region, it is suggested that there are others that would be suitable and interested in work and or training</p> <p>Work with existing training providers to develop appropriate programs to increase the availability of a stable, skilled and mature workforce</p> <p>Approach various government departments (both State and Commonwealth) and local resources including the regional Area Consultative Committee for advice to develop a program which builds on existing interest to obtain skills</p>

¹⁰² Spencer Institute of TAFE, Whyalla campus

¹⁰³ University of South Australia, Whyalla campus

¹⁰⁴ Business Faculty, University of South Australia, Whyalla campus

Strategy: Identify specialist areas to provide education and training utilising existing resources and industry (in both school, vocational and tertiary education)

Actions: Develop course/ training specialisation with existing industries, for example mining and resource processing, defence, health, tourism, aquaculture and agriculture etc with scope for expansion and the provision of specialist services

Support the cluster for resource engineering proposed by work undertaken on behalf of USGIT and consider opportunities for training specialist skills. For example, develop specialist skills and training in modularised construction from design through to construction, instrumentation and installation specifically for remote servicing

Promote expertise in rural and remote servicing in education and training developing national and international recognition (including flexible learning and technology based programs)

Continue to engage young people (school age) in the school-to-work programs providing specialist trades and academic training to complement industry sectors and proposed new developments. For example, to support the defence and aerospace industry, provide specialist courses in telecommunications and satellite recovery techniques. Also, draw on the substantial infrastructure and interest in the region in sport and look at utilising state-wide assets like football clubs, cricket associations and womens basketball to run mentoring and training programs in the region

Review and utilise local assets (like the currently disused high school in Port Pirie for alternative uses to support education and training) and extensive youth networks, associations and centres to contribute to future education and training strategies

Investment Potential: Fisheries and Aquaculture

Strategy Rationale:

- Existing education programs supporting the industry exist within the region
- Existing infrastructure to support the development of the aquaculture industry
- Natural capital with the waters of the Upper Spencer Gulf
- New policy framework for industry management and development created by the South Australian Government
- Public and private investment has already been contributed to the development of the industry
- Significant aquaculture industry in the wider region extending to the Eyre Peninsula
- Success in research and development developing new hatchery technology
- Synergies with the major investment potential strategies (transport and services, tourism, education and training and sustainable development)

Overview

The basis in developing this investment strategy is to work from the existing assets in the region and where possible, review associated assets from existing reports and submissions. Given that much of the area has traditionally been farming and pastoral region, this strategy could have been broadened to include general primary industries. However a view was expressed throughout the study that while the broadacre industries are important and the supporting industries in the region such as abattoirs (kangaroo, sheep and goat) are highly valued, new investment potential is

more likely in the fisheries and aquaculture industries. It should be noted that there has been investment in broadacre operations including new sheep breeds for meat production and research and investment in alternative industries including olives and quandongs in the southern Flinders Ranges and a variety of crops south of Port Pirie.

South Australia is the second highest producing state for edible fish, crustaceans and molluscs. In 1998/99 the economic impact of aquaculture in the State was \$181.1 million.¹⁰⁵ Over the next ten years, it is forecast that direct employment in aquaculture will be over 3,000. The current value of marine finfish is about \$200,000 per annum and seen as a 'rapidly emerging [industry] in the Spencer Gulf'.¹⁰⁶ The main industry constraints include: environmental issues, access to sites, finance, marketing, technical information, innovation infrastructure support and networking opportunities.

Current land based and sea cage aquaculture in the Upper Spencer Gulf utilises the natural and developed capital in the region. Spencer Gulf Aquaculture, located at the Flinders Power station site, utilises the warm water outflow from the station in its hatchery. Through trials at the hatchery with snapper and yellow tail kingfish, a successful technique and program has been developed to take the eggs through to fingerlings and recently, the hatchery had its first significant success with 'out of season spawning' for the yellow tail kingfish. Spencer Gulf Aquaculture was the first hatchery to spawn snapper commercially in South Australia and the first in Australia to spawn yellow tail kingfish.¹⁰⁷ The results of the trial have developed a technique that is in demand for other species. Currently there is interest from New Zealand, Cowell, Tumby Bay and further west along the Eyre Peninsula.

¹⁰⁵ Aquaculture Group Primary Industries and Resources South Australia (1999) The Economic Impact of Aquaculture in the Eyre Peninsula Region and South Australian 1998/99 p.iii

¹⁰⁶ Aquaculture Group Primary Industries and Resources South Australia (1999) The Economic Impact of Aquaculture in the Eyre Peninsula Region and South Australian 1998/99 p.iii

¹⁰⁷ South Australia Aquaculture Management, Whyalla

Existing Assets

- Access to deep water (20 m) 500 metres offshore in Fitzgerald Bay suitable for sea cage aquaculture
- Available sea cage licenses in Fitzgerald Bay
- Established aquaculture courses offered by the Spencer Institute of TAFE and industry specific training at Cowell High School with strong industry connections
- Existing operations in oyster, snapper, yellow tail kingfish and tuna farming
- Existing beta carotene operation in Whyalla
- Natural prawn spawning area (with designated commercial fishing)
- Natural waters of the yellow tail kingfish
- New technologies and successful trials in hatchery management
- Rapid development of the aquaculture industry in the Eyre Peninsula region (south and south west of the Upper Spencer Gulf) resulting in \$172 million direct financial output and 755 direct jobs in 1998/99¹⁰⁸

- Report on the Aquaculture Opportunities For the Far Northern Spencer Gulf by the Primary Industries and Resources South Australia (October 1998)
- Significant public sector infrastructure support
- Significant snapper fishing area (Whyalla hosts the Australian Amateur Snapper Fishing Championships in April each year)

New Developments

Since 1997, financial assistance through the Commonwealth Government's Rail Reform Transition Fund has been provided to further develop the aquaculture industry in the Upper Spencer Gulf region.¹⁰⁹ Recent projects undertaken in the region include:

- Trialling the hatching of yellow tail kingfish by Spencer Gulf Aquaculture¹¹⁰
- Construction of a groyne at Fitzgerald Bay¹¹¹
- Development of an aquaculture traineeship program

Existing Aquaculture Companies within the Upper Spencer Gulf region

Company	Location	Operation	Ownership	Product
Betatene Ltd	Whyalla	Extraction and processing beta carotene	Private	Biotechnology processors
South Australia Aquaculture Management	Whyalla	Sea cage aquaculture	Private	Yellow tail kingfish for domestic consumption and export
Spencer Gulf Aquaculture	Port Augusta	Hatchery	Private	Hatchery for yellow tail kingfish and snapper

¹⁰⁸ Aquaculture Group Primary Industries and Resources South Australia (1999) The Economic Impact of Aquaculture in the Eyre Peninsula Region and South Australian 1998/99 p.iii

¹⁰⁹ The Business Centre, Adelaide

¹¹⁰ Spencer Gulf Aquaculture, Port Augusta

¹¹¹ The Business Centre, Adelaide

- Potential development of up to five licenses (with the capacity for 12 sea cages/license) in Fitzgerald Bay¹¹²
- Development of a currently small scale marron farm in Whyalla
- Establishment and expansion of an oyster farm
- Exploration of new aquaculture species including crabs and rosafish (shellfish) and sea urchin roe
- Preparation of an Aquaculture Act by Primary Industries and Resources South Australia to develop sustainable framework with appropriate legislation and regulation to address environmental, multiple use and community issues for the development of the aquaculture industry

Developing A Draft Investment Attraction Strategy for Fisheries and Aquaculture

Current land based and sea cage aquaculture in the Upper Spencer Gulf utilises the natural and developed assets in the region. The existing operations within the region may offer a number of synergies for further investment.

Strategy: Utilise existing education and research assets in the region to further develop market potential for aquaculture in the region and identify specific research opportunities

Actions: Utilising the education and training facilities. For example, approach the business students at the University and TAFE and high school students in Cowell to conduct various research projects. This may include: evaluation of the aquaculture potential in the region; a value chain analysis for both the international and domestic markets; development of a marketing proposal for aquaculture in the Upper Spencer Gulf, assessment of the existing marine environment; and a review of the opportunity of land based aquaculture utilising saline waters. This could be linked with existing studies and research being conducted (for example by Primary Industries and Resources SA and other existing private research)

Access research and services from industry associations including relevant Cooperative Research Centres, centres of excellence, the Fisheries Academy and the Lincoln Marine Science Centre at Port Lincoln and The Lakes Centre for the Future in Gippsland, Victoria) (Possible contacts include: The Business Centre, Martin Hernen, Tel: 08 8463 3826, Client Manager, Marine Finfish, Carina Cartwright, Primary Industries SA, Port Lincoln, Tel: 08 8683 2519)

Utilise research facilities in the region (including the collection of data and industry start-up advice) and also visit various research centres and centres of excellence in the aquaculture industry, for example including operations in Tasmania and Darwin. This may assist in identifying potential pitfalls and assist in developing marketing strategies for the region to attract new investment

Consider opportunities to utilise existing technology in the region to support the aquaculture industry, for example the proposed e-commerce centre and the University of South Australia's Whyalla campus

¹¹² The Business Centre, Adelaide

Management

Strategy: Review industry development needs

Actions: Consider land use, access, buffer zones and proximity of other industries for aquaculture in the Planned Amendment Review

Encourage investment in the available leases and further development opportunities created by the hatchery and sea based aquaculture in the Upper Spencer Gulf

Develop strategies to service the domestic market, especially regions to the south around Port Lincoln with technology, research and product

Synergies

Strategy: Develop stronger links across the region for the aquaculture industry

Actions: Utilise existing networks, industry associations and Government assistance to develop closer relationships across the aquaculture industry in the region with the emerging operations in the Upper Spencer Gulf. These may include relevant industry associations, the South Australian Research and Development Institute (SARDI), Fisheries Research and Development Corporation, The Business Centre, Primary Industries and Resources SA and relevant Commonwealth departments including Agriculture Fisheries and Forestry - Australia and the Department of Transport and Regional Services amongst others

Establish and foster closer links with the education and training institutions including CDEP and the aquaculture industry

Engage providers of aquaculture industry services including technology, feed and equipment

Relevant Studies for Further Information and Bibliography

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(Available from: Upper Spencer Gulf Common Purpose Group, c/ Port Pirie Regional Development Board, 85 Ellen Street, Port Pirie SA 5540)

Investment Potential: Health Services

Strategy Rationale:

- Essential service for the region
- Established cross sector networks and integration of health service provision
- Industry services including rehabilitation servicing of national and multinational companies in the region
- Significant experience in remote servicing (tele and video consulting)
- Significant work force supported by established research facilities
- Specialist skills in rural, remote and Indigenous health
- Synergies with all major investment potential strategies (transport and services, resource processing, tourism, education and training, sustainable development, primary industries, defence and aerospace)
- Wellness focus in community health

Overview

The basis of this investment strategy is to work from the existing assets in the region and where possible, review associated assets from existing reports and submissions.

With a significant proportion of the world's population living in rural and regional areas with varying access to services and facilities, the work being done in the region offers the three cities in the Upper Spencer Gulf a potential competitive advantage to develop expertise and practical specialist methodologies in the field.

The health services offered include acute services, allied health, Indigenous health and rural and remote servicing. Health and community services

are significant employers in the region with 2,283 people involved in the industry across the three cities.¹¹³

The health services are strongly connected to the other investment strategies for the region. While many of the health service providers in the Upper Spencer Gulf region are publicly funded, investment potential may exist in the commercialisation and export of successful and tested community health models, expertise in rural and remote health management, Indigenous health, lead monitoring programs, rehabilitation and flexible education programs in health services including nursing and social work.

