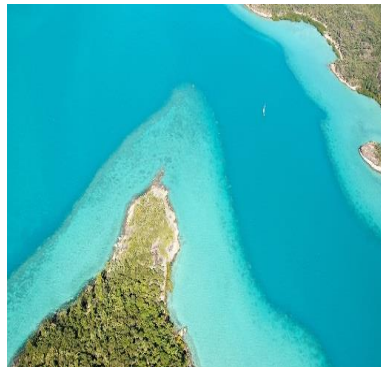
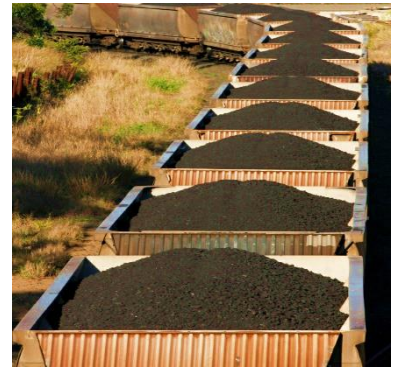


# Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022: A Strategy for Regional Prosperity



The Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022 has been developed in conjunction with the following partners:



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## Executive Summary

### A Roadmap for Regional Prosperity

The *Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022* delivers a roadmap for enhancing the vibrancy, diversity and sustainability of the Mackay-Isaac-Whitsunday region's economy. Informed by research, consultation and analysis, it is the outcome of an extensive body of work which consolidates the findings of over 30 economic development plans, studies, action plans and development plans that have been prepared across the region.

Regional in scope and global in its outlook, this strategy does not replace local or region-specific economic development planning tools or activities. Rather, it capitalises upon and reinforces the means by which these tools work, complement and connect with one another to facilitate and promote economic development throughout the entire Mackay-Isaac-Whitsunday region.

The *Mackay-Isaac-Whitsunday Region Economic Development Review* supports the region's economic development partners in their advocacy activities. It does this by providing an evidence-based strategic framework and a plan of action to coordinate economic development priorities and resources and to minimise potential duplication of effort to attract targeted industries and help to further develop existing industries to grow in the Mackay-Isaac-Whitsunday region.

By articulating the region's priorities for economic development, the *Mackay-Isaac-Whitsunday Region Economic Development Review*:

- Identifies initiatives that **encourage innovation, diversification and development of the region's current and emerging industries** in agri-business and food production, biotechnology and bioproducts, mining and METS, education and tourism;
- Presents an evidence-based plan of action to **advocate for strategic infrastructure** which underpins the capacity of business and industry in the Mackay-Isaac-Whitsunday region to engage with regional, national and international markets;
- Identifies the means to **promote the Mackay-Isaac-Whitsunday region to both public and private sector investors**, using a strategic, informed and targeted approach consistent with the vision for a more diverse Mackay-Isaac-Whitsunday regional economy; and
- **Promotes a partnership approach to regional economic development** to address key challenges and build on the Mackay-Isaac-Whitsunday region's strengths to encourage economic diversity and regional prosperity.

As a roadmap for regional prosperity, this overarching strategy provides the Mackay-Isaac-Whitsunday region's economic development partners with the tools to influence the factors that facilitate the resilience, competitiveness and success of local businesses and the capacity of the region to attract new investment, diversify the economy and create the jobs of the future.

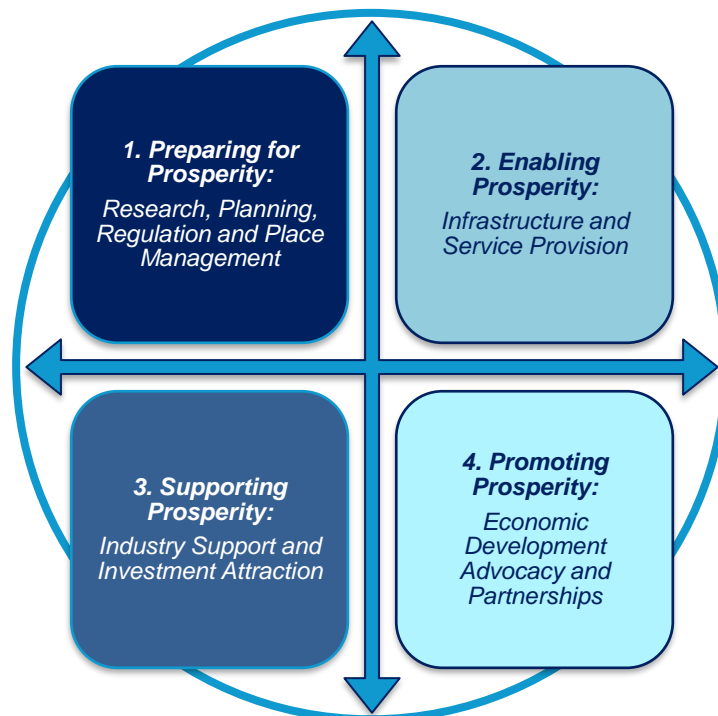
## A Strategy to Enable and Promote Regional Prosperity

**‘Economic development’** is the continuous process of growing an area’s level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community. Typically measured in terms of income and employment, economic development is also measured by improvements in education, skills, health, culture, community wellbeing, ‘place’ and the environment. Ultimately, economic development is about improving quality of life, or put more simply, it is about delivering prosperity.

While it is the private sector (industry) which drives economic development, the Mackay-Isaac-Whitsunday (MIW) Region’s economic development partners are committed to directing their collaborative efforts towards four core areas of economic development activity to facilitate, attract and promote investment, economic activity and employment throughout the region. These are:

1. **Preparing for Prosperity** - Research, Planning, Regulation and Place Management;
2. **Enabling Prosperity** - Infrastructure and Service Provision;
3. **Supporting Prosperity** - Investment Attraction and Business Support; and
4. **Promoting Prosperity** - Economic Development Advocacy and Partnerships.

### **The MIW Region’s Economic Development Facilitation Activities**



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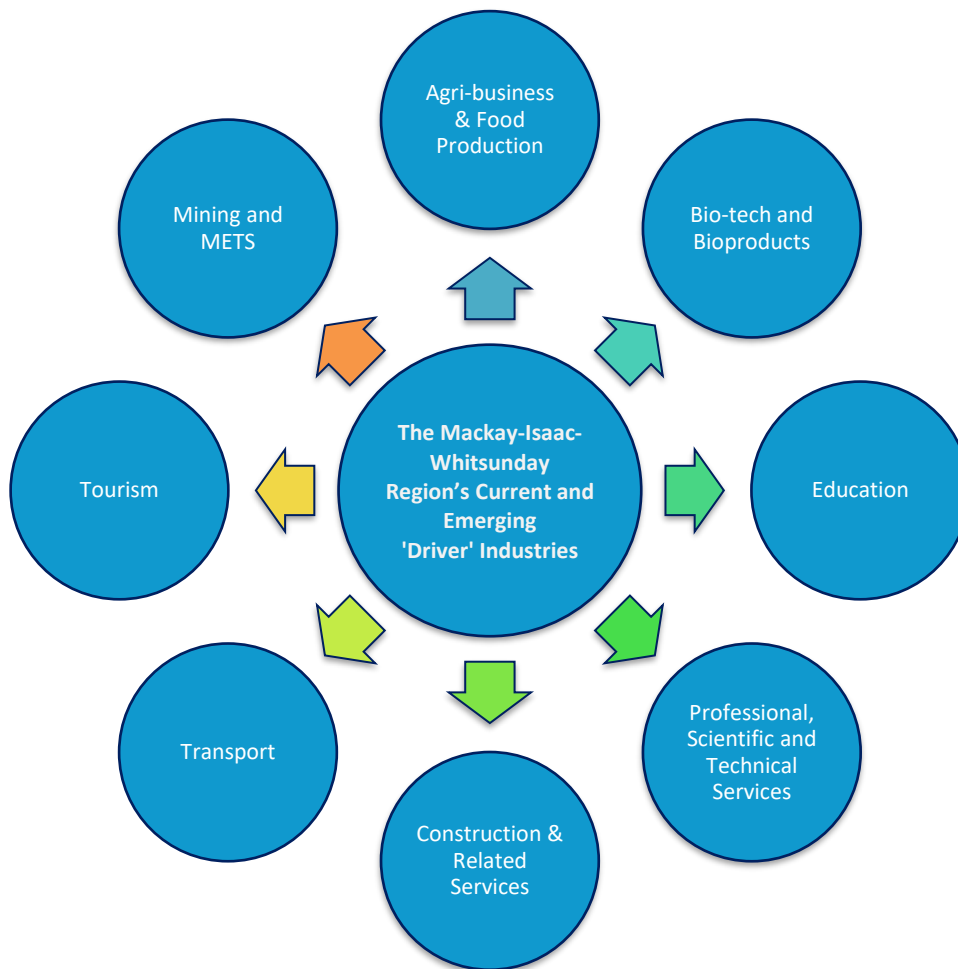
Mutually-reinforcing, these four core economic development activities are undertaken by the region’s economic development partners to varying degrees, and in collaboration with one another.

