



TOP END REGION

Economic Growth Plan

2022–2030

Developing a \$3.37 billion regional economy by 2030

The Top End region is resilient, opportunity-focused and rich with natural resources. Our vision is to grow the economy and improve social and economic outcomes for the people of the region. We will leverage our competitive advantages to grow existing industry, harness new economic opportunities and prioritise Aboriginal economic development.

Acknowledgment of Traditional Owners and Country

The Top End Regional Economic Growth Committee acknowledges the Traditional Owners and Aboriginal family groups that make up the Top End region, and pay our respects to Elders past, present and emerging.

We acknowledge the continuing connection to lands, waters and communities, and the evolving cultures of all our First Nations peoples.

We acknowledge the importance of our work to cohesively support Traditional Owners to deliver sustainable opportunities that enhance economic, cultural and social participation for Top End communities.

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Introduction

PRIORITISING ECONOMIC GROWTH

In 2020, the Territory Economic Reconstruction Commission (TERC) recommended a focus on the Northern Territory's regions to realise their economic vision and potential. The development of Economic Growth Plans was recommended to guide a coordinated and collective approach to growing the regions.

'Understanding a region's competitive advantages, and then seamlessly linking opportunities to the investment delivery system, will help lift and grow regional economies.' (TERC Final Report 2020)

The TERC set an ambitious goal to generate a \$40 billion economy by 2030, identifying priority industries critical to economic growth, to attract private investment and create jobs.

The TERC supported Regional Economic Growth Committees as key industry and community reference groups to develop Regional Economic Growth Plans that would provide advice from a regional context.

TOP END REGIONAL ECONOMIC GROWTH COMMITTEE

This plan has been developed by the Top End Regional Economic Growth Committee (Top End REGC) with the support of the Northern Territory Government. The Top End REGC is an independent advisory committee to government made up of representatives from local Aboriginal corporations, land councils and businesses from across the region. The committee offers a unique and diverse lens on what's required to support economic growth in the region and is committed to achieving the Top End's regional economic vision.

Our membership comprises:

- Murin Association Incorporated
- SeaLink
- Gundjeihmi Aboriginal Corporation
- Yagbani Aboriginal Corporation
- Green River Aboriginal Corporation
- West Daly Regional Council
- Thamarrurr Development Corporation
- Nguju Ullintjinni Association Incorporated
- Tiwi Partners
- Tiwi Islands Land Council
- Northern Land Council

REGIONAL GROWTH FOR THE TOP END

The Top End Region Economic Growth Plan's main objective is to enhance social and economic opportunities for people throughout the region, and to increase the region's contribution to economic growth for the Northern Territory.

To achieve this, the plan is guided by 4 key priorities:

1. Identify and construct key infrastructure to support economic growth
2. Prioritise Aboriginal capability and leadership
3. Grow existing industry and skilled local workforce
4. Activate economic opportunities to diversify and grow the economy.



The plan provides a guiding framework that will foster economic opportunity and enhance the liveability of our communities by focusing on growth sectors that provide the greatest opportunity for sustainable economic growth: agribusiness, resources, tourism, energy transition, construction and civil works.

In addition, the plan highlights existing industries unique to the region that contribute to the economy, and that provide consistent and sustainable income and employment.

The plan will play an important role in:

- promoting the region
- enhancing understanding of the region's population and economic makeup
- identifying the region's competitive advantages
- identifying key infrastructure to enable economic development and enhance the region's liveability
- identifying shared challenges and barriers to economic growth
- identifying and realising economic growth opportunities.

Achieving sustainable long term economic growth will involve a contribution from the Territory and Commonwealth governments to provide the enabling infrastructure to stimulate and fast track economic opportunities. It will require a coordinated approach by government and industry.

This plan advocates for upgrades to basic economic and social infrastructure to improve the region's liveability, encourage population growth and realise the many economic opportunities available. The plan aligns with the Territory wide strategic objectives to grow the economy in the regions, with Aboriginal people pursuing new opportunities, and with a focus on existing strengths and industries emerging in line with global demand trends.

It should be read in conjunction with the Territory's Regional Development Framework, NT Aboriginal Economic Participation Framework 2022-2032 and the NT Infrastructure Strategy 2022 to 2030, which guide how government, stakeholders and communities can work together to deliver improved prosperity and liveability for all Territorians.

The plan is a living document and will be updated as the region progresses to ensure prospective investors can continue to use the document to connect with the region.

The Top End Region

REGIONAL SNAPSHOT



Total Population
17,900



Aboriginal
Population (%)
74%



Median Age
32
years old



Home Ownership
25%
of population own
their home



Education
(Completed year 12
or equivalent (%))
23.5%



Working age population
(aged 15-64 years)
69%

Source: Australian Bureau of Statistics (ABS) and National Institute of Economic and Industry Research (NIEIR)

The Top End region encompasses the northernmost section of the Territory, an area of 112,295 square km including Daly, West Arnhem and the Tiwi Islands. The region extends from Wadeye in the west to Maningrida in the east, and includes the historic mining town of Jabiru inside Kakadu National Park.

Because of its unique geography and diverse population, the plan profiles 4 sub-regions:

1 Daly

3 Tiwi Islands

2 West Arnhem

4 Top End rural and unincorporated
(unincorporated is land not governed by a local government)

Landscape

The region is characterised by its expansive landscape and natural beauty, with extensive mangrove-lined coasts, wetlands, floodplains and sandstone plateaus supporting a number of endemic native flora and fauna species. Much of its natural landscape remains untouched; it has not been subject to the same level of development pressure through urban expansion or intensive agriculture as in other parts of Australia.

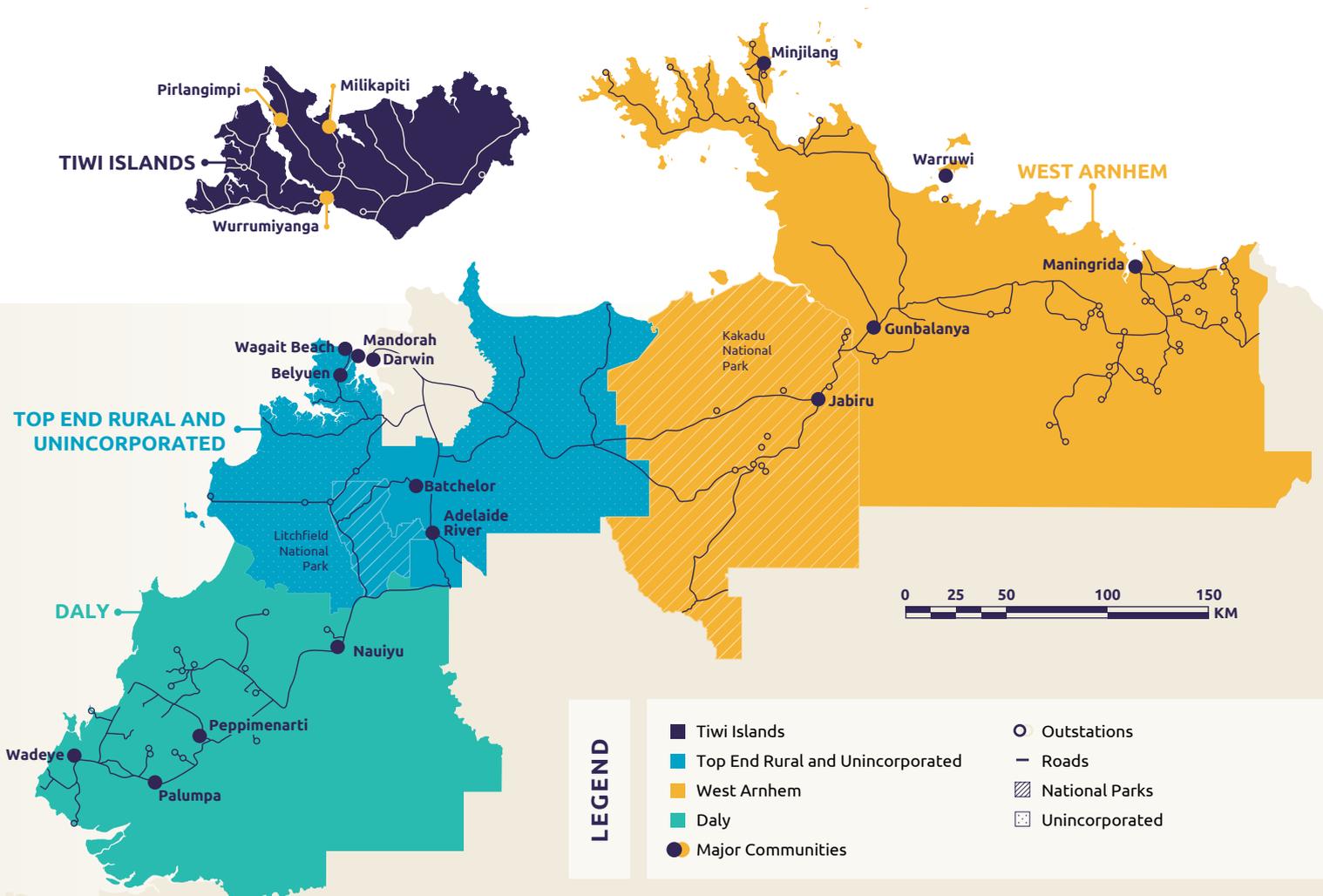
Although climate change is increasing pressure on the natural environment, this plan aims to ensure sustainable economic development is balanced with the right growth industries that do not exacerbate the effects of climate change on the natural environment.

