

REGIONAL ECONOMIC GROWTH PLAN

.....
2022 - 2032 EAST ARNHEM
.....

Acknowledgement of Country

We would like to acknowledge that the lands and seas associated with this plan are the lands of the Yolŋu and Anindilyakwa people.

We pay our respect to Elders past, present and future.

The entirety of the East Arnhem region is Aboriginal land. Economic growth will only be achieved in partnership with Yolŋu and Anindilyakwa people and in line with the aspirations of the lands traditional owners.

EAST ARNHEM REGIONAL ECONOMIC GROWTH COMMITTEE

The East Arnhem Regional Economic Growth Committee (REGC) has been an integral part of the East Arnhem economic and business development landscape since Regional Economic Development Committees were initially established across the regions of the Northern Territory and most recently has provided advice and support through the difficult COVID-19 years (under the banner of Regional Reconstruction Committees). The East Arnhem REGC has maintained a proactive, consistent and committed membership and provided strong advocacy for the region for many years.

Our current membership includes:

- » Anindilyakwa Land Council
- » Arnhem Aboriginal Business Council members – currently Gumatj Corporation, Rirratjingu Aboriginal Corporation, North East Arnhem Land Aboriginal Corporation and Arnhem Land Progress Aboriginal Corporation
- » BIG Carpentry
- » Chamber of Commerce NT
- » Australian Government – National Indigenous Australians Agency
- » Charles Darwin University
- » Developing East Arnhem Limited
- » Dhimurru Aboriginal Corporation
- » East Arnhem Regional Council
- » Goŋ- Däl Aboriginal Corporation
- » Gove Real Estate
- » Nhulunbuy Corporation Limited
- » Northern Land Council
- » Northern Territory Government - Departments of the Chief Minister and Cabinet; Industry, Tourism and Trade; and Education
- » Regional Development Australia NT
- » Rio Tinto
- » Tourism East Arnhem

This plan has been developed by the East Arnhem Regional Economic Growth Committee with the support of the Northern Territory Government.



MESSAGE FROM THE EAST ARNHEM REGC CHAIR



The Hon. Natasha Fyles MLA
Chief Minister of the Northern Territory

Dear Chief Minister,

The East Arnhem Regional Economic Growth Committee is pleased to present to you our ten-year Regional Economic Growth Plan under Regional Prioritisation Recommendation 2 of the Territory Economic Reconstruction Report.

In line with the Northern Territory Regional Development Framework, our Plan sets out our vision and principles for regional development, baseline data and targets, priority industries and enablers and recommended actions to accelerate the East Arnhem's economic growth and participation.

The East Arnhem region is entering a period of transition from a long established resources based economy to a diverse economy which supports greater regional participation and distribution of jobs. This is our roadmap to ensure our region is a strong contributor to the Territory's economy over the next decade. We have set out clear actions to accelerate industry and jobs growth to provide opportunity and prosperity for all the in region which will be achieved investment attraction and local business development.

We now call on the Northern Territory Government, together with the Australian Government, to get behind our Plan and negotiate a Regional Deal which addresses the priority enablers which we know will increase investment attraction and facilitate the necessary partnerships to ensure the region achieves its goals.

Finally I would like to thank the East Arnhem Regional Economic Growth Committee for their extensive work and input in the development of the plan, and in particular for the support of the regional offices of the Department of the Chief Minister and Cabinet and Developing East Arnhem Limited who spent many hours researching, engaging and drafting the plan in line with the Committee's directions.

The Committee looks forward to working with you and your Government's agencies to improve the lives of the people of East Arnhem and yo grow our economy for the benefit of future generations.

Sincerely,

A handwritten signature in black ink, appearing to read 'Klaus Helms', written in a cursive style.

Klaus Helms

Chair – East Arnhem Regional Economic Growth Committee



MESSAGE FROM THE NORTHERN TERRITORY CHIEF MINISTER

East Arnhem is one of the Territory's most prospective regions. With pristine waters, stunning landscapes, abundant natural resources and rich unbroken cultures, East Arnhem is set to be one of the Territory's fastest growing regions in the decade to come.

I commend the East Arnhem Regional Economic Growth Committee for its significant efforts to develop a comprehensive ten-year Regional Economic Growth Plan. This blue print for economic growth articulates an inclusive vision for the regional economy, ambitious yet achievable targets and clear actions to ensure the region can attract the necessary investments to grow jobs and business on country.

I acknowledge that East Arnhem is entirely Aboriginal Land and that industry development must align to Traditional Owner aspirations for land and seas.

The Northern Territory Government has established the Territory Economic Reconstruction Agenda, and a bold plan for a \$40 billion economy by 2030. I commend the Regional Economic Growth Committee for developing a plan that aims to ensure your region contributes to the achievement of this goal through diversified industry growth across a range of prospective sectors. I also acknowledge that the region faces the opportunities and challenges of the transition from a resources based economy to a diversified economy. The Territory will stand with you and support this transition over the next decade.

As the Chief Minister, and on behalf of the Cabinet, I am pleased to provide our support for the East Arnhem Regional Economic Growth Plan and to confirm our commitment to work to implement the short, medium and longer term actions therein to achieve your goals. My Government looks forward to working with you and the region's stakeholders over the coming years.

Kind regards

Natasha Fyles
Chief Minister of the Northern Territory



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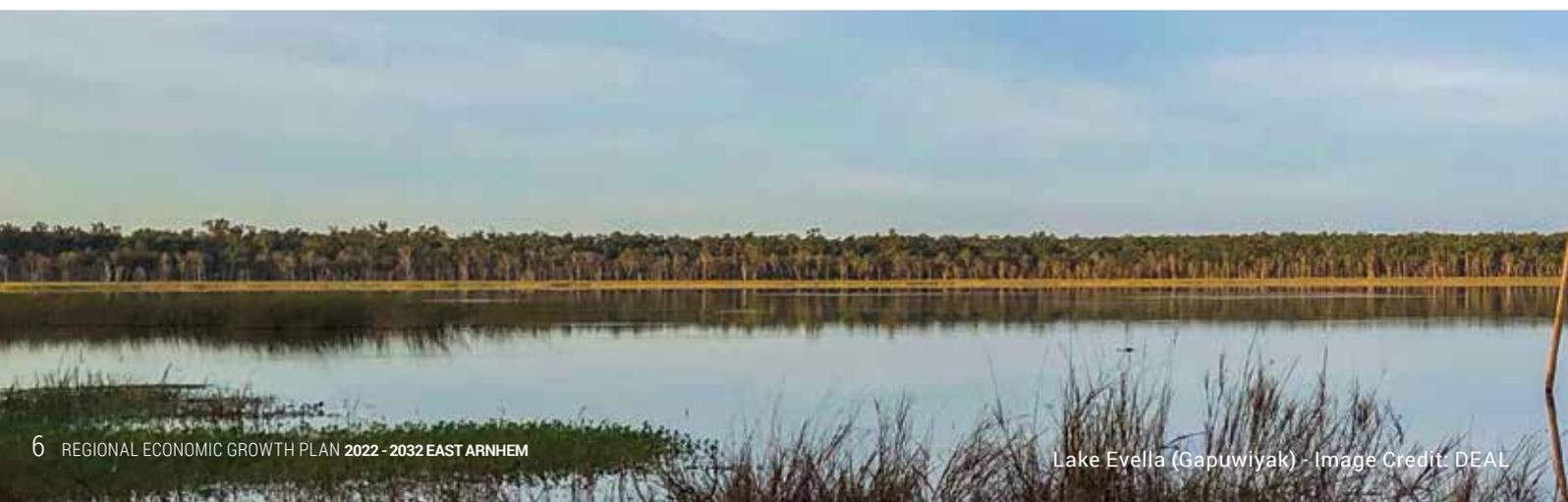


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1 | EXECUTIVE SUMMARY



Arnhem Space Centre - Image Credit: Equatorial Launch Australia

This East Arnhem Regional Economic Growth Plan aims to capture the collective vision of the East Arnhem community with regard to economic development and growth for the next 10 years. The Plan describes the context for this economic growth, including the enablers and limitations that currently exist in East Arnhem's economic ecosystem. This plan set of targets for economic growth and makes a range of recommendations for future action to assist in achievement of these objectives.

The East Arnhem region is home to the one of the world's longest continuing cultures and is entirely Aboriginal freehold land. Set against a spectacular natural environment, the region has a history of trade and entrepreneurship, and is connected with national and international markets. The population is approximately 15 000, of which more than 75% are Yolŋu or Anindilyakwa. There are eleven main communities in the region: Nhulunbuy, Yirrkala and Gunyajarara (collectively referred to as the Gove Peninsula), Galiwin'ku, Gapuwiyak, Ramingining, Milingimbi and the Groote communities of Alyangula, Angurugu, Umbakumba and Milyakburra as well as more than fifty homelands and satellite communities across the region. The region is very remote, the positive and negative effects of this remoteness are apparent in some of the challenges and areas of strength identified later in this Plan.

The East Arnhem REGC has established a clear economic vision to grow a diverse and sustainable regional economy which maximises opportunities for jobs and prosperity for all residents of the region, supports existing and new businesses to grow and to attract new investment through partnerships and traditional owner agreements.

The coming years are expected to see a period of unprecedented job creation in East Arnhem, with a net increase of 2000 jobs an achievable target should the full vision of this Plan be realised. This will see the region increase from providing 4.3% of jobs in the Territory in 2020 to 4.5% of jobs in 2030.

These new jobs will need to be created in a variety of priority sectors as outlined later in this document, and by increasing household consumption through increased availability of goods and services and a more equitable distribution of business development opportunities.

Over the next 10 years East Arnhem’s population is forecast to increase from 14,584 to 15,255. Most of this population growth will be achieved in Nhulunbuy, with the population anticipated to rebound from approximately 3300 to over 4000 by 2030 after an expected shift through the mining transition. Accelerated industry growth may see the Nhulunbuy population grow well beyond these conservative estimates.

Whilst the attraction of skilled workers from outside the region will be essential to the success of a variety of new and existing sectors, one of the priorities of this plan will be increasing employment opportunities for the Yolŋu and Anindilyakwa populations through targeted skills development pathways in preferred industries.

The gross regional product of the East Arnhem Region was just under \$1 billion in 2021, representing approximately 3.8% of the Territory economy. By 2030 we are targeting an increase in excess of \$400 million to the total value of the East Arnhem economy. The East Arnhem REGC has also set key targets for growth in the number of small businesses, education attainment, workforce participation and youth development.

As the Territory seeks to grow a \$40 billion economy by 2030, the East Arnhem region faces a time of economic transition. For four decades, the regional economy has been dominated by mining activity, however the coming years will see the closure of two major mines. This transition is expected to be a time of opportunity. Despite the loss of significant economic value from these mines, significant economic growth and diversification is expected to be achieved in East Arnhem by 2030 through tourism, aerospace, human services, green energy and manufacturing, defence and border protection, new resource projects (including traditional owner-led mining), agribusiness including agriculture and native products, land management, forestry, fisheries and aquaculture, and creative industries.

This Plan identifies the investment in enabling infrastructure which will provide the highest economic return for the Territory and the region, unlocking private sector investment and acting as a catalyst for economic growth. Priority infrastructure includes industry housing, the full sealing of the Central Arnhem Road, a maritime precinct at Gove Port and the creation of telecommunication redundancy and broader equitable access to ensure uncompromised digital connectivity throughout the region to support industry and jobs growth.

The table in Section 11 summarises all the short-term (0-2 year), medium-term (2-5 year) and long-term (5-10 year) actions needed to realise the targets set in this Plan. The actions will require the collective commitment from all tiers of government, Land Councils, Developing East Arnhem Limited, the Indigenous Land and Sea Corporation, Indigenous Business Australia, the financial sector, traditional owners, investors and existing local and regional businesses over the short, medium and long term.

We recognise that the targets and actions in this Plan are ambitious and will require significant investment in terms of funding and efforts by a range of stakeholders and land owners, communities and individuals. However the Committee also recognises that laying out a comprehensive action plan and pathway for success is crucial to ensuring the region achieves its vision and goals, and contributing to the broader growth of the Northern Territory.



East Arnhem is set to be one of the highest growth regions of the Northern Territory over the coming 10-years of Governments and key stakeholders must work together to address the challenges to achieving sustainable growth. This sustainable growth must benefit all in the region to ensure we are working collectively to Close the Gap on Indigenous disadvantage and support prosperity for all in the region. The East Arnhem REGC invites you to join us on this exciting journey of sustainable economic growth over the next years and for you or your organisation to consider how you can play a key role in the future of this extraordinary region.

2032

2 ECONOMIC DEVELOPMENT VISION AND PRINCIPLES

VISION

A growing, diverse and sustainable regional economy which maximises opportunities for jobs and prosperity for all residents of the region, supports existing and new businesses to grow and attracts new investment through partnerships and traditional owner agreements.

PRINCIPLES

The principles that underpin our plan:

- 1 Yolŋu and Anindilyakwa people will be active partners in the economy, whether they choose to live in a regional centre, major community, homeland, or a satellite community. The whole region will be involved and economic activity will be regionally dispersed.
- 2 Yolŋu, Anindilyakwa and non-Indigenous people will live and work together in harmony throughout the East Arnhem region, as a leading example for the rest of Australia.
- 3 Economic growth is understood to be an important part of this region's journey, but not its destination; critically important to achieving the aspirations of its people but not an indicator of success in isolation from broader socio-economic improvement and the ability to live and work on country.
- 4 Young people from this region will see a future for themselves here, there will be clear pathways for them to pursue their aspirations and achieve their goals.
- 5 This region will be a place for new ideas, bringing together innovation and traditional knowledge that builds on its special location and history.
- 6 Population growth will not be at the expense of opportunities for Yolŋu and Anindilyakwa to be more actively involved in the economy.
- 7 To continue to reduce the reliance on major projects and achieve significant growth in non-mining activities over the coming decade.
- 8 East Arnhem will have reliable, affordable essential services and quality infrastructure to support a good quality of life and a strong economy.

3 | ABOUT THIS PLAN AND HOW IT FITS WITH OUR KEY DOCUMENTS

This plan is not intended to duplicate core information or strategies already established in the region and actions other related plans.

Key interrelated plans and documents include:

- » Invest East Arnhem
<https://www.developingeastarnhem.com.au/invest/>
- » East Arnhem RRC's Submission to the Territory Economic Reconstruction Commission
<https://ntrebound.nt.gov.au/submissions/lodged-submissions/lodged-submissions-details?submission-id=909250>
- » Anindilyakwa Land Council
 - » Future Groote Strategy and ALC Strategic plan
 - » <https://anindilyakwa.com.au/future-groote/future-groote-strategic-plan/>
- » Gove Peninsula Futures
 - » Traditional owner vision for the Gove Peninsula
 - » <https://www.developingeastarnhem.com.au/blog/2021/03/30/traditional-owner-vision-for-the-gove-peninsula>
- » East Arnhem Land Destination Management Plan
<https://www.tourismnt.com.au/research-strategies/destination-management-plans/east-arnhem-land-region>

4 | REGIONAL ECONOMIC PROFILE



Nhulunbuy - Image Credit: DEAL

OVERVIEW

The East Arnhem region is home to the one of the world's longest continuing cultures and is entirely Aboriginal freehold land. Set against a spectacular natural environment, the region has a history of trade and entrepreneurship, and is connected with national and international markets. The population is approximately 15 000, of which more than 75% are Yolŋu or Anindilyakwa. There are eleven main communities in the region: Nhulunbuy, Yirrkala and Gunyajarara (collectively referred to as the Gove Peninsula), Galiwin'ku, Gapuwiyak, Ramingining, Milingimbi and the Groote communities of Alyangula, Angurugu, Umbakumba and Milyakburra as well as more than fifty homelands and satellite communities across the region. The region is very remote, the positive and negative effects of this remoteness are apparent in some of the challenges and areas of strength identified later in this Plan.

Most major services are found in the town of Nhulunbuy on the Gove Peninsula, a regional economic hub which supports a network of communities and homelands located 600 kilometres east of Darwin (approximately 1000 kilometres by road) with direct daily flights from both Darwin and Cairns.

Off the coast of mainland East Arnhem is the Groote Archipelago of Groote Eylandt and Bickerton Island, home to the Anindilyakwa people, where the sub-regional hub of Alyangula supports the neighbouring communities of Angurugu, Umbakumba and Milyakburra, a number of smaller satellite communities and the island's manganese mine. The Groote Archipelago and the Anindilyakwa traditional owners are represented by the Anindilyakwa Land Council (ALC).

The East Arnhem regional population is approximately 15,000, of which more than 75% are Yolŋu or Anindilyakwa.

There are several unique characteristics that make East Arnhem a competitive location for diverse industry investment, living and working, not least of which is the long history associated with mining operations, which has seen significant infrastructure investment at a level and scale not typically found in comparative locations.

Geographically, East Arnhem sits as a natural gateway to the boundless opportunities beckoning from the neighbouring markets of Asia Pacific and beyond. The natural deep-water port in Melville Bay represents a strong geographical advantage as the next natural link between the closest major ports in Cairns and Darwin.

An overview of the regional economy is provided in the following section.

ECONOMIC OUTPUT & PRODUCTIVITY

INDICATOR	EAST ARNHEM	NORTHERN TERRITORY	AUSTRALIA
Gross Regional Product billion	\$0.98	\$26.5	\$2.0 trillion
Local Businesses businesses per 1,000 people	17	60	93
Net New Business Start-ups of all businesses	7%	2.3%	3.7%
Small Businesses Index small businesses per 1,000 people	7.7	58	91.0

In the 2020/21 financial year the Gross Regional Product (GRP) of the region was \$0.98 billion. This represents a decrease of 4.2% on the previous year, and a decrease of approximately 50% since the economy's peak of slightly under \$2 billion in 2014/15¹.

The significant decrease in economic productivity within the region over the past six years largely relates to reduced activity within the mining sector, in particular the curtailment of the Gove alumina refinery in 2014. In 2014/15 the mining sector added almost \$1.4 billion in value to the East Arnhem economy, accounting for 77% of the total regional economy. In 2020/21 the mining sector represented 49% of the total regional economy, adding \$423 million of value².