## Informing Regional Prosperity: The MIW Region's Economic Drivers

The Mackay-Isaac-Whitsunday region has a population of approximately 173,000 and is home to 85,165 jobs (source: REMPLAN, June 2018). A \$16 billion economy, the industries that drive the Mackay-Isaac-Whitsunday region in terms of regional exports, employment and industry value-added include mining, agriculture, manufacturing, transport and construction. The region's other key industries, such as construction and the emerging 'knowledge-intensive' industries of education and the professional, scientific and technical services, are closely integrated with the region's driver industries through local and regional supply chain links.

The Mackay-Isaac-Whitsunday region's future economic development will be underpinned by innovation in traditional sectors of employment including **mining and METS** and technology-driven **agri-business and food production**, diversification and development of the region's **tourism** sector, new investments in industries including **biotechnology and bioproducts** and opportunities to develop the region's emerging 'knowledge-based' industries which are allied with the region's driver industries. This includes the **professional, scientific and technical services** and **education**.

### *The Mackay-Isaac-Whitsunday Region's Current and Emerging Economic Drivers*



Source: SC Lennon & Associates

## Delivering Regional Prosperity: Strategy Themes and Actions

The *Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022: A Strategy for Regional Prosperity* is based on a solid understanding of the region's socio-economic trends and characteristics, and the influences and impacts of broader social, cultural and economic megatrends taking place nationally and globally. This informs a plan of action which acknowledges and addresses the region's challenges for economic development and which capitalises on those attributes underpinning new and emerging opportunities for growth and prosperity.

The vision for the Mackay-Isaac-Whitsunday region's economic development, which underpins a collaborative approach to build a diverse, resilient, sustainable outward-looking and prosperous regional economy, is:

*The Mackay-Isaac-Whitsunday region is an internationally-recognised centre of innovation and prosperity in agri-business and food production, bio-futures, mining and METS, education and tourism.*

The economic development action plan, which is designed to help realise the vision, contains three overarching themes as follows.

### **Mackay-Isaac-Whitsunday Economic Development Themes**



Source: SC Lennon & Associates

A suite of actions are presented under the three economic development strategy themes accordingly. The actions in each theme respond to the economic development vision for the Mackay-Isaac-Whitsunday region and a statement of strategic intent, which articulates what the target outcome is for that action area.

A total of 26 actions are identified across the three strategy themes. They are summarised below.



## Theme 1: Provide Support for the Delivery of the MIW Region's Strategic Infrastructure and Catalyst Projects

- 1.1 Undertake a **regional import/export logistics chain study** to define and quantify the components of logistics chains in the Mackay-Isaac-Whitsunday region, emphasising export freight opportunities and priorities for filling freight infrastructure gaps. Pending the study findings, **prepare a business case to establish the regional economic benefits of a Mackay-Isaac-Whitsunday Regional Distribution Hub**.
- 1.2 Prepare a Mackay-Isaac-Whitsunday region **industrial land demand and supply study**, co-ordinated across the region's three local government areas, to confirm existing capacity to accommodate growth and identify potential gaps in supply. Use the study outcomes to promote priority investigation areas / parcels of land for future industry.
- 1.3 Research and prepare a **'State of the State Roads in the Mackay-Isaac-Whitsunday region' report**, to support lobbying for improvements in the network and to inform grant-funding applications.
- 1.4 Prepare a **Mackay-Isaac-Whitsunday Region Digital Infrastructure Plan** to better target regional digital infrastructure investment to support economic development by ensuring the technology needs of the industries and jobs of the future are met.
- 1.5 **Continue to build the business cases and advocate for expanded airport capacity and air services in the MIW region**, including supporting the implementation of the Mackay Airport Master Plan and the development of Whitsunday Trade Coast.
- 1.6 Continue to support the work of North Queensland Bulk Ports Corporation to **finalise and implement master planning for the MIW region's port facilities**.
- 1.7 **Attract and grow world-class events and supporting infrastructure** in the Mackay-Isaac-Whitsunday region.
- 1.8 Advocate for the sustainable development of the **Galilee Basin**.
- 1.9 Advocate for the development of a **regional water security plan** in the Mackay-Isaac-Whitsunday region.
- 1.10 Advocate for the development of a **regional energy security plan** for the Mackay-Isaac-Whitsunday region.

## Theme 2: Support the Development of the MIW Region's Current and Emerging Industries

- 2.1 Co-ordinate the consultation, feasibility assessment and business case development for a **Mackay-Isaac-Whitsunday Region Ag-Tech Cluster** to help 'cultivate' opportunities identified in the Growing Greater Whitsunday Agrifood project.
- 2.2 **Review opportunities for investment in the MIW region's tourism infrastructure** from government-related funding sources such as the Northern Australia Infrastructure Facility (NAIF).
- 2.3 Progress the **development of an integrated bioprocessing facility** in the Mackay-Isaac-Whitsunday region through the preparation of a land investigation study and a project business case and development plan.
- 2.4 Undertake a **regional mining services supply chain study** to determine import replacement opportunities and priorities for addressing supply chain gaps in the Mackay-Isaac-Whitsunday region.

- 2.5 **Promote the development of the Mackay-Isaac-Whitsunday region as a cruise ship destination.**
- 2.6 Host a **Mackay-Isaac-Whitsunday Region Mining and METS Forum** to prioritise steps required to progress the development of a regional advanced manufacturing cluster.
- 2.7 Prepare a **Mackay-Isaac-Whitsunday Region Bio-futures Investment Strategy and Prospectus** to attract investment in the region's bio-products, bio-fuels and clean energy sectors.
- 2.8 **Facilitate investment in the development of a horticultural processing facility** to take advantage of currently underutilised raw product available in the Mackay-Isaac-Whitsunday region.
- 2.9 Develop a **regional climate change adaptation strategy**, focusing on support for on-farm adaptation and mitigation while also addressing the needs of the region's other industry sectors.
- 2.10 **Support the growth of Mackay-Isaac-Whitsunday region's tertiary and vocational education sector, including the development of the international student market.**
- 2.11 Investigate options for designing and implementing a **regional business incentives attraction package targeting 'knowledge-based' businesses.**
- 2.12 **Support proponents of the Resource Centre of Excellence as a catalyst for future innovation and investment** in the Mackay-Isaac-Whitsunday region.

### **Theme 3: Provide Support for the Delivery of the MIW Region's Knowledge Infrastructure and Services**

- 3.1 Commission a **Mackay-Isaac-Whitsunday Region Future Employment Study.**
- 3.2 **Map the Mackay-Isaac-Whitsunday region's innovation ecosystem.**
- 3.3 **Advance the work of the Study Greater Whitsunday Cluster Project** to increase international student numbers across the region.
- 3.4 **Support proponents of Centres of Excellence in Agriculture and Marine Services** as catalysts for education, research, innovation and investment in the Mackay-Isaac-Whitsunday region's key industries.

## **Implementation Partnerships and Performance Measures**

Collaborating to cultivate regional economic development partnerships is key to the successful implementation of the *Mackay-Isaac-Whitsunday Region Economic Development Review*, which will be progressed by the region's economic development stakeholders in partnership. Measuring strategy progress and performance is also critical to determining success. Implementation progress will be monitored through various methods and sources including surveys and published data.

The *Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022* will be reviewed annually with an update anticipated in four years.

# 1. A Roadmap for Regional Prosperity

## 1.1 Economic Development Strategy Purpose and Planning Framework

The *Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022* delivers a roadmap for enhancing the vibrancy, diversity and sustainability of the Mackay-Isaac-Whitsunday region's economy. Informed by research, consultation and analysis, it is the outcome of an extensive body of work which consolidates the findings of over 30 economic development plans, studies, action plans and development plans that have been prepared across the region.<sup>1</sup>

Regional in scope and global in its outlook, this strategy does not replace local or region-specific economic development planning tools or activities. Rather, it capitalises upon and reinforces the means by which these tools work, complement and connect with one another to facilitate and promote economic development throughout the entire Mackay-Isaac-Whitsunday region.