Climate

The climate is tropical monsoonal with a dry and wet season. The wet season is also cyclone season. Aboriginal people of the region recognise many seasons in the Top End, with Kakadu's Aboriginal landowners identifying 6 distinct seasons.

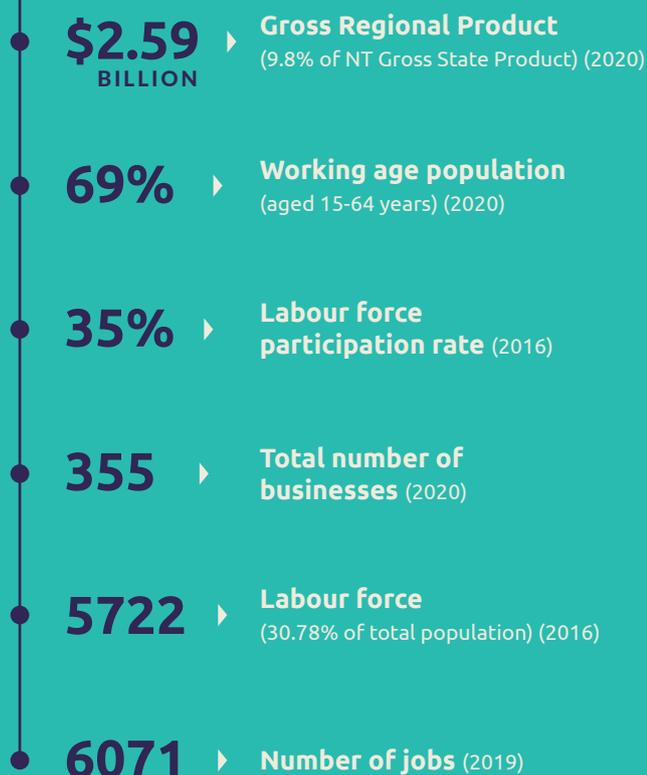
Aboriginal culture

Aboriginal culture in the region dates back 65,000 years. The richness of the many cultural and family groups is demonstrated by the diversity of languages spoken. Aboriginal cultural and ecological practices that continue today are central to the region's competitive advantage in showcasing its unique cultural makeup for domestic and international visitors.



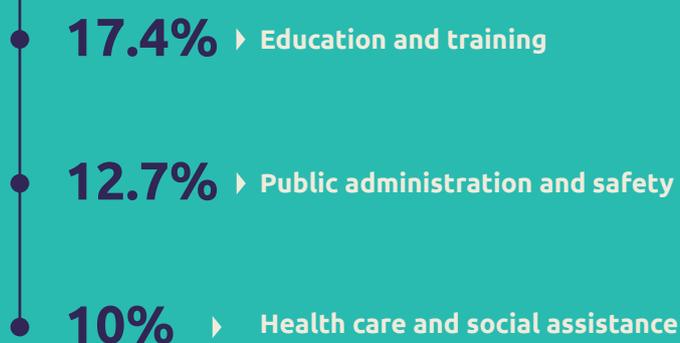
Economy and employment

ECONOMIC SNAPSHOT



EMPLOYMENT BY INDUSTRY

The largest employment industries in the region (2016):



Source: Australian Bureau of Statistics (ABS) and National Institute of Economic and Industry Research (NIEIR)

Population and settlements

The region is sparsely populated. Of the 17,900 people living across the region, most are young Aboriginal people: about 39% are aged 24 or younger; only 7% are aged 65 or older. The Top End has the highest proportion of Aboriginal people in the Territory, with approximately 74% of residents identifying as Aboriginal.

The region is home to 12 major Aboriginal communities, 5 minor communities, 2 town camps and 135 homelands.

With almost three-quarters of residents identifying as Aboriginal people, and with the majority of land across the region classified as Aboriginal land, traditional Aboriginal landowners play a critical role in the development of the region and its industries, infrastructure and services.

Land tenure

Approximately 67% of the region's land is classified as Aboriginal land. This is followed by national park (23%) and pastoral land (10%).

Economy and employment

The Top End region's economic output comes largely through the mining sector with the main contributors to employment being education and training, public administration and safety, and health care and social assistance.

Although the strongest employment in the region is predominantly service related, the resources, agriculture, tourism and renewable energy sectors are significant in terms of their economic output and future opportunity to diversify and grow the region's economy.

REGIONAL GROWTH SECTORS

1. Agribusiness

The Top End region's climate, land and aquatic resources, and proximity to international markets make it ideal for supporting agribusiness.

Opportunities exist to build on existing industry as well as developing products and new business ventures on Aboriginal land. The region has ideal growing conditions for a number of crops and animals as well as native bush tucker foods and medicines.

Further, changes to the NT Pastoral Leases Act will allow for greater flexibility and diversity in production on pastoral land.

Contributing to approximately \$204 million of economic output and providing jobs to 489 people¹ (data includes NT unincorporated areas excluding Alyangula and Nhulunbuy), agribusiness in the region includes cattle, buffalo, forestry, bush foods, horticulture, aquaculture, fisheries and crocodile farming.

Opportunities to grow include:

PASTORAL

The beef cattle industry is a well-established, resilient industry managing vast areas of land supplying beef cattle to mainland states and producing quality animals for live export.

A long term contributor to the region's economy, the pastoral sector delivered 60.5% of the total value of Territory primary industry and fisheries production in 2019–20². The Top End contains 15 pastoral properties, equating to 10% of the region's land area.

Although demand for live cattle has declined due to COVID19, high Australian cattle prices and reduction in northern Australia herd numbers are supporting demand.

With the sustained need for prime pastoral land, opportunities exist for Aboriginal landowners to explore developing pastoral enterprises or partnering with reputable companies to kickstart new pastoral businesses.

Likewise, recent changes to pastoral lease administrative arrangements create opportunities for current pastoral lease owners to diversify traditional pastoral businesses.

BUFFALO

The buffalo industry (live export and meat products) is a small industry with potential to grow. Demand for live buffalo has increased following extended periods of higher than average prices for live cattle.

Indonesia is the largest export destination for Territory buffalo, accounting for 61% (6560 head) of total buffalo exports in 2021, followed by Malaysia at 20% (2185 head). Buffalo turn-off grew 37.1% in 2019–20 to 10,764 head with an estimated value of \$9.2 million.³

Large numbers of wild buffalo on the Tiwi Islands and across West Arnhem, together with strong demand from South East Asia, provides opportunities to further develop the industry as well as training and employment for Aboriginal people.

HORTICULTURE

The Top End region produces a diverse range of commercial horticulture products including mangoes, melons, vegetables, grapes, tropical fruit, ornamental plants, pastures and fodder crops. The value of horticulture for 2019–20 was \$343.2 million, an increase of 18.8% compared to 2018–19 and contributing to an estimated 24.2% of the total value of Territory primary industry and fisheries production in 2019–20.⁴

Interstate demand for our products is increasing and pastoral companies can more easily diversify into horticultural production due to changes to the NT Pastoral Leases Act.

¹ National Institute of Economic and Industry Research (NIEIR) 2021

² Northern Territory primary industry and fisheries economic overview 2019–2020

³ Northern Territory primary industry and fisheries economic overview 2019–2020

⁴ Northern Territory primary industry and fisheries economic overview 2019–2020

FISHERIES AND AQUACULTURE

Although small by national and international standards, the NT commercial fishing industry has significant potential for future growth. The farming of aquatic species such as fish, molluscs, crustaceans and aquatic plants is the fastest growing industry in Australia.

Reflecting this growth, Aquaculture production in the Territory increased by 12% to \$53 million in 2020–21, due to growth in barramundi, pearling and other smaller developments.⁵

With most produce transported interstate, the value of the entire Territory fisheries production for 2019–20 was \$124 million.

The Top End region can contribute to future growth of the fisheries industry, with commercial production trials of Blacklip rock oysters, black jewfish, prawns and sea cucumber under way from West Arnhem to the Tiwi Islands.

Opportunities also exist for Aboriginal landowners to capitalise on the 2008 Blue Mud Bay decision by the High Court of Australia handing coastal Aboriginal people control over the inter-tidal areas. The decision, affecting over 80% of the Northern Territory's coastline and some major rivers has the potential to support Aboriginal landowners to implement profitable and sustainable fishing policies and businesses.

CROCODILE

Australia accounts for 65% of the global trade in saltwater crocodile skins, with about two thirds farmed and exported by the Territory. In 2020–21, revenue from the Territory crocodile industry was \$24 million.⁶

The industry creates employment at all stages from “marsh to market”, including in remote Aboriginal communities, and has attracted new local and international investment exceeding \$100 million over the last 10 years (NT Crocodile Farming Industry Strategy 2015-21).

A pilot project has been confirmed for the Tiwi Islands to develop a hatchery that can support the incubation of 2100 eggs.

The crocodile market could grow further through commercialising by-products, further processing or manufacturing finished products.

