

Regional Roadmap Moreton Bay

2013-16



Regional
Development
Australia

MORETON BAY QLD



▶REGIONAL ROADMAP 2013-16

MESSAGE FROM THE CHAIR



Neil Hoddinett,
Chair
RDA Moreton Bay

This is the fourth Regional Roadmap for the Moreton Bay region produced since the appointment of the initial Regional Development Australia Moreton Bay Committee in December 2009. The committee is comprised of members of the Moreton Bay region community, appointed by the Federal Minister for Regional Development, all of whom act in a voluntary capacity. The RDA Charter in 2009 was, and is still today, very broad and reflects the ongoing partnership between the Australian Federal, State, Territory and Local Governments to develop and strengthen the regional communities of Australia.

Regional Development Australia Moreton Bay has consulted with the community, business, non-profit organisations and all levels of government, to articulate local priorities, identify and align resources, engage stakeholders and promote solutions. The result of this consultation is encapsulated within this Regional Roadmap. The consolidation of the fifty-five documents from all of the Regional Development Australia regions then directs and guides the Department of Regional Development in supporting the growth of regional communities across the country.

As in previous years there are clearly identified needs and issues for the Moreton Bay region which must be addressed. Many of these are short-term, the direct responsibility of the three tiers of government in Australia, and subject to local political and economic constraints in their treatment. However, the longer-term requirements necessary to ensure the future success, viability and sustainability of the region were developed after much research and collaboration with most of the region's stakeholders.

The Roadmap articulates a Vision for our region, portrays a Profile of the region, and then details the key Regional Priorities that have been assessed as being most critical for the attainment of that Vision. These are then followed by the currently identified Projects and Initiatives being undertaken in moving the region forward.

The Moreton Bay Region is expected to absorb much of the projected growth that will occur within Queensland towards 2031 and beyond. This will only be possible with the support of government at all levels and the active participation and support of the Moreton Bay region community at large.

I commend this roadmap to you as the blueprint for the future of our region and look forward to your support in bringing it to fruition.

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

Neil Hoddinett
Chair
Regional Development Australia Moreton Bay Inc

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EXECUTIVE SUMMARY

THE MORETON BAY REGION – AN EMERGING AND GROWING REGION

Regional Development Australia (RDA) Moreton Bay covers the same geographic area as Moreton Bay Regional Council (MBRC) (Figure 1) which was formed during March 2008 through the amalgamation of the three former local government areas (LGAs) of Pine Rivers, Caboolture and Redcliffe. The region is home to a diverse range of settlements ranging from rural, urban and bay-side communities, each with its own characteristics and strong sense of identity.



Figure 1 – Map of the Moreton Bay Region
(Source: MBRC)

Moreton Bay Region – Quick Stats

- ♦ Geographic area ▷ 2,000 sqkm
- ♦ Population 2012 ▷ 399,406
- ♦ Population is *higher* than that of ACT & NT
- ♦ Estimated population 2031 ▷ 533,170
- ♦ Economy GRP ▷ \$11.08B
- ♦ Unemployment ▷ 5.5%
- ♦ Average wage ▷ \$723/week
- ♦ Key economic sectors ▷ Manufacturing, Retail, Construction, Professional Services, Transport & Logistics
- ♦ Key Business Locations ▷ Brendale, Caboolture, Clontarf, Narangba, North Lakes, North East Business Park (North Harbour), Redcliffe and Strathpine

The Moreton Bay region is strategically located in South East Queensland to the north of the Brisbane CBD with direct access to nationally and internationally recognised export infrastructure, including the Port of Brisbane, the Australian Trade Coast and Brisbane Domestic and International Airports, enabling businesses to access both domestic and international markets with ease. The Bruce Highway is the key road corridor and the region is serviced by the Brisbane to Caboolture rail line, which extends north through the Sunshine Coast. The \$1.1B Moreton Bay Rail Link is the region's major infrastructure project and is scheduled to be completed during 2016 linking Petrie to Kippa-Ring (Redcliffe).

The region's economy is diverse and is dominated by small business with 60% being sole traders and 96% employing 19 or fewer employees. Approximately 100,000 residents travel outside of the region to work each day (57.9% of the regions workforce) (ABS 2013).

Queensland University of Technology has a small co-located campus with TAFE at Caboolture. The vast majority of tertiary, VET and trade-based students need to travel outside of the region to access courses, mainly to Brisbane and the Sunshine Coast.

The region also lacks research & development and innovation infrastructure, which combined with the lack of a regionally significant tertiary education facility is restricting the region's ability to both support its future economic and business growth and to create a greater diversity of employment options to meet the ambitions of the region's rapidly increasing population.

Major natural features include Bribie Island, Bribie Island National Park, D'Aguilar National Park, Freshwater National Park, Glass House Mountains National Park, the Pumicestone

Channel, Pumicestone Passage Marine Park, several beaches and various wineries and vineyards.

The region provides a high quality of life and environment, which is making it increasingly attractive to residents and visitors alike. The region provides a beautiful and varied hinterland with a range of villages and coastal communities providing varied opportunities for both residents and visitors.



Figure 2 – Redcliffe and Moreton Bay
(Source: MBRC)

The Moreton Bay region is one of the fastest growing regions by population in Australia and will continue to be the third largest local government area by population in Australia behind Brisbane and the Gold Coast. Consequently, the regional priorities reflect the challenges and opportunities associated with this growth, especially as the region is located adjacent to a state capital city – Brisbane.

It is this proximity to Brisbane which is fuelling the region's population growth and the region is principally accommodating the population growth which Brisbane requires to sustain its future employment growth. Currently, both Federal and State Government investment in infrastructure is lagging significantly behind the demand caused by a rapidly expanding population. Not all of the employment growth predicted for Brisbane needs to be located in Brisbane. The Moreton Bay region is a highly competitive and cost effective location for business.

The following regional analysis provides a summary of the region's strengths, challenges, needs and opportunities.

Strengths	Challenges
<ul style="list-style-type: none"> ▷ One of the fastest growing regions in Australia ▷ Broad economic base ▷ Regional diversity ▷ Strategic location providing direct access to strategic export infrastructure – Brisbane International Airport and Port of Brisbane ▷ 1800+ha of land for business use ▷ Workforce: a large and highly skilled workforce of 174,488 ▷ Strong and cost effective business environment and location ▷ Lifestyle: a great lifestyle in a beautiful region ▷ Location of nationally and internationally renowned festivals and events ▷ One of the first regions in Australia to benefit from the roll-out of the National Broadband Network 	<ul style="list-style-type: none"> ▷ Sustainable population growth ▷ Funding infrastructure to match the needs of growing communities ▷ Community resilience ▷ Communities of double digit and long term unemployment ▷ Employment growth ▷ Travel to work patterns ▷ Economy dominated by small business ▷ Lack of regional identity ▷ Fragmented region – political, business, community and resident perspective ▷ Business community is represented by numerous chambers of commerce, business groups and networks ▷ Proximity to Brisbane
Needs	Opportunities
<ul style="list-style-type: none"> ▷ Regional jobs growth and diversity of employment ▷ Enhanced regional business and consumer confidence ▷ Investment in tertiary education and training infrastructure ▷ Investment in infrastructure to support the needs of growing communities ▷ Public transport investment 	<ul style="list-style-type: none"> ▷ Agriculture ▷ Supply chain management and clusters ▷ Economic and business growth ▷ Attraction of professional and financial services businesses, including from the Brisbane CBD ▷ Employment, education, skilling and training ▷ Investment Attraction – logistics, high tech manufacturing, food and beverage and machinery and equipment manufacturing ▷ Digital technologies and innovation ▷ Telework and SMART WorkCentres ▷ Enhancing quality of life, community diversity and resilience (community wellbeing) ▷ Building regional leadership and identity

Figure 3 – Regional Analysis of the Moreton Bay Region

Over 100,000 residents travel outside of the region to work each day with the majority commuting to Brisbane for employment, which places significant strain on already stretched infrastructure. Congestion at peak times and increased travel costs, and time are impacting significantly on the sustainable growth of the region and the quality of life and liveability for which the region prides itself. The use of digital technologies can be used to change travel to work patterns through teleworking, SMART Work Centres and flexible work patterns. The region also needs to focus on creating a broader range of employment opportunities to support the needs and aspirations of its residents, alongside providing the tertiary and training infrastructure to support a population estimated to be over 585,000 by 2031.