The *Mackay-Isaac-Whitsunday Region Economic Development Review* supports the region's economic development partners in their advocacy activities. It does this by providing an evidence-based strategic framework and a plan of action to coordinate economic development priorities and resources and to minimise potential duplication of effort to attract targeted industries and help to further develop existing industries to grow in the Mackay-Isaac-Whitsunday region.

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- Identifies the means to **promote the Mackay-Isaac-Whitsunday region to both public and private sector investors**, using a strategic, informed and targeted approach consistent with the vision for a more diverse Mackay-Isaac-Whitsunday regional economy; and
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As a roadmap for regional prosperity, this overarching strategy provides the Mackay-Isaac-Whitsunday region's economic development partners with the tools to influence the factors that facilitate the resilience, competitiveness and success of local businesses and the capacity of the region to attract new investment, diversify the economy and create the jobs of the future.

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<sup>1</sup> The findings and recommendations presented in this strategy are supported by a compendium report which summarises an analysis of the Mackay-Isaac-Whitsunday region's economic development policies, plans, projects and priorities, its socio-economic profile and key megatrends.

## 1.2 A Strategy to Enable and Promote Regional Prosperity

**‘Economic development’** is the continuous process of growing an area’s level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community. Typically measured in terms of income and employment, economic development is also measured by improvements in education, skills, health, culture, community wellbeing, ‘place’ and the environment. Ultimately, economic development is about improving quality of life, or put more simply, it is about delivering prosperity.

To be more prosperous, The Mackay-Isaac-Whitsunday region must build on its comparative and competitive strengths by finding new ways of doing things or doing what it does now, better. This means economic development is also about innovation. Innovation, and by implication, the ability to attract investment and support industry growth is a collaborative effort, underpinned by good regional governance. Strong and effective regional governance is defined by the factors that reduce investment and operating uncertainty such as transparency in government processes, ease of access to information, strong leadership and good infrastructure management.

While it is the private sector (industry) which drives economic development, the Mackay-Isaac-Whitsunday (MIW) Region’s economic development partners are committed to directing their collaborative efforts towards four core areas of economic development activity to facilitate, attract and promote investment, economic activity and employment throughout the region. These are:

1. **Preparing for Prosperity** - Research, Planning, Regulation and Place Management;
2. **Enabling Prosperity** - Infrastructure and Service Provision;
3. **Supporting Prosperity** - Investment Attraction and Business Support; and
4. **Promoting Prosperity** - Economic Development Advocacy and Partnerships.

Mutually-reinforcing, these four core economic development activities are undertaken by the region’s economic development partners to varying degrees, and in collaboration with one another.

### **Preparing for Prosperity - Research, Planning, Regulation and Place Management**

Strategic land use planning, development controls and other regulations have a significant impact on economic development outcomes. As well as ensuring that adequate land is available for commercial development, the regulatory and land use planning regime serves to reinforce existing or emerging industry clusters by providing appropriate signals relevant to the performance and locational requirements of the industries concerned. More broadly, at the regional level, key stakeholder partnerships underpin good ‘economic planning’, characterised by co-ordinated approaches to: research and analysis; information dissemination and knowledge-sharing; engagement with State and Federal governments (advocacy); regional land use planning; regional branding and promotion; strategic project identification and prioritisation; and the design and implementation of strategies for the good of the whole Mackay-Isaac-Whitsunday region.

### **Enabling Prosperity - Infrastructure and Service Provision**

Efficient and effective infrastructure underpins economic activity and is fundamental to a prosperous economy. It includes: (1) *physical infrastructure* including roads, rail and airports, communications, power and water; (2) *education infrastructure* which underpins a skilled workforce; (3) *research and innovation infrastructure*, that is, the facilities, resources and services used by researchers, educators, the science community and industry to conduct research and foster innovation; and (4) *community infrastructure* such as recreation and leisure facilities, cultural facilities and community services and facilities. The Mackay-Isaac-Whitsunday region’s economic development partners work together to ensure that these fundamentals for investment and economic development are addressed by planning for and providing both local and regionally-significant infrastructure in an informed, planned and co-ordinated manner.

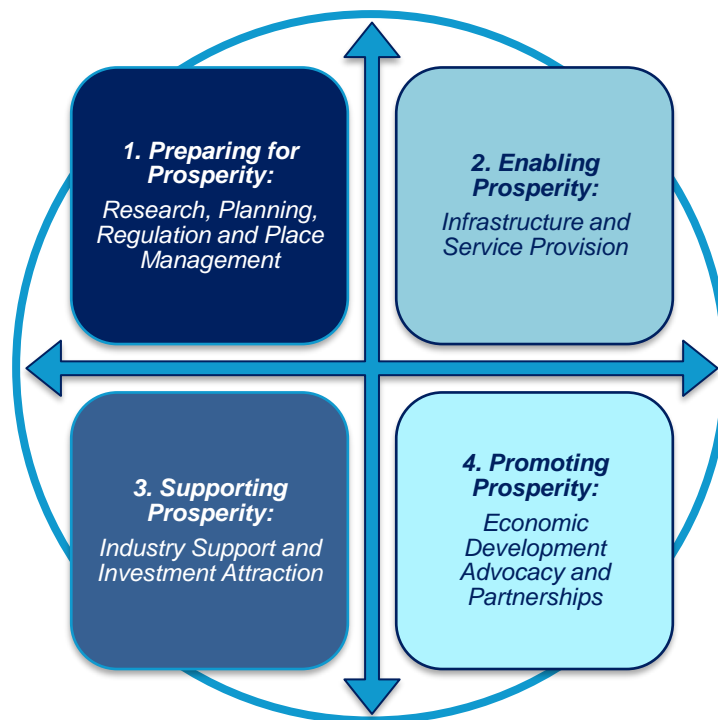
### **Supporting Prosperity - Investment Attraction and Business Support**

Investment is vital for economic development, and access to markets is a key determinant of long-term economic growth. Working together, key agents of change in the Mackay-Isaac-Whitsunday region can facilitate investment by promoting what the region has to offer prospective investors in a strategic and targeted fashion. An evidence-based economic development strategy provides the overarching framework for this and can be supported by a well-articulated investment prospectus together with a shared regional approach to investment attraction priorities and protocols.

### **Promoting Prosperity - Economic Development Advocacy and Partnerships**

The Mackay-Isaac-Whitsunday region's economic development partners provide a unifying voice for communities and for businesses when lobbying State and Federal Governments and industry proponents on key economic development or infrastructure issues. Working collaboratively, they have a role to play in attracting investment in enabling infrastructure by identifying strategic project priorities. By undertaking the necessary research and investigations and preparing informed business cases, they provide a conduit for State and Federal Government funding for infrastructure projects including regional transport infrastructure, communications infrastructure, health and education services and facilities and cultural and sporting facilities.

**Figure 1. The MIW Region's Economic Development Facilitation Activities**



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Articulating the Mackay-Isaac-Whitsunday region's collaborative economic development activities in this way, combined with an understanding of the region's comparative and competitive advantages, and the priorities drawn from the evidence base supporting this strategy, informs a plan of action to facilitate and promote the region's economic development.