FORESTRY

Forestry is an emerging industry, with \$115 million worth of timber harvested per annum, \$1.32 billion in plantations and approximately 170 fulltime equivalent staff.⁷

The Territory is home to extensive managed native forests, in addition to plantations of Indian sandalwood, acacia and the world's largest plantation of African mahogany. The forestry industry provides significant employment in the Top End region particularly in the Daly region and the Tiwi Islands.

On the Tiwi Islands, the Plantation Management Partners (a subsidiary of ASX listed Midway Limited) manage a 35,000 hectare forestry plantation project that exports wood pulp through a partnership with the 100% Aboriginal owned Tiwi Plantations Corporation. The project has an export capacity of 400,000 green metric tonnes per annum.

To date, 24 shipments have been exported to customers in China and Japan. Shipments are now resuming following disruptions due to COVID-19. Regional demand for pulpwood is projected to grow as a result of increasing Chinese demand.

Tiwi Plantations Corporation and Plantation Management Partners are trialling eucalyptus trees in a project that, according to early evidence, could be up to 100% more productive than the current plantings of acacia. It is projected that a \$100 million investment into this second plantation will create an additional 155 fulltime direct and indirect jobs.

⁵ Northern Territory primary industry and fisheries economic overview 2019–2020

⁶ Northern Territory primary industry and fisheries economic overview 2019–2020

⁷ 2022, NT Farmers, NT Forestry



The commercial outlook for the Tiwi project has improved with recent new investment by Midway Limited, a maturing resource, and underlying demand for the biomass to make either paper or bioenergy in Asian markets.

2. Native bush foods

Kakadu plum (*Terminalia Ferdinandiana*) is a native bush food harvested within Kakadu National Park, West Arnhem and West Daly regions of the Top End. The Kakadu plum contains the highest concentration of ascorbic acid (vitamin C) of any fruit or vegetable in the world. The fruit is primarily wild harvested for use in functional foods and drinks, health supplements and personal care products.

Kakadu plum is endemic across northern Australia, and it is estimated that current wild harvests net less than 1% of available fruit. There is a real opportunity to expand the scale of production and engage more Aboriginal people to support the future growth and firmly establish Traditional Owner-led enterprises in the bush food sector.

In 2019 approximately 50 tonnes of Kakadu plum fruit was produced for commercial supply chains in Australia, and an estimated 80% came from the NT.

The fruit is significantly undersupplied. As an emerging industry, it does require focused investment. The current Kakadu plum harvest delivers significant cultural, social and economic benefits to Aboriginal communities in the NT, and is a product Aboriginal people can gather directly off country.

The Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA) consists of 7 Aboriginal corporations, 4 of which are based in the NT, working to develop the industry. In 2019, NAAKPA producers represented about 40 to 45% of total Kakadu plum annual output. As a non-distributive cooperative, NAAKPA provides support for member producers, by sharing technical information, supporting food safety, food testing, research, funding and advocacy.

3. Resources

The Top End's proximity to export markets and abundant mineral resources provide a competitive advantage for mineral exploration and processing.

The Top End is mineral rich with proven lithium and gold deposits. The Finnis Lithium Project, 30 km west of Berry Springs, is the first new mine in more than 10 years and the first lithium mine to open in the Territory, with production expected to start by the end of 2022.

Gold production will also recommence with the Mt Bundy Gold Project to restart 3 mines – Tom's Gully, Rustlers Roost and Quest 29 – about 100 km south-east of Darwin via the Arnhem Highway. It is estimated the \$412 million project will generate \$1.78 billion in operating expenditure over its life. Construction will create 150 jobs over 18 months, and operations are expected to create 300 fulltime jobs for 10 years.

4. Mine rehabilitation

Mining operations cause significant environmental disturbance and, if not managed appropriately, may have detrimental impacts. Rehabilitation of disturbed sites typically occurs in multiple stages and can take many years.

Rehabilitating disused mines across the Top End will provide a major boost to the economy, provide long term job opportunities and support improvements to the environment.

RANGER URANIUM MINE

Ranger Uranium Mine, operated by Energy Resources of Australia Ltd (ERA), is in the West Arnhem region of the Northern Territory, 8 km east of the township of Jabiru. The mine is located in the Ranger Project Area which is surrounded by, but separate from, the World Heritage listed Kakadu National Park.

Rehabilitation of the Ranger mine site commenced in 2021. ERA has revised timing and costings of the project, moving the completion date to 2028 and scaling the approximate cost from \$900 million to \$1.6 billion.

RUM JUNGLE URANIUM MINE

About 105 km south of Darwin and 6 km north of Batchelor, the former Rum Jungle mine and satellite sites Mt Burton and Mt Fitch were mined between 1953 and 1971 and produced 3530 tonnes of uranium oxide and 20,000 tonnes of copper concentrate. Mine operation practices created legacy landforms, groundwater and surface water contamination, including significant acid mine drainage issues and impacts to the east branch of the Finnis River. This project's main objective is to restore the environmental condition onsite and downstream of the mine; the secondary objective is to create stable landforms to support future land use.

In 2009, further rehabilitation works commenced in partnership with the Australian and Territory governments, and the Kungarakan and Warai people.

Stage 3 of the project will deliver a rehabilitation plan and major procurement activities expected to commence in 2022. The project has been designed to maximise the potential local and regional economic impact and represents a significant investment.

5. Tourism

Tourism is an important contributor to economic activity in the region, with the world renowned Kakadu and Litchfield national parks alone supporting over 1180 jobs and contributing \$136 million to the economy each year.⁸ Additionally, the Mary River and Daly River systems that fall within the region attract thousands of recreational fishing and camping enthusiasts each year, as do the arts and textiles industry on the Tiwi Islands, Peppimenarti, Nauiyu (Daly River), Gunbalanya and Maningrida.

Outside of the already popular destinations, there is untapped potential with a number of Aboriginal cultural and nature based opportunities – both self-drive and private operator.

The re-establishment of the luxury cruise industry since COVID-19 also has the potential to increase tourism on the Tiwi Islands and islands off the West Arnhem coast. With total output for the industry exceeding \$5.2 billion (2018–19), the region could leverage off the expedition cruise ship market as cruise lines look to explore the Kimberley region between Darwin and Broome, and the Territory's remote coastline between Darwin and Cairns.

The Daly, Tiwi Islands and the Top End rural and unincorporated sub-regions are captured in NT destination management plans; however, further work is required to ensure West Arnhem is included in future tourism planning.

⁸ Deloitte: Kakadu: Beyond Measure



6. Energy transition

In line with the Territory Government's commitment to a target of 50% renewable energy by 2030, the Top End has substantial opportunities to grow and explore innovative renewable energy solutions.

Global energy transitions are driving demand for renewable energy. The opportunities this transition provides are already seen in solar and hydrogen projects across the Top End.

Provaris Energy (PE) is planning to develop a largescale green hydrogen export project on the Tiwi Islands, with a phased capacity up to 2.8 gigawatts, producing up to 100,000 tonnes per annum of green hydrogen. Following a successful capital raising in November 2021, the Territory Government continues to work with PE and stakeholders.

Across the region, it is anticipated further land will be required to construct additional solar farms to accommodate increased future demand. This follows the successful completion of a 10MW grid connected solar plant in Batchelor. The Batchelor Solar Farm will add generation capacity to the Darwin-Katherine network and contribute to the Territory Government's target of 50% electricity supply from renewables by 2030.

7. Construction and civil works

A significant pipeline of infrastructure investment is budgeted for delivery over the next 10 years, predominantly for land servicing and construction of new social and industry housing, as well as the enhancement and upgrade of arterial roads including the Port Keats Road from Palumpa to Wadeye (\$60 million), Tiwi Islands roads corridor (\$75 million) and roads within Kakadu National Park (\$70 million).

These investments provide opportunities for local businesses to apply for contracts, which in turn will support local upskilling and employment. Longer term economic opportunities also exist for local organisations to provide repairs, maintenance and management services.



Jabiru water tower

CATALYST GROWTH PROJECTS

The region is positioning projects that leverage off our competitive advantages to expand existing industries, as well as diversify to meet global demand for new products.

Catalyst projects in the pipeline for development in major growth sectors include:

- 1. Future of Jabiru and Kakadu**
- 2. Ranger and Rum Jungle Mine Rehabilitation Projects**
- 3. Finnis Lithium Project**
- 4. Adelaide River Off-Stream Water Storage (AROWS)**
- 5. Wildman Agricultural Precinct**

Top End capacity for growth

The Top End REGC has identified a number of competitive advantages and growth enablers that will support the plan's vision and long term aspirations. Shared challenges that hinder or slow progress and that require a cohesive approach from government and private industry have also been identified.

COMPETITIVE ADVANTAGES

Natural environment

The region has a diverse natural environment and already directly provides resources and raw material of economic benefit – including timber, minerals, water, solar – as well as indirectly by attracting tourists seeking to experience the NT's natural environment. The region's vast area of underutilised land will provide opportunities to expand sustainable practices and tourism ventures, leveraging the natural environment.

Aboriginal culture and heritage

The region boasts strong and distinctive cultural heritage value with a large number of diverse Aboriginal cultural groups present. Well known for Kakadu National Park and Tiwi Islands art and textiles, the region holds other untapped cultural and arts tourism opportunities that can leverage off tourism inflows.