The key focus of the region’s Economic Development Strategy is to create more employment options for the region’s residents through supporting existing, new and emerging businesses, alongside the attraction of new investment in to the region. Regional Development Australia Moreton Bay and Moreton Bay Regional Council are working in partnership to attract new investment in to the region.

The proximity to Brisbane, governmental boundaries and the amalgamation of three distinct Councils and a fragmented political, business and community landscape also places a focus on the need for building regional cohesion, leadership and identity.

The development of the Regional Roadmap, Vision for the Region, and associated regional priorities and activities have been developed within the context of the following global mega trends, national and state policy, and regional priorities. They also reflect Moreton Bay Regional Council's (MBRC) vision and priorities for the Moreton Bay region. Within this context the Regional Priorities and Actions are developed further in **Regional Priorities (page 29)** and **Projects and Initiatives (page 39)**.

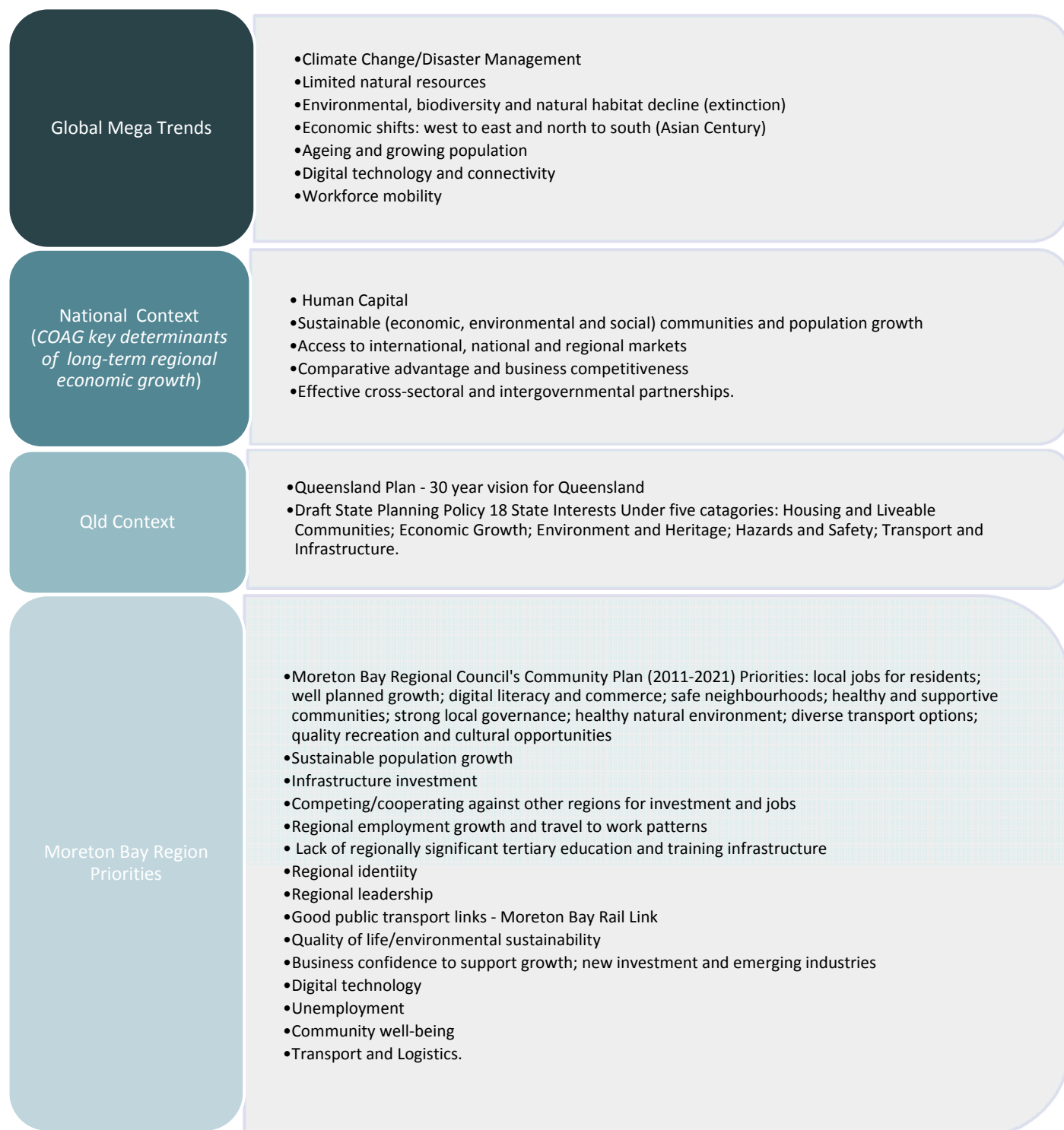


Figure 4 – International, National, State and Regional Society Trends and Policies Affecting the Moreton Bay Region

The key regional priorities to be taken forward within this Regional Roadmap are detailed below:

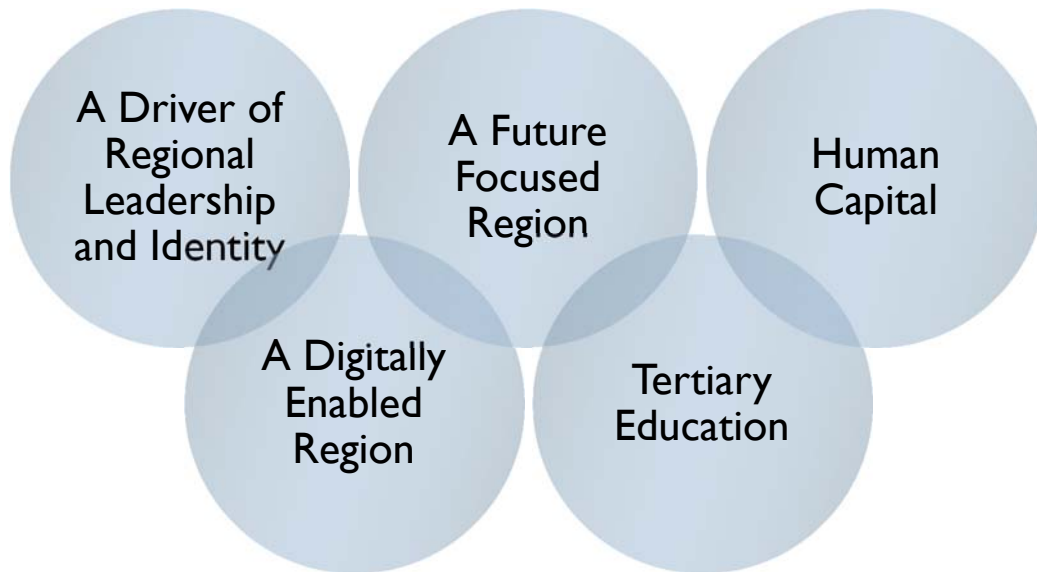


Figure 5 - RDA Moreton Bay Key Regional Priorities 2013-16

A VISION FOR THE REGION

The Regional Development Australia (RDA) Moreton Bay vision for the Moreton Bay region is:

“The Moreton Bay region provides the balance of lifestyle and business opportunities in South East Queensland”

This vision statement for the region has evolved over the three plus years of operation of RDA Moreton Bay, and reflects the views of committee members both past and present and also reflects the processes of consultation and engagement across the Moreton Bay region.