The sectors that have demonstrated the strongest economic growth over the last six years are Health Care & Social Assistance, Education & Training and Public Administration & Safety. This is largely due to regionalisation efforts and increased levels of investment from the Northern Territory and Commonwealth Governments. In 2020/21 these

sectors collectively contributed over \$238.9 million in value to the regional economy, an increase of 35.7% since 2014/15².

Another sector demonstrating significant growth, although at a smaller scale, is Building and Construction which has grown by 37.6% since 2014/15 to \$38.6 million in 2020/21². This is largely driven by government investment as a part of the National Partnership Agreement on Remote Indigenous Housing, so this trend is expected to continue throughout the next decade. This is particularly important within our region as this work is increasingly being contracted to regionally based and Aboriginal businesses, resulting in increased local employment at a community, rather than regional/Territory level.

There were 17 new businesses created across the region in 2020/21. However, the Small Business Sector is underrepresented within our region, with only 7.7 small businesses per 1000 people in the region. This is in comparison to 58 across the rest of the Territory and 91 nationally³.

JOBS & WORKFORCE

INDICATOR	EAST ARNHEM	NORTHERN TERRITORY	AUSTRALIA
Total Jobs	5,782	134,892	13,242,000
Labour Force of total population	28%	47.98%	52.68%
Unemployment Rate of total population	13.8%	7%	4.6%
Long Term Unemployment of total population	23%	11.1%	6.1%
University Qualified of working age population	8.8%	27.5%	22%
Technical Qualified of working age population	14.1%	23.9%	24.7%
Adults in Higher Education Learning of working age population	2.1%	6.8%	10.3%

In the 2020/21 financial year there were 5,782 local jobs in the East Arnhem region, this represented growth of 4.3% on the previous year and a net decrease of 3.1% since 2014/15⁵.

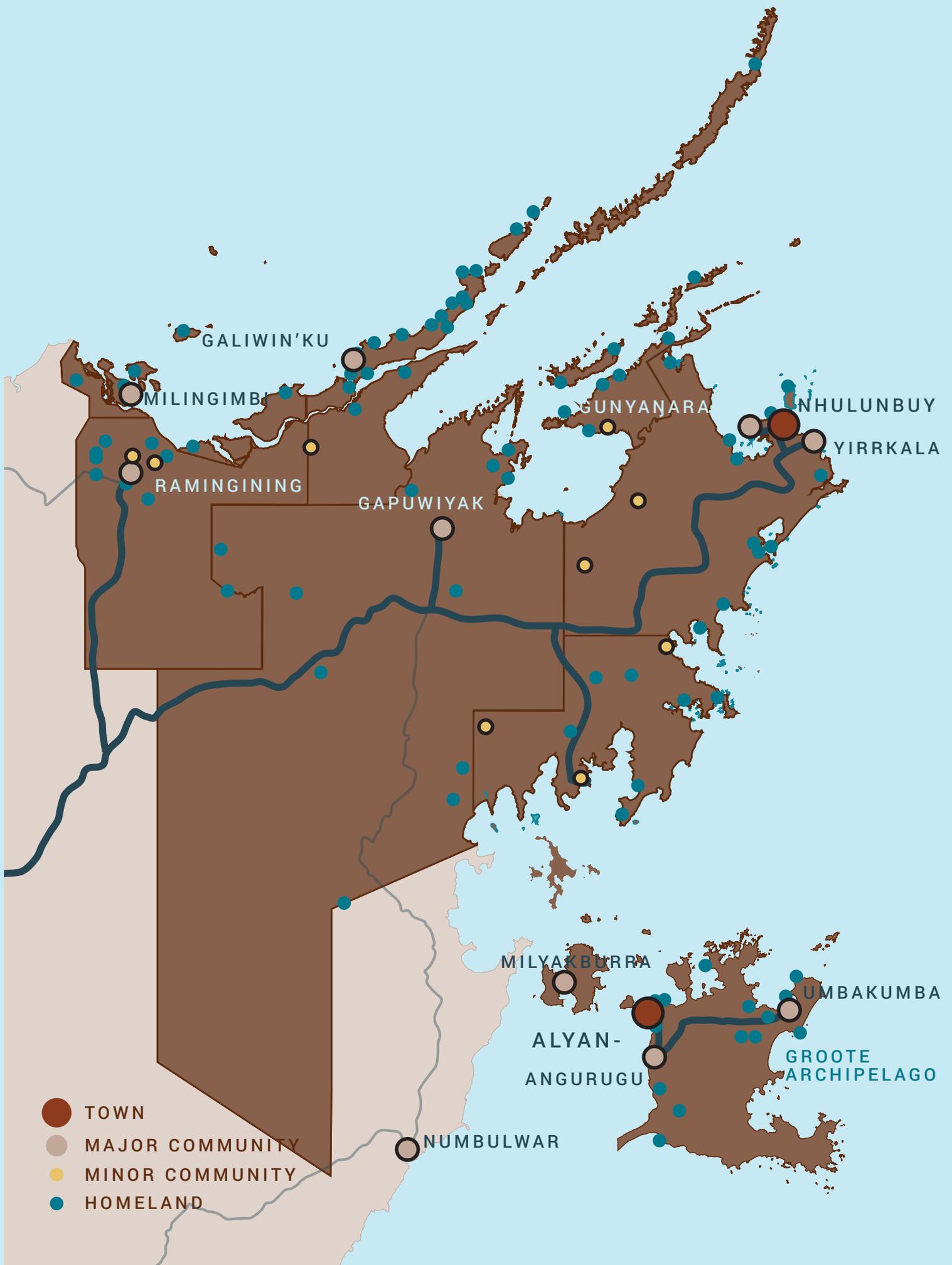
At the time of the 2016 census there were 4,079 people within the region in the labour force, this equates to 43.9% of the population aged 15 and over and 28% of the region's total population⁶.

Of these 4,079 people 2,330 (57.1%) were employed full-time, 1,041 (25.5%) were employed part-time and 562 (13.8%) were actively looking for work.

When considering the region's unemployment rate of 13.8% in comparison to other parts of the Northern Territory of Australia it is important this number only represents people in the labour force who are actively looking for work. In East Arnhem

there were more people of working age outside of the labour force (4,111) than there were in it. This cohort represented 44.2% of all working age people, in contrast only 20% of working age people were outside of the labour force in the Greater Darwin region and 25.7% across the Territory⁶.

This increased level of disengagement from the labour market is also reflected in the levels of qualifications attained by the working aged population with the region. Both University (8.8%) and Technical qualifications (14.1%) are significantly below the Northern Territory and National benchmarks and only 2.1% of the working aged population are currently undertaking studies for qualifications at a level of Cert III or higher compared to 6.8% across the Territory and 10.3% nationally⁷.



POPULATION & LIVEABILITY

INDICATOR	EAST ARNHEM	NORTHERN TERRITORY	AUSTRALIA
Population	14,584	245,909	25,738,142
ATSI residents per region	68.1%	25.5%	2.8%
Population with Disability	3.3%	3.2%	5.4%
Health Services Employment Medical Practitioners per 10,000 people ¹	24.2	24.1	9.7
Health Services Employment Registered Nurses per 10,000 people ¹	180.8	107.7	133.7
SEIFA Socio-economic Index	719	939	1000
Social Housing of people in rented dwellings	65.1%	21.4%	3.6%

The estimated residential population of the East Arnhem region was 14,584 at the end of the 2020/21 financial year. The population has been relatively static recently, with a net increase of 27 people since the end of 2015/16⁸.

In the 2016 census, over 68% of the regions residents identified as Aboriginal or Torres Strait Islanders⁹, this reflects 100% of the region being Aboriginal Land under the traditional ownership of the Yolŋu and Anindilyakwa people. This is in comparison to 25.5% of the Northern Territory population and 2.8% nationally¹⁰.

The Social Health Atlas of Australia estimates that 3.3% of the region's population are living with a profound or severe disability¹¹. It is reasonable to assume that this figure may be impacted upon

by significant under-diagnosis, a result of limited specialists in parts of the region and families being reluctant to seek a diagnosis due to concern that it may lead to stigma or negative intervention from government services¹².

As a result of a geographically dispersed population with a high burden of disease there is a significant investment in Health Services in the region. This is demonstrated by higher rates of medical practitioners and registered nurses employed per capita than the rest of the Territory and significantly more than the national average¹³.

Over 65% of all people living in rented dwellings in the East Arnhem region are living in social housing. This is significantly higher than the figure for the Northern Territory (21.4%) and the national figure of 3.6%¹⁴.

Geographically, East Arnhem sits as a natural gateway to the boundless opportunities beckoning from the neighbouring markets of Asia Pacific and beyond.

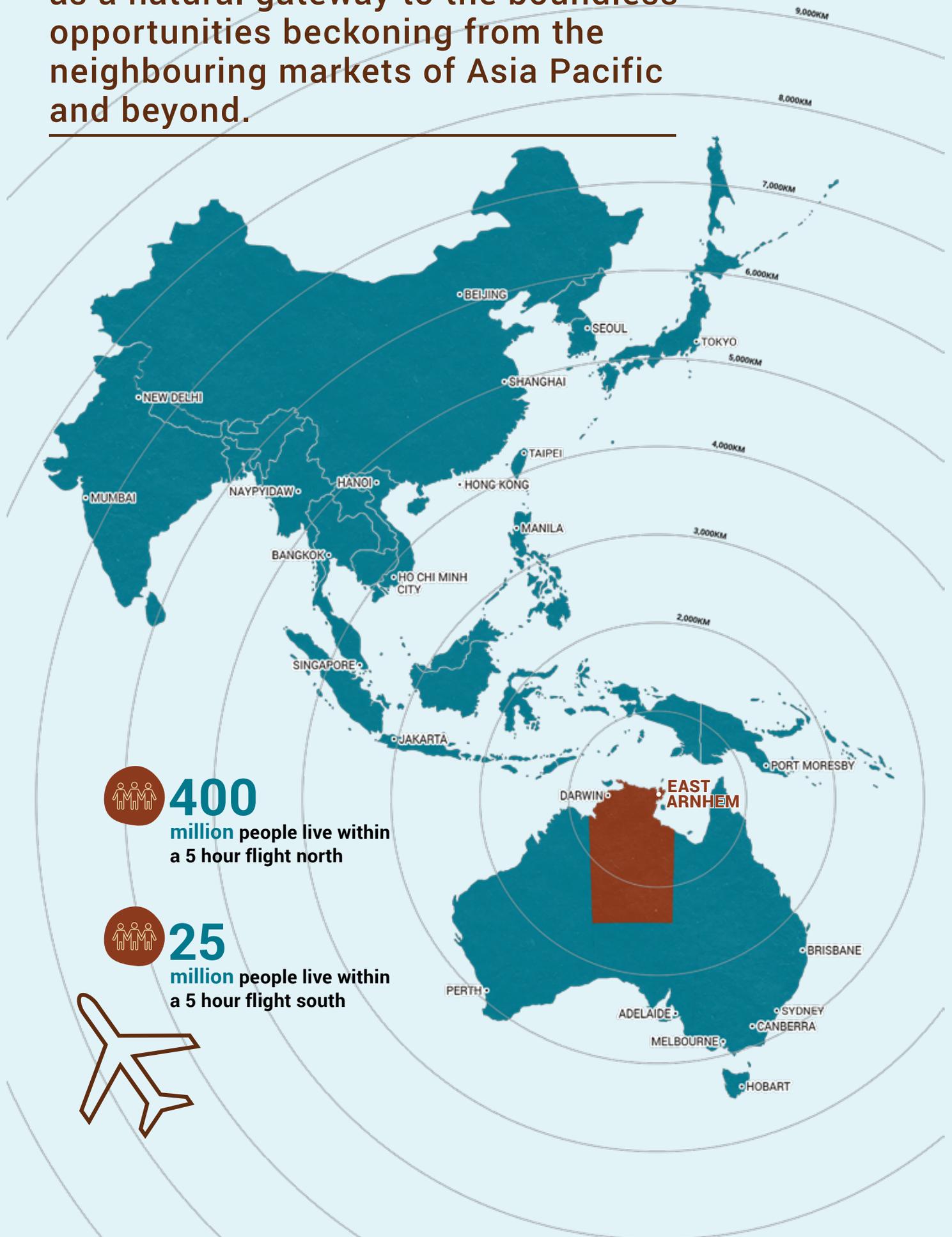




Image Credit: Anindilyakwa Media

CLOSING THE GAP & ABORIGINAL AFFAIRS STRATEGY

INDICATOR	EAST ARNHEM	NORTHERN TERRITORY	AUSTRALIA
Attainment of Year 12 or equivalent qualification of ATSI people ages 20-24	5,782	134,892	13,242,000
Completion of a Tertiary Qualification of ATSI people ages 25-34	1.1%	4.8%	12.6%
Aboriginal Economic Participation of ATSI people aged 25-64 are employed	14%	23.5%	35%
Young people engaged in employment, education or training of ATSI people aged 15-24 are fully engaged	27.1%	18.5%	18.2%
Proportion of ATSI people living in appropriately sized housing of working age population	19.3%	21.3%	78%
Northern Territory Public Service employees ATSI people employed in NTPS	176	2,569	N/A
Aboriginal Tourism Ventures of working age population	29	100	N/A

The 2016 census reported that 15.4% (approx. 320) of Aboriginal people aged 20-24 living within the region had successfully completed Year 12 or attained an equivalent qualification. This is in comparison to a Territory wide attainment rate of 12.8% and 20.3% nationally¹⁵.

At the time of the 2016 census 1.1% (approx. 11) of Aboriginal people aged 25-34 living within the region reported having successfully completed a Tertiary qualification. This is in comparison to a Territory wide attainment rate of 4.8% and 12.6% nationally¹⁵.

In the same census data 14% (approx. 720) of Aboriginal people aged 25-64 reported being

employed. Territory wide 23.5% of Aboriginal people aged 25-64 reported being employed at the time of the 2016 census, whilst the national figure was 35%¹⁵.

The 2016 census reported that 27.1% (approx. 515) of Aboriginal people aged 15-24 living within the region were fully engaged in employment, education or training. This is in comparison to a Territory wide engagement rate of 18.5% and 18.2% nationally¹⁵.

Throughout the East Arnhem Region 19.3% of Aboriginal people are living in appropriately sized housing, meaning that over 80% of the Aboriginal population are living in crowded, overcrowded or severely overcrowded dwellings¹⁶.



BIG Carpentry - Image Credit: BIG Carpentry

5 | 2032 ECONOMIC GROWTH TARGETS

The East Arnhem REGC held workshops to determine the appropriate metrics to measure the attainment of the vision, goals, principles and targets of this plan over the next 10 years. The selected metrics and associated targets are outlined below.



JOBS

The total number of jobs in the region



If job creation opportunities across the range of prospective sectors are realised (Section 7 refers), a target for a net increase in excess of 2000 jobs is achievable. This target includes the expected impacts of the loss of jobs in the resources sector by 2030.

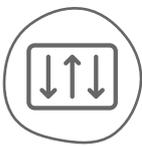


POPULATION

The official residential population of the region



This target is largely forecast to be achieved through population re-growth in the Nhulunbuy community as a result of additional industry housing stock being created or unlocked to support ongoing employment growth in a variety of prospective sectors. The relatively low population growth target (5% over 10 years) reflects the forecast reduction created within the region from mining activity as a result of major mine closures and anticipated population rebound through expected industry growth.



GROSS REGIONAL PRODUCT

The total value of goods and services produced in the region



Economic growth is expected in a wide variety of prospective sectors over the coming years which are outlined in Section 7 Growth Sectors. Expected net economic growth is impacted by the forecast reduction in the economic value within the region from mining activity as a result of major mine closures.



SMALL BUSINESS

The number of small businesses (1-19 employees) operating in the region per 1,000 residents

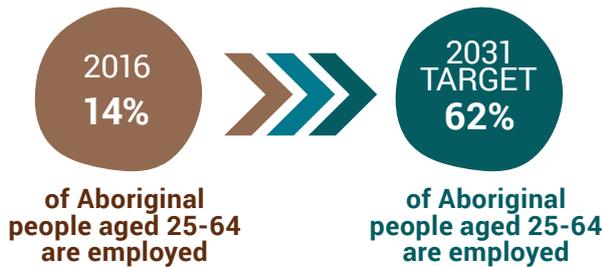


The small business sector accounts for over 32% of all jobs nationally, yet small businesses are significantly underrepresented within the East Arnhem region. Many communities in this region have unmet demand for goods and services, which could be delivered locally by small businesses, however people currently have to travel to a major population centre to access them.



ABORIGINAL ECONOMIC PARTICIPATION (CLOSING THE GAP TARGET)

The proportion of Aboriginal and Torres Strait Islander people who are employed



To achieve the target, approximately 2500 additional Aboriginal people aged 25-64 need to have access to and gain employment than were reported in 2016. The majority of the Aboriginal population live outside of the region's service centres of Nhulunbuy and Alyangula. Accordingly, there will need to be significant growth within local community and Homeland economies to create sufficient employment opportunities for this target to be achieved but there is also opportunities for employment in regional centres.



AGI Markets in Nhulunbuy - Image Credit: ALPA



YOUTH ENGAGEMENT IN EMPLOYMENT OR EDUCATION (CLOSING THE GAP TARGET)

The proportion of young people who are fully engaged in employment, education or training



To achieve the target, approximately 750 additional Aboriginal people aged 15-24 would need to be fully engaged in employment, education or training than were reported in 2016. Despite our region exceeding both the Territory and national figures for this measure, there will need to be a significantly improved rate of successful transition from secondary school into employment or further education or training for this target to be achieved.



STUDENTS REACH THEIR POTENTIAL (CLOSING THE GAP TARGET)

Attainment of Year 12 or equivalent qualification



To achieve this target, approximately 1700 additional Aboriginal people aged 20-24 would need to have completed Year 12 or attained an equivalent qualification than were reported in 2016. This demonstrates a critical need to ensure that education in the region is relevant, tailored to student needs and demonstrates clear value to students and families.