Mineral resources

The region has unique geology and resources such as lithium and gold. This has enabled the recent development of the Mt Bundy Gold and Finniss Lithium projects. A number of additional mining related projects are earmarked for the future.

Location, accessibility and lifestyle benefit

The Top End region surrounds Darwin, the Territory's major commercial and population base. This location provides multiple benefits including access to goods, services and human capital, as well as an access point for domestic and international tourism.

In addition, the region's location is at the doorstep of major Asian economies including Singapore, Japan, China, Taiwan, Korea and Indonesia with these nations being the NT's major trading partners. Residents of these nations make up a significant portion of international visitors to the Territory for tourism and study.

GROWTH ENABLERS

The Top End REGC has identified enablers shared across the region to progress economic, social and cultural development.

Infrastructure

TRANSPORT AND LOGISTICS

Rail, roads, bridges, marine infrastructure, air transport and intermodal hubs are essential to connect communities. Connectivity between communities and regional centres drives economic and social development across the Top End region. For months each year during the wet season, many communities are inaccessible by road, requiring visitors and essential services to fly in and out.

Recognising the high cost of sealing and maintaining roads in the region, this plan identifies essential connecting road corridors that require investment and are vital to enabling economic growth and improving year round access.

WATER, ENERGY, TELECOMMUNICATIONS

Access to reliable, safe and affordable water, energy and telecommunications services is vital to successful economic development in the region. Without these, the region's liveability is diminished, affecting population growth, with business and government unable to plan effectively or make reliable investment decisions.

This plan will advocate to ensure basic services are prioritised across the region to make sure future regional investment opportunities are not overlooked and the region's liveability is enhanced.

GOVERNMENT AND INDUSTRY HOUSING

Readily available and secure government and industry housing is essential to ensure the development of the region is not hindered by an inability to house employees.

Increasing the availability of industry housing will attract future workforce and create stability and security, enabling longer term retention of skilled workers. An increase in staff accommodation will also allow organisations to offer housing to local Aboriginal employees which will reduce the reliance on, and overcrowding in, social housing.

Opportunities exist for Aboriginal landowners to lead the development of government and industry housing projects with the application of long term lease security available for locally owned and built houses from government and industry.

This plan will ensure industry and government housing needs are better understood across major communities so appropriate investment decisions can be made.

SOCIAL INFRASTRUCTURE

Social infrastructure – the facilities, spaces, services and networks that support the quality of life and wellbeing of communities – is critical to sustaining the needs of the population and increasing the region's liveability. This includes social infrastructure across health, education, recreational facilities, social housing and justice and emergency services.

This plan identifies the social infrastructure needs of the region and will seek to connect suitable pathways to investment.

Skills

WORKFORCE TRAINING AND DEVELOPMENT

Quality and accessible workforce training and development is essential to growing local capacity and enabling local people to enter the skilled workforce. Increasing access to training and education contributes to an environment that supports entrepreneurship and economic independence.

This plan will prioritise workforce development activities to align with identified projects and emerging industries, and determine regional infrastructure needs that can best support future long term workforce development and training.

Access to Aboriginal land

Across the Top End, 67% of land is classified as Aboriginal land under the *Aboriginal Land Rights (Northern Territory) Act 1976 (ALRA)*. The act provides the legislative foundations of Aboriginal land and sea ownership in the Northern Territory. Understanding the tenure and leasing processes required on Aboriginal land allows landowners and investors to maximise existing and future economic growth opportunities. Additionally, clear understanding from stakeholders of land tenure conditions and processes helps to ensure the development of the region is uninterrupted.

In collaboration with land councils, the Top End REGC will explore ways to streamline consultation and improve approval processes for Traditional Owner-led proposals for economic development on Aboriginal land.

CHALLENGES TO GROWTH

The region has many strengths and competitive advantages; however, it does face challenges in its ability to realise its economic potential and diversifying the economy. Due to the complex nature of the challenges, a collaborative multi-faceted approach is required. These following challenges have been identified through analysis of the social, economic and infrastructure circumstances in the region.

Socio-economic inequality

Despite being land rich, Aboriginal people of our region generally live under challenging socio-economic circumstances, experiencing entrenched inequality when compared with non-Aboriginal residents. With a significant portion of the region's population speaking English as their second or third language and living remotely, there are varying levels of service quality and access to education, employment and business opportunities compared with those in larger urban centres.

Geography

The Top End is vast, covering over 112,000 square km including inland, coastal and island communities relatively isolated from regional and metropolitan centres.

The remoteness of many of the region's assets can hinder its ability to realise the opportunities stemming from its competitive advantages.

Together with lack of population and visitors, remoteness has historically impacted the level of services and infrastructure for the region. Despite these challenges, the region remains a key contributor to economic output, with great potential to expand current and new industry. Future investment in the region to improve access and increase services will reduce costs and challenges for doing business in our region.

Enabling infrastructure

For much of the region, baseline enabling and social infrastructure is lacking. The lack of adequate infrastructure across transport and logistics, utilities and industry housing currently impedes the ability for our regions to grow. The required infrastructure is a key enabler to economic growth, with priority infrastructure needs highlighted in the sub-regional profiles.

Capacity and leadership

A growing challenge for communities across the Top End is transitioning leadership to future generations, and ensuring future leaders have the capacity to contribute and make informed decisions on behalf

of their communities. This is important so Aboriginal people of our region are central to progress economic and regional development on their country now and into the future. Early education is paramount to addressing this challenge, as is the importance of integrating and respecting local cultural influences on the transition of leadership.

Skill requirements

Diversity of skills and experience is fundamental to economic activity and crucial to regional competitiveness and resilience.⁹ Levels of skills and education vary across communities and socio-demographic groups. The rising number of people aged 15 years and over with non-school qualifications is increasing (37.3% in 2011 and 44.4% in 2016) which provides an indication of constraints in skills development for the local population.

The cornerstone for developing a skilled workforce is broad availability of childhood education and skills supply closely matched to industry needs.

Access to land

Approximately 67% of the Top End region is classified as Aboriginal land under the Aboriginal Land Rights (Northern Territory) Act 1976 (ALRA). An important protection of the cultural value of land to the region's Traditional Owners. However there are some challenges in supporting timely development on Aboriginal land under the Acts processes.

Climate change

The NT faces some of Australia's most extreme climate changes including rising sea levels, rising temperatures and more extreme and common severe weather events. Regional development will focus on infrastructure required to protect communities from climate change and on industry development that will not contribute further to climate change.

⁹ A Skilled Workforce for Strong, Sustainable and Balanced Growth, International Labour Office Geneva, 2010

Regional economic growth priorities

THE TOP END REGION ECONOMIC GROWTH PLAN IDENTIFIES 4 STRATEGIC PRIORITIES ACROSS THE REGION.

PRIORITY 1

Identify and construct key infrastructure to support economic growth

- Improve economic opportunities and liveability by identifying and constructing key infrastructure across transport and logistics, utilities, housing, education and community safety.

PRIORITY 2

Prioritise Aboriginal capability and leadership

- Support Aboriginal Territorians to actively lead development on their land, creating jobs and economic opportunity.
- Support future generations to represent their region and contribute to decision making, deliver long term capacity-building activities for younger generations of Aboriginal leaders.

PRIORITY 3

Grow existing industry and skilled local workforce

- Develop existing strengths in health and social services, agriculture, aquaculture, traditional harvesting, tourism, mining and renewable energy.
- Prioritise workforce development activities aligned with major projects and emerging industries.

PRIORITY 4

Identify and activate economic opportunities

- Collaborate and materialise new economic opportunities leveraging off the region's competitive advantages, to expand and diversify the local economy.

Priority 1 ▶ Identify and construct key infrastructure to support economic growth

Investment in infrastructure across multiple sectors continues to be a central need for our region with a multitude of assets requiring immediate investment to bring them in line with acceptable standards comparable with other jurisdictions.

Our strategic approach aims to advocate for, and deliver on, key infrastructure requirements to attract investment, create jobs, address disadvantage, enhance liveability and prepare for the future needs of our communities.

Objective:

Improve economic opportunities and liveability by identifying and constructing key social and economic infrastructure.

Priority actions

- At a sub-regional level, identify economic infrastructure requirements to support economic growth, pursuing funding certainty if unbudgeted, including:
 - identify and advocate for key roads and marine infrastructure requiring upgrades and that are as yet unbudgeted
 - develop regional needs assessment to better understand industry and government employee housing needs in major Top End communities
 - to support digital and telecommunication upgrades, assess capacity and bandwidth needs of communities to assist future investment and business case decisions for government and the private sector
 - monitor and assist with progressing the delivery of investments to transition Top End communities to clean and reliable electricity
 - assess ground and surface water availability and existing infrastructure to support future community planning and industry development
 - in collaboration with local governments, assess waste management infrastructure and programs, and implement waste management improvement plans where required.
- In coordination with responsible government agencies, identify and prioritise key social infrastructure needs to enhance liveability of the region. These include health-related services, education and training, social housing programs, police, courts and other justice and public safety provisions, as well as arts, culture and recreational facilities.
- Where required, establish a localised roads committee to ensure strategic coordination of roads related planning, service delivery, advocacy and funding.