## 2. Informing Regional Prosperity: Economic Drivers

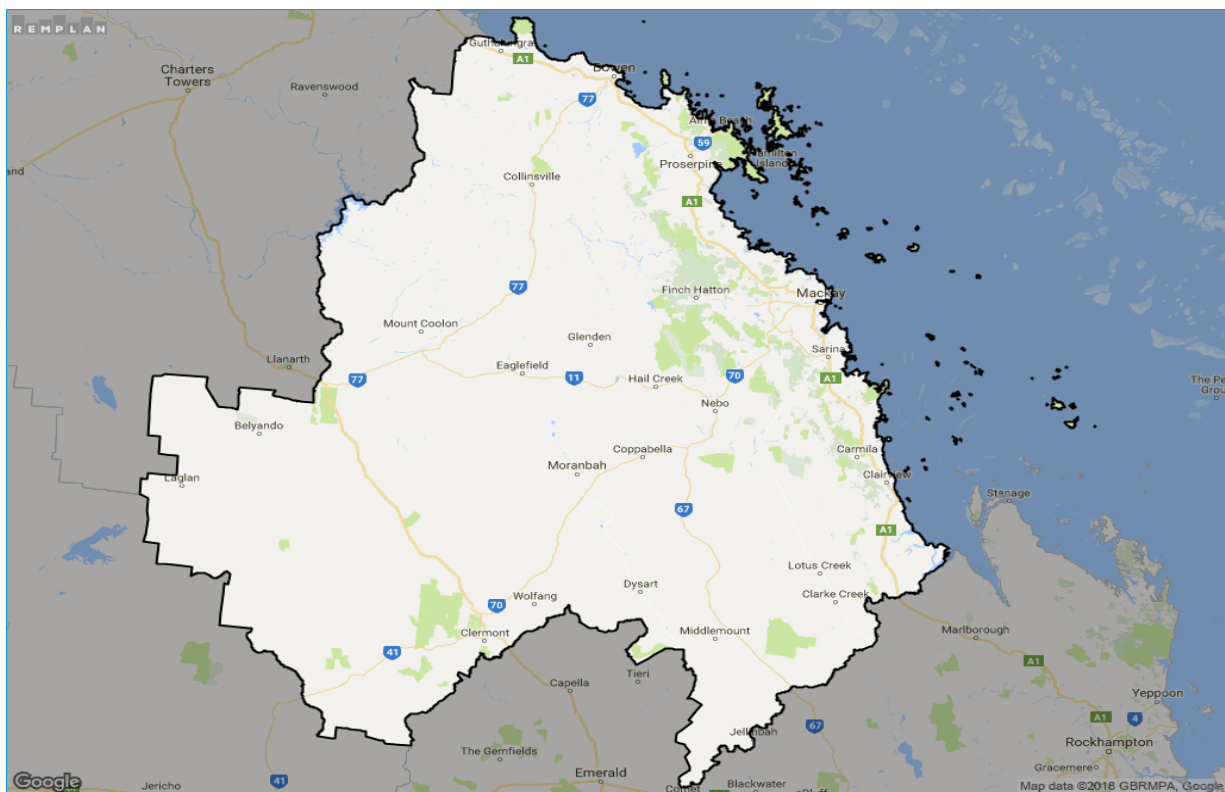
### 2.1 Capitalising on Regional Comparative and Competitive Advantage

Comparative advantage is an area of relative strength or specialisation. Efforts to develop the Mackay-Isaac-Whitsunday region's economy will be most successful by focusing on programs and projects which leverage these strengths. Business and industry can also use the region's comparative advantage to build a competitive advantage, which is developed through a combination of factors including industry knowledge, resources, skills and the ability to innovate.

The Mackay-Isaac-Whitsunday region's comparative advantage stems from various sources, including its strategic location, its mining and agricultural resource base, access to strategic infrastructure and the skill profile of the region's workforce. The economic strengths of the region are built upon these attributes, with key industries developing out of mining and related services, agriculture and food production, related industries including transport and construction, emerging industries in education and business services and the visitor economy, which leverages the quality of the region's natural environment and its appeal as a visitor destination.

Located on the north Queensland coast halfway between Brisbane and Cairns, the Mackay-Isaac-Whitsunday region has a population of approximately 173,000 and is home to 85,165 jobs (source: REMPLAN, June 2018). A \$16 billion economy, the major industries that currently drive and support economic activity in the Mackay-Isaac-Whitsunday region are **mining, construction, transport, manufacturing, agriculture, education** and **tourism**. The region's unemployment rate is 3.4%, compared to 6.0% for Queensland and a national unemployment rate of 5.5% (source: Department of Jobs and Small Business, June 2018).

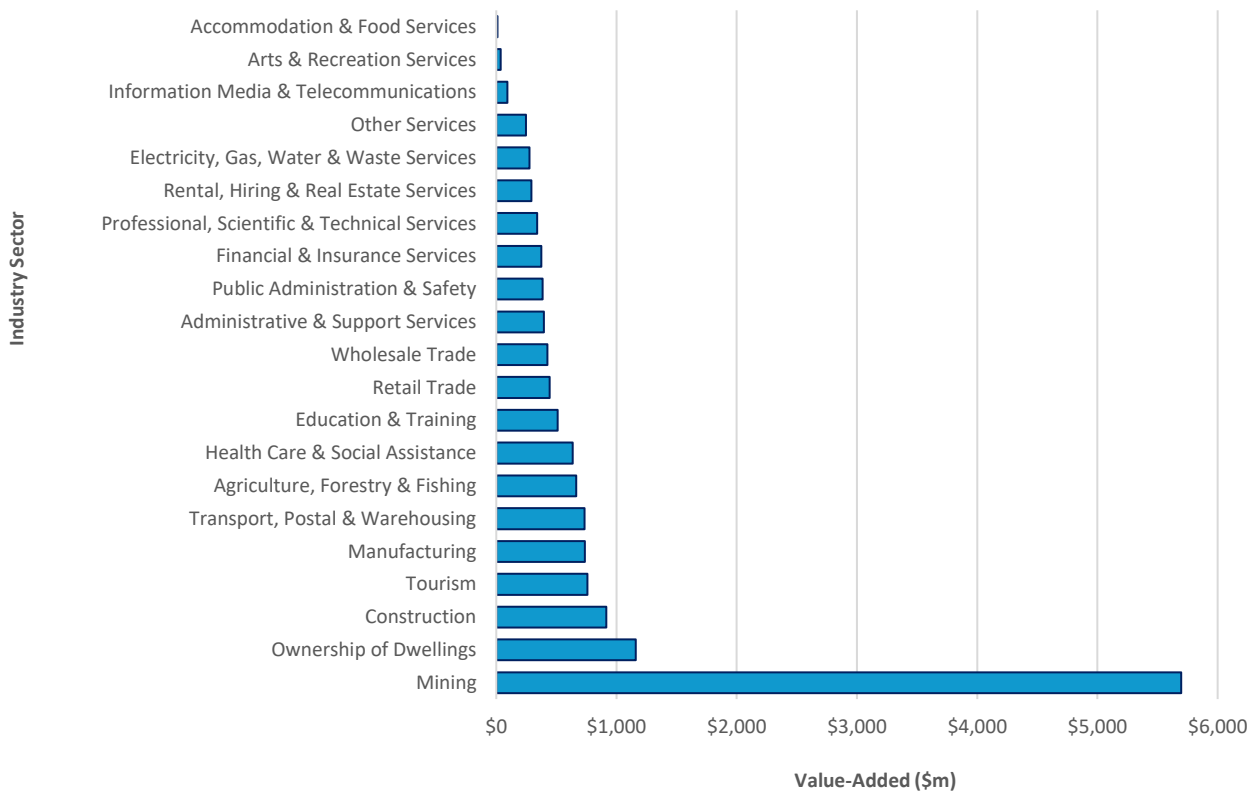
Figure 2. The Mackay-Isaac-Whitsunday Region



Source: REMPLAN

The Mackay-Isaac-Whitsunday region’s **mining** sector underpins economic activity throughout the region and is driven by the strength of the coal exports industry. In 2016/17, approximately 107 million tonnes of coal was exported through the world-class port of Hay Point (source: Queensland Government, Department of State Development, Manufacturing and Infrastructure, 2018). The Mackay-Isaac-Whitsunday region is the principal support services centre for Central Queensland’s mining and resources sector and is also home to both the Bowen and Galilee Basins.