STUDENTS ARTICULATE TO FURTHER EDUCATION (CLOSING THE GAP TARGET)

Completion of a Tertiary Qualification (Certificate III and above)



To achieve this target, approximately 650 additional Aboriginal people aged 25-34 would need to have completed a tertiary qualification than were reported in 2016. This demonstrates a need to ensure that there is sufficient access to appropriate tertiary pathways throughout the region if this target is to be achieved.

6 | REGIONAL STRENGTHS



Gove Port - Image Credit: Rio Tinto

There are several unique characteristics that make East Arnhem a competitive location for diverse industry investment, living and working.

The region boasts strong Aboriginal economic leadership, with some of the largest and most successful Aboriginal corporations in the country based in the region and governed by Yolŋu and Anindilyakwa directors. Both the Northern Land Council and Anindilyakwa Land Council are actively involved in a variety of both long-term economic planning and current economic development activities throughout the region.

East Arnhem has seen significant infrastructure investment at a level and scale not typically found in comparative locations, a legacy of the regions long history of major mining operations. Significant investments are also scheduled in areas such as remote housing and the Central Arnhem Road.

Geographically, the East Arnhem region sits as a natural gateway to the boundless opportunities beckoning from neighbouring markets of Asia Pacific, and beyond. The natural deep-water Gove Port also boasts a strong geographical advantage as a natural link between the closest major ports in Cairns and Darwin.

If these strengths are effectively leveraged in the pursuit of the many opportunities that this region presents, East Arnhem will be able to realise significant economic growth, not only in the period of time covered within this plan, but in the decades to come.

ABORIGINAL ECONOMIC LEADERSHIP



The East Arnhem region is steeped in a proud history of entrepreneurship, with the Yolŋu and Anindilyakwa people trading both domestically and internationally for hundreds and perhaps thousands of years.

This entrepreneurial spirit has been carried forward into the present, with Arnhem Land boasting some of the largest and most successful Aboriginal corporations in Australia.

This is typified by the Arnhem Aboriginal Business Council, recently established to represent businesses from a range of industries across the East Arnhem region. The eight current members of the business council have generated over \$1.1 billion in revenue in the past five years and invest on average more than \$50 million per year back into their communities through capital infrastructure, maintenance, local jobs, benevolent programs and sponsorship.

These organisations also lead the way when it comes to Aboriginal employment, with almost 75% of their total workforce consisting of Aboriginal employees, equating to approximately 1200 jobs.

Traditional land owners throughout the region are more eager than ever before to be partners in the economic activation of their estates, seeking to

drive economic growth and realise benefits and opportunities for their people.

Developing East Arnhem Limited have been working closely with the Northern Land Council to engage with Yolŋu traditional owners and support them in identifying and realising their economic development aspirations, and connecting them with potential opportunities and partners.

In the Groote Archipelago, the ALC have worked closely with Anindilyakwa leaders and regional stakeholders to develop the Future Groote Strategy, a road map to build a self-sufficient post-mining future that protects, maintains and promotes Anindilyakwa culture.

The Northern Land Council (NLC) is in the process of implementing a regionalisation strategy which will see more resources permanently located within the East Arnhem Region. This will provide increased capacity for consultation and agreement making, streamlining the process for both traditional owners and prospective proponents.

WHAT NEEDS TO BE DONE?



- » AEL1 – The Value for Territory Assessment Framework updated to ensure the public value delivered by Aboriginal businesses is given sufficient weighting (Short-term)
- » AEL2 - Aboriginal Procurement Policy implemented to strengthen procurement arrangements and adopt procurement targets for the engagement of Aboriginal businesses (Short-term)
- » AEL3 – Support the development of Local Economic Growth Plans across the sub-regions of East Arnhem (Short-term):
 - » Groote Archipelago
 - » Gove Peninsula
 - » Laynhapuyŋu sub-region
 - » Djalkiripuyŋu sub-region (Blue Mud Bay homelands)
 - » Miyarrka sub-region (Gapuwiyak and surrounding homelands)
 - » Marthakal sub-region (Galiwin'ku and surrounding homelands)
 - » Gattjirrk sub-region (Milingimbi and surrounding homelands)
 - » Birr Rawawang (Ramingining and surrounding homelands)
- » AEL4 - Increase availability of key economic and industry development information in first languages to support Traditional Owner and community engagement.

UNDERUTILISED LABOUR

Throughout the region people's desire for work is not being met, this is particularly true of the region's Aboriginal working age population. Many Aboriginal people who are not working want to work, and many more who are working want to work more.



In East Arnhem over 44% of working age people were not in the labour force in 2016, equating to over 4000 people¹⁷. This cohort of people represent an important opportunity for the region due to their potential contribution to the labour market. This is especially true in the current conditions, in which many businesses have identified opportunities for growth and new activities but are unable to realise them due to an inability to import additional skilled and unskilled labour into the region due to housing scarcity.

There are a wide variety of reasons why people may be out of the labour market including a lack of appropriate housing, retirement, ongoing study, parenting or caring, long-term illness or disability, incarceration or not wanting to work.

Less than 5% of the region's population are at retirement age, only 3.3% reported as having a profound or severe disability and a very small proportion of the population are undertaking study. Whilst Aboriginal people in the Northern Territory are overrepresented in the justice system the incarceration rate in this region is not material in the context of a cohort this large.

Considering these figures it is reasonable to assume that the majority of these 4000 people are either undertaking caring duties or have chosen not to seek work. Whilst many people may have chosen not to seek work due to personal circumstances that are unlikely to change, it is likely that many have given up looking for work for labour market reasons and would re-join the labour force should these labour market conditions change and opportunities are presented.

In East Arnhem, there are a variety of labour market reasons that could impact on a person's willingness to continue to seek work. These include a lack of suitable jobs, a lack of jobs with suitable hours, a lack of jobs with sufficient flexibility to accommodate cultural and family responsibilities and a lack of jobs with culturally safe workplaces.

Qualitative evidence gathered by employment services providers within the region suggests that the most significant labour market reason impacting upon a person's willingness to continue seeking work is a lack of suitable jobs within the person's community.

This demonstrates that, should economic development activities be successful in creating new opportunities for employment, there may be thousands of discouraged job seekers already within the region who want to work, but have disengaged due to a lack of appropriate opportunities.

Activation of this underutilised labour pool will be a catalyst for economic growth, both in terms of providing the necessary workforce and through increased consumer spending as a result of higher employment levels and personal wealth within the region.



LOCATION & CONNECTIVITY

The East Arnhem region is strategically positioned between Darwin and Cairns, with the only deep-water port and major airport between the two. Geographically positioned as a natural gateway to Asia Pacific markets and the 400 million people that live within a 5 hour flight north.



The Central Arnhem Road is the primary access road to the region and runs 675 kilometres from the Stuart Highway to Nhulunbuy, with a travel time between the towns of Katherine and Nhulunbuy of 8 to 10 hours. Although large sections of the road are unsealed, it is well-maintained and open to travel with a four-wheel drive vehicle articulated road transport (b-double) for the vast majority of the year.

Gove (Nhulunbuy) Airport is serviced by regular nonstop Airnorth commercial passenger flights from both Darwin and Cairns. International visitors and workforce participants can quickly transit to Nhulunbuy in just over an hour from Darwin and 1 hour and 40 minutes from Cairns.

The East Arnhem region benefits from having the Northern Territory's second deepest naturally occurring port facilities, located on the Gulf of Carpentaria and about 14 kilometres from Nhulunbuy. A deep-water marine wharf and roll on roll off barge ramp services the town and region with complementary infrastructure, which accommodates a range of vessel sizes moving bulk goods and large-scale industrial equipment.

Telecommunication infrastructure is vital to the development of future-focused industries, and the East Arnhem region is serviced by the Arnhem and Groote Fibre Networks, which provide broadband telecommunication services via the National Broadband Network (NBN) and Telstra.

The telecommunications services in regional hubs within the East Arnhem region are considered to be superior to some major cities and regional centres across Australia. However, this does not accurately reflect the challenges presented to businesses by

unreliability in the network and a lack of options for redundancy. Nhulunbuy boasts Fibre to the Premises (FTTP) infrastructure for residential and commercial use, with the remainder of the East Arnhem region able to connect with a combination of NBN satellite and Sky Muster services. The region also benefits from Telstra 4G mobile coverage in most major towns and communities.

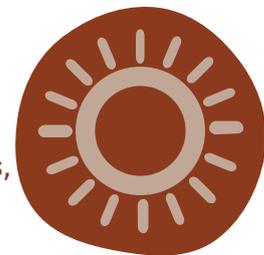
Due to the isolated nature of some of the population centres, and the powerful weather systems that are associated with a sub-tropical climate, some connectivity in more remote locations can be limited at times. Although there are high levels of connectivity in some areas, overall the region demonstrates a high level of inequity in connectivity.

The strategic location of the East Arnhem region and historically high levels of infrastructure investment from the mining sector ensure that the region is already highly prospective for a variety of industries which will be detailed throughout the plan.

Further investment to upgrade critical road and marine infrastructure has been identified as necessary to increase the viability of private sector investment within the region in high value sectors such as agribusiness, fisheries and aquaculture, manufacturing and defence.



HOMELANDS



Across East Arnhem Land, there are more than 50 Yolŋu homelands. These are small communities established through the homelands movement of the 1970s, when kinship groups left mission communities to return to their traditional lands. Homelands represent the vision of Yolŋu leaders to determine their own future. On Anindilyakwa country, homelands are termed 'satellite communities'.

Yolŋu and Anindilyakwa leaders continue to advocate that strong homelands will support the larger communities across the East Arnhem region. This includes enabling the economic use of land and resources where land ownership is largely undisputed and there is high prospectivity across industries.

Homelands leaders have articulated a vision in which they are supported to manage their ancestral lands and seas; preserve tradition and culture; provide for changing community needs; live with dignity according to their local and Australian laws; encourage sustainable development on their lands and seas to support local jobs and increased prosperity; and provide strong governance for homelands residents.

Homelands have comparatively high school attendance and attainment, higher levels of employment and participation and a healthier population than the nearby larger communities. This is generally attributed to very strong local Bāpurru (clan) leadership and governance, as well as each clan and family living on their own traditional lands.

This plan proposes that sustainable homelands development be at the heart of the regional development approach in East Arnhem. This is consistent with international best practice community development approaches to addressing disadvantage which take a strengths based

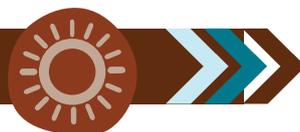
approach rather than a deficit approach.

Currently there are a mix of emerging and established businesses based in Homelands throughout the region. This includes a variety of tourism activities in Baniyala (Yilpara), Ninyikay; Bawaka, Bukudal and Dhalinybuy; a rainforest spring water bottling operation in Mandjawuy; and a regionally significant forestry research project based in Birany Birany.

In all of these instances the economic development activities are driven by traditional owners who want to utilise their land to create opportunities and employment for their family and clan. Despite these early successes, there are many more opportunities which are yet to be realised due to a lack of housing, limited essential services, a lack of telecommunication connectivity and insufficient road infrastructure to ensure year round connectivity to major communities and regional centres.

Increased homelands investment in enabling infrastructure and a more coordinated approach to the funding and provision of services is required to further unlock the economic capability of homelands and the vast pristine areas of Arnhem Land. Doing so will enable a greater proportion of the population to permanently reside on homelands, reduce housing and infrastructure pressure in major communities and accelerate the sustainable development of the Aboriginal estate.

WHAT NEEDS TO BE DONE?



- » **H1** – Ensure homelands economic opportunities are clearly represented in the Local Economic Growth Plans (AEL5) (Short-term)
- » **H2** - Create a Homelands Infrastructure Prioritisation Plan through co-design with homelands leaders, service providers and funding bodies to identify and prioritise the enabling infrastructure needed to unlock homelands economic activity identified in the Local Economic Growth Plans – AEL5 (Short-term)
- » **H3** - Create a homelands funding strategy encompassing investment and ongoing maintenance of housing, essential services, infrastructure and municipal and essential services through co-design with homelands leaders, service providers and funding bodies. (Short-term)

INVESTMENT FACILITATION



When the Territory Economic Reconstructions final report was provided to the Chief Minister in November 2020 it called for coordinated efforts to create a bankable investment environment.

The private sector is essential to the Territory's ongoing economic growth. This is no different in East Arnhem and securing private sector investment must be the priority. Regional economic development actors such as the Northern Territory (NT) Government, the Commonwealth Government, the Land Councils and Developing East Arnhem Limited (DEAL) need to work together to make East Arnhem an easy place to do business and invest.

In East Arnhem, this is not a new approach. Since the curtailment of Rio Tinto's Gove Alumina Refinery in 2014, there has been a coordinated approach to economic development within the region, focusing on reducing the region's reliance on mining through economic growth and diversification.

The establishment of DEAL in 2014 as a joint initiative of Rio Tinto and the NT Government provided the region with an array of independent economic development specialists uncommon in regional Australia. DEAL facilitates planning and coordinated action to support emerging industries in the region and acts as a 'front door' for businesses and investors from Australia and around the world.

Recent times have also seen an increase in regionalised economic development functions within government agencies. The NT Departments of Chief Minister and Cabinet (CM&C), Industry, Tourism and Trade (DITT) and the National Indigenous Australians Agency (NIAA) have all created dedicated economic development positions within the region and adopted a practice framework that promotes increased coordination and collaboration in both investment attraction and facilitation.

The region boasts a variety of forums in which Government agencies, NGO's and the private sector come together to advance the economic priorities of the region through collaborative planning, coordination of support services and advocacy for investment in priority enabling infrastructure. These include the Regional Economic Growth Committee, Gove Peninsula Futures Reference Group and Groote Eylandt Executive Steering Committee.

These collaborative forums and established governance structures provide a competitive advantage, increasing the regions capability and capacity to drive increased levels of private sector investment; develop new industries, attract and deliver major projects; and facilitate sustained economic growth.

WHAT NEEDS TO BE DONE?



- » **IF1** - Governments (NT and Australian Government), DEAL and stakeholders to work together to develop the Investment Facilitation Framework for the region including expanding collaborative investment and economic development framework to the local (sub-regional) level (via the development of the Local Economic Growth Plans)



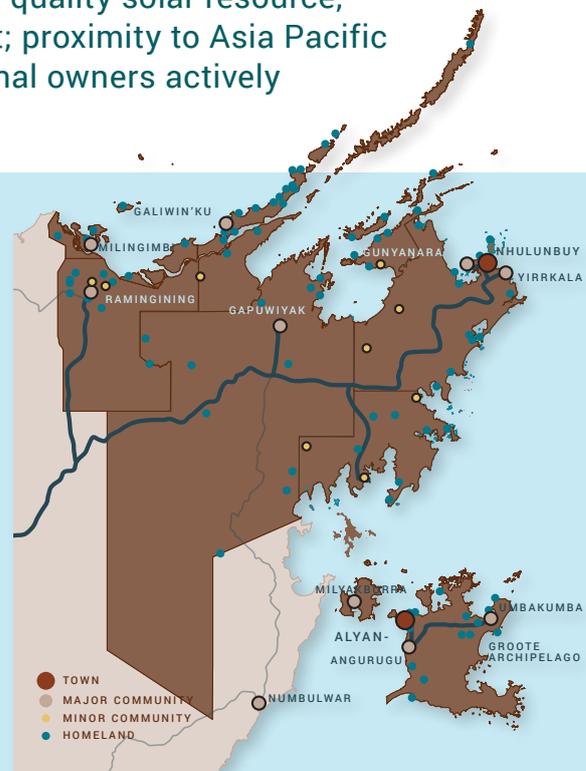
7 | ENABLING ENVIRONMENT (AND BARRIERS TO GROWTH)

Central Arnhem Road - Image Credit: DEAL

East Arnhem is a highly prospective but emerging regional economy. The region boasts world-class mineral deposits; a quality solar resource; a strategic location for defence; a deep water port; proximity to Asia Pacific markets and; vast Aboriginal estates with traditional owners actively seeking to increase their economic participation.

The region is well-placed to benefit from a variety of global trends such as:

- » accelerated digitalisation, with accelerating technological advances and helping overcome the barrier of remoteness;
- » de-globalisation, with the region a potential beneficiary of an increased focus on growing local manufacturing and;
- » sustainability, with the region equipped for significant increases in renewable energy production and decarbonisation.



This prospectivity ensures that there are many immediate opportunities for economic growth within the region. However, for the region to achieve its economic potential, investment is needed in the enabling environment and there are a variety of regionally specific barriers that need to be addressed.

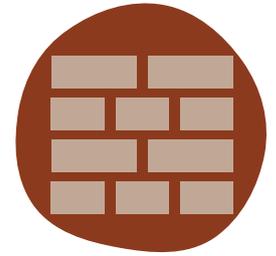
The enabling environment is critical for both the viability of major projects and the development of priority industries. There are a variety of priority infrastructure projects which will serve as growth catalysts for a variety of industries, however in the absence of these investments it will be difficult to attract private sector investment.

Other priority projects will increase investor confidence by streamlining access to land, facilitating Aboriginal led developments and increasing workforce readiness.

Collectively these priority projects will deliver ongoing productivity, enhance connectivity, increase sustainability and ultimately create an environment in which the region's competitive advantages will lead to a significant increase in private investment.

The key barriers to economic, industry and jobs growth are explored below.

INDUSTRY HOUSING



A key priority for the East Arnhem region if the region is to have a sufficient workforce to support the identified economic opportunities is ensuring that there is sufficient housing stock. Access to housing is a critical part of population attraction and retention, this is even more so the case in the East Arnhem region.

Scarcity of housing has created a significant barrier to attracting new industry or supporting existing private/non-government sector employers to grow or diversify.

The issue of housing scarcity is currently recognised as the most pressing issue in Nhulunbuy, Groote Eylandt and across the remote communities and homelands from an economic development perspective by the Regional Economic Growth Committee (refer to East Arnhem TERC Submission).

In Nhulunbuy around 150-200 additional houses are required to just meet current industry demands (government, service providers and private sector). In Groote around 60-80 houses are required to support various initiatives on foot through the Groote Local Decision Making Agreement and economic development initiatives and the requirements across the remote communities are currently being surveyed, but are expected to be in the order of 80-100 houses across 6 Yolŋu region communities just for known demand.