Existing Assets

- Client needs requiring diverse specialist services
- Commitment to training by the three hospitals across the region
- Concentrated knowledge and experience from service providers and research organisations
- Concentration and expertise of health service professionals and well utilised facilities
- Established links with business, industry, education, training and community sectors
- Expertise in rural and remote servicing
- Location for the South Australian Centre for Rural and Remote Health (SACRRH) providing expertise in research and new methodologies in service provision (within the University of South Australia's Whyalla campus)
- Royal Flying Doctor Service Base

¹¹³ Australian Bureau of Statistics, Spencer Gulf

- Significant infrastructure (three hospitals and related community health services)
- Significant regional employers
- Specialist areas in servicing Indigenous, child and youth health and rehabilitation
- Stable workforce in client services, nursing and clerical

Existing Health Service Providers in the Upper Spencer Gulf

Organisation	Location	Region	Ownership	Service
Aboriginal and Torres Strait Islander Commission (ATSIC)	Port Augusta	Port Augusta, Port Pirie, Whyalla and the Pitjantjatjara Lands, Flinders Ranges including Hawker, Quorn, Copley and Maree, Coober Pedy and Oodnadatta	Public and private	Aged care and health services including environmental health, substance misuse and health cooking programs and youth services
Environmental Health Care	Port Pirie	Port Pirie	Public (SA Department of Human Services)	Specifically lowering blood level counts in children and general lead awareness
Port Augusta Hospital and Regional Health Services Inc.	Port Augusta	Port Augusta and the Northern and Far Western region of South Australia	Public	82 bed hospital with five additional day beds, acute and specialist services, primary health care, occupational health, safety and injury management. Also under management 40 bed nursing home, 50 bed Ramsay Village, 21 Quorn Aged Care and 8 Aged Care
Port Pirie Regional Hospital	Port Pirie	Port Pirie and the Mid North area of South Australia	Public	104 bed hospital, acute and specialist services, primary health care, wellness and community health
Royal Flying Doctor Service	Port Augusta	South Australia and the Northern Territory	Public with private sponsorship	Emergency services

Existing Health Service Providers in the Upper Spencer Gulf (cont)

Organisation	Location	Region	Ownership	Service
South Australian Centre for Rural and Remote Health	Whyalla	Northern and Far Western region of South Australia	Joint venture between the University of Adelaide, University of South Australia funded by the Commonwealth Department of Aged Care	Health education and research
Whyalla Aged Care	Whyalla	Whyalla	Public with patient contribution	48 nursing home beds, 76 hostel care, 6 individual living units
Whyalla Hospital and Health Services	Whyalla	Northern and Far Western region of South Australia	Public (with fee paying services)	82 bed hospital and 20 day surgery beds. Acute and specialist services, primary health care, occupational health, safety, rehabilitation. Only regional South Australian hospital providing prosthetics and orthotics treatment

New Developments

- Potential \$1 million planned upgrade of the Port Augusta Royal Flying Doctor Service base in Port Augusta¹¹⁴
- Major renovation and upgrade of SACRRH's Family Practice Network 'to provide state of the art consulting and learning environment'¹¹⁵
- \$1 million provided to SACRRH from the Commonwealth for a four year program (commencing in 2000) in primary health research and evaluation (which will lead to two more full time jobs)¹¹⁶
- SACRRH has attracted three international doctors to the region and offers regional work placement opportunities for John Flynn scholars and 4th year medical students from South Australian universities
- School of Nursing at the University of South Australia's Whyalla campus
- The integration of Whyalla Hospital and Port Augusta Hospital to combine human resource management, financial and information technology services, and to provide services management and assistance to the more remote hospitals

¹¹⁴ Royal Flying Doctor Service, Adelaide¹¹⁵ SACRRH University Family Practice Network¹¹⁶ Head of Centre, SACRRH, April 2000

- The Whyalla City Council has completed the \$4 million Whyalla Health and Leisure Centre providing a range of health services including a hydrotherapy pool
- Video and tele consulting facilities to the more remote regions of South Australia including Coober Pedy, Oodnadatta and Maree
- Whyalla hospital employs its own tradespeople (electrician, plumber, refrigeration, technician, fitter and turner)
- Whyalla Hospital has a close working relationship with SACRRH and the University of Whyalla's campus through the School of Nursing and the School of Social Work
- Whyalla Hospital has developed the RESTART (rehabilitation program). Clients include One Steel, Henry Walker, Santos and the Whyalla City Council

Developing A Draft Investment Attraction Strategy for Health Services

The further development of the health services in the Upper Spencer Gulf, as it currently stands, is largely reliant on public expenditure both State and Commonwealth. However, over the last few years, the closer integration of the hospitals and services in health management in the Upper Spencer Gulf and the establishment of SACRRH in 1997 provide possibilities for the Upper Spencer Gulf region to attract interest from private sector investors.

Champion Network

Strategy: Explore the potential to establish a health services and broader economic development champion or patron network that targets respected leaders of the established health services and other target industry sectors in the region

Actions: A cross sector champion network could be established to develop broader networks and identify new opportunities. For example, a network may include: the Royal Flying Doctor Service, visiting specialists, chief executives of the hospitals, one person from the proposed resource processing champion network, Government (Local, State and/or Commonwealth), Indigenous health professional and an aged care representative

Private Investment	<p>Strategy: Develop a strategy to attract private sector investment</p> <p>Actions: Define areas of expertise (possibly utilising the proposed champion network)</p> <p>Assess options through a feasibility assessment. For example, explore opportunities with health IT intermediaries such as the Collaborative Health Informatics Centre (CHIC) and the Centre for On-Line Health at the University of Queensland. CHIC has a client base of 500 Australian small to medium enterprises and multinational corporations operating in the health IT industry and assists companies with existing Australian operations to expand their business overseas or to arrange strategic alliances with multinational companies in Australia</p> <p>Engage appropriate partners to develop a policy framework for the commercialisation of opportunities using mainly public sector infrastructure and resources</p> <p>Develop a locally based landmark remote health pilot project</p> <p>Develop a strategy for commercialisation (and identify resources to assist, including government agencies and the Upper Spencer Gulf export manager)</p>
	<p>Strategy: Promote the region as a national and international servicing and specialist research centre for rural and remote health</p> <p>Actions: Discuss with SACRRH the needs and possible opportunities in developing its community health model for export. Possible countries suitable for the existing community health model may include Canada, United States, United Kingdom and New Zealand. Discuss with <i>Invest Australia</i> the development of an investment brief for the services. Also, evaluate the potential of SACRRH’s community health model for developing countries (initial discussions with Professor David Wilkinson, Head of Centre at SACRRH suggest that the program could be tailored to meet specific in-country needs). Possible strategic partners may include United Nations agencies including the World Health Organisation</p> <p>Utilise the existing and comprehensive experience in managing Indigenous health issues and services with ATSIC, Aboriginal Corporations and Aboriginal Health Units in the region</p> <p>Target investment to attract multinational companies (like Mayne Nickless), global health providers and governments</p> <p>Market the region as a specialist centre/ facility in rural and remote health to attract relevant professionals to specialise in the health services sector</p>
	<p>Strategy: Explore opportunities for retaining and attracting retirees</p> <p>Actions: Identify housing options for older people (interest by potential residents has identified the need for two additional independent living units in Whyalla)</p> <p>Assess opportunities for private investment for retirement facilities (including the proposed developments at the Eco-City core site)</p> <p>Consider appropriate marketing to target retirees to relocate to the cities in the region (during this study, real estate agents reported increasing interest by retirees, especially in Alice Springs)</p>

Strategy: Utilise the hidden assets in the region

Actions: Promote appropriate community management of resources. For example, the approach used by the Davenport Community in Port Augusta in engaging the community in the administration and management housing (formerly administered by the South Australian Housing Trust) is resulting in well-managed and successful housing

Utilise and promote the concentration of academic resources in the region. For example, SACRRH has 17 staff, five with PhD qualifications and another two staff will be PhD qualified within a year

Use significant employers to assist in economic development and information sharing. For example, the hospitals are among the larger employers in the region and their awareness and contribution to broader economic issues means that many in the cities would be aware of the developments – much of it through word of mouth. Combined, the hospitals and the health and community sector employ 2,283 people

Utilise alternative sources of funding for development of projects. For example, the Indigenous Communities Foundation or The Myer Foundation may be able to assist with projects

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(Available from: Upper Spencer Gulf Common Purpose Group, c/ Port Pirie Regional Development Board, 85 Ellen Street, Port Pirie SA 5540)

Investment Potential: Resource Processing

Strategy Rationale:

- Appropriate infrastructure, service and suppliers exist to support the resource processing industries
- Exploration potential of over 500,000 km²¹¹⁷
- History of community support in the resource processing industries
- Locally based companies and capabilities in the work force located within the region
- Multinational companies already operating within the region servicing both the domestic and export market
- Significant intellectual capital available from research studies prepared specifically for the development and further exploration of mining and resource processing in northern South Australia
- Synergies with the major investment potential strategies (transport and services, health services, tourism, education and training and sustainable development)

Overview

The basis in developing this investment strategy is to work from the existing assets already in the region and, where possible, review associated assets from existing reports and submissions.

Significant research in the minerals exploration and processing for the northern region of South Australia region has been completed.¹¹⁸ The findings suggest that northern South Australia has

‘substantial potential as a mining province’.¹¹⁹ This, coupled with the recent exploration and development of resource processing facilities of WMC Limited’s Olympic Dam operation, the exploration by Helix Resources, construction of the South Australian Steel and Energy (SASE) pilot plant at Whyalla and the potential site for the SAMAG magnesium smelter at Port Pirie creates further opportunities for investment.

These investment opportunities, utilising the intellectual, economic and social capital already in the region, could pursue mining and resource processing companies to locate, mine and value add in the region. While this strategy is vulnerable to the vagaries of international business with exploration heavily reliant on commodity prices and relative dollar values, there is potential, as demonstrated by the Gawler Craton study, to attract further private investment.¹²⁰

Development and further exploration within the region may attract investment for several reasons. One, to supply feed stock to the established and the establishing resource processors in the region.¹²¹ Second, to develop new synergies with the existing resources (some of which, by traditional mining standards, may become increasingly attractive due to the new technologies available to process lower grade ore) and processors in the region, such as the SASE plant and SAMAG. From the Gawler Craton study, it is estimated that the potential value of the developments could yield a gold value of \$900 million per year.¹²²

¹¹⁷ Dainis, 1994 (b) The Northern Spencer Gulf Resource Processing Strategy, The Study of Regional Economic, Social and Environmental Factors 1993/4, p.1

¹¹⁸ Northern Spencer Gulf Resource Processing Strategy (1994) and the Gawler Craton Infrastructure Advance Planning Study (1999)

¹¹⁹ Woodward-Clyde et al. 1999, Gawler Craton Infrastructure Advance Planning Study, Section 1-1

¹²⁰ Woodward-Clyde et al. 1999, Gawler Craton Infrastructure Advance Planning Study

¹²¹ Woodward-Clyde et al. 1999, Gawler Craton Infrastructure Advance Planning Study, Section 3-2

¹²² Woodward-Clyde et al. 1999, Gawler Craton Infrastructure Advance Planning Study, Section 3-2

Existing Assets

- A range of specialist smaller companies with experience in construction, fabrication and engineering with the ability to be flexible and responsive to customer needs
- Availability of a suitably skilled work force with a range of specialist skills
- Demonstrated community support
- Existing industrial infrastructure and associated industries in Port Pirie, Port Augusta and Whyalla
- Existing power generation in the region
- High evaporative levels of between 1900 -2600 mm per annum in the Upper Spencer Gulf region provide an advantage in various forms of processing and management of waste products¹²³
- Intellectual capital, experience and resources from education and training institutions and programs
- Low cost available land in the three cities
- Mineral deposits in the northern region include: barite, coal, copper, gold, natural gas and oil, heavy mineral sands, iron ore, jade, lead, limestone, magnesite, marble, dolomite, opal, palygorskite, salt, silica, silver, uranium and zinc¹²⁴
- National and multinational companies already operating within the region servicing both the domestic and export market
- Proximity to the resource
- Significant investment by private companies has created new opportunities for value adding
- Synergies and support from the existing (and proposed) transport and servicing facilities, education and training and health services