**Figure 3. Value-Added by Industry, Mackay-Isaac-Whitsunday Region, June 2018**



Source: REMPLAN, June 2018

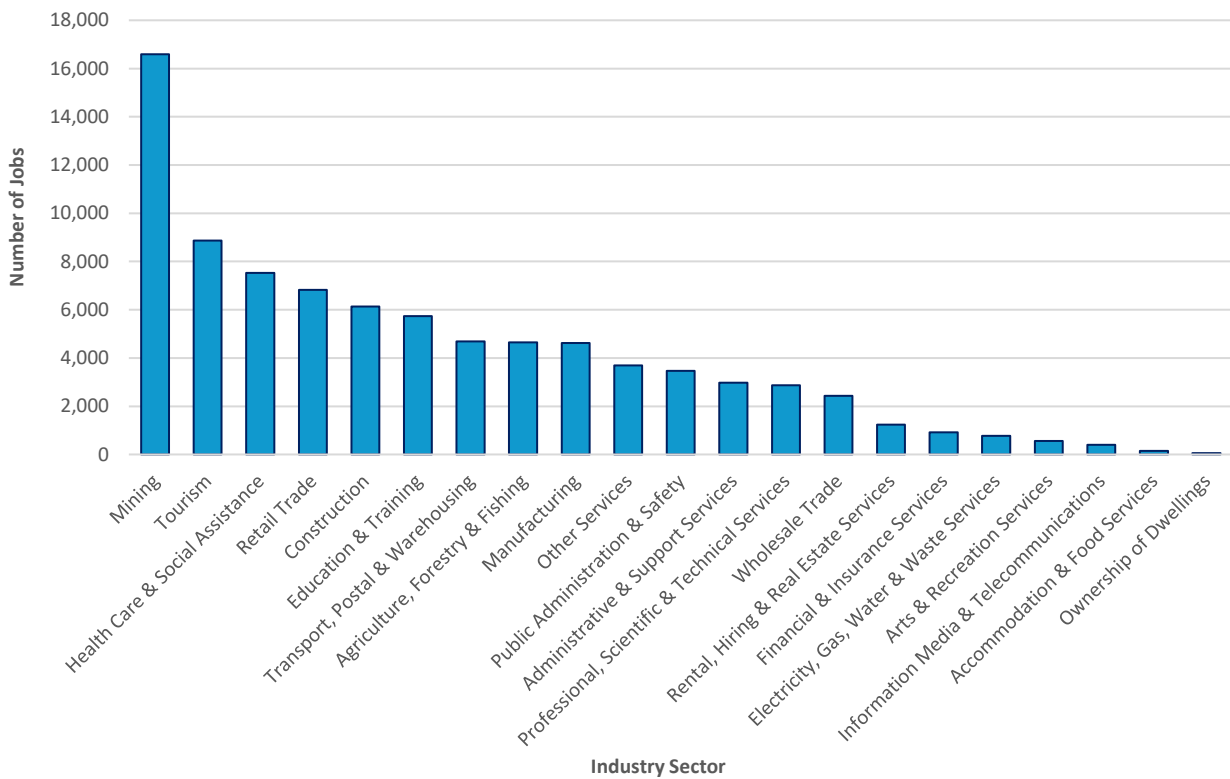
The strength of the Mackay-Isaac-Whitsunday region’s resource industry production chain is evident in the size and performance of other key sectors including **transport, postal and warehousing** and **construction**. The construction industry is driven by the strength of heavy and civil engineering construction and the construction services sector, both of which provide inputs to the mining and agricultural industries. The region’s transport industry consists of road, rail, water and other transport as well as a large transport services and storage sector.

Second only to mining in terms of employment, the Mackay-Isaac-Whitsunday region’s **tourism** sector is a key provider of jobs and one of the largest contributors to the value of the region’s industry output. The Whitsunday Coast is a gateway to the ‘74 island wonders’ and to a large section of the Great Barrier Reef.

Australia’s tourism industry continues to grow as new markets emerge, particularly in Asia where the Indian, Malaysian and Chinese middle-class is driving much of the industry’s income growth. According to IBISWorld (2017), over the five years to 2022-23, Australia’s tourism industry revenue is expected to increase by an annualised 3.0% to total over \$150 billion. The tourism industry is expected to further enhance its online capabilities as consumers increasingly use the internet to research and organise trips.

Regional Australia’s visitor economy is on an upward trajectory with visitors increasing on average by 4.1 per cent per annum over the past five years (source: <http://www.tourisminvestment.com.au/en/investment-opportunities/Regional-Australia.html>). The potential to grow the Mackay-Isaac-Whitsunday region’s significant visitor economy is strong given the diversity of the region and the potential to develop a multitude of experiences across, new attractions, accommodations and offerings.

**Figure 4. Employment by Industry, Mackay-Isaac-Whitsunday Region, June 2018**



Source: REMPLAN, June 2018

**Agriculture** is a traditional economic mainstay of the Mackay-Isaac-Whitsunday region which contains agriculturally-rich areas with key commodities including sugar cane, cattle, tomatoes and other horticultural crops. Opportunities to value add to the local agricultural production chain, through export market growth, processing, packaging and distribution, present significant opportunities for the Mackay-Isaac-Whitsunday region.

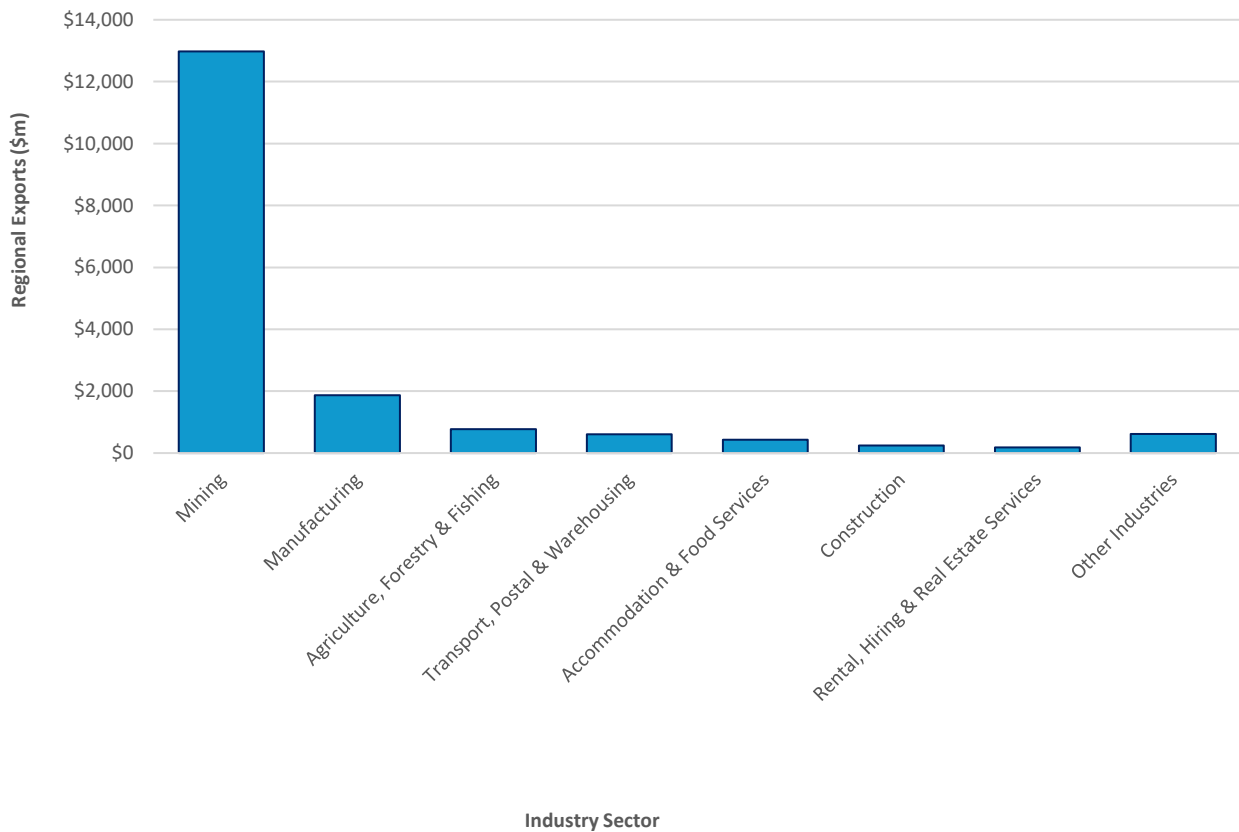
Agriculture in Australia is rapidly transitioning towards the production of higher-value commodities using an **ag-tech ecosystem** supported by an increase in capital invested into start-ups, the emergence of numerous ag-tech incubators and accelerators and more research and development into new ways of producing, which enables Australian farmers to be more efficient, less wasteful, more productive and more profitable.

For example, technological advances are present in relation to precision agriculture or ‘satellite farming’, which refers to the use of GPS tracking systems and satellite imagery to monitor crop yields, soil levels, and weather patterns to increase efficiency on the farm. With drones, farmers can locate precisely where a diseased or damaged plant is, more accurately release fertilizer and pesticides, or take photos and have immediate information about a certain area of the farm.



The horticultural sector is rapidly-growing and is Australia’s third-largest agricultural sector after livestock and broad acre farming. **Food production** is changing with a trend towards large-scale, technologically complex, high-yielding and resource-efficient production methods using renewable energy such as wind and solar generation to grow a diversity of products. The already well-developed agricultural base of the Mackay-Isaac-Whitsunday region means it is well-positioned to take advantage of new and emerging food production trends.

**Figure 5. Regional Exports by Industry, Mackay-Isaac-Whitsunday Region, June 2018**



Source: REMPLAN, June 2018

The **manufacturing** sector is another key contributor to economic activity in the Mackay-Isaac-Whitsunday region and is a provider of specialist industrial, transport and supply chain services. Manufacturing sector accounts for 10% of the value of exports out of the Mackay-Isaac-Whitsunday region making it the region’s second-largest exporter after mining.