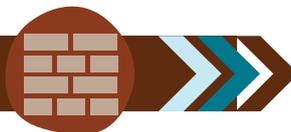
It is currently prohibitively expensive for most organisations to meet the costs of servicing land and building employee housing. The average cost of building a three-bedroom house in a remote East Arnhem community is \$550,000, in addition to the building costs, developers generally need to cover the costs of essential services connections and sub-division development amounting to approximately \$200,000 per lot.

This is a disincentive to businesses and organisations who wish to expand their footprint in communities or create more permanent presences and encourages Fly In Fly Out (FIFO) servicing. Another challenge to private sector investment in housing stock is the length and transferability (or 'fungibility') of tenure available through leases on Aboriginal land and the impact this has on the ability to achieve an economic return on housing investment.

These challenges highlight the need to explore models of Aboriginal-led housing development where traditional owners and Aboriginal Businesses develop land and housing for leaseback to governments and funded service providers and the private sector on long term leases.

This would be a significant enabling investment, resulting in job creation, regional population growth, improved service provision and business opportunity. It is also important that staff accommodation stock enables organisations to offer housing to local Aboriginal employees as part of their packages, reducing the reliance on and overcrowding in social housing.

WHAT NEEDS TO BE DONE?



- » **IH1** - Governments provide traditional owners and Aboriginal Businesses confidence (via long term leases) to develop land and housing through long-term leaseback arrangements in Nhulunbuy, Groote Eylandt and across the remote communities and leverage these commitments for further development of land and housing for the private sector (Short-term)
- » **IH2** - Facilitate access to capital incentive schemes and/or preferential financing arrangements (such as NAIF) to encourage Aboriginal led housing developments (Short-term)

ROAD INFRASTRUCTURE

Improved all weather and year round road connectivity is critical to both social and economic development in the East Arnhem region.



CENTRAL ARNHEM ROAD

The first order priority is the Central Arnhem Road. The Central Arnhem Road is a 675-kilometre road connecting the Stuart Highway to Nhulunbuy. The route services many Aboriginal communities and homelands, links Nhulunbuy to the National Highway Network, and is a key tourism drive and freight route for the mining and pastoral industries.

The majority of the road – 650 kilometres is unsealed and requires an AWD/4WD to traverse. Over recent years, all waterways except two have been bridged. Historically, the road had been inaccessible in the wet season for several months. Recently, this has reduced due to major bridging works, however, it still averages about 9 days of closure per year, and weeks to months where weight and axle restrictions are placed on the road due to its condition.

To date, \$225 million has been committed to the upgrade of the Central Arnhem Road over 10 years under the National Partnership Agreement on Land Transport (NPALT), which will see around 25-35% of the road sealed. The project will result in sealing, reconstructing, widening and flood immunity improvements to priority sections of the route. The funding committed to date, however, is only approximately one quarter of what is required to upgrade the entire road to a dual lane sealed road.

The Department of Infrastructure, Planning and Logistics (DIPL) funded the creation of a corridor investment strategy to prioritise packages of work based on assessment of the social and economic benefit of sealing different sections of the road. Based on the prioritisation process the packages of works were assigned as either short, medium or long term priorities. The funding committed to date is only sufficient to complete the short term priority packages of works.

Funding certainty of a full road upgrade is also a key driver for private sector investment, as well as supporting existing businesses to plan their operations. For example, the NT Seafood Council has advised that if wharf infrastructure

access and upgrades of the Central Arnhem Road were completed, private sector investment in cold storage and processing facilities would be progressed in the region.

Upgrading the entire road would also reduce access barriers to the region, cutting travel time and increasing connectivity to the National Highway Network, which is critical for supply chains for industry. It also provides a more viable route for road freight which creates competition in the logistics industry and reduces costs for consumers and businesses in the region, including in relation to food security and pricing in remote stores.

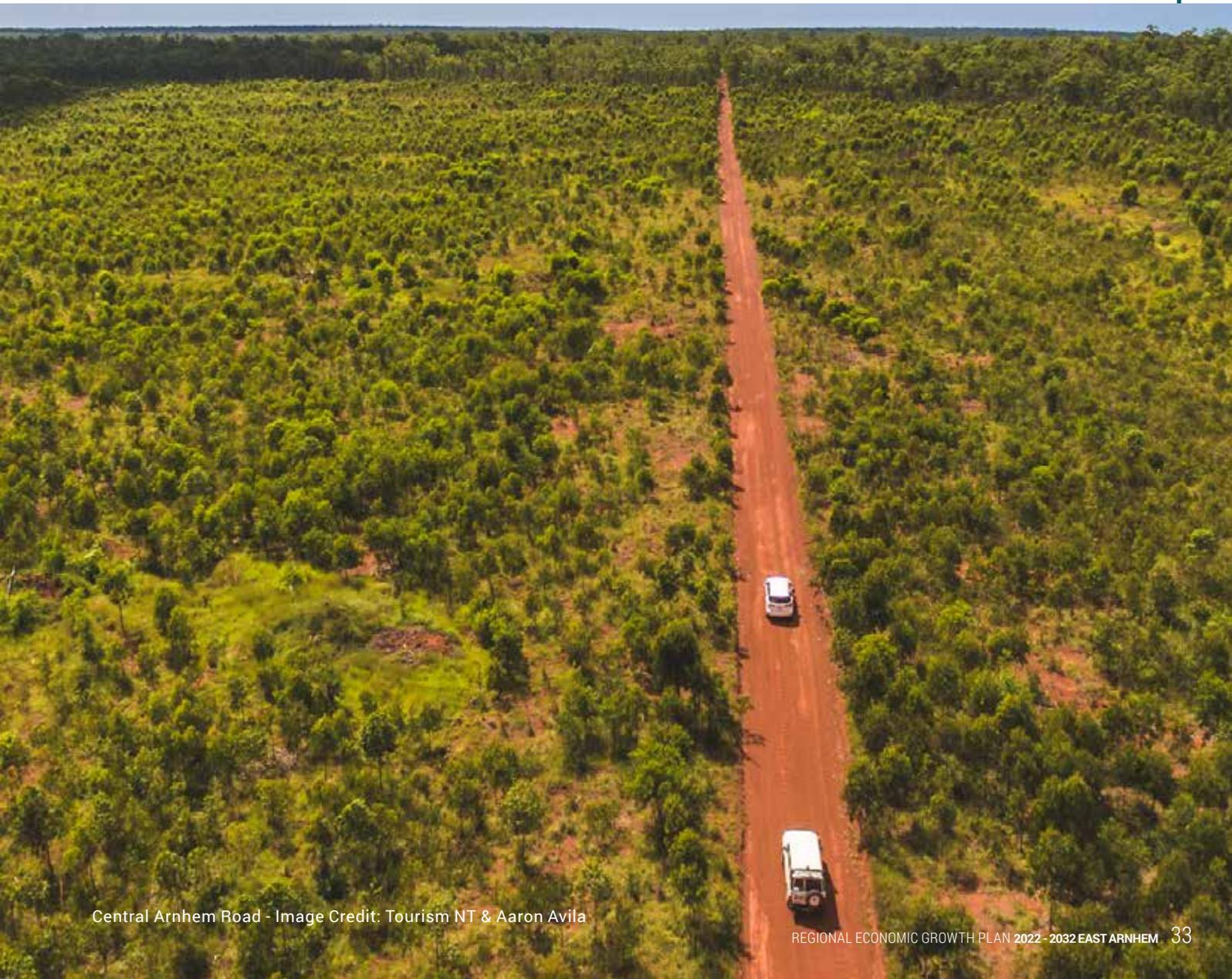
Development of the entire road supports the establishment of the Central Arnhem Road as an extension to the Stuart Highway drive, one of Australia's most iconic tourist drives. It provides an opportunity to create meaningful visitor experiences along the road in partnership with traditional owners and grows the self-drive visitor market by making it more accessible. It would also leverage the NT Government's Arts Trail funding for East Arnhem, which will see the upgrade of two art centres in the region to support increased tourism.

While the funding required to complete the full road upgrade is significant, governments would see a large return on investment. It would support Indigenous and non-Indigenous mining operations across the region, including emerging opportunities, that will contribute tax revenue beyond current mine lives. It will also see the creation of employment opportunities across many industries which will in turn reduce welfare expenditure, a very significant saving to governments on an ongoing basis.

KEY ARTERIAL ROADS TO COMMUNITIES AND HOMELANDS

To support the achievement of social-economic outcomes from the upgrade of the Central Arnhem Road, it is critical that access roads connecting communities such as Gapuwiyak and Ramingining and homelands to the main arterial roads are prioritised. This will also support tourism aspirations in many communities and homelands by increasing accessibility and safety. As part of these upgrades, roads between barge landings communities (in particular in Gapuwiyak, Ramingining and Galiwin'ku) should be upgraded to ensure food security and ease of logistics.

Whilst many traditional owners support investment in road infrastructure to increase connectivity and economic development opportunities, concerns are regularly expressed about the risk this presents of increased visitation leading to unauthorised access of other Aboriginal Lands. This is particularly true when consulting with traditional owners about improving infrastructure and increasing economic development activities in Homelands. The mitigation that has been suggested to address this issue is a strengthening of powers for Aboriginal rangers and granting them the authority to enforce compliance with the access permits issued by the Land Councils. It is recommended that the NT and Commonwealth Governments, Land Councils and relevant ranger groups progress discussions and opportunity for reform. This would not only support additional fee for service or funding opportunities for ranger groups, but also support tourism expansion in the region by ensuring mechanisms are in place to ensure tourism is in line with traditional owner wishes and areas are not being accessed inappropriate or illegally.



THE TOP TRACK

The Top Track, linking Jabiru to Ramingining via Gunbalanya and Maningrida, has long been a subject of discussion between governments, the Northern Land Council, traditional owners and industry regarding upgrade and access.

Well managed upgrades, re-routing and conditional access to the track would create significant opportunity for Central Arnhem communities through the provision of goods, accommodation, cultural experiences and supporting services, as well as provide a drive route from Kakadu National Park through to East Arnhem Land. Currently, travel into East Arnhem requires significant duplicative travel on the Central Arnhem Road. Development of the Top Track would enable visitors to experience Kakadu, West and East Arnhem, Katherine and Nitmiluk in a round trip, rather than a disjointed journey that requires self-drive tourists to drive to Nhulunbuy and return on the same stretch of road.

SOUTH EAST ARNHEM LAND TRACK

Traditional owners have previously expressed interest in providing more open access to the South East Arnhem Land track, which connects the Central Arnhem Road to the Savannah Way.

Like the Top Track, this would create a significant tourism opportunity with a full link being created between several key tourism destinations in the Northern Territory, as well as opportunities for traditional owners and communities to benefit from tourism development.

WHAT NEEDS TO BE DONE?



- » **RI1** - Re-establishment of a Regional Roads Committee to ensure strategic coordination of roads related planning, service delivery, advocacy and funding (Short-term)
- » **RI2** - Acceleration and completion of short term priority packages of works for the Central Arnhem Road per current Investment Strategy (Short-term)
- » **RI3** – Engage with the Northern Land Council on whether traditional owners would like to see the Top Track developed in a way that supports road upgrades and more open access but also protects the interests of traditional owners and sites of cultural significance (Short-term)
- » **RI4** - Undertake a social impact assessment on the South East Arnhem Land Track to understand traditional owner interest and opportunities for development (Short-term)
- » **RI5** – Advocate and secure funding to complete medium and long term priority packages of works to complete the sealing of Central Arnhem Road (Medium-term)
- » **RI6** – Undertake planning and work to secure funding for the upgrade other priority arterial roads, in particular sealing the roads to Ramingining and Gapuwiyak from the Central Arnhem Road and improving flood immunity and accessibility to homelands (Medium-term)
- » **RI7** – Progress the necessary legislative changes and capacity building to grant Aboriginal Ranger groups the powers to undertake compliance on Aboriginal Land (Medium-term)
- » **RI8** - Subject to the outcome of further discussions with traditional owners, develop further funding bids for upgrades to the Top Track (Medium-term)
- » **RI9** - Subject to the outcome of the social impact assessment, commit funding to tourism development and road upgrades on the South East Arnhem Land Track to support development (Medium-term)
- » **RI10** - Complete medium and long term priority packages of works to fully seal the Central Arnhem Road (Long-term)

LIVEABILITY



Liveability plays a strong part in attracting and retaining a skilled workforce within the region. East Arnhem has a spectacular landscape, with rugged coastlines, remote islands, and alluring biodiverse habitats of national and scientific significance. From the pristine shores of its coastal beaches to the iconic red dirt of its inland environment residents and visitors alike can't help but be captivated. The lifestyle, infrastructure and services, the landscape and the community are unique benefits to those living in our region.

Sport and recreation are a big part of the lives of people in the region. There is a diverse range of regional and town-based competitions, recreational activities and facilities, with camping, boating, and four-wheel driving popular activities for residents. Fishing is also a major drawcard for the region, with East Arnhem offering some of the best sports and recreational fishing in the world.

Liveability outcomes vary significantly throughout the region with incredible discrepancy in the level of amenity, and in particular, access to housing when comparing Aboriginal communities with the regional centres of Nhulunbuy and Alyangula.

Throughout the East Arnhem region only 19.3% of Aboriginal people are living in appropriately sized housing, meaning that over 80% of the Aboriginal population are living in crowded, overcrowded or severely overcrowded dwellings.

Housing for community residents is critical to addressing current levels of overcrowding and entrenched social issues, which are issues in and of themselves but also undermine the potential for Aboriginal people to fully participate in local and regional economies.

The National Partnership for Remote Housing NT is an Indigenous housing strategy aimed at reducing severe overcrowding, increasing the supply of new houses, improving the condition of existing houses and ensuring rental houses are well maintained and managed in remote Indigenous communities. Funding under the National Partnership totals \$1.1 billion, with the Commonwealth and NT Governments jointly providing \$550 million over five years.

In addition to the intended outcomes stated above, the National Partnership will seek to accelerate the economic opportunities for Indigenous Australians by requiring that, to the maximum extent possible, works are delivered by local Aboriginal Territorians and their businesses with an initial minimum of 40% Aboriginal full-time employment, rising to 46% by 2022-23.

Currently it is difficult to accurately assess the standard of liveability throughout the region, as perceived by its residents, as a liveability index has not been adopted nor data collected.

The adoption or development of a liveability index should contemplate the fact that there may be vastly different perceptions of what factors influence liveability. Considering the different worldviews of both Aboriginal and non-Aboriginal residents will be critical to the efficacy of this work.

WHAT NEEDS TO BE DONE?



- » **L1** - Develop or identify a liveability index appropriate for the region and its population. Establish baseline data (Short-term)
- » **L2** - Develop a liveability strategy with targets and an action plan to demonstrate how they will be achieved (Medium-term)
- » **L3** - Increase the proportion of Aboriginal people living in appropriately sized housing to 88% by increasing social and other affordable housing availability within the region (Long-Term)

DIGITAL CONNECTIVITY



The Territory Economic Reconstruction Commission's final report stated that 'digital transformation is changing society and the economy, but many areas of the Territory still remain without access, creating a digital divide.' This is true of the East Arnhem region, with the level of digital connectivity fluctuating throughout the region and currently insufficient to meet industry demand even in regional centres.

Limitations of current backhaul capacity on the trunk networks in the region constrain industry, services, and jobs growth. While the original fibre cables are serviceable and have bandwidth capacity well beyond current utilisation, the associated huts and exchange equipment have reached carrying capacity, restricting new business and expansion for customers.

Existing and new customers are seeking bandwidth that exceeds the current carrying capacity of the two core optic fibre networks. Known, unmet demand exists now for immediate and longer-term telecommunications customer growth for both the Groote Eylandt Optic Fibre Network and the Arnhem Fibre Network through the expansion of existing industries (mining, government and tourism/arts and residential sectors) and new customers (Arnhem Space Centre and related customers, new/expanding tourism operators). It is also critical to securing future private sector investment in new and emerging industries. Anecdotally, the region has lost at least three opportunities to attract private investment in the space industry due to limitations on the telecommunications network capacity and reliability.

Funding has now been secured and work is underway to upgrade the two core fibre optic networks that service the region. The Arnhem Fibre connects to the Gove Peninsula via Jabiru, providing connections to several communities and the regional services hub of Nhulunbuy. The Groote Eylandt Fibre connects to the central trunk networks via a subsea cable from Alyangula to Numbulwar and to main trunk networks via the Roper region. These upgrades are expected to increase the speeds on the backhaul link from 5MBs to 100MBs, providing sufficient carrying capacity to meet current and future industry demand.

Regular network outages also plague these Arnhem and Groote Eylandt regions, detrimentally impacting on business and essential service operations. There is currently no redundancy possible in these networks, however redundancy could be established through a Groote-Gove subsea fibre link. This link would connect the two backhaul links, ensuring that if there was a disruption in one network redundancy is provided through the other, providing continuity of digital connectivity.

Another option to provide redundancy is to demonstrate the viability of independent investment in digital infrastructure, connecting the region to a commercial network such as the recently announced Hyper One network. This would significantly boost the region's digital capacity and provide a direct connection to the rest of Australia and South-East Asia.

The current upgrading of exchanges on the Arnhem Fibre network will not provide benefit to the island communities without further investment. Upgrades are also required for the radio tower links to Galiwin'ku and Milingimbi to address current severe limitations on access.

Digital connectivity in the homelands is currently very limited and generally not fit for purpose, restricting potential small business growth and social connections. There are many homelands who are involved with the tourism sector and other business opportunities and reliable telecommunications is a key barrier to achieve jobs and business development for homelands residents.

WHAT NEEDS TO BE DONE?