Existing Resource Processing Companies in the Upper Spencer Gulf Region and Northern South Australia

Company	Location	Project/ Division	Ownership	Product
One Steel Limited	Whyalla	Long Products Division	Listed ASX	Steel products – columns, rail, beams,
Flinders Power	Port Augusta	Electricity generation	Undergoing privatisation	Electricity
Heathgate Resources Pty Ltd	North east of Port Augusta	Beverley Uranium mine	Private	Uranium
Pacific Salt	Whyalla		Private	Salt for domestic consumption
Pasminco	Port Pirie	Smelter	Listed ASX	Lead, zinc and silver
Santos	Port Bonython	Fractionation Plant	Listed ASX	Gas, oil and naphtha
WMC Limited	Roxby	Olympic Dam	Listed ASX	Copper, uranium

¹²³ Dainis, 1994 (a) The Northern Spencer Gulf Resource Processing Strategy, The Information Paper, p.64

¹²⁴ Primary Industries and Resources SA, 1998

New Developments

- Establishment of the cluster project in the resources sector proposed through work commissioned by USGIT
- Initial exploration of a marble resource just south of Leigh Creek
- Potential to stimulate enhancements in infrastructure for the region including the extension of a gas pipeline from Victoria to South Australia, and the development of another power station in the region
- Recent review and forecast of estimated skill requirements relative to this sector in mining and the value adding support industries of fabrication, construction and engineering¹²⁵
- Recently commissioned Murray Basin Mineral Sands Infrastructure Planning Study by the Commonwealth Department of Industry, Science and Resources, the Victorian Government through Natural Resources and Environment, the South Australian Government through Primary Industries, Natural Resources and Regional Development and the New South Wales Government through Mineral Resources¹²⁶
- The synergies offered with the existing resources processing companies has contributed to the establishment of the South Australian Steel and Energy (SASE) project. The pilot plant is trialling innovative technology for the production of pig iron in Whyalla (construction commenced March 2000, with completion expected by July 2000). The initial investment is \$15 million for the research and development phase, including \$6.5 million through the Commonwealth's R&D Start Program. If the trial is successful, full commercialisation of the project could result in a potential investment of \$1.2 billion and the

potential of 500 direct jobs producing 2.4 million tonne per annum pig iron to be located in either Whyalla or Coober Pedy

- The Upper Spencer Gulf region has been identified by SAMAG Limited as the preferred location for a magnesium smelter. This would utilise the natural resource of high quality magnesite north of Leigh Creek and the three cities' proximity to the ore body with their established infrastructure and work force. The capital costs of this project is expected to be close to \$640 million and is estimated to create 300 direct jobs¹²⁷

Developing A Draft Investment Attraction Strategy for Resource Processing

The success of resource processing as investment potential will require considerable effort and is vulnerable to the vagaries of international business due to the globalised nature of resource processing industry, resources in other countries and the national and local operating environment. Some of the major determinants of the development of this investment opportunity are subject to continued private investment in exploration, the relative value of the Australian dollar, commodity prices, access to markets, competitively priced energy, available transport and services and the regulatory operating environment.

In the present transitional stage within the region given the current operating environment, there may be some additional opportunities and potential with leveraging through existing operations to attract further resource processing investment. If the development of the Gawler Craton region occurred, the Upper Spencer Gulf region is well placed to benefit, provided it can promote and deliver appropriate comparative advantages in the services required.

¹²⁵ Complete Personnel, 1998, Skills Audit for Port Pirie, Whyalla and Port Augusta

¹²⁶ Coordinated by Minerals Competitiveness and State Relations, Coal and Minerals Division, Commonwealth Department of Industry Science and Resources, Canberra

¹²⁷ Delta Electricity and Access Economics Investment Monitor Number 41 March 2000 p.56

Champion Network	<p>Strategy: Establish a mining and resource processing champion or patron network that targets the respected leaders of the established resource processors in the region and includes an Indigenous representative. It may also be appropriate to include both State and Commonwealth Government departments like Primary Industries and Resources SA, Department of Industry, Science and Resources and appropriate planning and investment facilitation agencies</p> <p>Actions: This network may draw on existing companies operating in the region and include One Steel, Pasminco, and WMC Limited</p> <p>ATSIC's Regional Council Commissioner could be asked to suggest appropriate names for the Indigenous representative</p> <p>The benefit to the Upper Spencer Gulf region includes a global network, credible endorsement and the potential to act in an advocacy role for the region</p>
Cluster	<p>Strategy: The further development and support of the cluster for resources sector proposed through work undertaken on behalf of USGIT</p> <p>Actions: While the project is in its early days, three champions, one in each city, have been identified and welcome enquiry by companies in the region interested in being a part of this project. (For further information contact the Regional Development Board in each city)</p>
Housing	<p>Strategy: Review of available housing for young professional people that may be attracted to the locally based value adding companies for the resource processing industry</p> <p>Actions: The South Australian Housing Trust Regional Manager in Whyalla has indicated that discussions related to housing to assist investment would be welcomed</p>
Mineral Sands	<p>Strategy: Establish dialogue with consultants, Sinclair Knight Mertz for the Murray Basin Mineral Sands Infrastructure Planning Study</p> <p>Actions: Arrange a meeting to present and inform the consultants of the earlier work for the titanium dioxide processing facility in Whyalla and findings from the draft environmental impact statement. (Contact: Sinclair Knight Mertz, via Coal and Mineral Industries Division, Commonwealth Department of Industry, Science and Resources)</p> <p>Gather all relevant studies and information for the Mineral Sands project</p> <p>Contact Minerals Competitiveness and State Relations, Coal and Mineral Industries Division, Commonwealth Department of Industry Science and Resources in Canberra (Tel: 02 6213 7178)</p>

Strategy: Utilise the hidden assets in the region to leverage investment opportunities

Actions: For example, promote the servicing and value adding of WMC Limited's Olympic Dam mine and the production and handling at Pasminco with the export of lead bullion and zinc ingots to Asia

Mobilise resources and foster effective networks and regional champions
Effective networks could include current and past industry leaders (some of whom have a close relationship to the region) and State and Commonwealth Government representatives

Utilise and partner with the existing and established networks of the regional Aboriginal Corporations and ATSIC's regional office in Port Augusta

For example, the Buttlingarra and Bungala Aboriginal Corporation's have had success in gaining employment for Aboriginal workers at both WMC Limited's Olympic Dam mine and the Beverley Uranium Mine. Eight people have been placed at both mines this year and a further five are currently being trained at Kalgoorlie for WMC Limited

Access appropriate mechanisms for industry support

For example, where appropriate, take advantage of the State Government's Planning Approval process for Major Projects (through the Department of Industry and Trade) and the Commonwealth's Major Project Facilitation Process (through *Invest Australia*) to ensure that government processes for the proponents, including the identification of additional infrastructure requirements, can be managed

Demonstrate community support and familiarity with mining and resource processing. For example, the establishment of 'Port Pirie Proud' in March 2000 supporting existing industry and attracting new investment

Examine ways to add value to waste product

Utilise the necessity of mine site regeneration and management of mining waste to attract research and investment. For example, the School of Resource Science at the University of Southern Cross in Lismore has been involved in developing techniques to manage acid mine drainage and acid sulphate soils using a 'waste' product of specially tested soil (this technique has since been commercialised). Mining companies are increasingly broadening their scope in managing and minimising environmental degradation and are committing significant financial resources. The existing resources within the region combined with the work of the University might provide an avenue for further discussion and development of a strategy

Utilise alternative sources of funding to support community development, adding value to the region's social, economic and environmental capital. For example, One Steel, WMC Limited and Pasminco all have Foundations with a philanthropic focus. For example Normandy Mining Limited is a major sponsor of the newly opened Australian Aboriginal Cultures Gallery at the South Australian Museum. Other sponsors include Thiess Contractors (involved with the SASE project in Whyalla) and Hugh H Morgan's individual contribution

Discuss potential links with the education and training strategy and health services strategy

Review proposed developments by the community in Iron Knob for a combined mining and tourism development and consider broader opportunities for mining and resource processing industry development

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Investment Potential: Sustainable Development

Strategy Rationale:

- Existing environmentally focussed projects have been established in the region
- Increasing legislative requirements in relation to environmental management
- Potential to diversify the existing industry base
- Region wide focus to combat potential development impediments or restrictions (water and energy limitations)
- Significant intellectual capacity and research facilities within the region
- Significant investment in environmental projects by multinational companies
- Synergies with the major investment potential strategies (health services, tourism, education and training, resource processing and primary industries)
- To support region wide land and marine environment protection and management

The investment opportunity, utilising the intellectual, economic and social capital already in the region, would pursue further development, commercialisation and possibly production of the existing and emerging projects. The Upper Spencer Gulf region and the three cities have a long history of resource processing, dating back to 1889.¹²⁸ In recent years, there has been a concerted effort to counteract some of the adverse perceptions of the cities to support the development of the sustainable management of natural resources, diversify the industry base and utilise existing resources.

The further development of this strategy may attract investment for several reasons. These include the suitability of the climate for sun and wind based renewable energies generation, significant research projects already undertaken within the region, suitable and available land for projects requiring trials and facilities for construction, increasing legislative environmental requirements and corporate responsibility, growing community interest and the opportunity to create new business and industry diversification using ecologically sustainable development principles.

Overview

The basis in developing this investment strategy is to work from the existing assets already in the region and where possible, review associated assets from existing reports and submissions. Sustainable development in this context includes the environmental projects that have undergone significant research and/or are already being undertaken in the region. These projects include solar energy and other renewable energy technology, water resource management including reuse and desalination, conservation and rehabilitation of land and marine biology, environmental protection and arid zone and marine plant physiology research.

Existing Assets

- 300 days of sunshine per year
- Access and proximity to the environments of the Lake Eyre basin, the Flinders and Gawler Ranges, arid zone rangelands and marine environments
- Access to the resources and support of established research and educational organisations including the University of South Australia (supporting the proposed node for the Cooperative Research Centre in renewable energy in Whyalla) and the Royal Adelaide

¹²⁸ <http://www.sa.gov.au/information/saybhist&chron.pdf>

- Botanical Gardens and industry projects (Pasminco Port Pirie Smelter has for the last six years been trialling tree species to grow in reclaimed land)
- Anecdotal evidence suggesting there is a decline in the quantity of potable water in northern South Australia
 - Available land for trialling new technologies
 - Evaporative conditions
 - Existing infrastructure and resources
 - Extensive established networks with industry, international and Australian universities and government departments
 - Industrial and mine site rehabilitation projects and requirements
 - Research including working papers and pre-feasibility studies on the Whyalla Solar Oasis project (renewable energy and water desalination) and marine environment protection
 - Significant expenditure and expertise by resource processing industries in environmental management. For example, Pasminco Port Pirie Smelter and One Steel have significant programs for site environmental management
 - Significant research and monitoring in climatic conditions (solar and wind)