Priority 2 ▶ **Prioritise Aboriginal capability and leadership**

Transitioning leadership from current to future generations is vital for communities in our region to achieving better social, economic and cultural outcomes.

For generations, Aboriginal and Torres Strait Islander people have passed the knowledge, skills and practical experience needed for future generations to take on leadership roles.

This is evident in the capacity, strength of leadership and decision making abilities throughout our region and the ability for leaders to balance their cultural and family responsibilities together with their broader responsibilities when working with industry and government.

Objective:

- Support Aboriginal Territorians to actively lead development on their land, creating jobs and economic opportunity.

- Support future generations to represent their region and contribute to decision making, deliver long term capacity building activities for younger generations of Aboriginal leaders.

Priority actions

- Support and contribute to the development of a regional Aboriginal Capability and Leadership Strategy to identify and support emerging leaders to develop the skills required to participate in and contribute to future decision making.
- Connect existing Commonwealth and Territory government funding and leadership programs with community level organisations to support organisational governance and succession planning.
- Progress local decision making with community leaders and youth councils to streamline future engagement activities and approval processes.
- Lift and normalise Aboriginal economic participation and business entrepreneurship by promoting and connecting Territory Small Business Champion programs

- Create accessible and well-coordinated pathways for Traditional Owners to access funding for strategic business planning for identified economic growth opportunities.

- In consultation with land councils and Traditional Owners, support and invest in consultations to improve approval process of development applications and Section 19 lease agreements.

Priority 3 ▶ Grow existing industry and a skilled local workforce

Because of the region's rich culture, geography and natural environment, the Top End boasts a diverse range of industry across both public and private sectors, contributing to approximately 10% of the Territory's Gross State Product (GSP). Across all major growth sectors, there are opportunities to unlock and expand industry to maximise the region's potential. The sectors with the greatest potential include agribusiness, native bush foods, resources and mine rehabilitation, tourism, energy transition and construction and civil works.

Additionally, connecting our local labour force with training that will allow them to support and benefit from new and existing projects across the region will enhance the region's competitive advantage. It will also reduce costs of doing business, minimising major projects' reliance on fly in and fly out (FIFO) workforce.

Objectives

- Strengthen existing growth sectors across agribusiness, native bush foods, resources and mine rehabilitation, tourism, energy transition and construction and civil works.

- Prioritise workforce development activities aligned with major projects and emerging industries.

Priority actions

- Individual actions to support existing regional growth sectors include:
 - tourism – support the development of and promote a tourism destination management plan for the region, to include a breakdown of product development opportunities at sub-regional level
 - agribusiness – support the expansion of the buffalo industry in the West Arnhem region
 - native bush foods – support the expansion of Kakadu plum harvesting in the Daly and West Arnhem region
 - energy transition – assess existing needs for additional renewable energy projects (Batchelor Solar Farm) to support the Territory's 50% renewable target by 2030.
- Create a regional profile of current business capability.
- Connect with peak industry bodies to address growth challenges, infrastructure needs and support future aspirations for industry growth and development.
- Connect with private sector and owners of major projects to better understand and support workforce needs and priorities.
- Develop the Top End Regional Workforce Plan, aligned with major projects and emerging industries (construction, civil works, agribusiness, health, social and disability services).
- Engage with responsible government agencies and business to understand skill requirements for individual project lifecycles.
- Map existing regional training centres and educational capabilities.

Priority 4 ▶ Identify and activate unrealised economic opportunities

This priority will ensure entrepreneurs and land owners have every opportunity to successfully develop their land or create business opportunities for their communities.

Objectives

- Collaborate and materialise new economic opportunities leveraging off the region's competitive advantages, to expand and diversify the local economy.

Priority actions

- Identify and prioritise the progression of regional development opportunities across major and emerging industries, within each sub-region, including:
 - pastoral – in collaboration with responsible government agencies and Traditional Owners develop the feasibility of the buffalo meat industry on the Tiwi Islands and West Arnhem
 - fisheries and aquaculture – in collaboration with responsible government agencies, industry and Traditional Owners, progress the development of an aquaculture industry from research based activities to viable investment ready businesses
 - fisheries and aquaculture – support progression of the Blue Mud Bay Implementation Action Plan to foster growth in fishing, aquaculture, and tourism-related industries
 - energy – continue to support the private sector to progress the development of hydrogen production and export facilities on the Tiwi Islands
 - agriculture – in collaboration with local landowners, support the development of crocodile farming enterprise on the Tiwi Islands
 - tourism – in collaboration with local landowners and responsible government agencies, identify potential product development opportunities for inclusion in Tourism NT's destination management planning.
- Where required, develop local economic forums at a sub-regional level to better coordinate and progress economic and regional development activities.
- Where required, develop localised project delivery plans to enhance the coordination of local infrastructure and growth projects at a sub-regional level.
- Connect funding pathways to support the development of business feasibility studies for identified industry growth opportunities.

Top End
sub-regional
profiles



Daly sub-region

The Daly sub-region is located in the north-western section of the Territory, between 300 and 420 km south-west of the Darwin CBD. Covering an area of 14,000 square km, the region is predominantly low-lying native forest, in addition to areas of land used for agriculture.

The population of the Daly sub-region is largely Aboriginal and is home to a number of outstations and 4 major Aboriginal communities: Nganmarriyanga (Palumpa), Peppimenarti, Wadeye (Port Keats) and Nauiyu (Daly River).

Most of the sub-region is classified as Aboriginal freehold land held by the Daly River/Port Keats Aboriginal Land Trust. A significant portion is also held under pastoral lease.

Population and economic snapshot



Gross Regional Product (GRP)
\$61 million



Population
3,735



Labour Force
1,236 (25%)
of total population



Local jobs
726



Labour Force Participation Rate
37%



Largest industry (by employment)
Education and training - 140 jobs



Largest industry (by output)
Agriculture, forestry and fishing - \$16 million

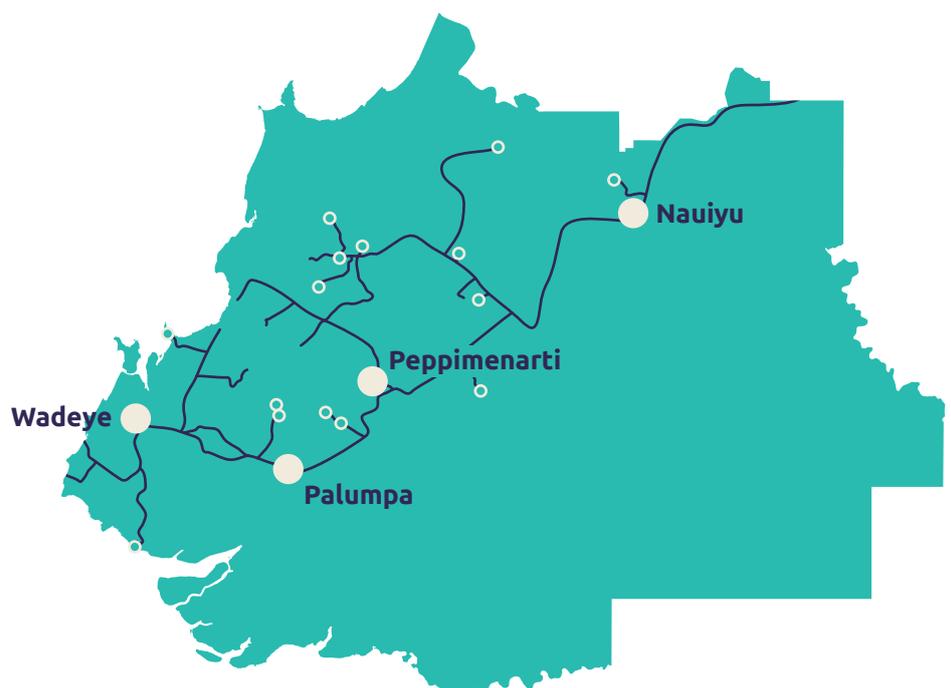
References: 2016 ABS SA2 Daly, 2019 ABS West Daly LGA only, 2020 ABS West Daly LGA only, West Daly LGA only - 2021 National Institute of Economic and Industry Research. Source: Australian Bureau of Statistics (ABS) and National Institute of Economic and Industry Research (NIEIR). Note: SA2 Data includes the town of Pine Creek which sits outside the Top End region boundary. West Daly LGA data excludes Nauiyu (Daly River) and other parts of the Top End region.

Transport and logistics

The sub-region can be accessed by road or by air, with Wadeye serviced by a small coastal port with a weekly barge service. The Port Keats Road allows road access to all Daly region communities and homelands.

The communities of Wadeye, Palumpa, Peppimenarti and Emu Point have working aerodromes, with Wadeye boasting daily flights to and from Darwin.

Road access is limited in the wet season.