As the world economy evolves and supply chains continue to globalise, Australia’s opportunities in this sector lie in **advanced manufacturing**. Advanced manufacturing, which encapsulates a diversity of industrial activities, is the process by which knowledge-intensive value is added in both the pre- and post-production phase in areas including R&D, concept design, planning, engineering and after-sales service.

In Australia, the future for manufacturing is in highly specialised products and processes in areas such as agri-business, bio-pharmaceuticals and mining equipment, technology and services (**METS**). The Australian METS sector is emerging as a driver and facilitator of change in the mining sector, harnessing the deep mining domain knowledge and expertise that has been established in both Australia's METS and mining industries and the research sector over the past few decades.

Australia's METS sector has an important role to play in the continued success of Australia's mining industry, and the sector's increasing dependence on specialist technologies, combined with global economic trends, is creating new opportunities for regions with a strong manufacturing heritage, such as the Mackay-Isaac-Whitsunday region.

The significance of manufacturing in the Mackay-Isaac-Whitsunday region is also defined by the strength of the region's **food processing** sector, which includes sugar cane processing as well as meat and meat product manufacturing. The region's agricultural heritage, food production capabilities together with access to research and innovation presents an opportunity to develop a **biofutures** industry. The term 'biofutures' broadly refers to the industrial biotechnology and bioproducts sector. This sector focuses on developing and manufacturing products from sustainable organic or waste resources, rather than fossil fuels. It encompasses a range of innovative scientific and industrial technologies designed to convert sustainable feedstocks or waste into a diverse range of bioproducts.

Other important industries of employment and industry value-added in the Mackay-Isaac-Whitsunday region include **health care and social assistance, education, retail trade, ownership of dwellings** and **construction**.

Reinforcing the enabling role of **education** in underpinning a region's stock of human capital (skills), economists have noted the high correlation between regional economic growth and higher educational attainment, and the role of education, along with enterprise and employment, as a key lever for economic development. Regions are successful because enterprises in these regions are successful. When enterprises grow, employment grows, and this depends on skilled and educated people.

As well as being an enabler of prosperity, education is an export-earner and in Australia, the higher education sector is worth \$32 billion with forecast annual growth of 3.5% over the five years to 2024. International students account for one-fifth of the sector's market share and this is expected to continue to grow (IBISWorld, August 2018).

The Mackay-Isaac-Whitsunday region's industry and employment profile, together with an assessment of broader economic trends and prospects, informs an understanding of the region's competitive strengths and its current and emerging economic drivers.

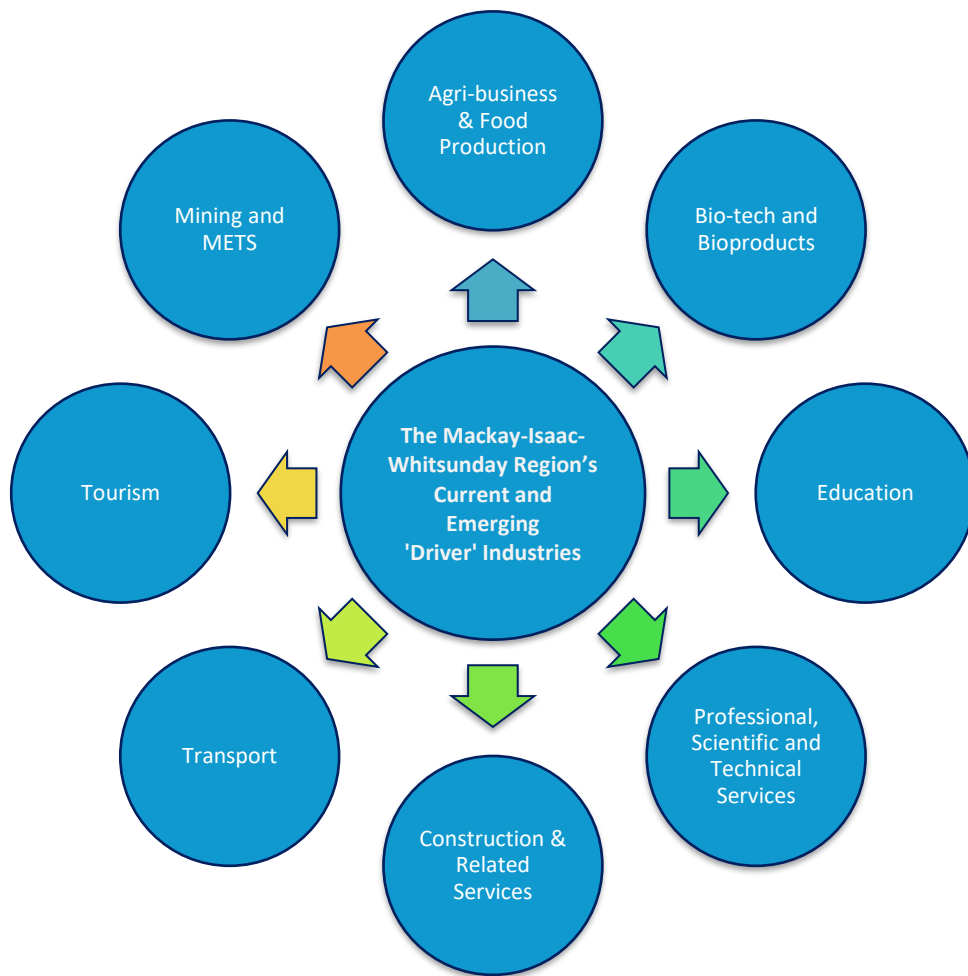
## **2.2 The Mackay-Isaac-Whitsunday Region's Economic Drivers**

The industries that drive the Mackay-Isaac-Whitsunday region's economy in terms of regional exports, employment and industry value-added include mining, agriculture, manufacturing, transport and construction. The region's other key industries, such as construction and the emerging 'knowledge-intensive' industries of education and the professional, scientific and technical services, are closely integrated with the region's driver industries through local and regional supply chain links.

Other population-driven industries, like retail trade, health care and social assistance, and accommodation and food services are important employers which are reliant on the region's economic drivers for their own sustainability and growth.

The Mackay-Isaac-Whitsunday region's future economic development will be underpinned by innovation in traditional sectors of employment including **mining and METS** and technology-driven **agri-business and food production**, diversification and development of the region's **tourism** sector, new investments in industries including **biotechnology and bioproducts** and opportunities to develop the region's emerging 'knowledge-based' industries which are allied with the region's driver industries. This includes the **professional, scientific and technical services** and **education**.

Figure 6. The Mackay-Isaac-Whitsunday Region's Current and Emerging Economic Drivers



Source: SC Lennon & Associates

The *Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022* is based on a solid understanding of the region's socio-economic trends and characteristics, and the influences and impacts of broader social, cultural and economic megatrends taking place nationally and globally. This informs a plan of action which acknowledges and addresses the region's challenges for economic development and which capitalises on those attributes underpinning new and emerging opportunities for growth and prosperity.

The Mackay-Isaac-Whitsunday region's challenges, which this strategy seeks to address, concern the 'enablers' of economic development which the region's stakeholders can help influence. This includes the region's physical infrastructure, its regulatory and planning framework, the capacity and location of its employment land and the attributes which define the region's appeal as a place to visit, to live and work in and to invest.

### 3. Delivering Regional Prosperity: Strategy Themes and Actions

#### 3.1 Economic Development Vision and Strategy Themes

The vision for the Mackay-Isaac-Whitsunday region's economic development, which underpins a collaborative approach to build a diverse, resilient, sustainable outward-looking and prosperous regional economy, is:

*The Mackay-Isaac-Whitsunday region is an internationally-recognised centre of innovation and prosperity in agri-business and food production, bio-futures, mining and METS, education and tourism.*

The economic development action plan, which is designed to help realise the vision, contains three overarching themes as follows.

**Figure 7. Mackay-Isaac-Whitsunday Economic Development Themes**



Source: SC Lennon & Associates

A suite of actions are presented under the three economic development strategy themes accordingly. The actions in each theme respond to the economic development vision for the Mackay-Isaac-Whitsunday region and a statement of strategic intent, which articulates what the target outcome is for that action area.

Within each of the three themes, the individual actions are further categorised into the MIW region's economic development facilitation activities, being: (1) **Preparing for Prosperity** - Research, Planning, Regulation and Place Management; (2) **Enabling Prosperity** - Infrastructure and Service Provision; (3) **Supporting Prosperity** - Investment Attraction and Business Support; and (4) **Promoting Prosperity** - Economic Development Advocacy and Partnerships.