Existing Sustainable Development Activities in the Upper Spencer Gulf

Organisation/ Association	Location	Project/ Division	Ownership	Product
Arid Land Centre for Urban Ecology	Whyalla	Education	Whyalla City Council (public)	Environmental education
One Steel	Whyalla	Environmental management	Listed ASX	Minimisation of waste and revegetation
City of Port Augusta (Council)	Port Augusta	Environmental	City of Port Augusta (public) with private investment	Sewerage water reuse (DIT may assist with this project)
Collex	Whyalla	Waste recycling	Private	Waste transport disposal/treatment
Eco-City site	Whyalla	Environmental	Whyalla City Council	Available subdivided land
Pasminco Port Pirie Smelter	Port Pirie	Environmental	Listed ASX	Water reuse, revegetation, waste minimisation
Quorn Bushcare Support Base (Greening Australia)	Quorn	Landcare	Public	Vegetation and environmental projects
Spencer Plastic Recyclers	Port Pirie	Recycling	Private	Supply of recycled plastic products
The Australian Arid Lands Botanic Garden	Port Augusta	Development and expansion	City of Port Augusta	Arid land botanical research and tourism
Whyalla City Council	Whyalla	Wind monitoring	Whyalla City Council	Mapping of wind speed at airport

Existing Sustainable Development Activities in the Upper Spencer Gulf (cont)

Organisation/ Association	Location	Project/ Division	Ownership	Product
Whyalla City Council	Whyalla	Environmental	Whyalla City Council	Sewerage water reuse
Whyalla Conservation Park	Whyalla	Vegetation conservation	Whyalla City Council	Demonstration and tourist site
Whyalla Solar Oasis	Whyalla	Renewable energy and desalination	Private	Solar electricity and water

New Developments

- Feasibility assessment of the Whyalla Solar Oasis project using technologies to create renewable energy and water desalination. This may also lead to the manufacturing of the components in the region¹²⁹
- The Whyalla City Council has developed an EcoCity concept, which is a residential and commercial urban development project based on the principles of ecological sustainable development. The core site is located in the geographical centre of the city. The EcoCity core site was developed in part from awareness of projects undertaken in other parts of the world and commitment by the Whyalla City Council to provide 'a demonstration site for best practice sustainable building and urban design'.¹³⁰ The Buddhist Meditation Centre is already built and plans are underway for further buildings, including the potential to construct up to 90 independent living units.¹³¹

Developing A Draft Investment Attraction Strategy for Sustainable Development

Human use has highlighted the need for more effective sustainable management techniques. Mining and resource processing related environmental management initiatives in the region combined with existing projects provide a basis for developing a sustainable development strategy and an environmental management sector within the region. While some of this work is in the early stage of the commercialisation process, investment opportunities exist in the support and feasibility stages, which, with appropriate results, should assist in the commercialisation of selected sustainable development projects for the region.

¹²⁹ Whyalla Solar Oasis

¹³⁰ Whyalla City Council

¹³¹ Whyalla EcoCity Development Core Site brochure

Marketing

Strategy: Develop a marketing strategy for sustainable development (demonstrating a 'whole of region' approach) to combat adverse perceptions

Actions: Identify a marketing strategy (or target) for the cities. For example, an industry recognised as environmentally friendly by 2030

Where possible, review and expand links and synergies for mutual benefit of existing projects

Bring together key people involved in projects related to sustainable development. For example the proposed Australian Arid Research Centre may benefit with the combined resources from the Solar Oasis project

Link existing industry (including One Steel, Pasminco and WMC Limited) with other sustainable development projects. WMC Limited has already provided funding to the Australian Arid Lands Botanic Garden

Prioritise Investment Opportunities

Strategy: Develop a united strategy for the development of sustainable development projects

Actions: A way forward could be to:

Identify the current status of the project (pre-feasibility/ feasibility/ commercialisation)

Decide an anticipated time frame (short, medium, long term)

Assess the potential opportunities for commercialisation - national and international (including export potential)

Identify which projects have the maximum intellectual property, resources and networks/ associations (local, national and international)

Contact AusIndustry to discuss the COMET and other related programs to assist with research, development and commercialisation of projects (Contact: AusIndustry Tel 08 8406 4712)

Depending on the status of the project with *Invest Australia* and other appropriate partners, develop an investment brief for proposals close to commercialisation

Provide a unified (cross-city) approach to prospective investors through joint promotion and public commitment to the projects selected

Through the Planned Amendment Review, identify suitable land for industry buffer zones for possible carbon sinks and other environmental projects. This could be a 'point of difference' for investors by making land available for purchase specifically to manage and minimise potential environmental degradation from their industries

Strategy: Review the Australian Arid Research Centre proposal and, if appropriate, integrate its aims and principal objectives more closely with the significant tourist experience at The Australian Arid Lands Botanic Garden in Port Augusta

Actions: This integration could increase its attractiveness and scope for potential investors, both domestic and international, and assist in meeting the stated aims of the USGCPG to establish closer links with appropriate Cooperative Research Centres (CRCs)

To further this action, review existing CRCs and consider links with existing education and training facilities locally, within the state and interstate. Overseas links may also be appropriate especially with those countries/regions facing similar climatic and environmental issues

Strategy: Utilise the hidden assets in the region:

Actions: Utilise and combine the substantial and influential networks and resources. For example both the proponents for the Arid Land Research Centre and the Solar Oasis project have held discussions with the Ben Gurion University of the Negev in Israel – considered a pre-eminent research organisation of practices and methods for sustainable development

Form closer associations with new and sustainable industries. For example, create partnerships with the developing film industry, mostly in the Northern area of the Flinders Ranges from Hawker to Leigh Creek. This link offers excellent national and international exposure for the region and service and logistics handling opportunities for the three cities. Closer association may create and further diversify the economic base

Build professional working links with similar projects. For example, a link has been formed with members of the Broken Hill Tourist Association and Whyalla. Utilise the established links with Broken Hill to establish a closer relationship with Cockburn (50 km west of Broken Hill) where the community is reportedly developing a similar eco-city style for residential building as Whyalla. The concentration and resource sharing may make the project more substantial and attractive to investors

Encourage and utilise the advice from visitors. The Australian Arid Lands Botanic Garden attracts approximately 330,000 visitors each year and where possible, gathers information via the Visitors Survey. In September 1999, visitors from Arizona suggested to “expand the gardens - develop relationships with US institutions such as the Boyce Thompson Arboretum, Apache Jurret or the Sonora Desert Museum”. Establishing international links where commonalities exist such as climate and vegetation can strengthen proposals seeking investment and increase the available opportunities for support

The issue to decentralise public sector employment and base offices in the regions was raised at the Regional Forums Australia Programme in Whyalla in 1999. Particular reference was made to attract the departments of the Commonwealth Scientific and Industrial Research Organisation (CSIRO). CSIRO, in its formal response, listed a number of conditions. These include: new and major research needs requiring a fixed presence, opportunities for working in collaboration and sharing investment with local, regional, State or Federal agencies, significant on-going funding support for its presence in an area from some of these sources or from private interests directly

The combination of sustainable development projects may provide the opportunity for discussion with CSIRO to support the proposed Arid Lands Research Centre and renewable energy focus of the region

Contact Flinders University in Adelaide to discuss any opportunities to link with the newly formed Gunnerman Pollution Centre utilising technologies and procedures established in the region to combat pollution. In December 1999, the establishment of the Gunnerman Pollution Research Centre was announced with a \$1.5 million donation from Dr Rudy Gunnerman, a United States environmentalist. The Centre’s purpose is to provide information to combat local and international pollution problems

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Investment Potential: Tourism

Strategy Rationale:

- An existing range of tourism experiences (industrial, industry specific, Indigenous and natural) are already offered in the region
- There are established tourism operators in the region
- New investment to provide additional tourist experiences has commenced
- Local government and community interest and support for the development of tourism
- Synergies with the major investment potential strategies (transport and services, health services, sustainable development, education and training, resource processing and primary industries)

investment in infrastructure that the visitor experience will not be of a sufficient standard to satisfy expectations and may be detrimental to industry growth'.¹³³

Existing tourist experiences in the Upper Spencer Gulf region have often been formed from an existing industry value adding. These have then been expanded and new opportunities created by the need to provide information and service to visitors and to encourage short stays. Tourist opportunities offered include viewing existing industrial operations (One Steel and Flinders Power tours), industry specific tourism experiences with the School of the Air, the Royal Flying Doctor Service, the soon to be established reception centre for Spencer Gulf Aquaculture, Indigenous tourism operations, natural assets of the Flinders and Gawler Ranges, the Spencer Gulf waters and proximity to the Eyre Peninsula.

The tourism industry, especially the organisations, associations and peak bodies servicing the Upper Spencer Gulf region is in a transition phase. This is in part due to the amalgamation and subsequent divestment of the Flinders Ranges and Outback South Australian Tourism Inc. activities into broader goals of the South Australian Tourism Commission, the recent review of tourism in the region, the release of the State Tourism Infrastructure Plan suggesting in part, that 'too many agencies play a role in tourism development, often resulting in a lack of specialist tourism competencies and networks and the differing focus within each of the cities as to the impact achievable through increased tourism spending'.¹³⁴

Within the cities, there are mixed views as to the potential tourism can offer. Some believe the cities should become more of a servicing centre for tourism opportunities rather than tourist centres themselves while others support increased

Overview

The basis in developing this investment strategy is to work from the existing assets already in the region and, where possible, review associated assets capital from existing reports and submissions.

The South Australian tourism industry generates \$2.7 billion annually which supports approximately 32,000 full time equivalent jobs and contributes \$1.5 billion in export earnings.¹³² Significant local government spending across the cities supports a range of facilities and services for visitors including tourist information centres, guide books and specialist activities.

Findings from the recent South Australian Tourism Commission Infrastructure Report suggest that many regions have become increasingly reliant on tourism income and as a result, the Infrastructure Report suggests that 'without significant

¹³² South Australian Tourism Commission (1999) 1999/2000 Summary State Tourism Infrastructure Plan p.5

¹³³ South Australian Tourism Commission (1999) 1999/2000 Summary State Tourism Infrastructure Plan p.5

¹³⁴ South Australian Tourism Commission (1999) 1999/2000 Summary State Tourism Infrastructure Plan p.iii

spending to help create greater tourist sites and facilities within the cities.

However, working within this mixed framework of community aspirations, there are opportunities to improve existing operations, options to more closely integrate tourism experiences across industry sectors and improve tourism servicing to the broader region.

Existing Assets

- Climate
- Development of the Cuttlefish Capital of the World (Whyalla) as an eco-dive and tourist destination.
- Existing operations in industrial, industry specific and Indigenous tourism experiences
- Historically significant region
- Natural assets with proximity to the Flinders Ranges, Gawler Ranges and the Spencer Gulf
- The cities’ close proximity to national highways
- The restoration of the Pichi Richi Railway and The Original Ghan
- Tourism infrastructure including road, rail, air, accommodation and associated services
- Two internationally recognised regular interstate passenger services travel through Port Augusta and to within four km of Port Pirie
- Volunteer culture supporting tourism development

Significant Existing Tourism Experiences in the Upper Spencer Gulf Region

Operation	Location	Experience	Ownership	Product
One Steel	Whyalla	Industrial tour	ASX Listed	Steel making
Flinders Power	Port Augusta	Industrial tour	Private	Power station tour
Homestead Park Pioneer Museum	Port Augusta	Museum	City of Port Augusta	Railway and pastoral museum
Mt Laura Homestead	Whyalla	Historic homestead	National Trust	Museum type experience
National Trust Museum	Port Pirie	Showcasing Port Pirie’s past	Port Pirie Regional Council	Museum
Port Pirie Tourism and Regional Art Gallery	Port Pirie	Tourist information and gallery	Port Pirie Regional Council	Tourist information, historical, local artists and travelling exhibitions
Royal Flying Doctor Service	Port Augusta	Remote health servicing	Private	Tour of base
The Australian Arid Lands Botanic Garden	Port Augusta	Environmental	City of Port Augusta	Arid land botanical research and tourism
Wadlata Outback Centre	Port Augusta	Interpretive centre and tourist information	City of Port Augusta	Historical experience (Indigenous and European)
Whyalla Maritime Museum	Whyalla	Maritime museum and information	Whyalla City Council	Maritime museum celebrating Whyalla’s shipbuilding past plus general tourist information

New Developments

- A \$700,000 redevelopment of Bungala Aboriginal Corporation's Administration Centre with the addition of a gallery area for the display of local Aboriginal work¹³⁵
- Concept development of the Crystal Brook Explorers Hall of Fame
- Continued planned extension of The Australian Arid Lands Botanic Garden
- Development of three theme trails: the Shiralee, Original Ghan and the Flinders Ranges Dreaming
- Developments in the Flinders Ranges and north towards Leigh Creek. These include the \$1 million development at the Prairie Hotel in Parachilna catering for specialist tourism experiences and capitalising on new business opportunities including the film industry, Wilpena Pound Resort and the proposed developments with the recent review of the tourist attractions and opportunities report for Beltana, Blinman and Parachilna
- Interest in developing the Beetaloo Reservoir (east of Port Pirie) for greater recreational use
- Preparation of the 1999/2000 State Tourism Infrastructure Plan by the South Australian Tourism Commission

Developing A Draft Investment Attraction Strategy for Tourism

Because of the mixed views within the cities as to the potential tourism can offer, this pathway has drawn together a brief summary of some of the identified issues and opportunities from the South Australian Tourism Infrastructure Plan and existing proposals in the region.