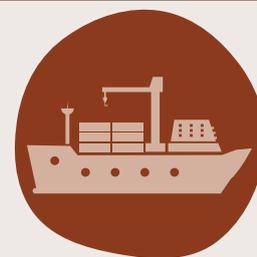


- » **DC1** - Complete the upgrades to huts and exchanges on the Groote Eylandt Optic Fibre Network and the Arnhem Fibre Network (Short-term)
- » **DC2** – Develop a Digital Connectivity Strategy incorporating regional and sub-regional consultation with the objective of aligning efforts to improve digital connectivity in East Arnhem (Short-term)
- » **DC3** - Undertake commercial pilots to determine which technology solution is most appropriate to improve digital connectivity in Homelands (Short-term)
- » **DC4** - Undertake demand mapping with major data users throughout the region to demonstrate the viability of independent investment to connect East Arnhem to a commercial network (Short-term)
- » **DC5** - Upgrade radio tower links to Galiwin'ku and Milingimbi to address current severe limitations on access (Medium-term)
- » **DC6** - Facilitate commercial roll out of digital connectivity solution to all interested Homelands throughout the region (Medium-term)
- » **DC7** - Establish redundancy in the Groote Eylandt Optic Fibre Network and the Arnhem Fibre Network through a Groote-Gove subsea fibre link (Medium-term)



MARINE INFRASTRUCTURE

A range of industries and businesses have identified a range of access and infrastructure improvements which are needed to support new and expanded industries from the Gove and Groote commercial ports.



The NT Government has previously identified the need and willingness to co-invest in new commercial marine infrastructure in Gove. An initial business case and rapid options assessment have been completed on upgrades required to support marine industry development in Gove.

The existing Gove commercial port does not support use by marine based industries including commercial fishing, marine maintenance, and tourism. This is due to a number of factors: technical deficiencies with the existing infrastructure; access constraints due to limited operating hours that do not align with commercial operator requirements; high costs to utilise infrastructure and land availability.

Upgrades to the commercial port precinct would support the growth of commercial fishing in the region. A report commissioned by the NT Seafood Council identified that 11 operators across seven fisheries would relocate at least a portion of their vessels to Gove if suitable access was available. In the short term, this would equate to an extra 173 vessel visits to Gove and an increase of catch worth \$4.3 million per year. It would also support projected growth in forestry and agriculture and support competitive freight. All would see opportunities for local and Aboriginal owned business to undertake stevedoring and offer fuel supply.

Longer term, with a clear government commitment to a full upgrade of the Central Arnhem Road, the seafood sector has indicated the Gove

Port development would unlock private sector co-investment in processing facilities, cold storage and the potential for direct exports to northern markets.

The Gove Port upgrades would create up to 20 jobs through expanded stevedoring and marine services with related industry jobs growth of up to 50-80 jobs in fisheries, aquaculture, tourism and other related industries. Well-developed port facilities would also position East Arnhem to take advantage of northern defence opportunities given the region's strategic location in relation to the Pacific Rim, and evolving investment in this area.

The \$8 million Gove Port Tourism Precinct has already been funded and planning for this is underway. This will add marine and landside infrastructure adjacent to the Gove Boat Club to create a marine tourism entrance to the region, support expeditionary cruise ships to visit the region, and provide a purpose-built facility for existing operators.

Anindilyakwa traditional owners, via the Winchelsea Mining joint venture, are developing a manganese mining operation through a \$130 million investment. New marine infrastructure is required at Winchelsea Island and Groote Eylandt to support this project including barge and wharf facilities on both islands. This would support up to 200 jobs during construction of the mine, 50 operational staff and 100 clan-based employees providing support services including in logistics, supply, accommodation, etc

WHAT NEEDS TO BE DONE?



- » **MI1** - Complete the jointly funded \$8M upgrade of Gove Port Tourism Precinct (Short-term)
- » **MI2** - Relevant stakeholders undertake master planning required to support development of Gove Port commercial maritime precinct (Short-term)
- » **MI3** – Governments and the private sector commit funding to upgrade infrastructure at the Gove Port commercial maritime precinct to support existing and identified new industry (Short-term)
- » **MI4** - Complete the broader development of Gove Port maritime precinct in line with outcomes of the cooperative master planning process (Medium-term)
- » **MI5** - Consider capital contribution strategies to enable the development of port facilities at Groote Eylandt and Winchelsea Island (Medium-term)
- » **MI6** – Appoint a permanent Biosecurity officer to facilitate international trade/ international yacht arrivals and manage pest and disease risks to the region (Medium-term)



AIR SERVICES



Affordable and reliable air servicing continues to be a critical enabler for the East Arnhem region. The region suffers from frequent and significant disruptions and delays in air services, combined with comparatively high ticket costs. These two factors impact opportunities to grow the tourism industry and are a barrier to business visitation. They also impact population attraction and retention, with it important to ensure that residents of the region feel connected and able to travel outside of the region when they need to at appropriate times and affordable prices.

Currently, the only major airline servicing Nhulunbuy and Groote Eylandt is Airnorth, since Qantas withdrew from the route in 2014. Without competition, it is critical that pricing is monitored to ensure fairness. In a positive development, 'Local fares' were recently introduced for a trial period by Airnorth in conjunction with Nhulunbuy Corporation and Darwin Airport. Continuation of these airfares will be important for population retention. Airnorth has also had a number of issues with scheduling, with the frequency of delays, cancelled services and other connection concerns presenting extreme challenges for the tourism industry, and creating difficulty for residents and businesses to manage travel in and out of the region. In turn, these challenges limit the opportunity for diversification of the economy on the Gove Peninsula towards non-mining economic development initiatives and growth in tourism, fisheries, forestry and agriculture for East Arnhem.

In relation to other air services to support industry development, medical retrieval is critical for the whole region. Safe and efficient medical retrieval that can support urgent needs day and night, as well as in remote locations that may or may not have airstrips. Not only is this important for the

existing Yolŋu and non-Yolŋu population, it has been identified as critical to a range of industry development opportunities, particularly economic development opportunities in homelands, allowing investors to be assured of the health and safety of their staff. It also supports the regional population with emergency response, particularly in relation to road accidents given the unsealed nature of the regional road network.

Increased medical retrieval capability would also support the occupational health and safety requirements that many tourism operators are increasingly seeking to implement to support remote immersion tourism opportunities, as well as supporting maritime operators and fisheries. This would be a job creation opportunity for the region with crew officers and dedicated engineering support necessarily based in Nhulunbuy.

More broadly, there is a need for investment across Aboriginal community and homeland airstrips to support greater servicing for charter, Regular Passenger Transport (RPT) and mainstream airlines. Opportunities to support better quality offerings should be explored and an audit undertaken to assess the suitability of existing air service facilities and infrastructure.

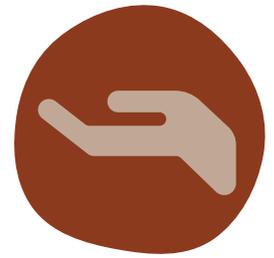
WHAT NEEDS TO BE DONE?



- » **AS1** - Undertake regional consultations to map the medical retrieval needs for the region and develop a prospectus to attract an appropriate service (Short-term)
- » **AS2** – Associated with other sector development plans, in particular tourism, develop an air services strategy for the region which aims to boost visitation and utilisation so as to improve economies of scale and improve affordability (Medium-term)
- » **AS3** – Undertake an audit of homelands airstrips and develop a proposal for their upgrade and maintenance (Medium-term)

ACCESS TO LAND

The entirety of the East Arnhem region is Aboriginal land granted under the *Aboriginal Land Rights (Northern Territory) Act 1976* (ALRA). This is an important protection of the cultural value of land to the region's traditional owners. There are some challenges, however, to support timely development on Aboriginal land under the Act's processes. In conjunction with the Northern Land Council and Anindilyakwa Land Council, there are some important steps that could be taken to better support development in this region.



It is essential to ensure the Land Councils have sufficient funding and staffing to resource their teams responsible for negotiating, consulting on and implementing leasing arrangements to support economic development to reduce lead times on applications

Another way is to streamline consultation and approval processes for Traditional Owner-led proposals for economic development on their lands, and to strengthen the regions capacity to attract private sector investment, is through the provision of contemporary, detailed natural resource information.

Currently there is limited data available regarding the natural resources existent within the East Arnhem region. This limits the regions ability to give confidence to investors about the viability of opportunities within the region and is also a challenge for the Land Councils, who are unable to effectively consult with traditional owners and negotiate lease terms when they cannot accurately attribute a value to the natural resources associated with a particular piece of land. Their process demands informed consent which is difficult in the absence of this information.

This could be addressed through ongoing scientific investigation to assess land capability; water resource assessment and modelling; monitoring of ground and surface water; biodiversity assessment; vegetation mapping; and threatened species research. This would provide a clear picture that would inform prospective private sector investors and traditional owners alike with the information

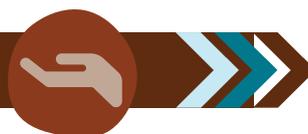
required to make investment decisions quickly and confidently.

Whilst many of the issues relating to land access relate to ALRA, there are a variety of regulatory and approval processes relating to the *Planning Act* (NT), environmental assessment and other regulation related to development that can be burdensome. This is particularly true in the case of Aboriginal businesses looking to develop opportunities on their own country. Dedicated support and expedited processes for projects on Aboriginal land where traditional owners have consented or are the proponents of a project should be considered.

This is equally true of support for Aboriginal owned mines or mining projects where traditional owners and traditional owner businesses are partners. These companies are often small, and do not have the experience or resources of larger companies to support the complex application and reporting requirements. Facilitated pathways for such companies through the various regulatory processes would be welcomed and support greater opportunities for Aboriginal-led mining. This should include facilitated and supported development pathways, and concessional or fast-tracked processes.

Another challenge associated with land access is the shortage of serviced land and the need to ensure that all long term planning gives consideration not only to accessing parcels of land for development, but also of the services required to effectively develop the land.

WHAT NEEDS TO BE DONE?



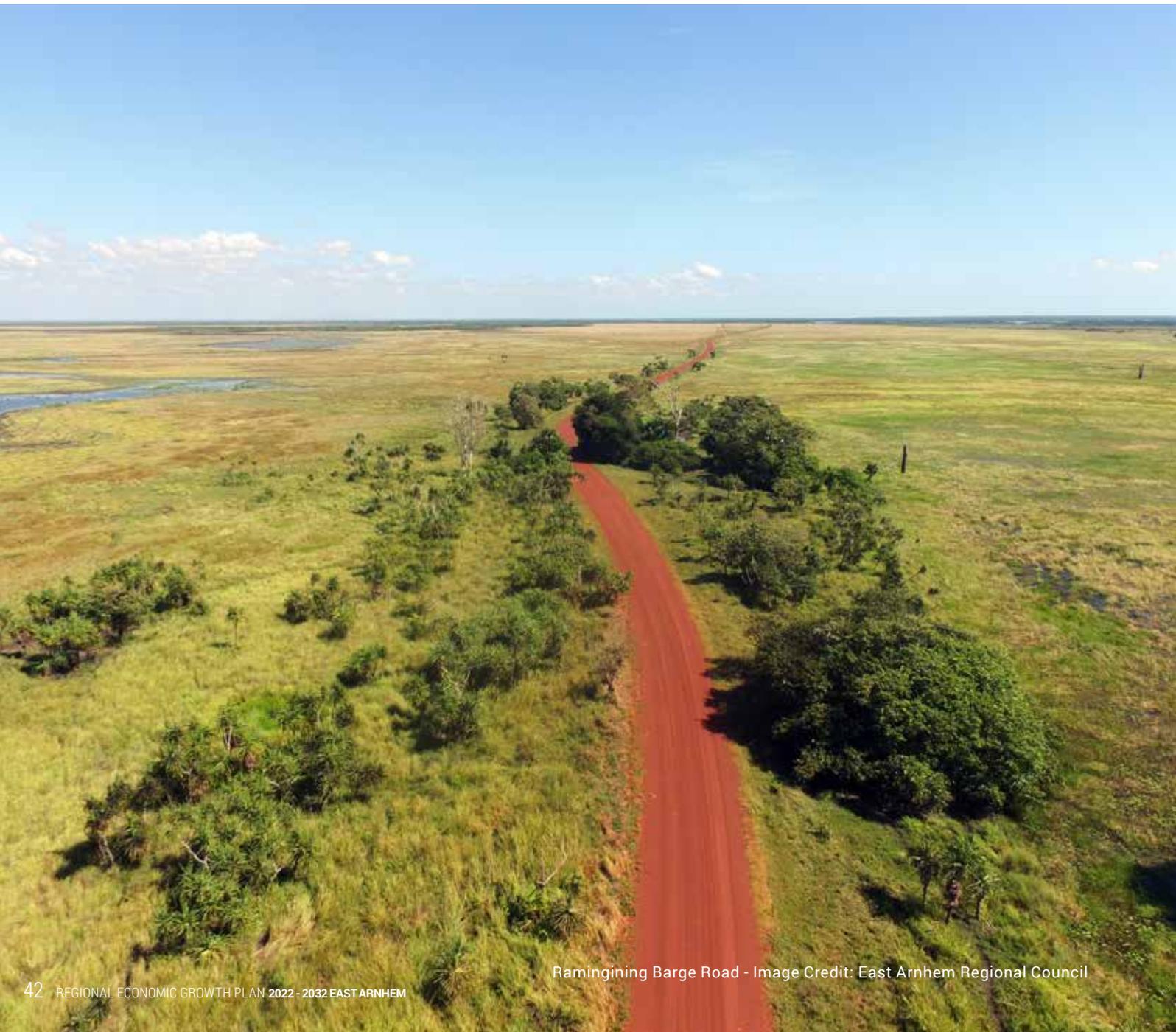
» **ATL1** - Increase Northern Land Council resources permanently based within East Arnhem through regionalisation of key functions (Short-term)

» **ATL2** - Undertake additional mapping of the natural resources on land identified as having a high prospective economic value or being considered for regionally significant projects, excluding areas identified as not to be developed by traditional owners (Short-term)

WHAT NEEDS TO BE DONE?



- » **ATL3** – Per the NT Aboriginal Land and Sea Action Plan, resolve uncertainties about Blue Mud Bay case sea rights to foster growth in fishing, aquaculture, and tourism-related industries (Medium-term)
- » **ATL4** - Undertake comprehensive mapping of the natural resources throughout the region to inform traditional owners and private sector investment (Medium-term)
- » **ATL5** - Develop educational resources to increase the private sector understanding of the application process for land-use agreements on Aboriginal land within the region (Medium-term)
- » **ATL6** – Undertake engagement with relevant NT Agencies and essential services authorities to determine a plan for serviced land for industry growth in remote communities (Medium-term)



EDUCATION AND TRAINING



The TERC Final Report calls for ‘a lifecycle approach to continuous skills development – through early childhood, school, higher education, vocational training, and on the job’. It identifies such an approach as essential to growing local workforce capability to support sustainable economic growth. We agree – but more importantly, so do regional leaders. Both Yolŋu and Anindilyakwa leaders consider education and training to be central to their holistic vision for sustainable economic development.

Currently, only 31% of young people (and only 15% of Aboriginal young people) aged 20-24 in East Arnhem have attained a Year 12 or equivalent qualification. These numbers become stark compared with attainment rates of 74% across Australia and 62% in the greater Darwin area. These relatively low attainment levels indicate that young people in East Arnhem, particularly those who are Aboriginal, have not been provided with the foundational skills required to transition into a diverse range of existing employment and training opportunities, or small business ownership. This leaves them especially vulnerable to future unemployment as industries increasingly embrace automation and digitalisation.

Perhaps the most important foundational skill for supporting Aboriginal learners emerged throughout multiple consultation processes with Aboriginal leaders in 2021. Leaders across the region consistently explained that for Aboriginal children to stand strongly in both the Aboriginal and Western worlds, it is essential that they are strong in their own cultural world first. That starting point could provide a much stronger basis for engagement and outcomes in the Western education system.

Separate consultations by the Department of Education in 2021 with the East Arnhem Regional Children and Families Committee and within the communities of Yirrkala, Ramingining and Galiwin’ku provided clear advice on some of the key factors contributing to the high levels of disengagement with the education system in East Arnhem:

- » The lack of a clear value proposition in participating in education, particularly in middle and senior years. Students and families alike identified a critical need to demonstrate defined pathways from school education directly into tertiary education or employment.
- » Insufficient connectivity between schools and other key institutions in the community such as art centres and ranger groups, which are important not only as employers but also as teaching areas within the Yolŋu academy. The strongest attendance and learning outcomes in the region are demonstrated through dual academy programs that leverage the strength of both the Western and Aboriginal academies, recognising them as two different, and equally formal, academic traditions. Examples of these are the Learning on Country (LoC) program delivered in partnership between schools and Aboriginal ranger programs in five communities throughout the region, and the Secondary Homelands Education Program (SHEP), delivered by Laynhapuy Homelands School. In both examples students experience learning, both in the classroom and on country, with curriculum that is relevant to the context of where they live and anchored in traditional knowledge.
- » Where a student’s language and culture is not reflected in the curriculum their learning will be compromised. There is renewed advocacy from Aboriginal leaders and educators to increase the investment in bilingual education in schools throughout the region.

Anindilyakwa people have leveraged the opportunity of NT Government's Local Decision Making policy to make agreements about place-based education reform. For example, the development of a bilingual curriculum for Anindilyakwa students in the Groote Archipelago as a part of the Groote Archipelago Local Decision Making Agreement. The opportunity also exists for Yolŋu leaders to explore Local Decision Making agreements to advance their aspirations for educational outcomes for their young people.

In the development of the Youth Action Plan for the Gove Peninsula, both Yolŋu and non-Aboriginal young people in Nhulunbuy and surrounding communities said that they feel they have to leave the area to access tertiary education and jobs. Young people have said that they want to stay here for both further education and employment opportunities; they want to find jobs that will allow them to stay here. Young people also expressed that it feels as though they need to make a choice between staying in the region and accessing further education.

Access to vocational education and training (VET) within the region is currently extremely limited, which could be one reason that young people expressed feeling that they were not ready to join the workforce on completing school. This lack of appropriate VET pathways is particularly evident when considering Aboriginal young people, with only 1% of Aboriginal people aged 25-34 years having completed a tertiary qualification (Certificate III or higher). Anecdotally, we are aware of a variety of contributing factors such as a lack of face to face delivery in the region, a reliance on English language for the delivery of training, written English assessments and a lack of flexibility in when training is delivered.