DALY PRIORITY INFRASTRUCTURE

Priority infrastructure	Description	Sector	Estimated investment	Budgeted	Growth drivers	
1	Port Keats Road Upgrade	Enhance upgrades on the Adelaide River to Wadeye corridor, including sealing Port Keats Road between Wadeye and Palumpa	Transport and Logistics - Roads	\$59.9m	Yes	Provide all weather access to support future economic growth and regional connectivity
2	Government Business Centre - Wadeye	Provide commercial infrastructure for government and non-government organisations required to deliver services, in addition to long term economic opportunities for Traditional Owners	Commercial Infrastructure	\$5m	No	Provide short and long term economic development opportunities for local landowners and community
3	Renal Clinic	Provide additional infrastructure to accommodate renal services	Health	\$5m	No	Improve health outcomes for the community through facility improvements
4	Govt. and Industry Housing Manthathpe Subdivision	Unlock unused land to increase community and industry housing	Housing	TBC	No	Reduce overcrowding, provide employment and training opportunities to local Aboriginal people
5	Education facilities to support Learning on Country	Provide easily accessible training opportunities that meet local industry needs	Education and Training	TBC	No	Improve access to industry training and employment opportunities
6	Wadeye - Commercial Infrastructure	Construct or refurbish commercial infrastructure to support business development opportunities	Commercial Infrastructure	NA	Yes (Private)	Provide commercial infrastructure required to enable new business development opportunities
7	Wadeye - Emergency Shelter and Sports Hall	Develop a multipurpose sports hall to support youth activities and provide emergency shelter facilities	Education and Public Safety	\$5-7m	No	Strengthen community engagement and youth development by supporting improved access to facilities and emergency shelter
8	Establishment of the Manthathpe School	Develop a primary school in Manthathpe	Education	TBC	No	Support the education of the Manthathpe community to improve education outcomes, and future employment opportunities
9	Naiyu/Daly River - New School and Emergency Shelter	Develop multipurpose infrastructure to provide modern educational facilities and flood proof emergency shelter	Education and Public Safety	TBC	No	Strengthen liveability by improving enabling and social infrastructure to provide modern educational facilities and local emergency shelter

DALY GROWTH OPPORTUNITIES

1. Construction and civil works

Demand for social and industry housing will see an increase in government investment over the next 5 to 10 years for new builds, and extensions or upgrades for existing housing stock – with an additional Manthathpe subdivision already planned for the Wadeye community.

Increasing investments in housing will provide opportunities to expand construction activities for local business and employment and training opportunities for the local Aboriginal population. Further economic opportunities will be available with upgrades of the Port Keats Road (the main arterial road connecting Daly communities and surrounding area) to be continued from Palumpa to Wadeye.

2. Agriculture - Aboriginal pastoral enterprise, traditional bush foods, forestry

Already delivering economic output and employment for the region, the agriculture sector could be further developed due to the quality and availability of prime agricultural land and an abundance of traditional food stocks.

Traditional Owners of the Daly sub-region are motivated to explore future opportunities across the pastoral and timber industries and are open to developing joint venture operations with established reputable industry organisations.

PALUMPA CATTLE STATION

Previously operating cattle and abattoir operations at Palumpa Station could be revitalised to provide economic and social opportunities. Led by Traditional Owners, work is underway to develop a road map to make the pastoral station a commercial cattle enterprise.

KAKADU PLUM

The existing Kakadu plum enterprise at Wadeye generates up to 12 tonnes in a harvest season lasting 4 to 6 weeks. Up to 250 Aboriginal people are involved in the annual harvest, and are paid up to \$150,000 which has a multiplier effect through the Wadeye community. Working with Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA), groups in Wadeye are looking at improving wild harvest technologies, as well as improving knowledge and behaviour around sustainability.

Other initiatives include developing Kakadu plum orchards and exploring the commercialisation of other bush foods found on country. Supported by NAAKPA, Traditional Owners from West Arnhem and West Daly are working to negotiate arrangements with the Northern Land Council to fix longer term harvesting agreements to maximise income and employment benefits.

3. Eco and cultural tourism product development opportunities –

With demand increasing for eco and cultural tourism experiences across the Territory, the Daly sub-region is well positioned to benefit from on-country tourism opportunities. Although only small in comparison to other regions, the Daly tourism industry is already showing early signs of growth. With focus areas already captured in Tourism NT's Big Rivers Destination Management Plan, further work is required, including building a better understanding of regional tourism opportunities through engaging with Traditional Owners and local tourism operators.

4. Learning on Country

School attendance and education is a major priority. With social pressures resulting in low school attendance rates, education programs could be established outside major communities on traditional homelands where there is strong demand for outreach education programs to support children's development.

Improving education outcomes will provide long term social and economic benefit, and enhance the ability to successfully empower local leadership and business creation for Daly communities.

5. Commercial infrastructure to develop new supermarkets and food businesses in Wadeye

To support business development, investment opportunities and to provide more diverse retail options for consumers, opportunities can be explored to build new or refurbish existing infrastructure to attract new business investment in Wadeye.



Tiwi Islands sub-region

Located 80 km from Darwin's CBD, the Tiwi Islands are known as Ratuatu Irara in Tiwi. They have a combined land area of 8,320 square km and comprise 2 large islands, Bathurst and Melville islands, and 9 smaller uninhabited islands. The estimated population of the Tiwi Islands in 2021 was 2,743, with the majority living in Wurrumiyanga on Bathurst Island.

Tiwi people are culturally and linguistically distinct from other Aboriginal people on the mainland with over 95% of the population speaking an Aboriginal language. The islands are bound by a common language and divided into 8 land-owning family groups. The family groups are represented equally on the Tiwi Land Council, the only body with the authority to direct and administer the Tiwi

Aboriginal Land Trust under the Aboriginal Land Rights (Northern Territory) Act 1976.

The Tiwi Land Council and the 8 land-owning families are key players in Tiwi-led economic development on the islands, with 8 groups owning the Tiwi businesses Tiwi Enterprises and Tiwi Resources.

Population and economic snapshot



Gross Regional Product (GRP)
\$60 million



Population
2,743



Labour Force
687 (25%)
of total population



Local jobs
719



Labour Force
Participation Rate
37%



Largest industry (by employment)
**Education and
training - 162 jobs**



Largest industry (by output)
**Construction
\$21 million**

References: 2016 ABS Tiwi Islands LGA, 2019 ABS Tiwi Islands LGA, 2020 ABS Tiwi Islands LGA, 2021 National Institute of Economic and Industry Research.
Source: Australian Bureau of Statistics (ABS) and National Institute of Economic and Industry Research (NIEIR)

Transport and logistics

The Tiwi Islands are accessible by air and ferry. The communities of Milikapiti, Pirlangimpi and Wurrumiyanga have daily flights to and from Darwin. Passenger ferry transport is available from Darwin to Wurrumiyanga 3 days a week in the wet season, increasing to 4 days from June to August. There is also a weekly car ferry service. The 3 main communities are connected mostly by unsealed roads that can be challenging in the wet season. A bus service, operated by Tiwi Enterprises, operates between the communities.



TIWI ISLANDS PRIORITY INFRASTRUCTURE

Priority infrastructure	Description	Sector	Estimated investment \$M	Budgeted	Growth drivers	
1	Tiwi Islands Road Corridor Upgrade	Seal 108 km of road connecting main communities, including new creek crossings	Transport and Logistics - Roads	\$75m	Yes	Provide all weather access to support future economic growth and regional connectivity
2	Wurrumiyanga Waste Management and Recycling Hub	Establish industrial waste and recycling facilities	Utilities - Waste Management	\$2m	No	Provide facilities to lower construction costs on the islands and grow the circular economy
3	Remediate Paru Barge Landing and Construct Public Amenities	Remediate the Paru barge landing and construct public amenities such as toilets and shade	Transport and Logistics Social/Lifestyle	\$3m	No	Improve access for 2WDs from the barge to increase connectivity and provide tourism infrastructure
4	SeaLink Ferry Service Expansion	Establish daily ferry route between Wurrumiyanga and Pirlangimpi	Transport and Tourism	\$8.5m (5 years)	No	Increase public transport resilience and access for tourism products in Pirlangimpi
5	Pirlangimpi Pontoon	Construct a pontoon in Pirlangimpi for transport ferries and recreational users	Transport and Logistics - Marine Infrastructure	\$1m	No	Improve marine connectivity for larger vessels and open Pirlangimpi to recreational boaters

TIWI ISLANDS GROWTH OPPORTUNITIES

1. Hydrogen export project with Provaris Energy

Provaris Energy (PE) is in first stage planning to develop a largescale green hydrogen export project with a phased capacity up to 2.8 gigawatts of solar generating capacity, with estimated production up to 100,000 tonnes per annum of green hydrogen.

2. Tourism

Significant demand exists for on-country eco and cultural tourism products, with potential for products to be offered by established tourism companies in partnership with local operators. In addition, there are future opportunities in the development of infrastructure that supports increasing demand for cruise industry offerings across northern Australia.

To better understand and capture tourism opportunities on the Tiwi Islands, engaging with Traditional Owners and local tourism operators will be required, in collaboration with Tourism NT tourism destination management planning.

3. Crocodile farming

A pilot that will harvest crocodile eggs and hatchlings on Melville Island is in the initial stages of seeking environmental approvals; \$1.5 million from the Aboriginals Benefit Account (ABA) will be allocated based on successful approvals. Tiwi Enterprises will construct and operate the hatchery, with the eventual aim, in year 2, to take in 2,100 eggs for incubation.