¹³⁵ Bungala Aboriginal Corporation

Integrate Tourist Experiences

Strategy: Identify, integrate and build on existing tourist experiences within the region where appropriate

Actions: Identify key tourism assets in each of the three cities to create draw cards. It may be appropriate to develop a tourism 'taskforce' with contributions from each city and appropriate existing and potential tourism operators, associations and relevant government departments - both State and Commonwealth

Currently many of the tourist experiences are separate, and there may be an opportunity to combine and package the experiences. For example, The Australian Arid Lands Botanic Garden now sell (on behalf of National Parks and Wildlife) the required 'Desert Pass' for visitors travelling to the national parks who may be travelling through on a Saturday or Sunday (when the National Parks office is closed) allowing them to continue their trip

Ensure appropriate infrastructure, services, zoning and signage support the tourist experience (review the 1999/2000 Summary State Tourism Infrastructure Plan)

Capitalise on the regular interstate passenger trains stopping in Port Augusta

Build from existing resources. For example, findings from the Infrastructure Plan report 'strong support' for the extension of the Pichi Richi Railway into Port Augusta from Stirling North

Review the Australian Arid Research Centre proposal and if appropriate, integrate its aims and principal objectives more closely with the predominantly tourism focussed Australian Arid Lands Botanic Garden

Consider tourism opportunities presented by the other strategies and look at ways to develop niche tourism opportunities (for example the new tourist reception centre at Spencer Gulf Aquaculture)

Examine alternative options for linking the cities to increase access and establish a series of 'short trips'. For example, there has discussion about establishing winter ferry runs (similar to Kangaroo Island) between Port Pirie and Whyalla

Hidden Assets

Strategy: Utilise the hidden assets

Actions: Review the suggestion to create the Beetaloo Reservoir, east of Port Pirie, as a tourist opportunity for recreational use including investment by capitalising on the existing reservoir. Beetaloo Reservoir, regarded as potentially a \$15 million asset, is managed by SA Water as a reservoir to support Adelaide's water supply. After initial discussions with SA Water's Corporate Communications in Adelaide and operations in Crystal Brook, there is some willingness to consider appropriate options for broadening the current uses of the reservoir

Build on the link formed with members of the Broken Hill Tourist Association and Whyalla. Broken Hill is recognised nationally for its 'gateway to the outback' label, art galleries and associated tourist experiences. Utilise the established links with Broken Hill to develop opportunities. Broken Hill has a long association with Port Pirie as much of the ore mined in Broken Hill was processed in Pasminco's Port Pirie Smelter. There may be opportunities for integrated interstate industrial tourism

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Various: Tourism brochures collected from the tourist information centres in Port Pirie, Port Augusta and Whyalla

Investment Potential: Transport and Services

Strategy Rationale:

- Available land for further development
- Commitment within the cities to become an 'integrated transport facility'
- Crossroads location of the Upper Spencer Gulf (servicing east west and north south)
- Existing national and multinational companies operating in the region
- Existing regional transport infrastructure of airports, port, rail, road
- Existing work force skills and capabilities
- Servicing and repair facilities and expertise within the region
- Support from existing industry and the wider community
- Synergies with the major investment potential strategies (health services, tourism, education and training, resource processing, fisheries and aquaculture, defence and aerospace)

Overview

The basis in developing this investment strategy is to work from the existing assets already in the region and, where possible, review associated assets from existing reports and submissions.

The natural 'crossroads' location of the Upper Spencer Gulf, and more specifically Port Augusta, is seen as a servicing facility for a number of reasons. These include: road train capacities, roads, expansion of the airport, marshalling yards at Spencer Junction supported by the interstate and intrastate passenger and freight services, and an existing work force in the transport and handling industry.

Through the 'Partners in Rail' project and the South Australian Government's assistance to business to capture the opportunities with the construction of the Alice Springs to Darwin railway and potential upgrade of the existing line from Tarcoola to Alice

Springs, the three cities see themselves well placed to service the anticipated (primarily freight) demand.

Existing Assets

- Available land
- Central location with access to east-west and north-south corridors
- Existing industry requiring transport and services
- Existing transport infrastructure with established rail and road corridors
- Freight trains have clearance on the Adelaide to Perth and return journeys to haul double stack container wagons of 6.6 m in height
- Leigh Creek has an aerodrome with two runways (1,800 m x 30 m sealed with night lighting, 1,300 m x 18 m sealed)
- Port Augusta has an existing work force of 648 people involved in the transport and storage industry¹³⁶
- Significant income from current transport and service industries
- Two road-train depot facilities (Wilmington, east of Horrocks Pass and Port Augusta at the Tarcoola intersection)
- Local engineering and fabrication firms have experience in handling and transporting specialist equipment to remote sites
- Quarantine services by the Australian Quarantine and Inspection Service are available when required
- Existing road train depot in Port Augusta (triple road trains require a depot in Port Augusta to travel further south towards Adelaide or east to Sydney because of haulage limitations)
- Significant rail maintenance and locomotive building facilities in the region

¹³⁶ Australian Bureau of Statistics, 1999 Integrated Regional Database

Major Existing Transport and Services Operations

Company	Location	Region	Ownership	Service
Airlines of South Australia	Port Augusta	State	Private	Air transport
Australian Rail Track Corporation	Adelaide	National including the Upper Spencer Gulf region	Government	Ownership and management of the Adelaide to Port Augusta - Kalgoorlie and the Port Augusta to Whyalla corridors
Australian Southern Railroad	Adelaide	National including Whyalla, Port Augusta and Port Pirie	Private	Interstate and intrastate freight service
One Steel Limited	Whyalla	Whyalla	Listed ASX	Primarily a private deep sea port (custom built port, owned and operated by One Steel)
Brambles Industrial Services	Whyalla	Region	Listed ASX	Equipment hire to major industries
Caroona Road Transport	Port Augusta	Region	Private	Road transport
Clyde	Port Augusta	State	Private	Maintenance of rolling stock and rebuilding in the rail industry
Great Southern Railroad	Adelaide	Interstate passenger service (inc. Port Pirie and Port Augusta)	Private	Interstate passenger service (Indian Pacific and The Ghan)
Epic Feat	Port Augusta	Region	Private	Transport
Kendell Airlines	Whyalla	State	Private	Air transport
KJ & LM Norton Transport	Stirling North	Region	Private	Freight transport
Linfox	Port Augusta	Depot servicing intra and interstate	Private	Freight and integrated logistics
Marlington Transport Pty Ltd	Quorn	Region, state and interstate	Private	Contracting transport to Adelaide to Darwin and Victoria to Darwin
National Railway Equipment Co.	Whyalla	Asia Pacific headquarters	Private	Rebuilding locomotives and wagons
Parnell Mogas	Port Augusta	State	Private	Gas freighting
PG Noble Freighters	Port Pirie	Region	Private	Freight service (suppliers of service to Toll)

Major Existing Transport and Services Operations (cont)

Company	Location	Region	Ownership	Service
Ports Corp of South Australia	Port Pirie	Port Pirie	Public	Port services including pilotage
Northern Kope	Port Augusta	Region	Private	Freight service (suppliers of service to Toll)
Spencer Gulf Coaches	Port Pirie	Region	Private	Passenger transport
Stringer Burt Transport Pty Ltd	Port Pirie	Region	Private	Road transport
Toll	Whyalla, Port Pirie	State	Private	Road, rail and containers
Tooley Transport	Port Pirie	Region	Private	Transport
Transfield Maintenance	Port Augusta	Specifically the Port Augusta to Kalgoorlie railway	Private	Maintenance of rail track

New Developments

- Proposed \$1.2 billion investment by the preferred consortium Asia Pacific Transport Consortium (with support from the State and Commonwealth Government) for the construction of the Alice Springs to Darwin rail corridor.¹³⁷ This is likely to result in some potential contracts for supply, including the production of rail track, construction and maintenance to companies in the Upper Spencer Gulf region.¹³⁸ The completion of the Alice Springs to Darwin railway creates an alternative freight corridor and the option to barge freight to Asia
- Upgrade the main rail line through Port Augusta and rail passing loop at the northern end of Spencer Junction by the Asia Pacific Transport Consortium
- Each of the Councils in Port Pirie, Port Augusta and Whyalla are conducting a Planned Amendment Review to reassess the zoning of existing industrial/ commercial, rural and residential land developing a coordinated approach to support new investment
- Potential transport and logistics handling depot expansions by existing private operators
- The Northern Regional Development Board has commissioned a three stage feasibility study on the establishment of an industrial park to support, among other industries, an integrated transport facility

¹³⁷ Delta Electricity and Access Economics Investment Monitor Number 41 March 2000 p.49

¹³⁸ Partners in Rail, Adelaide

- Transport SA is continuing its upgrade of the Port Augusta to Port Wakefield national highway and will increase the number of passing lanes by 10 in each direction providing one overtaking lane every 20 km (\$6 million). In addition, the widening of the Eyre Highway to 8 m, starting 25 km west of Port Augusta at Lincoln Gap is currently five years into its eight-year upgrade program (\$37.5 million)^{139&140}
- Upgrade and maintenance of the Tarcoola to Alice Springs railway

Developing A Draft Investment Attraction Strategy for Transport and Services

The Upper Spencer Gulf see significant synergies and site advantages in developing an integrated transport facility to service and support existing and potential industries.