For each action, participating stakeholders are nominated. Some actions address catalyst project planning and development initiatives which require action combined with a well-planned course of project implementation while others are focussed on strategic program implementation initiatives to be addressed as part of the MIW region's collaborative economic development planning and facilitation functions in a strategic and informed manner.

## 3.2 Economic Development Action Plan

### Theme 1: Provide Support for the Delivery of the MIW Region's Strategic Infrastructure and Catalyst Projects

#### Strategic Intent

Support investment in the Mackay-Isaac-Whitsunday region's enabling infrastructure and catalyst project opportunities, to secure its economic future as a location of choice for a diversity of industries, connected to the world by road, rail, air and sea.

#### Actions

##### Preparing for Prosperity: Research, Planning, Regulation and Place Management

- 1.1 Undertake a **regional import/export logistics chain study** to define and quantify the components of logistics chains in the Mackay-Isaac-Whitsunday region, emphasising export freight opportunities and priorities for filling freight infrastructure gaps. Pending the study findings, **prepare a business case to establish the regional economic benefits of a Mackay-Isaac-Whitsunday Regional Distribution Hub**.

*(Participating stakeholders: RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; North Queensland Bulk Ports; Department of Transport and Main Roads).*

- 1.2 Prepare a Mackay-Isaac-Whitsunday region **industrial land demand and supply study**, co-ordinated across the region's three local government areas, to confirm existing capacity to accommodate growth and identify potential gaps in supply. Use the study outcomes to promote priority investigation areas / parcels of land for future industry.

*(Participating stakeholders: Department of State Development, Manufacturing, Infrastructure and Planning; Mackay Regional Council; Isaac Regional Council; Whitsunday Regional Council).*

- 1.3 Research and prepare a **'State of the State Roads in the Mackay-Isaac-Whitsunday Region' report**, to support lobbying for improvements in the network and to inform grant-funding applications. The report would include an economic impact analysis to demonstrate the costs to the regional (and State) economy of those roads in the network that are sub-standard and to highlight the economic and community benefits of improvements.

*(Participating stakeholders: Whitsunday Regional Roads and Transport Group; Greater Whitsunday Council of Mayors; key industry stakeholders).*

- 1.4 Prepare a **Mackay-Isaac-Whitsunday Region Digital Infrastructure Plan** to better target regional digital infrastructure investment to support economic development by ensuring the technology needs of the industries and jobs of the future are met.

*(Participating stakeholders: RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; Greater Whitsunday Council of Mayors; Digital Technology and Services division within the Department of Housing and Public Works; Department of State Development, Manufacturing, Infrastructure and Planning).*

- 1.5 **Continue to build the business cases and advocate for expanded airport capacity and air services in the MIW region**, including supporting the implementation of the Mackay Airport Master Plan and the development of Whitsunday Trade Coast.

*(Participating stakeholders: Mackay Airport; Mackay Regional Council; Whitsunday Regional Council; RDA Mackay-Isaac-Whitsunday; Department of State Development, Manufacturing, Infrastructure and Planning).*

#### **Enabling Prosperity: Infrastructure and Service Provision**

- 1.6 Continue to support the work of North Queensland Bulk Ports Corporation to **finalise and implement master planning for the MIW region's port facilities**.

*(Participating stakeholders: North Queensland Bulk Ports; RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; Department of Transport and Main Roads).*

#### **Supporting Prosperity: Industry Support and Investment Attraction**

- 1.7 **Attract and grow world-class events and supporting infrastructure in the Mackay-Isaac-Whitsunday region**.

*(Participating stakeholders: Mackay Regional Council; Whitsunday Regional Council; Mackay Tourism; Whitsunday Tourism; North Queensland Bulk Ports; industry stakeholders).*

#### **Promoting Prosperity: Economic Development Advocacy and Partnerships**

- 1.8 **Advocate for the sustainable development of the Galilee Basin**.

*(Participating stakeholders: Whitsunday Regional Council; Isaac Regional Council; North Queensland Bulk Ports; Department of Transport and Main Roads).*

- 1.9 **Advocate for the development of a regional water security plan in the Mackay-Isaac-Whitsunday region**. Planning considerations should be holistic and consider alternative population growth scenarios, the need for infrastructure development as well as opportunities for water trading and re-allocation of disused water licences.

*(Participating stakeholders: Greater Whitsunday Council of Mayors; RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; Department of Natural Resources, Mines and Energy).*

- 1.10 **Advocate for the development of a regional energy security plan for the Mackay-Isaac-Whitsunday region**. The plan should include options to secure base-load power for the region and to support the development of renewable energy projects.

*(Participating stakeholders: Greater Whitsunday Council of Mayors; RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; industry stakeholders).*

## Theme 2: Support the Development of the MIW Region's Current and Emerging Industries

### Strategic Intent

Promote and grow investment in the Mackay-Isaac-Whitsunday region's key current and emerging industries including agri-business, food, bio-tech and bio-products, mining and METS, education, knowledge-intensive services and tourism to diversify and develop a resilient and robust regional economy and deliver future economic sustainability and prosperity.

### Actions

#### **Preparing for Prosperity: Research, Planning, Regulation and Place Management**

- 2.1 Co-ordinate the consultation, feasibility assessment and business case development for a **Mackay-Isaac-Whitsunday Region Ag-Tech Cluster** to help 'cultivate' opportunities identified in the Growing Greater Whitsunday Agrifood project. Key steps include: establishing a MIW Region Ag-Tech Working Group; co-ordinating the preparation of a feasibility assessment and business case for an Ag-Tech Cluster; and advocating for Government funding assistance and investment.

*(Participating stakeholders: Greater Whitsunday Alliance; Resource Industry Network; Greater Whitsunday Council of Mayors; RDA Mackay-Isaac-Whitsunday; industry stakeholders).*

- 2.2 **Review opportunities for investment in the MIW region's tourism infrastructure** from government-related funding sources such as the Northern Australia Infrastructure Facility (NAIF).

*(Participating stakeholders: RDA Mackay-Isaac-Whitsunday; Mackay Tourism; Whitsunday Tourism; Greater Whitsunday Alliance; Greater Whitsunday Council of Mayors; Department of State Development, Manufacturing, Infrastructure and Planning; industry stakeholders).*

- 2.3 Progress the **development of an integrated bioprocessing facility** in the Mackay-Isaac-Whitsunday region through the preparation of a land investigation study and a project business case and development plan.

*(Participating stakeholders: Department of State Development, Manufacturing, Infrastructure and Planning; Greater Whitsunday Council of Mayors; RDA Mackay-Isaac-Whitsunday; industry stakeholders).*

- 2.4 Undertake a **regional mining services supply chain study** to determine import replacement opportunities and priorities for addressing supply chain gaps in the Mackay-Isaac-Whitsunday region.

*(Participating stakeholders: Resource Industry Network; RDA Mackay-Isaac-Whitsunday; Department of State Development, Manufacturing, Infrastructure and Planning; Greater Whitsunday Alliance; industry stakeholders).*

#### **Enabling Prosperity: Infrastructure and Service Provision**

- 2.5 **Promote the development of the Mackay-Isaac-Whitsunday region as a cruise ship destination.**

*(Participating stakeholders: Mackay Regional Council; Whitsunday Regional Council; Mackay Tourism; Whitsunday Tourism; North Queensland Bulk Ports; industry stakeholders).*