This statement reflects a future-focused and sustainable region, which can meet the aspirations and needs of a rapidly growing population, and also of a region attractive to investment and future-focused to take advantage of economic, social, technological and environmental change. This vision reflects a long term aspiration for the region which is beyond the timeframe of this document.

The current committee membership also agreed that it was important that RDA Moreton Bay has its own regional vision to differentiate itself from Moreton Bay Regional Council but one which is also complimentary and captures the priorities contained in MBRC’s Community Plan 2011-2021. In this regard the Moreton Bay Regional Council Vision for the region is:

“A thriving region of opportunity where our communities enjoy a vibrant lifestyle”

RDA Moreton Bay is one of four RDAs currently aligned to the geographic boundary of one local government. In this regard, MBRC is the organisation’s key strategic partner within the region and the regional priorities outlined and developed within this document are also complimentary to those of Moreton Bay Regional Council.

ROLE OF REGIONAL DEVELOPMENT AUSTRALIA

Regional Development Australia (RDA) is a partnership between the Australian, State, Territory and Local Governments to develop and strengthen the regional communities of Australia. It has been given a pivotal role in ensuring the long-term sustainability of Australia’s regions.

Roles & Responsibilities of Regional Development Australia

1. Consultation & Engagement with the Community
2. Informed Regional Planning
3. Whole-of-Government Activities
4. Promotion of Government Programs
5. Improved Community and Economic Development

RDA will work with all sectors of the community, including women, young people, Indigenous Australians and people from a variety of cultural backgrounds. A key focus of RDA will be on the economic, social and environmental issues affecting communities. RDA will be an important contributor to and driver of:

- ▷ **Regional business growth plans and strategies**, which will help support economic development, the creation of new jobs, skills development and business investment;
- ▷ **Environmental solutions**, which will support ongoing sustainability and the management of climate change (including the impact of drought, flood and bushfires); and
- ▷ **Social inclusion strategies**, which will bring together and support all members of the community.



Figure 6 – Pine River Bridge
(Source: MBRC)

RDA in consultation with the community, business, non-profit organisations and all levels of government, will articulate local priorities, identify and align resources, engage stakeholders and promote solutions. In doing this, RDA will support the growth and development of regional communities across the country. RDA will support, promote and disseminate information on government policy initiatives for the benefit of local communities. To this end, Regional Development Australia committees will have a strong understanding of Federal, State and Local government policies and initiatives, and the ways in which local communities can engage with them.

RDA will take a leadership role in bringing together organisations to take advantage of government programs, policies and initiatives. RDA will be an effective conduit between governments and regional communities. It will enable all communities to provide input to governments about the strengths and weaknesses of regional Australia.

ROLE OF REGIONAL DEVELOPMENT AUSTRALIA WITHIN THE MORETON BAY REGION

RDA Moreton Bay committee members have prioritised the following key actions as being representative of both the role and activities of the organisation and the committee members as they work towards achieving the long-term vision for the Moreton Bay region.

In engaging within our region in building prosperous communities, RDA Moreton Bay will be:

- ▷ An **advocate** for the Moreton Bay region’s sustainable growth;
- ▷ An **enabler** of innovative partnerships and solutions;
- ▷ A consultative **conduit** for key issues facing the region;
- ▷ A **collaborator** in building a strong, harmonious community;
- ▷ A **champion** for enhanced regional recognition and identity; and
- ▷ A **builder** of cross regional partnerships.

A key role for RDA Moreton Bay will be to work across government, business and the community with key stakeholders to influence and advocate for the attainment of the vision for the region.



Figure 7 – Ironbark Gully Day Use Area
(Source: www.nprsr.qld.gov.au)

MORETON BAY REGION PROFILE & ANALYSIS

OVERVIEW OF THE REGION

The Moreton Bay region that RDA Moreton Bay covers is the same geographic area covered by the Moreton Bay Regional Council. The region is over 2,000 square kilometres and has an estimated current resident population of 399,406 as at 30 June 2012 (ABS 2013).

The Moreton Bay region is now the third largest local government in Australia based on population behind Brisbane City Council and the Gold Coast City Council.

Based on these medium series projections at June 2011, the population is projected to grow to 585,000 by 2031, creating further opportunities and challenges. It has undergone significant growth in recent years, benefiting from a surge in population.

Population growth is now placing significant pressure on existing infrastructure.

The Moreton Bay region is located in South-East Queensland, between 20 and 44 kilometres north of the Brisbane CBD. It is bounded by the Sunshine Coast Regional Council area in the north, the Coral Sea and Moreton Bay in the east, Brisbane City in the south and the Somerset Regional Council area in the west.

The region is home to a diverse range of settlements ranging from rural, urban and bay-side communities, each with its own characteristics and strong sense of identity. The region's natural assets include mountain ranges, water supply catchments, coastal wetlands, national parks, state forests, rural townships and urban centres. Rural land is used mainly for dairy farming, timber, beef cattle, mixed farming and tropical fruit growing.

Major natural features of the area include Bribie Island, Bribie Island National Park, D'Aguiar National Park, Freshwater National Park, Glass House Mountains National Park, the Pumicestone Channel, Pumicestone Passage Marine Park, several beaches and various wineries and vineyards.

The Region is served by the Bruce Highway, the D'Aguiar Highway and the Brisbane-Caboolture railway line.

The region provides a high quality of life and environment, which is making it increasingly attractive to residents and visitors alike.



Figure 8 – Bribie Island
(Source: Tourism Queensland)

The region provides a beautiful and varied hinterland with a host of village splendour, including Samford and Woodford, and the historic Dayboro. The coastal communities of Beachmere, Bribie Island, Deception Bay and Redcliffe provide a range of opportunities for residents and visitors, including major events, beaches and water sports.

The Moreton Bay region hosts a number of major events, which attract significant numbers of regional, intra and interstate and international visitors providing significant economic benefits and opportunities. For further information refer to **page 14**.



Figure 9 – Abbey Medieval Festival
(Source: Caboolture News)

There are opportunities for residents and visitors from arts & culture, beaches & foreshores, estuaries, cycle & walking tracks, history and heritage, jetties & marinas, markets, parks & gardens and water sports. The Moreton Bay region is also home to abundant wildlife and nature reserves, many providing key breeding grounds.

Owing to its unique environmental assets, a key element of this region's growth management should be focused on environmental management and sustainability.

Strategic Location

We have operated our business, Springers Solar, for over 10 years in Strathpine in the Moreton Bay region. Running a business in the region offers so many benefits including a strategic location, diverse customer base, and access to key infrastructure, all of which have contributed to our business growing significantly to now be installing some of the largest grid connected residential solar panel systems in Queensland.

Cheryl Springer, Owner, Springers Solar and President of Pine Rivers Chamber of Commerce

The following is designed to provide a brief overview of the region’s infrastructure to support economic, community and social development and activity. The following content was mainly sourced from the Moreton Bay Regional Council Economic Development Strategy (June, 2010). **Figure 9** shows detail of the location of the Moreton Bay region and key infrastructure.