Strategy: Developing an industrial park in Port Augusta

Actions: Stage one has been undertaken. The Northern Regional Development Board commissioned Collins Anderson Management in February 2000 to assess the opportunity for 'an accessible, appropriately located and serviced Industrial estate'. Collins Anderson Management has been commissioned to undertake stage two of a three-stage methodology to prepare a detailed feasibility study on the viability and likely position(s) of a future industrial park

Review other proposed developments and industry efficiency locations. For example, the energy/industrial park at Flinders Power may have implications for the siting of another industrial park

Consider access routes (wet weather and 'what if' scenarios if the bridge was out of service)

¹³⁹ Transport SA, Port Augusta

¹⁴⁰ Commonwealth Department of Transport and Regional Services (1999) Regional Forums Australia Programme Spencer Gulf (SA) Trial Formal Response by the Federal Government p.60

Prioritise Investment Opportunities

Strategy: Develop a framework for an integrated transport facility

Actions: To integrate existing transport activities with required service. Initial findings from the Collins Anderson study (April 2000) report that ‘industry leaders believe that a transport hub would produce opportunities including cross marketing and networking, fuel services, shared facilities including a wash down bay, storage and office facilities, security and access, better logistics for support services, more efficient operations and increased productivity and facilitation of future growth opportunities’

Consider existing private investment opportunities for logistics handling/depot facilities
For example, existing operators already in the region

Support the current Planned Amendment Review being conducted by each Council to review zoning of land. For example, consider land use/ zone issues relative to other development opportunities (some have been suggested in this study) including the proximity to urban developments and management options for Stirling North. Also review existing infrastructure, traffic movements and logistics including turnaround times and potential expansion opportunities

Visit other integrated logistics handling facilities to discuss with logistics staff the effectiveness and productivity gains achieved (for example, Big W in Monarto). This may assist in forming a framework for the proposed integrated transport facility in the Upper Spencer Gulf

Consider and review existing transport and logistics management. For example, the Point Lowly Ward Spit bridge project

Hidden Assets

Strategy: Utilise the hidden assets

Actions: Utilise the proposed champion network as described in the resource processing and health services strategy to further the transport and services strategy

Continue working with the Partners in Rail team to develop construction and longer term opportunities for the Alice Springs to Darwin rail project

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Potential Investment Opportunities¹⁴¹**Defence and Aerospace**

Project	Investment	Estimated timeframe
Kistler Aerospace	\$400 million	On hold
Spacelift Australia (satellite launch pad, Woomera)	\$50 million	2000 +

Education and Training

Project	Investment	Estimated timeframe
Certificate in Processing (resource processing)		2000
E-commerce centre at the University of South Australia, Whyalla campus	\$190,000	2000 +

Fisheries and Aquaculture

Project	Investment	Estimated timeframe
Sale of sea cage licenses at Fitzgerald Bay		2000 +

Health Services

Project	Investment	Estimated timeframe
Royal Flying Doctor Service, Port Augusta (upgrade of facilities)	\$1 million (plus consolidation of services)	2003-4
South Australian Centre for Rural and Remote Health (primary health research and evaluation)	\$1 million over four years	2000 - 2003/4

Resource Processing

Project	Investment	Estimated timeframe
Adchem Australia (Mt Gunson copper/cobalt prospect)	Several small deposits being investigated (possible \$50 million)	
One Steel (Whyalla blast furnace reline)	Proposed	2001+
Dominion Mining/ Resolute (Challenger gold prospect)	Exploration and drilling	
Electrometals (Kanmantoo copper mine)	Feasibility study underway	
Epic Energy (Adelaide - Moomba pipeline expansion)	na	2000-2001
Gas pipeline from Victoria to South Australia and power station	Potential total project \$520 million +	2000 +
GEO TPI	na	2000-2002
Goddard Development	na	Commencement mid 2000
Grenfell Resources (Perseverance Bonanza Zone, Tarcoola)	Pre-feasibility study complete	

¹⁴¹ Delta Electricity and Access Economics Investment Monitor Number 41 March 2000 and projects as identified throughout the study

Potential Investment Opportunities (cont)

Project	Investment	Estimated timeframe
Heathgate Pty Ltd (Beverley uranium oxide project)	Pilot plant \$5 million (potential total investment \$39 million)	2000 +
Kanowna Lights (Pinnacles nickel prospect)	Possible \$250 million	
Pasminco/ Werrie Gold (portia copper/ gold deposit)	Exploration stages	
Proposed marble mine (Leigh Creek)	Applied for an exploration drilling license	
SA Pipelines Authority (gas pipeline between Palm Valley (NT) and Whyalla (SA))	Palm Valley reserves being reassessed	
SAMAG Limited	Proposed \$640 million	2000 +
Santos (59.75%)/ Delhi (20.21%)/ Boral (13.19%)/ Gulf Australia (4.75%)/ Basin Oil (2.1%) (development of a low permeability gas, Nappaerri Trough)	In planning	
South Australian Steel and Energy (Construction of pilot plant)	\$15 million (pilot plant only) (potential \$1.2 billion)	2000 (for pilot) 2000 + if pilot is successful
Southern Cross Resources Australia Ltd (Honeymoon uranium project)	Under consideration (\$20 million)	EIS and feasibility study underway (2000+)
Tioxide Australia (titanium oxide plant)	Possible (Stage 1 cost \$250 million)	Classified as possible
WMC Limited (expansion)	Proposed \$900 million	2008 - 2010

Sustainable Development

Project	Investment	Estimated timeframe
The Australian Arid Lands Botanic Garden		Ongoing
Whyalla Solar Oasis	Potential feasibility study and commercialisation	2000 +

Tourism

Project	Investment	Estimated timeframe
The Australian Arid Lands Botanic Garden		Ongoing

Transport and Services

Project	Investment	Estimated timeframe
Asia Pacific Transport Consortium (Alice Springs to Darwin Railway)	Potential \$1.2 billion	2000 - 2006
Australian Rail Track Corporation (upgrade of Adelaide - Perth rail line)	\$40 million	1999 - 2000
Australian Southern Railroad (upgrade of Middlebank Range - Whyalla narrow gauge railway)	\$3.5 million	2000 - 2004
Flinders Power Pty Ltd (Leigh-Creek to Port Augusta rail track maintenance)	\$3-\$5 million	Underway
Linfox	Proposed depot	
Parnell Mogas	Proposed depot	

Red Flag Issues

The issues in this section were raised during the interview process. The issues are 'flagged' but not discussed. While many of these issues could have an impact on the overall investment climate, they are not specific to the region and are generally matters of a broad policy nature which may or may not have substance and which are outside the scope of this report.

Earlier reports including those presented to the Upper Spencer Gulf communities by The South Australian Centre for Economic Studies and the recent findings from the Regional Forums Australia Programme and the South Australian Regional Development Task Force have highlighted some of the challenges and needs faced by the region. This section of the report does not seek to replicate issues but lists those issues directly raised throughout this study. The issues have been broadly categorised into business, Local, State and Commonwealth Government, infrastructure, youth, services and attitudinal.

Business

- Major issues raised by many small to medium sized businesses include: decline of disposable income (in part due to population decline and limited work opportunities); rise of 'pokies' gambling (seen as reducing consumer spending in local shops/ businesses); history of being public sector or one employer cities; difficulty in accessing finance/loans for business expansion; limited computer skills and general lack of computerisation of businesses; lack of business expertise including preparing tender documents; that smaller businesses are often operated by a sole (and often aging) trader/owner; significant freight costs and time taken for deliveries to meet customer demands; not being taken seriously by company representatives; travel time required to conduct

business with suppliers and the length of time away from the business; the lack of recognition by professional associations/ organisations for professional people in the region.

Infrastructure

- Lack of access and services to a public transport system across all three cities and for the region¹⁴²; reported high cost of electricity; lack of availability to natural gas in Port Augusta; fully contracted gas pipeline capacity in Port Pirie and Whyalla; limited water capacity in the Morgan to Whyalla pipelines; lack of signage across the three cities to streets and major services and infrastructure including airports.

Local, State and Commonwealth Government

- Concerns about the impact of the introduction of the Commonwealth Government's new tax package; the perceived complexity of local, State and Commonwealth regulations; the type of compulsory training offered through Centrelink; the extended trading hours especially in Port Pirie; access to the range of government services (in part due to centralisation); cost of telecommunication charges (STD charges apply between the cities and the closest capital, Adelaide); uncertainty and discontinuity in funding reportedly making planning difficult for local government and development boards across all areas.

¹⁴² For example, patients in Hawker requiring dialysis three times per week (if they do not own their own vehicle) have no means to travel to Port Augusta hospital. Another example described includes a student travelling from Cowell (attending high school) to Leigh Creek catches the bus in Cowell, waits in Port Augusta for three hours, catches the bus to Hawker and is then picked up by a parent (2 hour trip) to complete the travel to Leigh Creek.

Youth

- These include: difficulties in gaining work experience¹⁴³; lack of leadership and mentoring opportunities; limited opportunities for employment; limited opportunities to be involved in youth unrelated committees/ associations to enable their voice to be heard on issues affecting their future; lack of recognition (outside the youth circle and associated services) to the extent of substance misuse (drugs and alcohol); trainees are finding challenges in obtaining longer-term employment and are often 'put off' just before being qualified; while young people are interested in trades, the cost of modules at TAFE is seen as an impediment.

Services

- Major issues highlighted include the need for closer integration of all existing economic development and wider associations and the extent of media staff turnover and reporting impacting on potential developments. Also seen as a major issue is that Medicare is not fully applicable to all telehealth/ video conferencing consultations.¹⁴⁴

Attitudinal

- General issues raised include the need for greater civic leadership and general access and support of leaders within the communities; the perceived capacity of the community to be positive; lack of understanding between white and Indigenous communities; and that the Upper Spencer Gulf Common Purpose Group is not recognised widely.

¹⁴³ For example, in Port Pirie, 100 businesses were approached with a personalised letter from a youth job placement employment training centre but only six responded. However, recent work completed on behalf of the Northern Regional Development Board have 29 businesses and major companies willing to accept work experience placements.

¹⁴⁴ The Federal Government's response to the Regional Forums Australia Programme (November 1999) report that the listing for the procedures using telehealth for the Medicare Benefits Schedule (MBS) is for 'the relevant craft group of the medical profession to make a submission to the Commonwealth for the inclusion of new items or changes to existing items. Some work has been undertaken in relation to telepsychiatry, however no other craft group has made a submission to the Government for MBS listing of telehealth items'.

Section 3: Ways Forward

This report on potential investment opportunities based on existing assets provides a preliminary investment strategy for the region. It is intended to provide a basis for community and stakeholder consultation as a step in the process of building an integrated and comprehensive investment strategy for the region.

In this section of the report, possible ways forward, including developing the partnerships on which successful strategy making could proceed, are canvassed. The objective of any investment strategy is likely to centre on the attraction to the region of new investment as a basis for generating new jobs and creating the potential for sustainable, longer-term economic activity and wealth creation.

To this end, it is likely that any ongoing strategy will require five inter-related sets of activities. These are:

1. Researching and validating the attractiveness of the region and of individual investment opportunities to potential investors;
2. Promoting identified opportunities and attracting specific investors to the region based on those opportunities;
3. Facilitating investments once a decision to invest has been made;
4. Providing effective “aftercare” to the investor once the investment has been completed; and
5. Encouraging expansion and diversification by the investor over the longer term.

These activities require a sustained and professional approach involving a dedicated capacity to undertake the necessary research, negotiation and service provision to identify, promote, attract and build upon new investment initiatives. The Commonwealth and State

Governments can provide relevant expertise and a range of services to assist the community to establish and maintain such an effort. However, over the longer term, the key driving forces for sustainable investment success lie in the region itself. These include private sector interests, local government and associations and the wider community.

In developing any partnership between the Commonwealth and State Governments and regional interests for investment promotion and attraction, a range of factors affecting the likely success of any strategy need to be kept in mind. These include:

- Perceptions concerning economic management, the degree of investment friendliness of the region and the nation as a whole, whether the business/investment regulatory regime (including the regime for protection of intellectual property, for instance) is considered efficient and transparent and whether the economy is regarded as being sufficiently flexible to meet the investors’ changing needs;
- Competitiveness based considerations, including bottom line cost factors such as labour costs;
- Availability of relevant economic, social and environmental infrastructure;
- Skill levels and reliability of the labour force and level of industrial disputation; and
- Lifestyle factors.

In particular, it should be noted that any investment promotion and attraction strategy needs to distinguish carefully between what the attractor *believes* (or thinks) its relative strengths and weaknesses are and what the potential investors *perceives* (or sees) them as being. The

investment decision is far from being self evident. A broad range of often complex factors enter into the investment decision making process - and while some are based on fact, others can be based on intangibles such as feelings and perceptions. The onus therefore is on the regional community to develop a strong case based on both the inherent bottom line competitiveness and the perceptions involved in any investment, noting that it is not always the bottom line that is the key determinant.

Possible next steps

The strategies and actions outlined earlier in this report provide a basis for the consideration of those areas of the Upper Spencer Gulf's regional economy on which an investment could be based. Also identified are some immediate actions to help more closely define and assess the proposed investment strategies.