### **Supporting Prosperity: Industry Support and Investment Attraction**

- 2.6 Host a **Mackay-Isaac-Whitsunday Region Mining and METS Forum** to prioritise steps required to progress the development of a regional advanced manufacturing cluster focusing on mining, equipment, technology and services and emerging opportunities in complementary areas including defence and ag-tech.
- (Participating stakeholders: Greater Whitsunday Alliance; Resource Industry Network; RDA Mackay-Isaac-Whitsunday; Department of State Development, Manufacturing, Infrastructure and Planning; industry stakeholders).*
- 2.7 Prepare a **Mackay-Isaac-Whitsunday Region Bio-futures Investment Strategy and Prospectus** to attract investment in the region's bio-products, bio-fuels and clean energy sectors.
- (Participating stakeholders: Department of State Development, Manufacturing, Infrastructure and Planning; Greater Whitsunday Alliance; RDA Mackay-Isaac-Whitsunday; Trade & Investment Queensland; Greater Whitsunday Council of Mayors; industry stakeholders).*
- 2.8 **Facilitate investment in the development of a horticultural processing facility** to take advantage of currently underutilised raw product available in the Mackay-Isaac-Whitsunday region.
- (Participating stakeholders: Whitsunday Regional Council; Greater Whitsunday Alliance; RDA Mackay-Isaac-Whitsunday; Department of State Development, Manufacturing, Infrastructure and Planning; industry stakeholders).*
- 2.9 Develop a **regional climate change adaptation strategy**, focusing on support for on-farm adaptation and mitigation while also addressing the needs of the region's other industry sectors.
- (Participating stakeholders: Greater Whitsunday Alliance; Greater Whitsunday Council of Mayors; RDA Mackay-Isaac-Whitsunday; industry stakeholders).*
- 2.10 **Support the growth of Mackay-Isaac-Whitsunday region's tertiary and vocational education sector, including the development of the international student market.**
- (Participating stakeholders: Greater Whitsunday Alliance; Trade & Investment Queensland; CQ University; James Cook University; industry stakeholders).*
- 2.11 Investigate options for designing and implementing a **regional business incentives attraction package targeting 'knowledge-based' businesses**. Using case study examples, explore and design an appropriate package of incentives including, for example, rates discounts, reduced developer contributions charges, reduced building certificate charges, business start-up grants and local employment grants for the region's three Councils to consider as part of a co-ordinated investment attraction strategy.
- (Participating stakeholders: Greater Whitsunday Council of Mayors; Mackay Regional Council; Isaac Regional Council; Whitsunday Regional Council).*

### **Promoting Prosperity: Economic Development Advocacy and Partnerships**

- 2.12 **Support proponents of the Resource Centre of Excellence as a catalyst for future innovation and investment** in the Mackay-Isaac-Whitsunday region.
- (Participating stakeholders: Resource Industry Network; Greater Whitsunday Alliance; Department of State Development, Manufacturing, Infrastructure and Planning; RDA Mackay-Isaac-Whitsunday; METS Ignited).*



## Theme 3: Provide Support for the Delivery of the MIW Region's Knowledge Infrastructure and Services

### Strategic Intent

Develop the Mackay-Isaac-Whitsunday region's unique attributes which serve to encourage investment in research and innovation infrastructure and educational institutions, and which attract knowledge workers, researchers, students, entrepreneurs and innovative businesses, to build the region's profile as location of choice in which to work, live and invest.

### Actions

#### Preparing for Prosperity: Research, Planning, Regulation and Place Management

- 3.1 Commission a **Mackay-Isaac-Whitsunday Region Future Employment Study**. The study would research and confirm emerging growth industries, the future of work, the estimated demand for the 'jobs of the future' and likely workforce needs and training priorities in the Mackay-Isaac-Whitsunday region.

*(Participating stakeholders: Department of Employment, Small Business and Training; Department of Jobs and Small Business; CQ University; James Cook University; TAFE Queensland; Greater Whitsunday Alliance; other education and training providers; industry stakeholders).*

#### Enabling Prosperity: Infrastructure and Service Provision

- 3.2 **Map the Mackay-Isaac-Whitsunday region's innovation ecosystem** - including skills, business capabilities, research capabilities, governance frameworks, markets, partnerships and funding sources - to identify gaps and to inform strategies to address those gaps.

*(Participating stakeholders: RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; CQ University; James Cook University; industry stakeholders).*

#### Supporting Prosperity: Industry Support and Investment Attraction

- 3.3 **Advance the work of the Study Greater Whitsunday Cluster Project** to increase international student numbers across the region.

*(Participating stakeholders: Greater Whitsunday Alliance; CQ University; Trade & Investment Queensland; Mackay Regional Council; Isaac Regional Council; Whitsunday Regional Council; key industry stakeholders).*

#### Promoting Prosperity: Economic Development Advocacy and Partnerships

- 3.4 **Support proponents of Centres of Excellence in Agriculture and Marine Services** as catalysts for education, research, innovation and investment in the Mackay-Isaac-Whitsunday region's key industries.

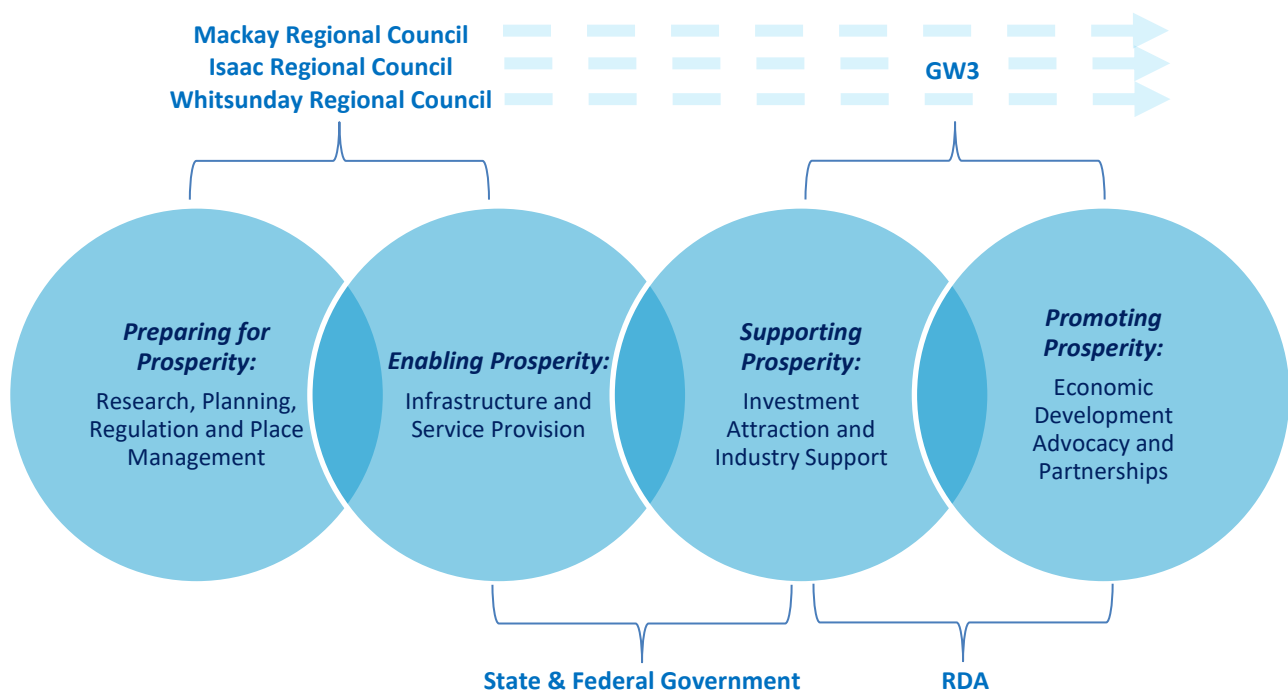
*(Participating stakeholders: Whitsunday Regional Council; RDA Mackay-Isaac-Whitsunday; Greater Whitsunday Alliance; industry stakeholders).*

### 3.3 Implementation Partnerships and Performance Measures

The *Mackay-Isaac-Whitsunday Region Economic Development Review* articulates and promotes a partnership approach between the region’s three Councils, Greater Whitsunday Council of Mayors, GW3 and other stakeholders in government, the non-government sector and industry. This includes RDA Mackay-Isaac-Whitsunday, Trade & Investment Queensland and the Department of State Development, Manufacturing, Infrastructure and Planning. It also involves other important contributors to the region’s economic development including industry peak bodies, business chambers and associations.

Collaborating to cultivate regional economic development partnerships is key to successful strategy implementation and a shared understanding of the region’s respective economic development roles and functions. Acknowledging that some roles and functions overlap or intersect, the Mackay-Isaac-Whitsunday Region’s principal economic development facilitation roles and functions, broadly speaking, are illustrated in Figure 8.

**Figure 8. The MIW Region’s Principal Economic Development Facilitation Roles**



Source: SC Lennon & Associates

Measuring strategy progress and performance is also critical to determining success. Implementation progress will be monitored through the following methods and sources:

- Business / economic development satisfaction surveys;
- Subscription to regularly updated and tailored data sources such as REMPLAN;
- Department of Jobs and Small Business data on unemployment and labour force trends;
- Data sourced from the Queensland Government Statistician’s Office; and
- Australian Bureau of Statistics (ABS) data.

The *Mackay-Isaac-Whitsunday Region Economic Development Review, 2018-2022* will be reviewed annually with an update anticipated in four years.

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