Moreton Bay Region Strategic Location and Infrastructure – Quick Stats

Strategic Location

- ◆ Road ▷ Bruce Highway M1; Gateway Motorway
- ◆ Air ▷ 20 minutes from Brisbane Airport; Caboolture & Redcliffe airstrips
- ◆ Port ▷ 40 minutes from the Port of Brisbane
- ◆ Rail ▷ Queensland rail passenger and freight services to Brisbane and the Sunshine Coast

Infrastructure

- ◆ Schools ▷ 94 schools (65 state, 29 non-state)
- ◆ VET ▷ Brisbane North Institute of TAFE (Caboolture and Redcliffe), Australian Trade College (Scarborough)
- ◆ Tertiary ▷ Queensland University of Technology (Caboolture)
- ◆ Public Hospitals: 2 (484 beds)
- ◆ Private Hospitals: 6
- ◆ GP Super Clinics: 2
- ◆ Aboriginal & Torres Strait Island Health Services: 2
- ◆ Aged Care ▷ 62 providers, 3,148 places

Strategically located to the north of the Brisbane CBD the region provides direct access to Brisbane International & Domestic Airports, the Port of Brisbane and to the Australian Trade Coast enabling businesses to access both domestic and international markets with ease.



Figure 10 – Proximity of the Moreton Bay region to the Brisbane CBD, Brisbane Airport and Port of Brisbane, with detail of North-South Orientation of Main Road and Rail Connections (Source: Basis Agency)

With its proximity to Asia, the Port of Brisbane is a key economic asset for the export and import of goods; receiving 2,559 shipping calls in 2011. (Port of Brisbane 2011)

Road

The major transport spine through the region is the six-lane Bruce Highway M1 motorway, which is part of the east coast national highway network. The region is also serviced by the Gateway Motorway, a toll road which connects the region to parts of Brisbane, and South-East Queensland.

Air

The south of the Moreton Bay region is located just 20 minutes from the Brisbane Airport, which saw 21 million passengers in 2011-12 and carries almost 2,000 flights per week to destinations across Australia and the world (Brisbane Airport 2008). Municipal aerodromes at Caboolture and Redcliffe provide service to recreational and small commercial aircraft, as well as, aircraft-related support services, including pilot training.

Port

The Port of Brisbane, the third largest container port in Australia, and one of the country's fastest growing, is just under 40 minutes from the Moreton Bay region accessed by the Gateway Motorway.

Rail

Queensland Rail operates a full timetable of passenger and freight rail connections within and beyond the region, with frequent express services to Brisbane and the Sunshine Coast. Significant investment in rail is required to improve the use, frequency and access to public transport for the region's workforce, and to take more cars off the road and reduce carbon emissions.

There needs to be an improvement in access to the rail network through investment in high frequency (no timetable) bus routes and commuter car parking.

Education Infrastructure

The Moreton Bay region has a total of 94 schools and colleges operating in the area, of which 65 are state schools and 29 non-state schools. The clear majority of these schools service the resident youth population for primary and secondary educational needs (Education Queensland 2013).

The region also supports tertiary and accredited vocational education through the major registered training providers (RTO's), Brisbane North Institute of TAFE (Caboolture & Redcliffe Campuses), Australian Trade College and the Queensland University of Technology Caboolture campus. Several proximate major universities draw their students from the region, including the University of the Sunshine Coast and the Australian Catholic University located in Banyo.

Telecommunications & the NBN Infrastructure

The Moreton Bay region provides access to broadband infrastructure, which will be significantly enhanced as the region is one of the first in Australia to benefit from the roll-out of the National Broadband Network (NBN) from 2013. However, many communities across the region experience poor broadband and mobile phone reception.

The NBN and other digital technologies present new opportunities for developing the region, including growing business, creating connected and inclusive communities, transforming work patterns through tele-working, and reducing the impact on the region's environment.

Research, Development & Innovation Infrastructure

Research, development and innovation are critical to build a knowledge-intensive economy. While the Moreton Bay region does have a Queensland University of Technology (QUT) campus in Caboolture and the Brisbane North Institute of TAFE, these centres provide more specialised training rather than research, development or innovation. Specialised training centres in the area are very important knowledge assets and can provide significant value to businesses in the region.

An increase in the region's capacity to support business innovation, and R&D activity through improved linkages with universities and public and private sector organisations is required to build a regional knowledge-intensive economy that supports business growth and resilience, and creates a broader range of employment options for the region's residents.



Figure 11 – QUT Caboolture Campus
(Source: www.qut.edu.au)

The Moreton Bay region's proximity to Brisbane also allows for access to research facilities at the Australian Catholic University, the University of Queensland, QUT's Brisbane campuses, Griffith University, Commonwealth Scientific and Industrial Research Organisation (CSIRO), and other Cooperative Research Centres (CRCs). These facilities provide a depth and breadth of research, development and innovation capabilities.

Competitive Location

The Moreton Bay region is one of the most competitive business regions in Australia. In brief summary, these advantages include:

- Strategically located in Brisbane’s northern growth corridor
- Rapidly growing region of opportunity
- Capital city convenience without capital city costs
- Close proximity to major export infrastructure
- Ready availability of high quality, affordable industrial and commercial sites
- Existing industry clusters and associated supply chains
- Highly skilled workforce
- Fast and convenient access to world class road, rail, air, port and broadband connectivity
- Strong, diversified economy
- Unparalleled lifestyle opportunities.

“Prior to moving our business here we investigated eight other areas in and around Brisbane. Frankly this area won hands down on all our criteria. Any business serious about their long term future needs to put this area to the test. The fact is when they do; it will tick all the key boxes as it did for us.”
Michael Kennedy, General Manager, Kennedy’s Aged Timbers

The following provide a competitive location benchmark for the region against the Australian Trade Coast, Melbourne and Sydney for land prices, commercial rents and access to a skilled workforce.

COMPETITIVE LAND PRICES
Source: AECgroup, Savills

Area	Avg Industrial Land Costs (\$/sqm)	Savings in Moreton Bay
Moreton Bay	\$220	
Brisbane (Australia Trade Coast)	\$320	31%
Melbourne	\$253	13%
Sydney	\$417	47%

Figure 12a – Comparison of Land Prices in the Moreton Bay with Capital Cities of Australia (Source: AEC Group 2013)

COMPETITIVE COMMERCIAL RENTS
Source: AECgroup, Savills

Area	Avg Commercial Rent (\$/sqm)	Savings in Moreton Bay
Moreton Bay	\$367	
Brisbane (Fringe)	\$480	23%
Brisbane (CBD)	\$689	47%
Melbourne (CBD)	\$567	35%
Sydney (CBD)	\$913	60%

Figure 12b – Comparison of Commercial Rents in the Moreton Bay region with Capital Cities of Australia (Source: AEC Group 2013)

SKILLED WORKFORCE
Source: ABS (2012)

Qualification	Workforce
High School Diploma	110,929
University Degree	49,670
Non-school Qualification	97,732

Figure 12c – Qualifications of the Moreton Bay Region’s Workforce
(Source: AEC Group 2013)

The following is an example of the cost savings in labour, payroll tax and WorkCover for a regional Medical and Surgical Equipment Manufacturing Operation employing 50 people locating in Moreton Bay as opposed to Brisbane, Sydney and Melbourne.

	Brisbane	Sydney	Melbourne	Moreton Bay
Payroll	\$2,771,536	\$2,879,446	\$2,822,598	\$2,452,699
Payroll Tax	\$79,398	\$119,379	\$111,357	\$64,253
Workcover	\$24,196	\$52,953	\$16,371	\$21,412
Total	\$2,875,130	\$3,051,779	\$2,950,326	\$2,538,365
Savings in Moreton Bay (\$)	336,765	513,414	411,961	NA
Savings in Moreton Bay (%)	12	17	14	NA

Source: AECgroup, ABS Census (2012), ABS Wage Price Index (2013), Office of State Revenue, QLD (2013), Office of State Revenue NSW (2013), Office of State Revenue Vic (2013), Workcover QLD (2013), Workcover VIC (2013), Workcover NSW (2013)

Figure 12d – Moreton Bay’s Competitive Cost Savings
(Source: AEC Group 2013)

Strategic Projects

Moreton Bay Rail Link

The \$1.15 billion rail link project has commenced construction and the first train will be running on the line in 2016.