4. Forestry

Plantation Management Partners (a subsidiary of ASX listed Midway Limited) manages a 35,000 ha forestry plantation project that exports wood pulp through a partnership with the 100% Aboriginal owned Tiwi Plantations Corporation. The project has a 400,000 green metric tonnes (GMT) per annum export capacity.

Current trials of eucalyptus trees could double the export value and, assuming a \$100 million investment into a second rotation, create 155 additional fulltime direct and indirect jobs. There is strong underlying demand for the biomass to make either paper or bioenergy for Asian markets.

5. Aquaculture

The Tiwi Islands have an ongoing interest in aquaculture development. An aquaculture prospectus has been created to promote potential areas for aquaculture development of different species, including prawns, barramundi and oysters. The Territory Government will continue to work with Tiwi Islanders on the promotion of aquaculture opportunities on the islands and support the extension of research on blacklip rock oysters.

6. Buffalo

Approximately 18,000 head of buffalo live on the Tiwi Islands. Feasibility planning is underway to develop the industry, including safari-style tourism, live buffalo exports and developing a meatworks that would service the local population and crocodile farm.

7. Housing, construction and civil works

Significant investment in housing will expand construction activities on the Tiwi Islands due to the HomeBuild NT (new homes) and Room to Breathe (housing extensions) programs. HomeBuild NT has funded a near completed subdivision in Pirlangimpi, a planned subdivision in Wurrumiyanga and new houses in Milikapiti. Both programs will further stimulate training and employment opportunities with local construction companies.

Construction activity is likely to increase in parallel to the housing programs through the construction of worker accommodation, infrastructure upgrades to Melville Port, and likely construction, or other capital works associated with, a child and families centre in Wurrumiyanga.

The Commonwealth and Northern Territory governments are co-funding a \$75 million package to seal the roads corridor on Melville Island over the next 10 years to improve access to communities and the Tiwi plantations project. The final investment strategy identifying priority upgrades is due for release in mid-2022.



West Arnhem sub-region

Located east of Darwin and encompassing approximately 50,000 square km, the West Arnhem region is a diverse and vast area made up of remote islands, coastline, floodplains and escarpments.

Easily accessible from Darwin, Jabiru township is at the heart of Kakadu National Park. Jabiru is a growing community servicing the regions surrounding communities and the increasing number of tourists that visit the region each year.

Maningrida is the largest community by population of the region, and the largest Aboriginal community in Australia. Other major Aboriginal communities in the region are Gunbalanya, Minjilang (Croker Island) and Warruwi (South Goulburn Island).

Population and economic snapshot



Gross Regional Product (GRP)
\$62 million



Population
6,860



Labour Force
1,821 (29%)
of total population



Local jobs
1,568



Labour Force
Participation Rate
40%



Largest industry (by employment)
Mining - 414 jobs



Largest industry (by output)
Mining - \$725 million

Resources: 2021 National Institute of Economic and Industry Research, 2020 ABS West Arnhem LGA, 2016 ABS West Arnhem LGA, 2019 ABS Tiwi Islands LGA.
Source: Australian Bureau of Statistics (ABS) and National Institute of Economic and Industry Research (NIEIR).

Transport and logistics

The region can be accessed by road or by air, with a number of island and coastal communities serviced by small barge landings. The region is served by the Arnhem Highway, the Kakadu Highway and Arnhem Link Road as well as several remote aerodromes and a regional airport in Jabiru. Internal road connectivity between West Arnhem communities is available; however, some roads connecting the communities of Maningrida, Gunbalanya, Jabiru and other smaller homelands can be inaccessible during the annual wet season.



WEST ARNHEM PRIORITY INFRASTRUCTURE

Priority infrastructure	Description	Sector	Estimated investment \$M	Budgeted	Growth drivers	
1	Arnhem Link Road Upgrade	Upgrade Arnhem Link Road to connect the communities of Maningrida, Gunbalanya and Ramingining, prioritising development of culverts, with the end goal to raise and bituminise priority sections	Transport and Logistics - Roads	\$50-100m	\$11m	Provide all weather access and improve road safety to support future economic growth and regional connectivity
2	Multipurpose emergency shelter/ community hall	Develop multipurpose infrastructure to provide emergency shelter and community activities	Public Safety	\$10-15m	No	Strengthen liveability by improving enabling and social infrastructure to provide community safety and improve service delivery
3	New health centre - Gunbalanya	Construct new health clinic	Health	\$10-15m	No	Strengthen liveability by improving infrastructure to support health services
4	Govt. and Industry Housing Maningrida and Gunbalanya subdivision and new house builds	Unlock unused land to increase community and industry housing	Housing	Unknown until needs assessments are completed	No	Reduce overcrowding, provide employment and training opportunities to local Aboriginal people
5	Jabiru Infrastructure	Part of Jabiru and Kakadu Futures Project - develop new health clinic, education precinct, Bininj Resource Centre, remediate township infrastructure and housing, improve internal roads within Kakadu, improve tele-communications, develop new waste water treatment facility	Health and Housing Transport and Logistics Utilities and Digital Telecommunications	\$400m	Yes	Securing the future of Jabiru as a sustainable services and tourism hub for the region



WEST ARNHEM GROWTH OPPORTUNITIES

1. Future of Jabiru and Kakadu

The Commonwealth and Territory governments have committed \$411.5 million to deliver a strong and sustainable future for Jabiru and Kakadu, including to support the transition of Jabiru from a mining town to a tourism hub and service centre for Kakadu National Park and the West Arnhem region.

A \$25 million new power plant was completed in 2022, with a \$12 million new medical centre to commence construction in 2022 with completion in 2023.

In the next 4 years further construction and remediation projects in Jabiru will total more than \$100 million. Budgeted projects include a world heritage centre, a Bininj resource centre, an education precinct and a new business centre.

2. Ranger mine rehabilitation and town remediation

The rehabilitation of the Ranger mine and the remediation of Jabiru township infrastructure is expected to be completed by 2028 at an estimated cost of between \$1.6 and \$2.2 billion. The scale and timing of this project is expected to stimulate extensive economic activity for the town and broader area, over the remaining life of the project.

3. Fisheries and aquaculture

Significant interest has been expressed by Traditional Owners along the coast of West Arnhem to be involved in wild-catch fisheries, an industry that can deliver considerable health outcomes through local sales of seafood and the opportunity to work on Sea Country, in addition to economic outcomes. Aboriginal coastal licences have been used to sell fish in Maningrida for the last 6 years and a mud crab licence has been operated by Bawinanga Aboriginal Corporation since 2018.

The 2008 Blue Mud Bay court case decision also provides coastal Aboriginal people with control over the intertidal areas, where much of the catch of the mud crab and barramundi fisheries occur. The decision also led to the creation of a Territory-wide Aboriginal Sea Company in 2022 and may lead to regulatory changes to the management regime. These developments may enable a stronger involvement in the seafood industry for West Arnhem Sea Country owners and Aboriginal corporations.

A partnership between Traditional Owners and Northern Territory Fisheries continues to progress the development of a sustainable aquaculture industry in West Arnhem. Research and development will continue to test the viability of blacklip rock oysters on South Goulbourn Island, in parallel with regulatory developments to support growth and attract private investment.

4. Traditional bush foods (Kakadu plum)

There are opportunities to grow the Kakadu plum enterprise currently operating in Maningrida. A total of 5.5 tonnes were harvested in 2022, with up to 80 Aboriginal people involved in the harvest over 4 to 6 weeks, generating payments of up to \$100,000 to harvesters in West Arnhem.

To support and grow the industry, Traditional Owners from West Arnhem and West Daly regions are working to negotiate arrangements with the Northern Land Council to arrange section 19 land use agreements consistent with agricultural levies in other agricultural industries. The Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA) is focused on initiatives to improve wild harvest tools and technologies and to provide education resources and tools to encourage behavioural change among harvesters to ensure sustainability of wild harvest practices.

There is an opportunity to establish a collection and packing hub for Kakadu plum in Jabiru.

Traditional Owner groups would be invited to harvest Kakadu Plum from their country for sale and packing in Jabiru. Funding for the packing hub has been sourced and NAAKPA is supporting the strategy to open up the facility to groups in the Kakadu region.

5. Construction

The Commonwealth and Territory governments have committed \$411.5 million to deliver a strong and sustainable future for Jabiru and Kakadu, including to support the transition of Jabiru from a mining town to tourism hub and service centre for Kakadu National Park and the West Arnhem region.

An extensive pipeline of construction projects will be delivered to achieve this transition, and will provide long term economic opportunities for the region. Upcoming projects include a new health centre (\$12 million), World Heritage Centre, Bininj Resource Centre (the Bininj are the traditional people of the region) and an education precinct. The hybrid power station (\$25 million) was recently completed. Pending the availability of land and the

agreed tenure, it is anticipated additional private sector investment will be required to develop a luxury tourism hotel development in Jabiru.

Further construction will continue across the region with subdivisions planned for Maningrida and Gunbalanya to increase the availability of community, government and industry housing.

6. Tourism

Already a major contributor to the West Arnhem regional economy, tourism will be strengthened with future investment in economic and social infrastructure in Jabiru township and Kakadu National Park.

Leveraging off an estimated increase in visitors to the region over the next 10 years will further expose opportunities to develop on-country eco and cultural tourism experiences beyond Jabiru and Kakadu National Park.