To build on the preliminary report, a closer evaluation of the proposed investment opportunities is required. This could be done by organising a series of community based focus groups engaging contributors to this report, scenario development workshops ('what ifs') and an investment forum to enhance the robustness of the proposed development strategy that would arise from such prioritisation. Similar processes have been adopted in several countries and are currently being utilised in Tasmania.

Having determined priority areas for investment activity, it would be then necessary to develop detailed promotion and attraction strategies centred on the kinds of success factors noted earlier. Such strategy development would benefit from the further input of both *Invest Australia* and *Invest SA* together with that of the support of the champion and other networks canvassed in the eight strategies summarised earlier.

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(Available from: Whyalla Economic Development Board, PO Box 804, Whyalla SA 5600)

Interview Bibliography

Over 170 people have generously given their time to be interviewed for this report. They represented business, industry, economic associations, government, educational institutions (mainly in vocational and tertiary education), services and some wider community associations. The report also draws on earlier studies and findings including forum discussions and workshops held recently in the region. During the preparation of this report, a number of other studies and workshops were being held. To minimise the disruption to business and potential 'doubling up on issues' informal discussions were held especially during the series of Partners in Rail Opportunity Analysis workshops in February – March 2000. Multiple interviews were conducted with various agencies and individuals in the regions as they often were involved in several programs (the company or organisation has only been listed once).

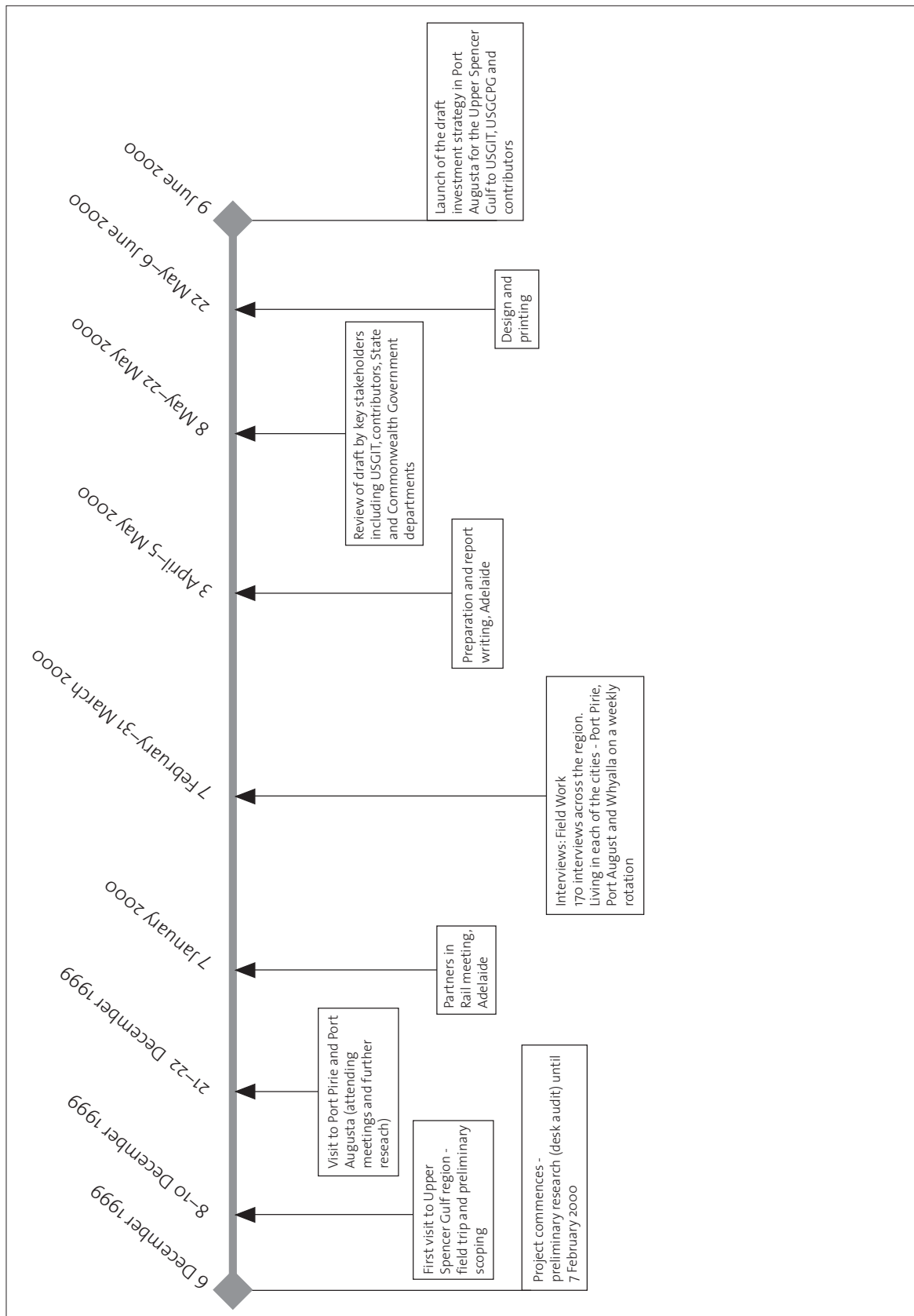
Aboriginal and Torres Strait Islander Commission, Port Augusta
 Advance Labour Hire Co., Adelaide
 Advancing Whyalla, Whyalla
 Aquaculture SA, Primary Industries and Resources SA, Adelaide
 Auiron Energy, Whyalla
 AusIndustry, Adelaide
 Australian Workers Union, Whyalla
 Australian Southern Railroad, Adelaide and Port Pirie
 Brambles Industrial Services, Whyalla
 Bungala Aboriginal Corporation, Port Augusta
 Buttlingarra Aboriginal Corporation, Whyalla
 Cabin Park, Port Pirie
 Centrelink Port Pirie
 Centrelink, Port Augusta
 Centrelink, Whyalla
 Century 21, Port Pirie, Port Augusta and Whyalla
 City of Port Augusta, Port Augusta
 Clyde Engineering, Port Augusta
 Combined Chamber of Commerce, Port Pirie, Port Augusta, Whyalla
 Complete Personnel, Port Augusta
 Davenport Community Council, Port Augusta
 Department of Education, Training and Youth

Affairs, Port Augusta
 Department of Family and Community Services, Adelaide
 Department of Industry and Trade, Adelaide
 Derham's Foreshore Motor Inn, Whyalla
 District Council of Coober Pedy, Coober Pedy
 Elders, Port Augusta
 ETSA Power, Adelaide
 Federal Member for Grey, Whyalla
 Flinders Power, Leigh Creek and Port Augusta
 Flinders Region Area Consultative Committee, Whyalla
 Flinders United Retail Traders Association, Port Pirie
 Greek Orthodox Community, Port Pirie
 South Australian Industrial Supplies Office, Adelaide
 Infrastructure SA, Adelaide
 Invest SA, Adelaide
 JPET (Job Placement Employment and Training), Port Pirie
 Kutjara Consultants, Alice Springs
 Leigh Creek School, Leigh Creek
 Lincoln Marine Science Centre, Primary Industries and Resources SA, Port Lincoln
 McDonalds, Port Pirie
 McLeod's Whyalla Motor Company Pty Ltd, Whyalla
 Meg's Bookshop, Port Pirie
 Member for Giles, Whyalla
 Middleback Theatre, Whyalla
 Mirambeena, Whyalla
 Mitre 10, Port Augusta
 Mr Music, Port Pirie
 National Railway Equipment Co. Whyalla
 Networking the Nation, Adelaide and Canberra
 Nganampa Health Council, Alice Springs
 Northern Regional Development Board, Port Augusta
 Nulla Wimila Kutju Regional Council, Port Augusta
 Office of Regional Development, Adelaide
 One Steel Long Products Division, Whyalla
 Outlook Management, Adelaide
 P&O Ports, Port Pirie
 Partners in Rail, Adelaide
 Pasminco Port Pirie Smelter, Port Pirie
 PB Environmental Services, Adelaide
 Pichi Richi Railway, Quorn
 Planning SA, Adelaide

Port Augusta Middle School, Port Augusta
Port Augusta Prison, Port Augusta
Port Augusta Regional Hospital, Port Augusta
Port Pirie Regional Development Board, Port Pirie
Port Pirie Central Mission, Port Pirie
Port Pirie Crime Prevention Centre, Port Pirie
Port Pirie Regional Art Gallery, Port Pirie
Port Pirie Regional Council, Port Pirie
Port Pirie Regional Health Service, Port Pirie
Ports Corp South Australia, Port Pirie
Prairie Hotel, Parachilna
President Italian Community, Port Pirie
Primary Industries and Resources SA, Adelaide
ReCoN SA, Whyalla
Rexco Group, Whyalla
Rodney's Quality Meats, Port Pirie
Royal Flying Doctor Service, Adelaide
S.J Cheesman Ltd, Port Pirie
SA Business Vision 2010, Adelaide
SA Centre for Rural and Remote Health, Whyalla
SA Water, Crystal Brook
Senator Minchin's Office, Adelaide
South Australia Aquaculture Management, Port Augusta
South Australian Business Coop, Adelaide
South Australian Housing Trust, Port Augusta
South Australian Police Force, Whyalla
South Australian Tourism Commission, Adelaide
Special Events @ Whyalla, Whyalla
Spencer Gulf Aquaculture, Port Augusta
Spencer Institute of TAFE, Port Pirie, Port Augusta and Whyalla
State Liberal Member for Stuart, Port Augusta
Stephen Timms Consulting, Adelaide
The Business Centre, Adelaide
The Hawke Institute, University of South Australia, Adelaide
Theiss Contractors Pty Ltd, Melbourne
Toy Kingdom, Port Pirie
Transfield, Port Augusta
Transport SA, Adelaide, Port Augusta and Crystal Brook
TyrePower & Video Ezy, Port Pirie
United Water, Adelaide
University of South Australia, Whyalla campus, Whyalla
USGCPG and USGIT Members, Port Pirie, Port Augusta, Whyalla
USGCPG/ Austrade, Whyalla
Wadlata Outback Centre, Port Augusta
Whyalla Aged Care, Whyalla
Whyalla City Council, Whyalla
Whyalla Economic Development Board, Whyalla
Whyalla Hospital and Health Services, Whyalla
Whyalla Information Service, Whyalla
Whyalla Migrant Community Centre, Whyalla
Whyalla Solar Oasis, Whyalla
Workplace Employment, Port Pirie

Attachment A

Project Timeline and Activities



Registered List of Company Capabilities in the Upper Spencer Gulf

Company information was provided by the South Australian Industrial Supplies Office (SAISO). SAISO is an independently managed non-profit organisation financially supported by the State Government within the South Australian Department of Industry and Trade. Activities of the SAISO include the identification of local industry capability. The SAISO are part of an ISO Network

who maintain and Australian /New Zealand Nationwide Industry Capability Register.

This capability register reflects companies that have contacted SAISO from the Upper Spencer Gulf and gives some indication of the existing capabilities already existing in the region.