It is essential that there is an increase in locally-based VET and higher education providers linked to relevant institutions to support tertiary education targeted towards new and emerging markets, but also existing markets, particularly in relation to human services, tourism and ranger training. There is sufficient demand to justify the re-establishment of a tertiary campus in the region, and in 2021 Charles Darwin University committed to the appointment of an Associate Vice-Chancellor in Nhulunbuy, and to rebuild their regionally based trainer workforce.

Whilst increasing access to tertiary education in the region is an essential first step, critically, there needs to be a change in how training is delivered. Consideration needs to be given to increasing the both the amount of learning that can be undertaken in Aboriginal languages and the amount of action-based and participatory learning. Also critical is ensuring multiple methods of assessment can be utilised, including observation of practical competencies, to diminish the reliance on written English assessments which disadvantage Aboriginal learners who do not speak English as a first language. This need is demonstrated by a completion rate of only 18% within the region from 6724 VET enrolments in the period of 2016-2020¹⁸.

Charles Darwin University has also demonstrated an approach to the development of Yolŋu researchers in North East Arnhem Land that combines a dual academy approach and micro-credentialing¹⁹. Micro credentials are delivered as 'bite-sized' chunks; illustrating the proficiency in a particular skill. They are often developed with a particular industry in mind, ensuring that the qualification meets industry-specific needs, is relevant and is recognised by future employers. This will be particularly relevant in the East Arnhem region, in which a significant proportion of the population seek practical pathways into the jobs that will be created over the coming years in a wide variety of industries. Consideration should be given to whether this approach can be incorporated into the broader delivery of VET throughout the region.

Both regional and community level planning is required to ensure all skills development is matched to current and future employment opportunities. Such planning will need to be informed by a shared view about future economic and industry trends, the nature of job creation in the East Arnhem economy, and the policy levers available to stimulate demand and improve labour supply.

Future industry development strategies within the region should link relevant and appropriate education, training and skills development to the creation of local jobs with employment conditions relevant to the context of East Arnhem and the people who live here.

WHAT NEEDS TO BE DONE?



- » **ET1** - Create an ex officio position on the Regional Economic Growth Committee for the senior officer from the Department of Education in the region (Short-term)
- » **ET2** - Develop an East Arnhem education engagement strategy responding to the unique educational context of this region and reflecting a dual academy approach to education (Short-term)
- » **ET3** - Undertake community level mapping of currently available employment opportunities and ensure that there are training and work experience programs that provide a direct pathway from school into employment (Short-term)
- » **ET4** – Support the appointment of an Associate Vice-Chancellor from CDU permanently based within the region including potential for East Arnhem CDU campus (Short-term)
- » **ET5** – Undertake a pilot micro-credentialing project in a sector identified as a priority for workforce development through an employer-trainer partnership and co-design process (Short-term)
- » **ET6** - Expand the number of Learning on Country programs throughout the region and increase the number of students they can be offered to, in partnership with Ranger organisations (Medium-term)
- » **ET7** – If called for through Local Decision Making processes underway in the region, explore the development of a bilingual curriculum in schools within Aboriginal communities throughout the region (Medium-term)
- » **ET8** - Develop an enterprise curriculum in senior years to build entrepreneurial skills and provide a pathway for students aspiring to develop their own businesses (Medium-term)
- » **ET9** - Establishment of a CDU tertiary campus within the regional centre of Nhulunbuy with outreach into communities throughout the region (Medium-term)



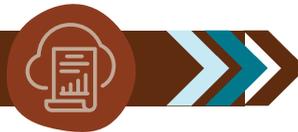
DATA CAPTURE AND MEASUREMENT



Data collection and analysis in the regions is a limiting factor to the measurement and subsequent improvement of economic growth, delivery of services and liveability. In the East Arnhem region, census data and Economy ID provide the majority of all data for analysis, which creates a lag time of 1-5 years, and maintains that only a relatively narrow suite of data is collected. This means that decision making and policy development cannot be best advised in the short term to provide nuanced and targeted support to identified priority areas.

Data collection could be improved by increasing regional coverage and reducing intervals between data points. As the region becomes more connected digitally, the use of an online survey may assist data collectors to continue to provide up-to-date data to a central distributor. Work should be undertaken throughout the region to ensure that the value of data is known and therefore data collection exercises are more broadly participated.

WHAT NEEDS TO BE DONE?



- » **DCM1** – Develop a regional data portal that is simple to update, and provides an easy to interpret visual summary of the current available data relating to economic growth (Short-term)
- » **DCM2** – Audit the existing available data sets for economic data in the East Arnhem region, identify gaps in data, and facilitate delivery of required data through Local Economic Growth plans and 2nd revision of Regional Economic Growth Plans (Short-term)
- » **DCM3** – Improve data collection and reduce data collection intervals, through a new survey or set of surveys that captures the underlying data for all headline metrics included in both the Local and Regional Economic Growth Plans (Medium-term)



Nuwul Nursery AGI in Yirrkala - Image Credit: ALPA



8 | GROWTH SECTORS



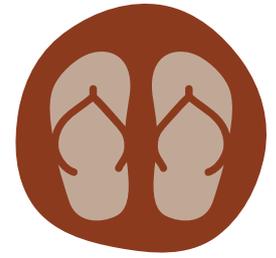
Buku-Larrnggay Mulka Centre - Image Credit: NT Tourism

A variety of priority industries have been identified for the East Arnhem region, representing the greatest current prospective opportunities for growth, the greatest likelihood of private sector investment and the most opportunities to generate new employment opportunities.

This plan will only focus on these identified industry opportunities, however the committee recognises that there are many further opportunities to contribute to economic growth of a diverse and sustainable East Arnhem economy.

TOURISM

To help realise the significant potential for economic growth within the tourism sector in the East Arnhem region, Developing East Arnhem Limited (DEAL) were engaged by Tourism NT to develop a Destination Management Plan (DMP) for the East Arnhem Land region. The DMP was developed in collaboration with East Arnhem Land tourism industry operators, the Regional Economic Growth Committee, regional stakeholders and traditional owner representatives.



This section of the Regional Economic Growth Plan consists of extracts from the East Arnhem Land Destination Management Plan 2021 - 2031²⁰.

Tourism is currently a relatively small industry within the East Arnhem regional economy, contributing approximately \$9.0 million to the region's economy in 2019-2020 and generating employment for 101 people.

Current economic activity attributed to tourism represents 0.6% of economic output for the East Arnhem region. In comparison, the tourism and hospitality sector contributes 5.0% to the Northern Territory economy.

Employment generated from tourism is significantly lower in East Arnhem Land compared to the Northern Territory as a whole. This is due to the significantly lower numbers of visitors to the region compared to most other regions of the Northern Territory.

It is estimated an additional 252 jobs would be created in the region if the tourism industry expanded to represent the same number of jobs as a proportion of the economy as the Northern Territory as a whole. Similarly, it is estimated that tourism would contribute \$61.1 million to the East Arnhem Land economy if the region's tourism sector was proportionate to the Northern Territory as a whole.

Significant and coordinated efforts will be required to grow the regional tourism industry's value to beyond \$60 million per year by 2030, however this is a realistic target. The DMP provides a clear roadmap for achieving this growth through product development and improved servicing in the core markets which have been identified below for growth and expansion.

Based on the current spread of tourism activities and accommodation, it is assumed the self-drive market is the core visitor market to the region. This market is strategic to the region, as there is more camping capacity in the region compared to standard accommodation, allowing for more visitors at one time.

They are also not reliant on hire cars or commercial tours to visit the region's recreational areas.

The region's remoteness and access requirements means travelling as part of an organised tour can often be a convenient and safe way to visit East Arnhem Land. Tour operators often have strong relationships with traditional owners, allowing visitors exclusive access to areas which are not available to independent travellers. Organised tours offered by Outback Spirit, Lirrwi Tourism and Wildcard Luxury Cruises are fully catered. Companies such as Great Divide Tours operate tag-along tours, allowing visitors to travel with their own vehicle in the safety of a convoy and with the convenience of having permits and campsites organised on the travellers' behalf.

A range of schools in Victoria and New South Wales currently offer their students the opportunity to visit the Gove Peninsula and surrounding homelands to participate in cultural immersion programs. There are opportunities to grow these programs to include more schools around Australia and expand the footprint of the programs to include other subregions such as Groote Eylandt. East Arnhem Land also has strong potential to grow its educational tourism market by leveraging the Arnhem Space Centre as an alternative to international space programs.

Fishing enthusiasts are high-yield, interstate visitors who dedicate their time in the region to fishing. These visitors stay at fishing lodges or aboard dedicated motherships, which include accommodation, meals, tackle, permits and transfers. Most fishing enthusiasts visit over the wet season, which offers the best chance of catching a prized barramundi.

The DMP identifies short, medium and long-term development actions categorised under the key development themes of Visitor attraction, Visitor research, Visitor access, Visitor experience and Business environment. These actions provide comprehensive guidance of what needs to be done to achieve sustainable economic growth in the East Arnhem tourism sector.

WHAT NEEDS TO BE DONE?

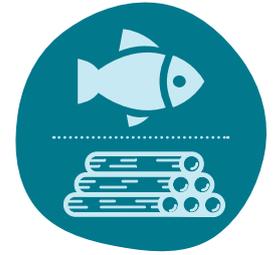


- » **T1** - Delivery of short-term development actions identified in East Arnhem Land Destination Management Plan 2021 – 2031 (Short-term)
- » **T2** - Delivery of medium-term development actions identified in East Arnhem Land

- » **T3** - Delivery of long-term development actions identified in East Arnhem Land Destination Management Plan 2021 – 2031 (Long-term)

AGRIBUSINESS

Considering the land and sea resources demonstrated throughout East Arnhem the Agribusiness sector is currently underrepresented within the East Arnhem regional economy. In 2019-2020 Agriculture, Forestry and Fishing added approximately \$3.9 million of value to the region's economy²¹ and generated employment for approximately 50 people²².



Current economic activity attributed to agribusiness represents only 0.4% of the total economic value for the East Arnhem region. In comparison, the agribusiness sector contributes 2.7% of all value added to the Northern Territory economy. There are currently less than 50 agribusiness jobs within the region, a figure that would more than double if employment within the industry is grown to a level proportionate with the current levels throughout the Northern Territory. When consideration is given to the natural advantages of this region and the projects already under development a target of 200 agribusiness jobs is appropriate.

The identified prospective drivers of agribusiness growth in East Arnhem are a major aquaculture project in the Groote Archipelago, investment in a maritime precinct to enable increased commercial fishing activity at Gove port and the development of a sustainable forestry industry. There are also numerous traditional owner led high-value initiatives in development which, whilst small in scale when considered individually, have the potential to contribute significant economic value and generate hundreds of sustainable jobs throughout the region.

If these opportunities for growth are realised a tenfold increase could be achieved in the economic value added by the agribusiness sector within the East Arnhem region, with an annual value of \$40 million a realistic target.

AQUACULTURE

The aquaculture opportunities being explored in the Groote Archipelago centre on the large scale of high-value seafood to international export markets. Marine surveys have been undertaken and a variety of prospective sites have been identified, rehabilitation activities post-mining also present the opportunity for the development of a landside aquaculture precinct.

A maritime precinct at Gove Port is expected to create up to 20 jobs through expanded stevedoring and marine services, with related industry jobs growth of up to 50 to 80 jobs in fisheries, aquaculture and other related industries. East Arnhem has a range of natural fish stock and resources that include mullet, barramundi, mud crabs, mackerel, oysters and trepang. With demand in seafood increasing across the globe, as well as gaps in supply to local and domestic markets, this signifies opportunities not only in commercial fisheries, but may also support several downstream activities such as fish processing and marine maintenance services.



Gumatj Corporation sawmill- Image Credit: Gumatj Corporation

FORESTRY

The current forestry industry in East Arnhem is small but regionally and strategically important. There are a variety of forest stocks within the East Arnhem region, with the majority being Darwin Stringybark, a timber with high durability and multiple potential uses.

Traditional landowners currently run a sawmill and woodworks facility near Gunyanjara which is currently focused on replacing imported construction materials including timber roof trusses and supply of specialty timber for local and regional markets.

A significant three-year research and development project for East Arnhem forestry commenced in mid-2020 and is funded until mid-2023. The project will explore sustainable forest-based livelihood benefits for Yolŋu traditional landowners.

A small pilot site has been established to enable harvesting, product identification, manufacturing, performance testing and market assessments to be undertaken by research partners.

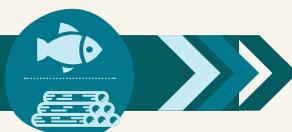
The information from the pilot site, coupled with a comprehensive forest resource assessment to inventory the commercial forests of East Arnhem, will be used to consult with traditional owners throughout the region and prepare an integrated forestry development model if viable. This model will identify how communities can best work together across the forestry industry in a way that is both commercially viable and environmentally sustainable.

AGRICULTURE

The Northern Territory Department of Environment and Natural Resources in 2019 finalised soil and land mapping on lands south-west of Nhulunbuy, which shows potential for food production. The study examined four separate survey areas located within a radius of 130 kilometres of Nhulunbuy, covering a total area of approximately 80,000 hectares.

Potentially suitable land for irrigated agriculture was identified in each of the study areas and given a water resource could be identified, there would be opportunities for local food production in the region. The region may have opportunity to support some of the Northern Territory's more significant crop production products such as mangoes, melons, bananas, citrus and pineapples if there is interest from Aboriginal land owners.

WHAT NEEDS TO BE DONE?



- » **AGR1** - Develop a regional partnership with the Darwin Aquaculture Centre to support traditional owner small-scale aquaculture ambitions (Short-term)
- » **AGR2** - Complete the 'Indigenous Commercial Forestry Opportunities: East Arnhem' project (Short-term)
- » **AGR3** - Undertake mapping of water resources in prospective agricultural areas (already mapped) to inform consultation with traditional owners and support investment attraction (Short-term)
- » **AGR4** - Facilitate the implementation of an integrated forestry development model for the East Arnhem region based on recommendations from the 'Indigenous Commercial Forestry Opportunities: East Arnhem' project (Medium-term)

RESOURCES

In 2019-20 mining contributed in excess of \$460 million in value to the East Arnhem regional economy and represented more than 50% of the total economy²¹. Mining was also the largest employer in the region, directly employing more than 1000 people, providing 18.1% of the total jobs in the region²².



It is expected that the next decade will see the mining sectors contribution to the regional economy diminish as the two major mines in the region, Rio Tinto's bauxite mine near Nhulunbuy and GEMCO's manganese mine on Groote Eylandt, approach the end of mine life.

As these two major mining operations approach closure there are a variety of emerging Aboriginal led mining ventures within the region. The recently established Gulkula Mine was the first Aboriginal-owned and operated mine on traditional owner land, extracting and exporting bauxite from the land of the Gumatj clan. On Winchelsea Island in the Groote Archipelago the Anindilyakwa Land Council are leading a joint venture seeking to mine and export manganese. These two mines will provide approximately 70 direct and 100 indirect jobs. Whilst not replacing the output and employment of GEMCO and Rio Tinto, they demonstrate the viability of smaller scale operations in partnership with Aboriginal land owners. There is a further prospective mine currently being discussed with traditional owners that promises to create up to 150 jobs in production.

Traditional owners have demonstrated a willingness in recent years to explore a broad range of opportunities to gain an economic benefit from their land, however this will only happen when there is informed consent. East Arnhem is a highly prospective region for a variety of minerals, however the region is underexplored and there is a hesitancy from some landowners to engage in this activity due to a lack of trust in the process.

If this hesitation is to be overcome, there must be an increase in the information that can be made available to traditional owners. Further geoscience data must be gathered to map the resource potential of the region and allow landowners to give full consideration to identified opportunities, and even potentially look to develop areas in partnership with mining companies.

By 2030 the economic value added by the resources sector in East Arnhem is anticipated to drop to approximately \$300 million with mining jobs declining to approximately 400. These figures are conservative and do not assume any new mines opening beyond those already in development.

WHAT NEEDS TO BE DONE?



- » **RS1** – Grant Major Project status to Winchelsea Mine and the associated developments being led by ALC in conjunction with the development of the mine (Short-term)
- » **RS2** – Finalise geoscience mapping for traditional owners to better understand the resource potential of prospective areas of the region (Short-term)
- » **RS3** – Support the planning and engagement of mining projects to progress through Traditional Owner decision making and regulatory processes

AEROSPACE



East Arnhem has the potential to be a major contributor to the growth of the space industry in Australia in both upstream and downstream economies. The global space industry was worth approximately USD \$330 billion in 2016 and is expected to grow to USD \$1 trillion by 2030²³.

East Arnhem is an emerging player in the space industry, with the first sub-orbital launch facility in Australia commencing operations. The Arnhem Space Centre is located on the Dhupuma Plateau, approximately 30 kilometres east of Nhulunbuy. The launch facility will initially be equipped with three launch pads to accommodate sub-orbital and small orbital satellite launch vehicles.

A report released in September 2019 titled *Australia Space Launch Assessment* found that of the 1,645 satellites that were launched over the past five years (globally), 43% were theoretically accessible to a launch provider operating from an Australian launch site. Between 198 to 213 satellites could be launched from Australia over the 2024 to 2033 period. This represents a total value of up to \$1.3 billion.

East Arnhem has a variety of competitive advantages that ensure it is well positioned to be a dominant force in the Australian space industry:

- » It is located just 12 degrees from the equator allowing launch vehicles to leverage the earth's rotation to gain extra velocity. This improves payload to fuel ratios providing significant cost savings over alternative global launch facilities.
- » The region is sparsely populated, air traffic is minimal, and the nearby Gulf of Carpentaria has low activity, allowing for frequent, safe and efficient space launch and easy recovery.
- » East Arnhem features tectonic stability (low risk of earthquakes) and consistent and favourable weather conditions.

Whilst the Arnhem Space Centre's current capability is sub-orbital sounding rockets there are opportunities to expand the centre to build orbital and deep-space launch capability. There is also the prospect of the site being developed into a ground station precinct, with proponent interest already demonstrated for a low orbit monitoring station that could be co-located with the space centre.