The project includes 12.7 km of dual rail track, a dedicated cycle/pathway along the entire length of the corridor, six new stations at Kallangur, Murrumba Downs, Mango Hill, Kinsellas Rd, Rothwell and Kippa-Ring and associated road and transport infrastructure (Figure 13).

This is a significant infrastructure and economic development project and it is expected that each express train trip will take 600 cars off the region’s roads bringing significant relief to the already congested roads and easing the gridlock experienced at peak times by the region’s 100,000 commuters.

The rail link will also enable residents to use public transport to more effectively access employment opportunities within the region. For example, residents of Redcliffe and North Lakes can use the rail link to access employment in Strathpine and Brendale – one of the main industrial/business precincts within the region (MBRC Major Projects 2013).

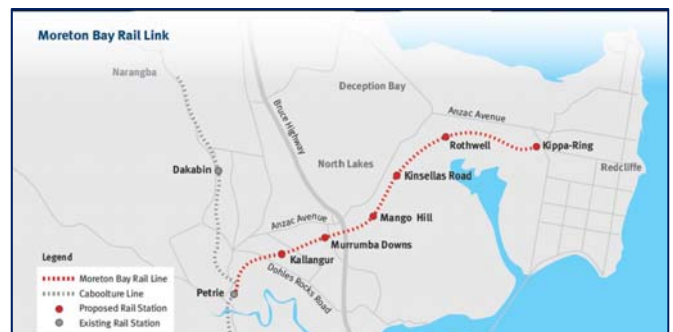


Figure 13 – Proposed Moreton Bay Rail Link Route
(Source: Moreton Bay Regional Council)

Caboolture West Master Planned Area

Caboolture West has been declared as a Master Planned Area and covers 6,413 hectares of land located west of Caboolture and Morayfield, bounded by the D’Aguilar Highway to the north, and Caboolture River Road to the south (Figure 12).

Caboolture West is recognised by the Queensland State Government as an Identified Growth Area which may accommodate significant population growth in the region in the long-term. It is expected that the area could house up to 60,000 people.

Moreton Bay Regional Council approved a project plan on 19th February 2013 and is currently holding information sessions for residents to present a number of draft development scenarios.

The earliest commencement of urban development in the area is likely to be 2016/17 (MBRC Major Projects 2013).

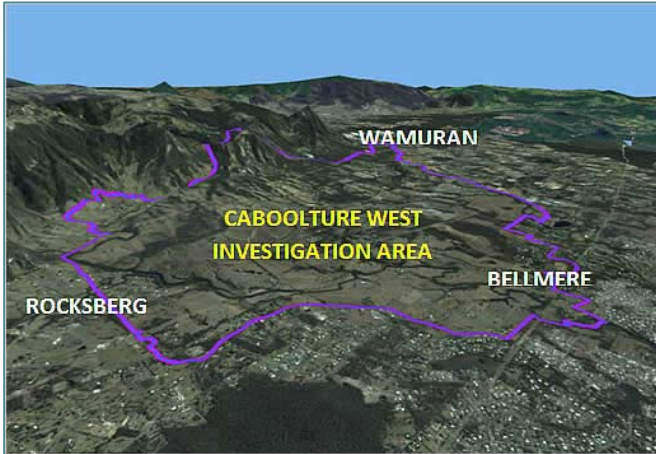


Figure 14 – Caboolture West Master Planned Area
(Source: Moreton Bay Regional Council)

Moreton Bay Regional Council Planning Scheme

Over the next year, Moreton Bay Regional Council (MBRC) will be focussing on its new regional planning scheme that is expected to be adopted by MBRC in late 2014.

The new MBRC Planning Scheme will help to respond to growth and development across the Moreton Bay Region and is a statutory document regulating how land can be used and developed.

The new planning scheme will replace the three existing planning schemes created by the former Caboolture, Pine Rivers and Redcliffe Councils.

The Corso, North Lakes



Figure 15 – The Corso Library (Artist's Impression)
(Source: Moreton Bay Regional Council)

The Corso, North Lakes will include a new Library, community centre, youth space and commercial office development. The project has been the subject of consultation with the general community and community groups, including young people and service providers, in North Lakes and surrounding areas.

Funding for the project consists of a grant of \$7.8 million received by MBRC from the Regional Development Australia Fund (RDAF) in 2012. This grant was additional to the \$3 million already pledged by the Australian Government for the planned young people's space for the North Lakes town centre. The project is set for completion during 2014.



Figure 16 – The Corso Young People's Space (Artist's Impression)
(Source: Moreton Bay Regional Council)

North Harbour

North Harbour is a planned 326 hectare multi-use precinct consisting of business, marina and residential developments on 760 hectares of land on the banks of the Caboolture River on privately owned land off Nolan Drive, Morayfield.

Approval has been granted for the business and industry precinct of this development, North East Business Park (NEBP), which covers 169 hectares and caters for mixed industry and businesses. NEBP is set to provide 9,000 jobs for the Moreton Bay region.



Figure 17 – North Harbour Aerial View (Artist's Impression)
(Source: Northeast Business Park)

The developers, Port Binnli, plan to integrate an Industrial Ecology project into the Business Park where resident businesses cooperate with each other and the local community to reduce waste, share resources, and improve environmental quality. Planning for construction of Stage 1 of the Business Park is underway (Northeast Business Park 2012).



Figure 18 – North Harbour Detailed View (Artist’s Impression)
(Source: Northeast Business Park)

Preliminary approval was provided in June 2013 by MBRC for the development of 1000 residential lots within the North Harbour precinct (Caboolture News 04/07/13 p.3)

Burpengary Regional Sports Park

Burpengary Regional Sports Park is a staged project worth \$50M in total. Stage 1 of the AFL precinct was completed in 2013 and is a \$14M project consisting of 2 Australian Rules fields and infrastructure including amenities and club building, lighting and irrigation. The precinct will be home for the Caboolture junior and senior AFL clubs and is expected to host state league games and Brisbane Lions team training and pre-season games.

Strathpine Gateway Project



Figure 19 – Strathpine Gateway Project (Artist’s Impression)
(Source: Moreton Bay Regional Council)

The Strathpine Gateway Project is a Moreton Bay Regional Council “signature project”. The project aims to provide a civic heart to Strathpine, linking Strathpine Railway Station to the surrounding retail precinct. Situated next to MBRC’s offices in Strathpine, the preferred option for the project will be based around a landscaped civic square and will contain a 6-10 storey building to house Strathpine Library, an Art Gallery, community meeting and service spaces, and commercial office and retail floor space. A second building, 6-8 storeys high, will contain commercial office and retail space. The existing MBRC offices will also undergo a refurbishment as part of the project.

MBRC is currently processing responses received as part of a community consultation process during February 2012 before heading into the concept design phase.

Upgrade of the Bruce Highway

The upgrade of the Bruce Highway from Pine Rivers to Caloundra Road (Sunshine Coast) will cost \$150M and is to be constructed within 6 years from 2012.

NBN Roll – Out

The Moreton Bay region is one of the first regions in Australia to get the NBN. NBN Co has commenced building its NBN fibre optic network in the following suburbs or plans to commence work within one year:

- Beachmere
- Dakabin
- Godwin Beach
- Griffin
- Kallangur (work already commenced)
- Kurwongbah (work already commenced)
- Mango Hill
- Murrumba Downs
- Ningi
- North Lakes
- Petrie (work already commenced)
- Whiteside

RDA Moreton Bay is advocating for the NBN roll-out to include as an earlier stage, Brendale, one of the region’s principal business/commercial locations.