Company	City	Summary Activity
A Noble and Son Ltd - Whyalla	WHYALLA NORRIE	Manufacturer and supply of lifting equipment
ABC Picture Framers P/Ltd	WHYALLA	Picture framers
Action Engineering Ptd Ltd	WHYALLA NORRIE	Engineering
Ampol Playford Service Station	WHYALLA	Service station
ASK Employment and Training Services	PORT PIRIE	Recruitment and labour hire
Augusta Design Centre Pty Ltd	PORT AUGUSTA	Civil and mechanical design
Ausrail Engineering Services	PORT AUGUSTA	Rail engineering consulting
Australian Highway Plant Services	PORT AUGUSTA	Construction and earthmoving
Automatic Print	PORT PIRIE	Printing
Aztec Analysis	WHYALLA	Engineering consultancy
B K Thomas Engineering	JAMESTOWN	Metal fabrication
Bagman Distribution Services	PORT AUGUSTA	Wholesale distribution
Bentley Signs	PORT PIRIE	Full design and manufacture of all signage
Betatene Ltd	WHYALLA	Biotechnology processors
Better Homes Supplies	PORT AUGUSTA	Hardware supplies
Bob's Home Hardware and Timber	WHYALLA NORRIE	Retail supply of hardware
Booloroo Engineering	BOOLOROO CENTRE	Engineering
Bradco	PORT AUGUSTA	Machining and engineering
Brambles Industrial Services	WHYALLA	Material handling equipment and equipment hire to major industries
Broadspectrum Australia	WHYALLA NORRIE	
Butlers Mechanical Service	PORT AUGUSTA	Heavy vehicle and truck repairs
C and M Asperti Pty Ltd	WHYALLA NORRIE	Industrial electrical contractors

Company	City	Summary Activity
Cabin Park	PORT PIRIE	Accommodation
Caddtec Pty Ltd	WHYALLA	Engineering
Career Employment Group	WHYALLA	Recruitment and labour hire
Caroona Road Transport	PORT AUGUSTA	Road transport
Catford Engineering P/Ltd	JAMESTOWN	Manufacturing and heavy engineering - retail/wholesale, construction, repair and maintenance of equipment in agriculture mining, earth moving and council equipment
Champion Trophy Co	WHYALLA	Plastic signs
Collex Spencer Gulf Waste	WHYALLA NORRIE	Waste transport disposal and or treatment
Combined Manufacturing Forum	PORT PIRIE	Manufacturing network
Complete Personnel SA Pty Ltd	PORT AUGUSTA	Recruitment and personnel placement agency
Cooper Glass and Metal Work	LAURA	Metal fabrication
Country Wide Labour Force Pty Ltd	PORT AUGUSTA	Recruitment and labour hire
CRA Rigging and Construction Australia Pty Ltd	WHYALLA STUART	
D and R Covino	WHYALLA	Concrete, paving, carpentry, plastering, tiling.
D E and W E Wauchope	STIRLING NORTH	Builder
Davey and Krawczyk Engineering Pty Ltd	WHYALLA NORRIE	Metal fabrication
David Brown Whyalla Engineering	WHYALLA	Engineering
Diverse Surface Engineering	WHYALLA	Fabrication, machining
Dulux Australia	PORT AUGUSTA	Paints, coatings
Electech	PORT PIRIE	electronics
Employment Directions	PORT PIRIE	Recruitment and labour hire
Epic Feat Pty Ltd	PORT AUGUSTA	Transport
Excel Enterprises Inc	WHYALLA NORRIE	Sheltered workshop; clothing
Flinders Personnel Pty Ltd	PORT PIRIE	Recruitment and labour hire
Flowserve FSD Pty Ltd	WHYALLA	Valve, seal and pump manufacturers
Forsyth Crash Repairs	PORT AUGUSTA WEST	Crash repair
Fugro Survey	PORT AUGUSTA	Surveying
G A and L A Ware	CRYSTAL BROOK	Metal fabrication and light engineering
Gadaleta Steel Fabrication Pty Ltd	PORT PIRIE	Structural and mechanical construction
Gobell Engineering Pty Ltd	PORT PIRIE	Steel fabrication / light engineering
Greening Australia	QUORN	Landcare
Gulf Built Systems	PORT AUGUSTA	Building estimating, administration and supervision
Gulf Instrument Services	PORT PIRIE	Engineering / designing
Hayden Hart Civil Engineering Services Pty Ltd	QUORN	Civil engineering
Home Hardware	PORT AUGUSTA	Retail hardware and trade

Company	City	Summary Activity
INDEC Consulting	PORT AUGUSTA	Consultant
Industrial and Marine Blasting	WHYALLA	Blasting and coating
Innovative Building Concept	PORT PIRIE	Construction
J Blackwood and Son Ltd	WHYALLA	Supplier of engineering products
John Rau Electrical	WHYALLA	General electrical work
JR Engineering Services	ROXBY DOWNS	Engineering consultants
K J and L M Norton Transport	STIRLING NORTH	Freight transport
KCI Konecranes	WHYALLA	Manufacturing, contracting
Keith Whittaker Enterprises	WHYALLA NORRIE	Fibreglass manufacture and repair
Kelly Engineering	BOOLEROO CENTRE	Engineering medium/general
Kent Perry Ford	PORT AUGUSTA	Motor vehicle sales, repairs and spare parts
Kilpatrick Green Pty Ltd	WHYALLA	Labour hire for electricians
KWS Contracting Australia	PORT AUGUSTA	Fabrication and welding
L H Perry and Sons	CRYSTAL BROOK	Distributor petroleum products
Link Engineering Pty Ltd	WHYALLA	Contracting, general fabrication of structural section, platework, pressure piping, site installation and shutdown and general maintenance
Lumen Lighting Design Service	PORT PIRIE	Lighting engineer
Mac's Machine Shop	PORT AUGUSTA	Machinery
Marand Precision Whyalla	WHYALLA	Precision engineering, manufacturing fabrication consulting, contracting NATA services within group
Marlington Transport Pty Ltd	QUORN	Contracting transport Adelaide to Darwin and Victoria to Darwin
Marriage Celebrant Services	WHYALLA	Justice of the Peace
Mastakraft Clothing Co	PORT PIRIE	Clothing manufacturer
MAV Media Advertising and Video Production Pty Ltd	PORT PIRIE	Video production and web site design
McLeod's Whyalla Motor Company Pty Ltd	WHYALLA	Motor vehicle sales and service
MetServ Australasia	WHYALLA	Metal recovery, rail track ballast
Mirambeena Lodge Pty Ltd	WHYALLA	Accommodation and restaurant
MJM Abrasive Blasting	WHYALLA NORRIE	Industrial protective coatings - surface treatment of steel
Monadelphous Engineering	OLYMPIC DAM	Mechanical engineering
N J and T McMullen Pty Ltd	WHYALLA	Mechanical services
Natrad Cooling Centre and 3 WD Systems	WHYALLA	Automotive
Neptune Fibreglass and Steel	PORT PIRIE	Fibreglass
Northern Agencies Nominees Pty Ltd	WHYALLA PLAYFORD	Wholesalers agents
Northern Belting	WHYALLA	Conveyors manufacture components

Company	City	Summary Activity
Northern Joinery and Timber Supplies Pty Ltd	PORT AUGUSTA	Timber supplies and custom joinery services
Northern Machinery	LAURA	Heavy plant maintenance
Northern Regional Development Board	PORT AUGUSTA	Regional development
Northern Scaffolding Pty Ltd	WHYALLA	Rigging and scaffolding
NREC - ALCO Locomotive Co Ltd	WHYALLA	Locomotive rebuilding, lease and hire
Olympic Dam Operations	ROXBY DOWNS	Mining
One Steel	WHYALLA	Steel manufacturers
Orana Enterprises	PORT PIRIE	Manufacture of wood and sewn goods
Ottoway Bros Pty Ltd	PORT PIRIE	Earthmoving and construction works
Ozdev Pty Ltd	WHYALLA NORRIE	Tapware
PA and CI Martin	PORT AUGUSTA	Earthmoving
Pacific Salt Pty Ltd	WHYALLA	Chemicals
Pasminco Metals	PORT PIRIE	Metal production
Pearce Earthmovers	PORT AUGUSTA	Earthmovers civil work
Piccadilly Distribution Services Whyalla	WHYALLA	Distribution spring water
Pirie Embroidery	PORT PIRIE	Embroidery/clothing
Pirie Forge	PORT PIRIE	Forging
Pirie Soil Sand and Metal Pty Ltd	PORT PIRIE	Civil works, communications
Pisani Metal Fabricators	PORT PIRIE	Manufacturing, metal fabrication
Prairie Hotel	PARACHILNA	Accommodation and native Australian foods catering
Prime Removals	WHYALLA	Removals
Port Pirie Regional Development Board	PORT PIRIE	Regional development
Quell Fire and Safety	WHYALLA	Fire and Security Systems and Service
Quin Investment Pty Ltd	GLADSTONE	Manufacture of Explosives and Explosive Contractors.
Quirk Engineering	WHYALLA NORRIE	General engineering
ReCoN SA Pty Ltd	WHYALLA NORRIE	Management, marketing consultants
Rexco Pty Ltd	WHYALLA	Professional placement, recruitment
S J Cheesman	PORT PIRIE	Steel fabrication, mechanical/structural, fitting and turning/machining
Santos Ltd	WHYALLA	Oil and gas
Schmitt Caterers	WHYALLA	Caterers
SDS Ausminco	OLYMPIC DAM	Steel fabrication
Sherrin Hire Pty Ltd	WHYALLA	Hire of heavy equipment
Simply Good Health	WHYALLA	Health foods - vitamins
Skillshare Port Augusta	PORT AUGUSTA	Recruitment and labour hire
South Australian Centre for Rural and Remote Health	WHYALLA	Health
Specialised Tyre and Rubber Repairers Pty Ltd	WHYALLA	Sales, servicing and reconditioning of industrial and earthmover tyres
Spencer Gulf Coaches	PORT PIRIE	Passenger transport

Company	City	Summary Activity
Spencer Gulf Telecasters Ltd	PORT PIRIE	Television advertising
Spencer Institute of TAFE	PORT PIRIE PORT AUGUSTA WHYALLA	Vocational education and training courses
Spencer Plastic Recyclers Pty Ltd	PORT PIRIE	Supply of recycled plastic products
Stan Hobbs Electrical	STIRLING NORTH	Electrical
Steelcity Cars	WHYALLA	Motor vehicle sales and repairs
Stringer Burt Transport Pty Ltd	COONAMIA VIA PORT PIRIE	Road transport
Sudel Industries Pty Ltd	WHYALLA	Instrumentation and electrical
T O'Connor	WHYALLA NORRIE	Electrical contracting
T S Lomman	OLYMPIC DAM	Civil contractors
Tankworld	PORT PIRIE	Fibreglass tank manufacturer
The Office Shop	PORT AUGUSTA	Supplier of office products
Tooley Transport	PORT PIRIE	Transport
Trend Drinks	GLADSTONE	Food processors
Trend Ice	PORT PIRIE	Manufacturing of ice
Unisteel Pty Ltd	WHYALLA	Steel fabrications
United Maintenance Pty Ltd	WHYALLA	Construction metal fabrication
University of South Australia - Whyalla campus	WHYALLA	Research and consulting
Vawn Engineering Pty Ltd	WHYALLA	General steel fabrication
Ware Engineering	CRYSTAL BROOK	Manufacturing, general repairs, modifications and manufacturing in the agricultural industry. with a fully equipped mobile field service
Weldesign Pty Ltd	PORT PIRIE	Steel and aluminium products
Wesfarmers Dalgety - Pt Augusta	PORT AUGUSTA	Rural and retail sales
Whites' Meat	PORT AUGUSTA	Meat processors
Whyalla Airlines Pty Ltd	WHYALLA NORRIE	Airline service
Whyalla Economic Development Board	WHYALLA NORRIE	Regional development
Whyalla Electrical Discounters Pty Ltd	WHYALLA NORRIE	Retailer
Whyalla Fabrications and Engineering	WHYALLA PLAYFORD	Structural engineers
Whyalla Foodland	WHYALLA	Supermarket
Whyalla Hose and Fitting Services	WHYALLA NORRIE	Engineering supply, fitting and repairs to industrial hoses
Whyalla Sheetmetal and Tankmaking Service	WHYALLA PLAYFORD	Engineering
Whyalla Video Hire Pty Ltd	WHYALLA NORRIE	Video hire and sales