As West Arnhem is not yet profiled under any NT destination management plan, future work is required to ensure its inclusion in Tourism NT's product development planning.

7. Buffalo

Populations of feral buffalo provide an economic opportunity and an opportunity to reverse the environmental damage the species causes. Although control programs exist, as well as a small live export market, there has not been a coordinated or integrated approach to maximise the species economic potential or reduce its effects on the environment.

With the significant number of wild buffalo in West Arnhem and strong demand from Asia, the development of the industry could be progressed, delivering training and employment opportunities to Aboriginal people of the region.

Top End rural and unincorporated sub-region

Surrounding Darwin and Palmerston cities, the Top End rural and unincorporated region is a diverse part of the Top End comprising rural, industrial, maritime and holiday areas. Most communities are located to the west and include Dundee Beach, Belyuen and Wagait

Beach, which is the largest community by population followed by Batchelor.

Unincorporated areas to the east are predominantly used for pastoral and other farming practices and include substantial low lying river floodplains.

In contrast to other Top End sub-regions, the Top End rural and unincorporated area has an ageing population, with a higher proportion of persons aged 60 or older than average in the Northern Territory.

Population and economic snapshot



Gross Regional Product (GRP)
\$1.88 billion



Population
9,477



Labour Force
4,528 (48%)
of total population



Local jobs
6,792



Largest industry (by employment)
Transport, postal and warehousing - 1,191 jobs



Largest industry (by output)
Mining \$883 million

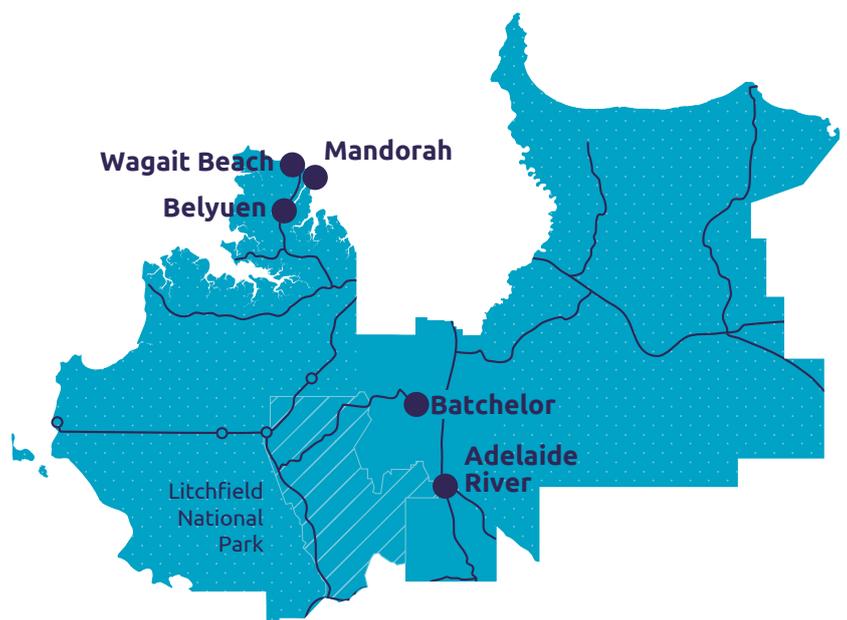
2021 National Institute of Economic and Industry Research, 2020 ABS LGA and Unincorporated, 2019 ABS LGA and Unincorporated, 2016 ABS LGA and Unincorporated, Unincorporated only - 2021 National Institute of Economic and Industry Research. Source: Australian Bureau of Statistics (ABS) and National Institute of Economic and Industry Research (NIEIR)

Transport and logistics

The region is accessible all year round by road via the Stuart and Arnhem highways, with Wagait Beach connected by a daily ferry service to Darwin.

This sub-region is the powerhouse of the Top End region contributing 72% of total GRP and with economic output of \$3.36 billion (2020–21).

The sub-region is home to 92% of businesses registered within the region, and has a number of significant and high profile infrastructure investments and major projects in development and or planned for the future.



TOP END RURAL AND UNINCORPORATED – PRIORITY INFRASTRUCTURE

Priority infrastructure	Description	Sector	Estimated investment \$M	Budgeted	Growth drivers	
1	Lake Bennett Road upgrades	All weather and sealed access along Marrakai Road and Heather Lagoon Road	Transport and Logistics	\$80m	No	Improve access and connectivity, supporting economic development
2	Wildman River Agricultural Precinct	To support future development of agribusiness, fisheries and aquaculture roads, 3 phase power and telecommunications	Agribusiness, Fisheries and Aquaculture	\$20m	No	Underpin the development of the agribusiness, fisheries and aquaculture industry should land and water be sustainable
3	Mandorah - New Marine Facility	New marine facilities to improve and maintain public transport services for residents of and visitors to Mandorah, Wagait Beach and Belyuen	Integrated Land Use and Infrastructure Planning	\$50m	Partial \$35m	Improve safety for ferry passengers and enable the service to grow to meet demand
4	Batchelor- Airport Upgrade	Transform the existing airstrip into an aviation hub, supporting a range of commercial and general aviation activities over the long term.	Integrated Land Use and Infrastructure Planning	\$10m	No	Support connectivity and improve all weather access to improve community safety and to support future growth
4	Batchelor - Aged Care Facility	Provide local aged care residential options for local residents.	Health	\$10m	No	Provide specific aged care services to improve health outcomes and enable people to remain in their community

GROWTH OPPORTUNITIES

1. Finnis Lithium project (Core Lithium)

Core Lithium's Finnis Lithium project is expected to begin production from late 2022, enabling the Territory to play a key role in supplying a mineral of strategic importance for new and emerging technologies. The project is estimated to provide around 250 jobs for Territorians, with a projected one million tonnes of lithium-bearing ore to be mined per year over the predicted life of the mine.

2. Adelaide River Off-Stream Water Storage

The Adelaide River Off-Stream Water Storage (AROWS) will deliver long term water security for domestic, agricultural and industrial users, through new pumping stations and potentially support agricultural production on 2000 ha of

currently undeveloped agricultural land at Lambells Lagoon. A total of \$18 million was allocated in the 2022–23 NT budget to progress the project, which includes a water allocation plan for the Adelaide River catchment, an environmental impact assessment, stakeholder engagement and community consultation, and concept design of the infrastructure. It is anticipated the project will supply up to 67.5 gigalitres of additional water each year.

3. Rum Jungle Mine rehabilitation

Located approximately 105 km south of Darwin and 6 km north of Batchelor, Stage 3 of the Rum Jungle Rehabilitation Project will commence major procurement activities in 2022. Remediation works are expected to be completed over a 10 to 15 year period and the project plan has been designed to maximise local and regional economic impact during this period.



4. New Mandorah marine facility

A new Mandorah marine facility will improve and maintain public transport services for residents of and visitors to Mandorah, Wagait Beach and Belyuen. The new facilities will be safer for ferry users and will improve disability access to board and disembark the ferry through the construction of a gangway and floating pontoon. Breakwaters will also be constructed to provide protection from wind, waves and swells, creating a calm water marina area. The project includes a more weather resistant dual berthing facility that can safely accommodate ferry vessels operating between Darwin, Mandorah and the Tiwi Islands, as well as future expansion.

5. Wildman Agricultural Precinct

The Wildman Agricultural Precinct will significantly expand the Territory's agricultural production area and provide opportunities for new investment in a range of high value crops, including mangoes, bananas, melons and forestry, and broad acre crops such as cotton, sorghum and chia.

Located 135 km east of Darwin and encompassing 26,000 ha of land, the precinct will comprise 4 areas of land on long term lease and for freehold sale. It is anticipated land will be development ready mid-2022 following the selection of suitable investors.

6. USFPI Northern Territory Training Areas and Ranges Project

The \$711 million NT Training Areas and Ranges Project will upgrade and expand the facilities at Robertson Barracks Close Training Area, Kangaroo Flats Training Area, Mt Bundy Training Area and Bradshaw Field Training Area to support the United States Forces Posture Initiative (USFPI) within the Territory.

Tendering for delivery phase works packages for enabling and preparatory works at Bradshaw Field Training Area commenced in 2021–22 for expected completion in 2027–28 with construction commencement contingent on departmental, government and parliamentary approvals. Further construction works packages for Bradshaw Field and Robertson Close Training Areas are being released in order of priority.

Defence's Aboriginal Procurement Strategy is designed to maximise the number of contracts awarded to Aboriginal business, while ensuring alignment to the Commonwealth Procurement Rules framework and achieving value for money.

Due to the nature of works and location of these projects, these present real opportunities for regional businesses, particularly those in nearby regional and remote areas.

Implementation

The completion of the Top End Region Economic Growth Plan is intended to be the first stage of an ongoing process to:

- progress key economic and social infrastructure required to support economic growth
- implement appropriate project delivery plans to guarantee growth opportunities identified within each sub-region are progressed.

The Top End REGC will review the plan annually to ensure the vision, infrastructure and growth opportunities are contemporary and relevant. The plan will be updated when key infrastructure needs are completed and growth opportunities reach development milestones. A brief report card will be published as an addendum to the updated growth plan.

This will also provide an opportunity to update the plan's strategic actions for new or modified actions in view of key economic, social, environmental and policy changes.