Tourism

The Moreton Bay region has significant tourism potential and already attracts a large number of visitors for a range of attractions, events, day and weekend trips, and holidays. It has some of South East Queensland’s best sights, experiences and cuisine, with parks, pristine beaches and waterways, scenic drives, bushwalks, rainforest trails, thriving shopping precincts and vibrant entertainment.



Figure 20 – Redcliffe Kite Fest
(Source: www.redcliffekiteclub.org.au)

There are currently around 250 tourism operators in the region including accommodation providers, museums, art galleries, aero sports, water based activities, trails, wineries, markets and restaurants (Tourism Queensland 2009).



Figure 21 – Redcliffe Jetty
(Source: Moreton Bay Regional Council)

Tourism provides employment and business opportunities, improved leisure and cultural opportunities for residents and visitors, attracts potential buyers and residents to the region and can be a catalyst for change.



Figure 23 – Urban Country Music Festival
(Source: www.couriermail.com.au)

There is opportunity for a greater focus on tourism and ways to support and build the capacity of the industry, as well as, looking at co-operative promotions and campaigns. A stronger brand for the Moreton Bay region will provide opportunity for further promotions and activities for operators.

The economic benefit from these major events could be enhanced for the long-term benefit of the region.



Figure 22 – Woodford Folk Festival
(Source: www.couriermail.com.au)

There are diverse events and activities in the region, both large and small - sports, equine, culture and heritage and the arts.

The Woodford Folk Festival is an internationally recognised event that attracts up to 130,000 visitors annually between 26th December and 2nd January. The Abbey Medieval Festival takes place in July and attracts over 37,000 visitors annually. Other significant annual regional events include Farm Fantastic (48,000 visitors), Celebrate Redcliffe Festival (formerly First Settlement Festival) (40,000 visitors), Festival of Sails (40,000 visitors), the Urban Country Music Festival (35,000 visitors), and the Redcliffe Kitefest (30,000 visitors).



Figure 24 – Dahmongah Lookout, Mount Mee
(Source: www.tourism.racq.com.au)

REGIONAL PROFILE

Economy

The following provides a brief summary of the strengths, weaknesses, threats and opportunities facing the economy of the Moreton Bay region.

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> ▷ Strategic location – proximity to infrastructure (Domestic and International airports, Port of Brisbane) ▷ Good road infrastructure (Bruce Highway, Gateway Motorway) ▷ Diversity of skilled workforce ▷ Availability of relatively inexpensive industrial land ▷ Lower tax rates compared to other states ▷ Strong population growth increasing demand for construction, services, wholesale and retail ▷ Diverse business base, including manufacturing ▷ Education facilities ▷ Proximity to universities and research centres in Brisbane and the Sunshine Coast ▷ A number of hospitals, health care facilities and aged care providers 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> ▷ Significant traffic congestion at peak times ▷ Investment in infrastructure not matching population growth ▷ Lack of knowledge assets in the region ▷ Lack of university or higher education research facilities ▷ Travel to work patterns ▷ Lack of incentives for economic growth ▷ Little cooperation between businesses and business groups ▷ Weak professional and business services cluster ▷ Lack of regional image or brand
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> ▷ Significant population growth ▷ Build capacity of collaboration between education and industry ▷ Develop innovation, research and development culture and investment ▷ Grow the small business base ▷ Regional job creation ▷ Business access to the changing demographic ▷ Build new and existing supply chains ▷ Attract new investment in target sectors, including manufacturing, transport and logistics, and professional services ▷ Build business clusters ▷ Build a strong regional image or brand ▷ Digital technology 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> ▷ Region becoming a “Dormitory suburb” with large percentage of labour force leaving the region for work each day ▷ Fragmented small business driven economy ▷ Lack of businesses collaborating ▷ Lack of business confidence ▷ Lack of investment in infrastructure ▷ Lack of regional employment ▷ Lack of a regional brand ▷ Other South-East Queensland regions with a stronger identity and clearer focus, with more resources allocated to promoting and developing their economies

Figure 25 – SWOT Analysis of the Moreton Bay Region’s Economy

**Moreton Bay Region Economy
– Quick Stats**

- ◆ GRP (to 30 June 2012) ▷ \$11.08B
- ◆ Avg. annual growth rate 1999-2011 ▷ 3.7%
- ◆ No. Businesses ▷ 27,064 businesses
- ◆ Total % of businesses employing <20 employees ▷ 96.7%
- ◆ Total % of businesses employing 1-4 employees* ▷ 25.1%
- ◆ Total % of businesses that are sole traders ▷ 60.8%
- ◆ Top 5 industries by employment ▷ Retail trade, health care and social assistance, education and training, manufacturing and construction
- ◆ Largest industry by economic output ▷ Manufacturing
- ◆ Labour Force ▷ 174,488 persons
- ◆ Unemployment (region) ▷ 5.8%
- ◆ Unemployment (highest in region) ▷ Caboolture (12.6%)
- ◆ Unemployment (lowest in region) ▷ Albany Creek (1.4%)

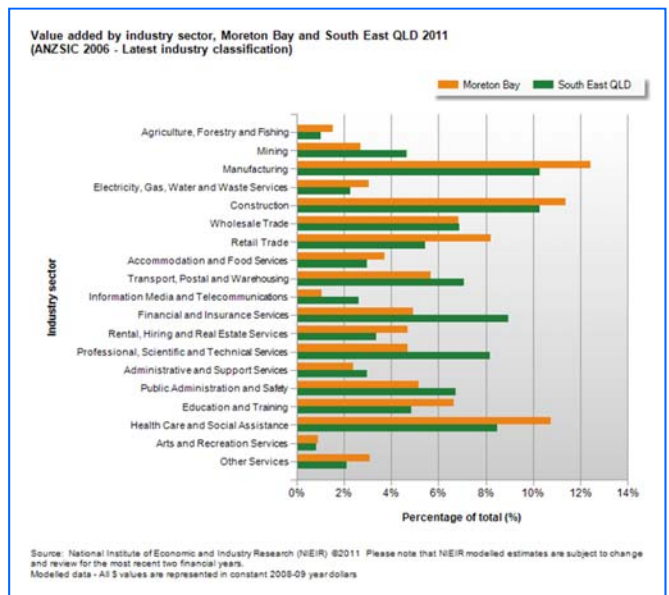


Figure 26 – Economic Output by Industry, Moreton Bay Region (2011) (Source: Economic id 2013)

Business and Industry

Gross Regional Product

In 2011 – 2012, the Moreton Bay region had a Gross Regional Product of \$11.08B, contributing 4.27% to Queensland’s economy. This increased from \$9.73B in 2010 (economic id 2013).

The Regional Australia Institute (RAI) ranks the Moreton Bay region the 20th largest economy in Australia out of 565 local government areas. RAI recently released “Insight”, a regional competitiveness index for Australia, ranking regions for competitiveness across 10 themes and 59 indicators. National rankings from the Insight report will be referred to throughout this Regional Roadmap.

Ranked 20th
in Australia for
natural resources
(net primary
productivity)
(Source: RAI)

The average annual growth rate between the year to 30 June 1999 and 30 June 2011 was 3.7% (MBRC Regional Profile 2013).

The largest industries by size of economic output are manufacturing, construction, property & business services and retail (Figure 26).

Registered Businesses and Industry of Employment

The count of registered businesses in the Moreton Bay region by employment size to 30 June 2011 was 27,064 businesses in total (6.3% of all Queensland businesses) (Moreton Bay Region Profile January 2013, MBRC).