By 2030 East Arnhem has the potential to be the world's premier site for equatorial launch services, research and development, boasting both a world class space port at the Arnhem Space Centre and a thriving ground station and rocket and payload assembly/manifesting precinct. Dependant on the frequency and types of launches that can be attracted to the region, the space industry has the potential to add hundreds of jobs and hundreds of millions of dollars to East Arnhem's regional economy.

WHAT NEEDS TO BE DONE?



- » **SI1** - Promote the region as the premier southern hemisphere location for Equatorial Launch Services, research and development (Short-term)
- » **SI2** - Work with Aboriginal communities and landowners to establish a facilitated investment pathway for ground station or manufacturing and assembly investors seeking a southern hemisphere location (Short-term)
- » **SI3** – Work with proponents to develop orbital and deep space launch capabilities in the region to support expanded industry capability (medium term)

CONSERVATION AND ECOSYSTEM MANAGEMENT



The East Arnhem region has six main ranger groups: Dhimurru Rangers, Yirralka (Laynhapuy) Rangers, Anindilyakwa Rangers, Gumurr Marthakal Rangers, the Arafura Swamp Rangers, and the Crocodile Island Rangers. All are considered employers of choice within their operational footprint, with the demand for employment within this sector exceeding what can be supported by current funding arrangements and commercial activities. Although the sector is generally dependent on government funding and grants, in recent times, there has been an increase in fee-for-service commercial activity. Investigations are also underway to further expand our understandings of other potential fee-for-service opportunities.

An example of successful land management practices leading to positive economic outcomes and opportunities is demonstrated by ranger groups participating in the carbon farming industry. Utilising 'Savanna Burning Methodology' practices, nine Aboriginal ranger groups consisting of traditional owners and their families operate a total of five fire projects across Arnhem Land, managing an area of 80,000 square kilometres. Australia's vast and ecologically intact northern tropical savannas are extremely flammable, and fire is arguably the most important tool that Aboriginal people have for looking after country. Using a recognised methodology under the Emissions Reduction Fund means that the process generates Australian Carbon Credit Units, which have a market value and can be freely traded within Australia.

The recent EY paper *Delivering economic stimulus through the conservation and land management sector*²⁴ identified that there is scope for tens of thousands of skilled and unskilled workers to be

employed in conservation and land management. East Arnhem represents a prime opportunity to see additional stimulus investment to support job creation, with significant flow on environmental effects. East Arnhem land management groups acknowledge the challenges of caring for such large tracts of country with the resources they have. There is a large underutilised workforce in the region with strong traditional knowledge of country that would support such a stimulus measure.

There has been national advocacy in support of doubling the number of Aboriginal rangers funded by the Australian Government under the \$746 million Indigenous Rangers Program. The East Arnhem Regional Economic Growth Committee strongly supports these calls for increased investment.

The economic benefits of expanded ranger program funding include greater workforce participation and increased financial returns generated by new Indigenous business ventures associated with fee-for-service work. Additional



Image Credit: Dhimurru Aboriginal Corporation

funding will create efficiencies of scale within these organisations that will allow them to increase their exploration of additional revenue opportunities without undermining their core land management responsibilities.

DEAL recently surveyed the region's five ranger groups to identify potential additional revenue opportunities which aligned with their strategic priorities. A variety of key opportunities were identified, all at varying stages of maturity and with a need to be implemented over differing time horizons if they are found to be viable within this region.

The first opportunity is to explore the potential of a credit-based economy for ecosystem maintenance. Ranger groups have been approached by organisations looking to use finance to drive the conservation of natural capital in the region. These conversations are in their infancy, with ranger groups interested in understanding next steps and the longer-term viability of this opportunity as a way to generate income.

Ranger groups already participate in carbon markets through savannah burning. However, there may be scope to expand the carbon abatement programs further in the East Arnhem region with blue carbon and other climate mitigation opportunities. Blue carbon creates opportunities to store carbon through restoring mangroves and tidal marshes and reduce methane and nitrous oxide emissions through the reintroduction of tidal flows. The Clean Energy Regulator has recently developed a method for blue carbon projects to be eligible for funding under the Emissions Reduction Fund. However, because the East Arnhem region's mangroves are mostly intact, this tidal reintroduction methodology may be largely

non-applicable. Further methods being explored that relate to restoration of areas damaged by feral animals may be more appropriate in East Arnhem Land. Ranger groups are interested in understanding more about blue carbon and whether this is a viable opportunity for ranger groups.

Opportunities exist to develop programs in which Yolngu rangers, supported by traditional owners, facilitate and lead delivery of course content as part of relevant diplomas and degrees. Several universities around Australia offer on-country learning, often delivered in intensive week-long courses. Current units are co-located with university campuses, which limits immediate opportunities available within the North East Arnhem Land. However, direct flights from Cairns and Darwin make the region accessible to university students based in Darwin, Cairns and beyond.

There are a variety of tourism product development opportunities available to ranger groups. These include expanding recreational areas and facilities, including campgrounds and basic amenities; offering cultural, wildlife and land management tours to tourists and creating their own tourism products allowing tourists to undertake cultural tourism and experience ranger activities in areas rangers currently manage.

Rangers are already involved in the regulation of industries that affect the natural environment such as regulation of fishing, forestry, and monitoring of permit compliance for tourists in some areas with delegated powers, as well as mine rehabilitation. There are identified opportunities to increase all of these activities through fee-for-service arrangements.

WHAT NEEDS TO BE DONE?



- » **CEM1** – Advocate for double the number of rangers to be funded under the Indigenous Rangers Program (Short-term)
- » **CEM2** - Fund feasibility studies to identify potential additional conservation and ecosystem management revenue opportunities (Short-term)
- » **CEM3** - Develop implementation plans to support ranger groups within the region pursuing feasible opportunities identified within their operational footprint (Short-term)
- » **CEM4** - Establish a sector led working group to identify the workforce development priorities for employers and create a regional workforce development strategy for the sector (Short-term)

CONSTRUCTION AND CIVIL WORKS



There are significant infrastructure investments budgeted and scheduled for delivery throughout the East Arnhem region including both the land servicing and construction of social housing, sealing the Central Arnhem Road and the development of industry and government employee housing.

Whilst some major social housing packages such as Galiwin'ku, Ramingining and Gapuwiyak community housing have commenced, there are many more packages that will be released over the course of the next decade. Current combined investment in the Northern Territory is \$2.1 billion over 10 years with further funding anticipated through the extension of the National Partnership Agreement on Remote Housing Northern Territory. A sizeable proportion of this investment will be in the East Arnhem region, where levels of overcrowding are amongst the highest in the country.

Further subdivisions are anticipated in all major communities and there is optimism the next partnership agreement will also allow housing investment in homelands. This plan has also identified the need for over 300 additional houses throughout the region to meet current industry demands, with significant further future demand anticipated.

Large packages of works of this nature, especially if local Aboriginal contractors are supported to deliver them, would immediately create large volumes of local jobs within the community. If contracts are structured in such a way as to ensure continuity of engagement for contractors then it

will be possible to create trades apprenticeships and support the completion of specialist trades qualifications at a community level.

This will allow communities and community organisations to take on repairs and maintenance contracts creating ongoing work for Yolŋu and Anindilyakwa tradespeople, increasing responsiveness to maintenance requests and impacting positively on environmental health whilst reducing the reliance on FIFO workforces.

There are currently approximately \$1 billion worth of road infrastructure priorities identified within this region's economic growth plan, primary amongst them the sealing of the Central Arnhem Road which is already partially funded. There is currently a capability deficit within the East Arnhem region to deliver roadworks on this scale. This represents a significant opportunity both in terms of creating local employment and developing regional capability throughout these projects which could be leveraged to support the ongoing repairs and maintenance and decrease the delivery cost of future major road infrastructure projects within East Arnhem.

WHAT NEEDS TO BE DONE?



- » **CCW1** - Establish a sector led working group to identify the industry and workforce development priorities for employers and create a regional industry and workforce development strategy for the sector (Short-Term)

CENTRAL ARNHEM RD

STUART HWY

Barunga

Beswick

Bulman

Ramingining

Gapuwiyak

Nhulunbuy

ROAD INFORMATION 1800 246 199
further details access: www.roadreport.nt.gov.au

MANUFACTURING



Nhulunbuy has a significant history of manufacturing. For four decades the bauxite mined in the region was refined into alumina at Nhulunbuy, supporting the emergence of a major town with a deep water port and full industrial infrastructure.

Bauxite continues to be exported by Rio Tinto, however the high cost of imported fuel led to closure of alumina refining in 2014, with the manufacturing processes migrating in the pursuit of more competitive energy prices. The manganese deposits at Groote Eylandt are processed in northern Tasmania, capitalising on low cost hydro-electric and wind energy.

There is an opportunity presented by mine closure, both at Nhulunbuy and on Groote Eylandt, to create Sustainable Development Precincts. This is particularly true in Nhulunbuy where the combination of a deep water port, existing industrial infrastructure, rich mineralisation and abundant marine resources make the site optimal for the production and use of biomass as well as processing of minerals, marine and agricultural products.

The heavy rainfall of the region and suitable soils make this a favourable environment more generally for growing biomass. A variety of suitable tree species have been identified by traditional owners for high-value timber, planted densely or interspersed with established vegetation as a part of the rehabilitation process on the mine site. This would support manufacture of high-value timber products, with waste timber from processing being utilised to produce bio-oil and bio char.

The legacy of industrial and town infrastructure would allow the establishment at relatively low cost of a Sustainable Development Precinct focusing on renewables based hydrogen manufacturing. Critical components required for the precinct already in place include multi-modal transport (port, road and air) and plentiful access to both salt and fresh water. Local solar supplemented by bio-energy resources and storage could today provide energy at reasonable costs, countering the disability that led to the closure of the alumina refinery.

Any development will need to be led by traditional land owners at the local level. With decisions soon to be made regarding the use of land and assets post-mining, it is essential that resourcing is provided to support informed decision making and provide land owners with visibility on all of the options for the next cycle of the economic activation of their lands.

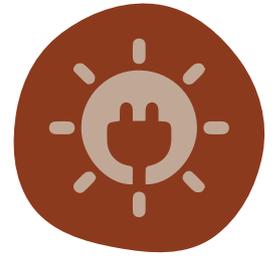
In 2019-20 manufacturing only added \$27.5m of value to the regional economy²¹ and approximately 160 jobs²². The successful creation of a Sustainable Development Precinct within the region has the potential to add hundreds of millions of dollars to the regional economy, providing significant employment opportunities to the regional population.

WHAT NEEDS TO BE DONE?



- » **M1** - Support studies in partnership with industry and traditional owners to explore manufacturing opportunities for a Sustainable Development Precinct near Nhulunbuy (Short-term)
- » **M2** - Develop a partnership between traditional owners and the NT Government to undertake a master planning process, then attract and assess relevant private sector enterprises (Short-term)

ENERGY TRANSITION



In line with the NT Government's commitment to a target of 50% renewable energy by 2030, East Arnhem boasts significant opportunities to explore innovative renewable energy solutions. Of note, energy on the Gove Peninsula is currently provided by Rio Tinto as part of its operations and similarly on Groote, by South³². With mine closures expected in the next 10 years, a core part of transition planning beyond mining is the delivery of essential services to the Gove Peninsula.

Rio Tinto currently provides generation, distribution and retailing of electricity to the township of Nhulunbuy, associated industrial estate and other related infrastructure including the Gove Port, Gove Airport and bore water supply. Rio Tinto's high voltage transmission is also provided to 'the gate' at the Yirrkala and Gunyayara communities. From there, the electricity distribution network is owned and operated by PowerWater Corporation who retail to commercial, residential, and business customers.

One of the most important transitions that needs to occur over the next 5 - 10 years is the transfer of providers of electricity generation (supply), distribution and retailing from Rio Tinto to new regulated power providers. As part of this, there is a need to explore alternative generation and innovative grid solutions to reduce emissions, improve reliability, provide capacity for growth and broaden the current grid reach to connect key regional industries including the Garma Festival site, Arnhem Space Centre and Gulkula Bauxite Mine.

With significant land areas surrounding Nhulunbuy and high levels of solar irradiance, this transition in energy generation presents an opportunity for large-scale solar and renewable hydrogen developments to be considered. These developments could power net zero emissions manufacturing, the communities across the Gove Peninsula and the provision of renewable energy for export.

East Arnhem communities and homelands are ripe for investment in renewable energy. There are significant natural assets in the region, including available land and workforce, which could be utilised in creating sustainable energy solutions for communities. Hybrid solar and hydrogen powered micro grids in communities and homelands throughout the region would provide cheap green energy on a scale that would support increased populations and serve as a catalyst for economic development activities.

WHAT NEEDS TO BE DONE?



- » **E1** - Deliver feasibility studies on viable options for future power generation for the Gove Peninsula and Groote Eylandt. This work should contemplate economic development opportunities and be undertaken in conjunction with master planning for a Sustainable Development Precinct (Short-term)
- » **E2** - Deliver a feasibility study which explores commercially viable hybrid models for micro grids in remote communities and homelands throughout the region (Short-term)

NATIONAL SECURITY AND DEFENCE



The Northern Territory is at the frontline of Australia's national security, and the defence sector contributes significantly to the Northern Territory economy. This is achieved through job creation, building infrastructure and demand for goods and services.

The NT Government is also investing \$100 million to develop a Darwin ship lift and marine industry facility in response to the growing need for marine industry services from defence and Australian Border Force, among other sectors. Seventy-five percent of Australia's Armidale class patrol boats, a squadron of FA18 Classic Hornet fighter jets and a large portion of the Tiger Armed Reconnaissance Helicopters are in the Northern Territory.

East Arnhem has a vast landscape with low population density, existing infrastructure, a natural deep-water port, and sits as a gateway to Asia. Opportunities may emerge to partner with traditional owners and governments to increase defence and border protection services, as well as biosecurity services.

Australian Border Force has a presence in East Arnhem with a permanent office based at Gove Port. Their scope of works includes engaging directly with Rio Tinto – specifically with regard to international shipping arrivals - and with land and sea ranger groups, marine debris surveying and Northern Territory Police operations. Norforce, an infantry regiment of the Australian Army Reserve for Northern Australia, also has a permanent base in Nhulunbuy.

There is an opportunity to facilitate engagement with traditional owners who have ownership of land and intertidal zones that would suit amphibious training exercises.

Given sparsely populated surrounding areas, there are a variety of land-based training areas also potentially available for humanitarian exercises and regional disaster response and recovery. Benefits include low tidal movements and geographically isolated areas for risk management. The Gove Peninsula features strong emergency response capabilities that support training exercises both on the Peninsula and further afield.

There may be further opportunities to support national security and defence activities by leveraging existing marine, warehousing and fuel storage assets to support marine resupply and logistics.

National Security and Defence currently contributes 0.1% of the total economic value of the region's economy, this in contrast to 3.4% of the Territory economy²¹. There will be no further activity in the region relating to national security and defence without the consent of traditional owners. Whilst the region is highly prospective for defence investment, significant social capital will need to be built with the region's residents for this to be considered.

WHAT NEEDS TO BE DONE?



- » **N1 - Where there is mutual interest, facilitate engagement between traditional owner groups and defence (Short-term)**

HUMAN SERVICES

The residential care services and social assistance services alone contributed \$33.2 million worth of output into East Arnhem's economy²¹ and employed 355 people²² in 2019/20.



There remains strong demand for aged care and disability services within the East Arnhem region, and with this demand comes significant opportunity for private and for-purpose entities to establish high quality services to support our community.

Since the National Disability Insurance Scheme (NDIS) commenced there has been a significant underutilisation of available funding to provide these essential services within the East Arnhem region. There are millions of dollars' worth of services which could be delivered to disability clients throughout the region, if a skilled workforce were available to deliver them. A conservative estimate informed by consultation with the National Disability Insurance Agency (NDIA) suggests this could equate to approximately \$20 million in personal care, disability support and day respite activities, equating to 250 new jobs.

The majority of this work could be delivered by local Aboriginal workers if a suitable skills development pathway was in place, however, the absence of a skilled workforce means that high needs disability clients cannot access required services, and significant NDIS funding which could be spent within the region is unspent year after year.

Fortunately, there is interest and commitment from providers in the region in building the appropriate skills in a local workforce. The realisation of this opportunity will require some catalytic investment from government in targeted training. Without that investment, providers in the region feel a high level of risk about investing up front to develop this workforce when the NDIA is unable to release breakdowns of funding at the level of individual communities and support categories, instead releasing aggregated regional funding information.

This investment would also support other aspects of the emerging services sector in East Arnhem, including the new \$20 million aged care facility being built in Nhulunbuy by ARRCs and Carers NT's Supported Independent Living facility. These projects will create over 60 new jobs and address the high levels of unmet demand for these services within the region.

WHAT NEEDS TO BE DONE?



- » **HS1** - Engage with the Caring Industries Workforce Development Group to identify the workforce priorities for employers and create a regional workforce development strategy for the sector (Short-term)
- » **HS2** - Provide funding to support the implementation of the sector specific workforce development strategy when developed (Short-term)
- » **HS3** - Engage with NDIA to collaborate on an evidence based regional NDIS model for East Arnhem based on community level data (Short-term)

THE SMALL BUSINESS SECTOR

The small business sector accounts for over 32% of all jobs nationally²⁵, yet small businesses are significantly underrepresented within the East Arnhem region with only 7.3 small businesses per 1000 people in the region in comparison to 91 per 1000 people nationally.



In 2016 the value of household final consumption expenditure was reported to be 58% of Australia's GDP²⁶. Household consumption consists of the market value of all goods and services purchased by households. In 2019-20 Retail Trade, Sports and Recreation Activities, and Personal Services contributed \$34.6 million to the East Arnhem regional economy, less than 4% of GRP¹.

Many communities in this region currently have unmet demand for goods and services, which could be delivered locally by small businesses, however due to market failure people currently have to travel to a major population centre to access them. This can be achieved through both the creation of new small businesses and through efforts to support existing small businesses to grow and diversify.