Small to medium-sized businesses dominate the Moreton Bay region economy, with 96.7% of businesses employing 20 or fewer employees (including non-employing businesses). Sole traders, or non-employing businesses, make up 60.8% of the region’s registered businesses, and 25.1% of businesses have 4 or less employees (Moreton Bay Region Profile January 2013, MBRC).

At the time of the 2011 Census, retail trade was the largest industry of employment for employed persons working in the Moreton Bay region, with 14,056 persons or 15.7% of the labour force. Other major employment sectors include manufacturing, health care and social assistance, education and training, and construction.

The Moreton Bay region traditionally has accommodated strong manufacturing and construction sectors and associated supply chains. The future of the region will rely upon building the capability of these sectors and diversification through innovative activity, to create clusters of high value-adding and knowledge-based industries (see text box on following page for definition).

Knowledge-Based Industries

Knowledge-based industries are concerned with processes that identify and gain new knowledge such as high-tech manufacturing, education, financial, IT and other professional business services and communications. The term usually refers to those industries that are relatively intensive in their inputs of technology and/or human capital.

Figures 27 & 28 show the largest business sectors within Moreton Bay by industry of employment for those working in the Moreton Bay region.

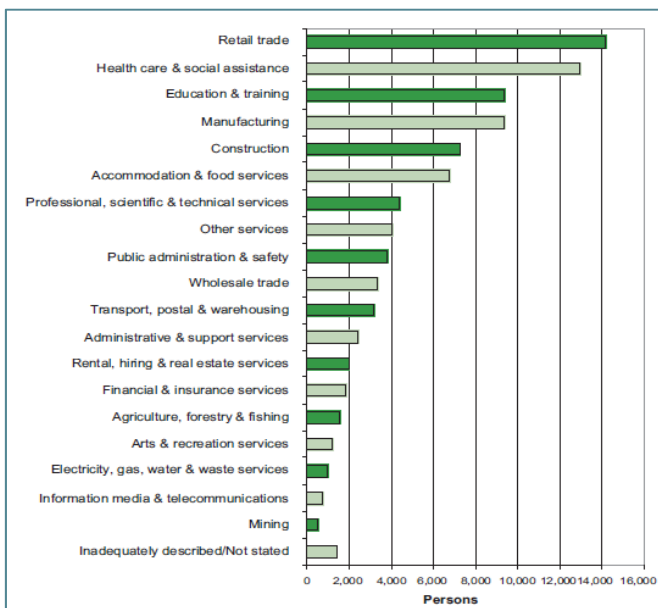


Figure 27 – Place of Work by Industry of Employment, Moreton Bay LGA (2011)

(Source: Regional Profile, 19 June 2013, Government Statistician)

Industry	Moreton Bay Regional LGA		Queensland	
	number	%	number	%
Agriculture, Forestry and Fishing	1,420	1.6	54,563	2.7
Mining	301	0.3	51,656	2.6
Manufacturing	9,138	10.2	169,025	8.5
Electricity, Gas, Water and Waste Services	921	1.0	24,764	1.2
Construction	7,281	8.1	179,947	9.0
Wholesale Trade	3,314	3.7	73,377	3.7
Retail Trade	14,056	15.7	214,617	10.8
Accommodation and Food Services	6,945	7.8	140,036	7.0
Transport, Postal and Warehousing	3,105	3.5	104,924	5.3
Information Media and Telecommunications	551	0.6	25,282	1.3
Financial and Insurance Services	1,837	2.1	53,833	2.7
Rental, Hiring and Real Estate Services	1,872	2.1	36,875	1.9
Professional, Scientific and Technical Services	4,298	4.8	131,921	6.6
Administrative and Support Services	2,270	2.5	64,185	3.2
Public Administration and Safety	3,925	4.4	135,586	6.8
Education and Training	9,181	10.3	160,241	8.0
Health Care and Social Assistance	12,957	14.5	240,017	12.1
Arts and Recreation Services	1,038	1.2	28,418	1.4
Other Services	4,169	4.7	78,157	3.9
Total (e)	89,451	100.0	1,991,753	100.0

Figure 28 – Place of Work by Industry of Employment, Moreton Bay LGA (2011) (number and percentage)

(Source: Regional Profile, 19 June 2013, Government Statistician)

Business Confidence in the Moreton Bay Region

314 businesses in the Moreton Bay region responded to the July 2012 Moreton Bay Business Confidence survey. The following is a summary of the key results.

Top 10 major constraints on business growth

- Rising overhead and utility costs
- Price pressure from customers
- Carbon tax
- Price pressure from competitors
- Global/national economic performance
- Declining demand from customers
- Declining customer base
- Rising transport costs
- Difficulties in obtaining finance
- Price pressure from suppliers

The Amcor Closure

The closure by December 2013 of Amcor's Petrie Cartonboard Mill is a major blow to the region's economy, with the loss of 220 jobs.

The Mill has been part of the Petrie community for over 60 years.



Amcor Australasia Managing Director, Nigel Garrard, said of the closure, "Significant increasing cost pressures in areas such as energy costs and the continued strength of the Australian dollar, have made it impossible for the Mill to remain competitive". (Quest Community Newspapers 2013)

Amcor and Moreton Bay Regional Council with support of RDA Moreton Bay will be exploring alternative uses for the 200+ha site.

Business Parks & Retail Locations

The main industrial, commercial and retail employment locations within the Moreton Bay region include:

- Brendale
- Burpengary
- Caboolture
- Clontarf
- Lawnton
- Narangba
- Northeast Business Park (North Harbour)
- North Lakes.

A new multi-million dollar industrial estate “133 South Pine Road” will be built in Brendale from August 2013 with tenants taking possession in early 2014.



Figure 29 – North Lakes Business Park
(Source: Stockland)

The region is well serviced by a wide range of sub regional retail centres servicing both urban and rural locations. The key main retail centres, include:

- Arana Hills
- Morayfield
- North Lakes, including the Westfield Centre
- Strathpine, including the Westfield Centre.

Major Activity Centres

The Major Regional Activity Centres (MRAC) for the region are located at Caboolture–Morayfield (Principal Regional Activity Centre), Redcliffe–Kippa-Ring, North Lakes and Strathpine. They are the region’s major centres for business, employment, research, education, services, higher density living and social interaction and are centred on public transport nodes.

The PRAC & MRAC within the Moreton Bay region are as follows:

- Caboolture – Morayfield (PRAC)
- North Lakes (MRAC)
- Redcliffe (MRAC)
- Strathpine (MRAC).



Figure 30 – Caboolture – Morayfield Major Activity Centre (MRAC)
(Source: Moreton Bay Regional Council)

There are a number of local area plans that MBRC will be undertaking in the future, with the focus on preparing urban design and planning strategies for the region’s activity centres following the introduction of the MBRC Planning Scheme in 2014.

Human Capital

The Moreton Bay region has a workforce of 174,488 persons. Of the total labour force, 73,446 persons (or 42.1% of the total labour force work within the Moreton Bay region, and 101,042 persons (or 57.9%) work outside of the region (ABS 2011).

*Over 100,000 residents leave the Moreton Bay region every work day to commute to work. This equates to over 57% of the total resident workforce.
(ABS 2011)*

The average unemployment rate for the Moreton Bay region is 5.8%, the same as for Queensland, with the highest rates in the north of the region in the Statistical Local Areas of Caboolture Central (12.6%) Deception Bay (10.5%), and Morayfield (9.4%), and the lowest unemployment rates in the centre of the region in Albany Creek (1.4%), Pine Rivers (2.1%) and the Hills District in the south (2.8%) (DEEWR Small Area Labour Markets, December 2012 quarter).