Large-scale job creation in remote communities and homelands throughout the region will increase household disposable income and create economies of scale sufficient to increase the viability of a variety of small businesses.

To increase the ratio of small businesses per 1000 people from 7.3 to 20 approximately 200 new small businesses will need to be operating in 2030. If this is achieved and the small businesses average 6 employees this would create 1200 additional jobs.

Whilst an increase of 200 new small businesses in ten years may seem like a large number, this is not the case when you consider the opportunities that exist throughout the region. There are 10 major communities and 50 homelands in East Arnhem in addition to Nhulunbuy and as the regional centre.

There are three key barriers that will need to be overcome for small business growth to be successful at scale within the East Arnhem region; a lack of spaces for small businesses to operate from; accessing business funding and; insufficient business support capacity to meet demand.

Throughout all communities in the region, Nhulunbuy and Alyangula included, there is a shortage of commercial real estate. This is especially true when considering affordability from the perspective of someone looking to start a new small business. Without investment in small business hubs from governments, private investors or philanthropists it is unlikely that the small business sector will be able to grow at scale.

Accessing business finance is a significant barrier to creating a new small business in a remote community, particularly for Aboriginal entrepreneurs. Setting up a new business with no prior trading history or assets that can be leveraged, such as a home, ensures that most



Arnhem Dental Services Image Credit: DEAL

aspiring entrepreneurs who live in remote communities do not meet the lending criteria of financial institutions. This creates a reliance on government grants and programs which in many cases involve lengthy and complex application processes which assume existing high levels of literacy, numeracy and business knowledge²⁷.

Another challenge created by many of these grants and programs is that they incorporate a debt component. Debt funding requires immediate regular repayments from when early cash flow may be uneven and the new businesses may be running at a loss. This creates significant risk for individuals who do not have an existing asset base or savings. More appropriate funding models include grant funding where there is no requirement for repayment, or an equity model in which returns are paid if and when the business turns a profit and gains value.

When entrepreneurs are navigating the establishment of a small business with limited experience and often not in their first language, it is essential that they are able to access support, mentoring and capacity-building. A variety of business support models have been trialled in the East Arnhem region over recent years including business incubators, micro-financing and the DEAL's recent direct employment of a business support manager.

The business support model trialled by DEAL has demonstrated strong outcomes in comparison to a variety of models implemented in the region over the past decade. In this arrangement a variety of different supports are provided under a services agreement and businesses are able to engage as few or as many services as required based on their individual business needs. Supports include managing bookkeeping and accounting, company secretary services, payroll and administration.

The principles of this model include limiting the number of businesses being supported so that the support service can regularly be on the ground, building and maintaining close relationships with business owners, having visibility on the business when it starts operating and being able to help navigate any issues that may arise.

The success demonstrated by this model can be achieved at scale with further investment, and DEAL is progressing a refreshed Business Support Strategy to extend the existing services to a greater number of businesses, and include opportunities for research, monitoring and evaluation.

WHAT NEEDS TO BE DONE?



- » **SBS1** – Work with key stakeholders to investigate opportunities and undertake a feasibility project to develop small business precincts in a variety of communities and homelands (Short-term)
- » **SBS2** – Develop and implement a pilot small business precinct in an agreed location (Short-term)
- » **SBS3** – Provide an evaluation service for current programs and grants providing financing to entrepreneurs attempting to establish small businesses (Short-term)
- » **SBS4** – Develop a prospectus for private sector and philanthropic investment in small business precincts and take to market (Medium-term)
- » **SBS5** – Develop tailored support packages to provide start-up capital to entrepreneurs through grants and equity arrangements (Medium-term)

9 | PROJECT PIPELINE

Infrastructure NT maintain online Project Pipelines for each of the Northern Territory regions. These pipelines are regularly updated to include projects from both the public and private sectors.

The most up to date information regarding upcoming projects to be delivered in the East Arnhem region can be accessed <https://dipl.nt.gov.au/strategies>

10 | INVESTMENT PORTFOLIO

Investment Territory maintain a prospective investment pipeline for each region. Some projects are commercial in confidence and are not detailed here.

A summary of the current investment/industry pipeline for East Arnhem is provided at the following link. At the time of publishing of this Plan, the Investment Pipeline for the region was continuing to be developed by DEAL at the NT Government. Further updates on the East Arnhem Investment Pipeline will be provided in due course.

https://invest.nt.gov.au/___data/assets/pdf_file/0006/1113792/investment-territory2021-22-progress-and-outlook-report.pdf



11 RECOMMENDATIONS ACTION PLAN

This section consolidates all of the recommended identified actions within the East Arnhem Regional Economic Growth Plan. The actions below are recommended across three timelines: Short term 0-2 years, Medium Term 0-5 years and Long Term 5+ year

Image Credit: Anindilyakwa Media

#	Short Term Medium Term Long Term	Action
EDV1	Short-term	Review this Plan including Economic Vision and Principles and Targets for relevancy and appropriateness after all Local Economic Growth Plans have been completed.
EGT1	Short-term	Review Economic Growth Targets for relevancy and appropriateness after the economic baseline has been updated using 2021 census data and all Local Economic Growth Plans have been completed.
EB1	Short-term	Update Economic Baseline section of the plan utilising more current data once 2021 census data is published
AEL1	Short-term	The Value for Territory Assessment Framework updated to ensure the value delivered by Aboriginal businesses has sufficient weighting.
AEL2	Short-term	Aboriginal Procurement Policy implemented to strengthen procurement arrangements and adopt procurement targets for the engagement of Aboriginal businesses.
AEL3	Short-term	Support the development of Local Economic Growth Plans across the sub-regions of East Arnhem: Groote Archipelago, Gove Peninsula, Laynhapuyngu sub-region, Djalkiripuyngu sub-region, Miyarrka sub-region, Marthakal sub-region, Gattjirrk sub-region, Birr Rawawang.
AEL4	Short-term	Increase availability of key economic and industry development information in first languages to support Traditional Owner and community engagement.
H1	Short-term	Ensure homelands economic opportunities are clearly represented in the Local Economic Growth Plans.
H2	Short-term	Create a Homelands Infrastructure Prioritisation Plan through co-design with homelands leaders, service providers and funding bodies to identify and prioritise the enabling infrastructure needed to unlock homelands economic activity identified in the Local Economic Growth Plans.

#	Short Term Medium Term Long Term	Action
H3	Short-term	Create a homelands funding strategy encompassing investment and ongoing maintenance of housing, essential services, infrastructure and municipal and essential services through co-design with homelands leaders, service providers and funding bodies.
IF1	Short-term	Governments (NT and Australian Government), DEAL and stakeholders to work together to develop the Investment Facilitation Framework for the region including expanding collaborative investment and economic development framework to the local (sub-regional) level (via the development of the Local Economic Growth Plans)
IH1	Short-term	Governments provide traditional owners and Aboriginal Businesses confidence (via long term leases) to develop land and housing through long-term leaseback arrangements in Nhulunbuy, Groote Eylandt and across the remote communities and leverage these commitments for further development of land and housing for the private sector.
IH2	Short-term	Facilitate access to capital incentive schemes and/or preferential financing arrangements (such as NAIF) to encourage Aboriginal led housing developments.
R11	Short-term	Re-establishment of a Regional Roads Committee to ensure strategic coordination of roads related planning, service delivery, advocacy and funding
R12	Short-term	Acceleration and completion of early works and short term priority packages of works for the Central Arnhem Road per current Investment Strategy
R13	Short-term	Engage with the Northern Land Council on whether traditional owners would like to see the Top Track developed in a way that supports road upgrades and more open access but also protects the interests of traditional owners and sites of cultural significance.
R14	Short-term	Undertake a social impact assessment on the South East Arnhem Land Track to understand Traditional Owner interest and opportunities for development.
R15	Medium-term	Advocate and secure funding to complete medium and long term priority packages of works for the Central Arnhem Road.
R16	Medium-term	Undertake planning and work to secure funding for the upgrade of other priority arterial roads, in particular sealing the roads to Ramingining and Gapuwiyak from the Central Arnhem Road and improving flood immunity and accessibility to homelands.
R17	Medium-term	Progress the necessary legislative changes and capacity building to grant Aboriginal Ranger groups the authority to enforce compliance with permits issued by the Land Councils to allow visitor access to Aboriginal land.
R18	Medium-term	Subject to the outcome of discussions with traditional owners, commit further funding for upgrades to the Top Track.
R19	Medium-term	Subject to the outcome of the social impact assessment, commit funding to tourism development and road upgrades on the South East Arnhem Land Track to support development.
R110	Long-term	Complete medium and long term priority packages of works to fully seal the Central Arnhem Road.
L1	Short-term	Develop or identify a liveability index appropriate for the region and its population. Establish baseline data.
L2	Medium-Term	Develop a liveability strategy with targets and an action plan to demonstrate how they will be achieved.

#	Short Term Medium Term Long Term	Action
L3	Long-term	Increase the proportion of Aboriginal people living in appropriately sized housing to 88% by increasing social and other affordable housing availability within the region.
DC1	Short-term	Complete the upgrades to huts and exchanges on the Groote Eylandt Optic Fibre Network and the Arnhem Fibre Network.
DC2	Short-term	Develop a Digital Connectivity Strategy incorporating regional and sub-regional consultation with the objective of aligning efforts to improve digital connectivity in East Arnhem.
DC3	Short-term	Undertake commercial pilots to determine which technology solution is most appropriate to improve digital connectivity in Homelands.
DC4	Short-term	Undertake demand mapping with major data users throughout the region to demonstrate the viability of independent investment to connect East Arnhem to a commercial network
DC5	Medium-term	Upgrade radio tower links to Galiwin'ku and Milingimbi to address current severe limitations on access.
DC6	Medium-term	Facilitate commercial roll out of digital connectivity solution to all interested Homelands throughout the region.
DC7	Long-term	Establish redundancy in the Groote Eylandt Optic Fibre Network and the Arnhem Fibre Network through a Groote-Gove subsea fibre link.
MI1	Short-term	Complete the jointly funded \$8M upgrade of Gove Port Tourism Precinct.
MI2	Short-term	Relevant stakeholders undertake master planning required to support development of Gove Port commercial maritime precinct.
MI3	Short-term	Governments and the private sector commit funding to upgrade infrastructure at the Gove Port commercial maritime precinct to support existing and identified new industry
MI4	Medium-term	Complete the broader development of Gove Port maritime precinct in line with outcomes of the cooperative master planning process.
MI5	Medium-term	Consider capital contribution strategies to enable the development of port facilities at Groote Eylandt and Winchelsea Island.
MI6	Medium-term	Appoint a permanent Biosecurity officer to facilitate international trade/ international yacht arrivals and manage pest and disease risks to the region.
AS1	Short-term	Undertake regional consultations to map the medical retrieval needs for the region and develop a prospectus to attract an appropriate service.
AS2	Medium-term	Associated with other sector development plans, in particular tourism, develop an air services strategy for the region which aims to boost visitation and utilisation so as to improve economies of scale and improve affordability.
AS3	Medium-term	Undertake an audit of homelands airstrips and develop a proposal for their upgrade and maintenance.
ATL1	Short-term	Increase Northern Land Council resources permanently based within East Arnhem through regionalisation of key functions.

#	Short Term Medium Term Long Term	Action
ATL2	Short-term	Undertake additional mapping of the natural resources on land identified as having a high prospective economic value or being considered for regionally significant projects, excluding areas identified as not to be developed by traditional owners.
ATL3	Medium-term	Per the NT Aboriginal Land and Sea Action Plan, resolve uncertainties about Blue Mud Bay case sea rights to foster growth in fishing, aquaculture, and tourism-related industries.
ATL4	Medium-term	Undertake comprehensive mapping of the natural resources throughout the region to inform Traditional Owner and private sector investment.
ATL5	Medium-term	Develop educational resources to increase the private sector understanding of the application process for land-use agreements on Aboriginal land within the region.
ATL6	Medium-term	Undertake engagement with relevant NT Agencies and essential services authorities to determine a plan for serviced land for industry growth in remote communities.
ET1	Short-term	Create an ex officio position on the Regional Economic Growth Committee for the senior officer from the Department of Education in the region.
ET2	Short-term	Develop an East Arnhem education engagement strategy responding to the unique educational context of this region and reflecting a dual academy approach to education.
ET3	Short-term	Undertake community level mapping of currently available roles and ensure that there are training and work experience programs that provide a direct pathway from school into employment.
ET4	Short-term	Support the appointment of an Associate Vice-Chancellor from CDU permanently based within the region including potential for East Arnhem CDU campus
ET5	Short-term	Undertake a pilot micro-credentialing project in a sector identified as a priority for workforce development through an employer-trainer partnership and co-design process.
MI5	Medium-term	Consider capital contribution strategies to enable the development of port facilities at Groote Eylandt and Winchelsea Island.
MI6	Medium-term	Appoint a permanent Biosecurity officer to facilitate international trade/ international yacht arrivals and manage pest and disease risks to the region.
ET6	Medium-term	Expand the number of Learning on Country programs throughout the region and increase the number of students they can be offered to, in partnership with Ranger organisations.
ET7	Medium-term	If called for through Local Decision Making processes underway in the region, explore the development of a bilingual curriculum in schools within Aboriginal communities throughout the region.
ET8	Medium-term	Develop an enterprise curriculum in senior years to build entrepreneurial skills and provide a pathway for students aspiring to develop their own businesses.
ET9	Medium-term	Establishment of a CDU tertiary campus within the regional centre of Nhulunbuy with outreach into communities throughout the region.
DCM1	Short-term	Develop a regional data portal that is simple to update, and provides an easy to interpret visual summary of the current available data relating to economic growth.

#	Short Term Medium Term Long Term	Action
DCM2	Short-term	Audit the existing available data sets for economic data in the East Arnhem region, identify gaps in data, and facilitate delivery of required data through Local Economic Growth plans and 2nd revision of Regional Economic Growth Plans.
DCM3	Medium-term	Improve data collection and reduce data collection intervals, through a new survey or set of surveys that captures the underlying data for all headline metrics included in both the Local and Regional Economic Growth Plans.
T1	Short-term	Delivery of short-term development actions identified in East Arnhem Land Destination Management Plan 2021 – 2031
T2	Medium-term	Delivery of medium-term development actions identified in East Arnhem Land Destination Management Plan 2021 – 2031
T3	Long-term	Delivery of long-term development actions identified in East Arnhem Land Destination Management Plan 2021 – 2031
AGR1	Short-term	Develop a regional partnership with the Darwin Aquaculture Centre to support traditional owner small-scale aquaculture ambitions.
AGR2	Short-term	Complete the 'Indigenous Commercial Forestry Opportunities: East Arnhem' project.
AGR3	Short-term	Undertake mapping of water resources in prospective agricultural areas (already mapped) to inform consultation with traditional owners and support investment attraction.
AGR4	Medium-term	Facilitate the implementation of an integrated forestry development model for the East Arnhem Region based on recommendations from the 'Indigenous Commercial Forestry Opportunities: East Arnhem' project.
RS1	Short-term	Grant Major Project status to Winchelsea Mine and the associated developments being led by ALC in conjunction with the development of the mine.
MI6	Medium-term	Appoint a permanent Biosecurity officer to facilitate international trade/ international yacht arrivals and manage pest and disease risks to the region.
RS2	Short-term	Finalise geoscience mapping for traditional owners to better understand the resource potential of prospective areas of the region.
SI1	Short-term	Promote the region as the premier southern hemisphere location for equatorial launch services, research and development.
SI2	Short-term	Work with Aboriginal communities and landowners to establish a facilitated investment pathway for ground station investors seeking a southern hemisphere location.
SI3	Medium-term	Work with proponents to develop orbital and deep space launch capabilities in the region to support expanded industry capability.
CEM1	Short-term	Advocate for double the number of rangers to be funded under the Indigenous Rangers Program.
CEM2	Short-term	Fund feasibility studies to identify potential additional conservation and ecosystem management revenue opportunities.

#	Short Term Medium Term Long Term	Action
CEM3	Short-term	Develop implementation plans to support ranger groups within the region pursuing feasible opportunities identified within their operational footprint.
CEM4	Short-term	Establish a sector led working group to identify the workforce development priorities for employers and create a regional workforce development strategy for the sector.
CCW1	Short-term	Establish a sector led working group to identify the industry and workforce development priorities for employers and create a regional industry and workforce development strategy for the sector.
M1	Short-term	Support studies in partnership with industry and traditional owners to explore manufacturing opportunities for a Sustainable Development Precinct near Nhulunbuy.
M2	Short-term	Develop a partnership between traditional owners and NTG to undertake a master planning process, then attract and assess relevant private sector enterprises.
E1	Short-term	Deliver feasibility studies on viable options for future power generation for the Gove Peninsula and Groote Eylandt. This work should contemplate economic development opportunities and be undertaken in conjunction with master planning for a Sustainable Development Precinct.
E2	Short-term	Deliver a feasibility study which explores commercially viable hybrid models for micro grids in remote communities and homelands throughout the region.
N1	Short-term	Where there is mutual interest, facilitate engagement between traditional owner groups and defence.
HS1	Short-term	Engage with the Caring Industries Workforce Development Group to identify the workforce priorities for employers and create a regional workforce development strategy for the sector.
MI6	Medium-term	Appoint a permanent Biosecurity officer to facilitate international trade/ international yacht arrivals and manage pest and disease risks to the region.
HS2	Short-term	Provide funding to support the implementation of the sector specific workforce development strategy when developed.
HS3	Short-term	Engage with NDIA to collaborate on an evidence based regional NDIS model for East Arnhem based on community level data.
SBS1	Short-term	Work with key stakeholders to investigate opportunities and undertake a feasibility project to develop small business precincts in a variety of communities and homelands.
SBS2	Short-term	Develop and implement a pilot small business precinct in an agreed location.
SBS3	Short-term	Provide an evaluation service for current programs and grants providing financing to entrepreneurs attempting to establish small businesses.
SBS4	Medium-term	Develop a prospectus for private sector and philanthropic investment in small business precincts and take to market.
SBS5	Medium-term	Develop tailored support packages to provide start-up capital to entrepreneurs through grants and equity arrangements.

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