Even with a strong and diverse economy and low regional unemployment rate, with over 57% of the resident workforce leaving the region to commute to work every day, there is a risk that the region will increasingly become a dormitory suburb and furthermore, on a daily basis the region’s workers’ contributions to the economy are lost to other regions. An exodus of skilled workers to other regions also provides an opportunity to attract knowledge-intensive and high-growth industries to the region to access this labour pool.

*“HBL is keen to maintain its aggressive growth in the area and is proud to call the Moreton Bay region home, we believe that it delivers the ideal work, live, play balance for our staff.”
Martin Hall, GM, Hornibrook Group*

Employment by Profession and Employment Skills

An overview of the Moreton Bay Region resident employment profile by occupation is contained in **Figure 31**. In comparison to Queensland, the Moreton Bay region has a lower percentage of employment by profession in the managerial and professional category, which reflects employment opportunities and levels of educational attainment in the region, and a higher level of employment in the fields of technicians and trade workers, clerical and administrative workers (Regional Profile, 19 June 2013, Government Statistician).

Occupation	Moreton Bay Regional LGA	
	number	%
Managers	18,618	10.7
Professionals	27,927	16.0
Technicians & trades workers	27,805	15.9
Community & personal service workers	18,447	10.6
Clerical & administrative workers	29,014	16.6
Sales workers	18,317	10.5
Machinery operators & drivers	12,877	7.4
Labourers	18,353	10.5
Total (d)	174,484	100.0

Figure 31 – Employment by Occupation, Moreton Bay Region
(Source: Regional Profile, 19 June 2013, Government Statistician)

“The Moreton Bay region has been instrumental in growing our nationwide business. It has provided strong economic growth and a consistent employment pool of professionals who continue to sustain our local operation.”

Geoff Auckland, Director of Corporate Services Auto & General, Budget Direct

Personal Income

As at 30 June 2011 the median weekly personal income in the Moreton Bay Regional Local Government Area for persons aged 15 years and over was \$581, lower than \$587 for Queensland (ABS 2011). In 2008-9 the average wage and salary income in Moreton Bay Regional LGA was \$46,265 (ABS 2012).

Caboolture Central is in Longman, one of five Queensland Federal electoral divisions ranked among 20 % of Australia's poorest divisions. The proportion of families where no parent works, an indicator of generational disadvantage, was significantly elevated in Caboolture Central and a significantly higher proportion had not completed Year 10, compared with Greater Brisbane (DEWR Trend Data 2010).

Education and Training

The region, at the time of the 2011 Census, had a higher share of the population attending primary and secondary schools, and a smaller proportion engaged in tertiary level education compared to the Qld average.

Overall 15% of persons in the region were learning at a tertiary level (TAFE and University), compared with 18.6% in QLD.

In 2011, the highest level of schooling completed for Year 12 was slightly lower at 52.9% compared to 55.3% for Qld, excepting for completion of Year 10 or equivalent, where the region was 3.8% higher than for Qld.

Although behind QLD for completion of Year 12 or equivalent, from 2006-2011 the Moreton Bay region statistics show that completion of Year 12 or equivalent has had a significant increase from 38.1% to 52.9%.

In the region, in 2011, residents had a lower percentage of bachelor or higher degrees (9.2%) compared to Qld (12.8%). However, when comparing data for the region between 1991 and 2011, it shows that the region has seen a significant increase in the bachelor degrees or higher obtained over this time - from 4.4% for a bachelor degree or higher degree to 9.2% in 2011.

Of concern is a significant decrease in attendance at vocational institutions from 14.1% for vocational qualifications in 1991 to 6.2% in 2011.

Therefore, there appears to be a trend toward increased education at the bachelor degree level or higher and a decrease in vocational education enrolments. However, if this decrease signifies a shift of students from vocational to university education, this indicates that education in the region is being advanced. This may also impact on industries such as manufacturing and construction which rely on trade-based employees.

Indigenous Employment, Education and Training

Indigenous citizens live in all parts of the region and nearly one-third (1843) are located in the areas of Woodford, Deception Bay, Dakabin-Kallangur, Morayfield, Burpengary and Strathpine. Most have moved to the region to obtain employment, continue their education or to join family.

In 2011, 8483 (2.2%) persons indicated they were of Aboriginal and/or Torres Strait Islander origin, an increase in the Moreton Bay region from 1.8% in 2006. This is significantly lower than the State average (3.6%). The following highlights the differences in employment, education and training between the indigenous and non-indigenous populations in the Moreton Bay region:

- A lower proportion completed Year 12 (19.8%) compared to the non-Indigenous population in the region (38.3%) in 2011
- A lower proportion completed Year 12 (28.7%) compared to non-Indigenous persons in the region (38.3%) in 2011

- There is a lower level of educational attainment compared to non-Indigenous in the region - 5.5% completed a bachelor or higher degree compared with 9.9% non-Indigenous in the region, 4.9% completed an Advanced Diploma or Diploma compared to 6.9% non-Indigenous in the region and 16.4% obtained a Vocational certificate compared to 19.8% non-Indigenous in the region in 2006.
 - 59.7% had no qualifications compared to 52.1% non-Indigenous in the region & 49.2% in Queensland in 2006
 - Indigenous household income of was \$1,138 a week compared to \$1,262 for non-Indigenous households in the region in 2011
 - 13.6% were unemployed compared to 4.7% non-Indigenous in the region in 2006.
- (Regional Database, Government Statistician)

Imports & Exports

There has been growth in imports and exports in the Moreton Bay region from 2011 to 2012 of 4.5% on average, with the growth in total exports slightly higher than imports.

Total exports for the year ending 30 June 2012 were \$2,735M, with total imports \$7,641M. Export and import values were the highest for the manufacturing industry sector (\$1,528M exports and \$1,289M imports).

Other industries with significant annual export values were accommodation and food services (\$253M), transport, postal and warehousing (\$231M) health care and social assistance (\$190), retail trade (\$190M), agriculture, forestry and fishing (\$86.3M), financial and insurance services (\$72M), and mining (\$57.1M).



The disparity between total exports and imports for the region provides an opportunity for industry development to reduce the level of imported goods and services.

Transport and Logistics

The Transport & Logistics industry is a key part of most business activities, and a significant sector of the Moreton Bay regional economy.

Australian freight volumes are expected to grow by 70% by 2021 providing significant infrastructure, economic development, and transport and land use planning challenges.

This unprecedented growth is a result of:

- Australian Population Growth - focus on urbanisation
- Increase in food and resource production
- Globalisation - increasing exports and imports, and growth in online retail (e-commerce).

This will result in significant national and regional challenges, including:

- Larger cities and urban conurbations
- Increased congestion, costs and emissions
- Modal shift from road to increased rail share
- Growth in ports and need for improved inland port infrastructure, including rail and road port access to meet demand
- Supply chain pressures and inefficiencies
- Increased competition with passenger traffic on rail corridors
- Increased transport orientated and infill development restricting space and time for rail freight movements.
- The need to add an additional

Moreton Bay Agriculture – Quick Stats

- ♦ Output/Sales ▷ \$470M (up 15% from 2011-12)
- ♦ Employment ▷ 1,611 persons
- ♦ Exports ▷ \$86.3M (up 25% from 2011 to 2012)
- ♦ Imports ▷ \$105.6M
- ♦ Local sales ▷ \$384.6M
- ♦ Products ▷ Beef cattle, dairy farming, fishing, strawberries, timber, tropical fruit growing (esp. pineapples, bananas)*

Strawberries

- ♦ About 42% of Queensland’s growers are in the Moreton Bay region (mainly Caboolture, Elimbah and Wamuran)
- ♦ 15 million plants are grown in the region each year
- ♦ Annual regional production is more than 30 million punnets

(Source: Economy id 2013, *DAFF 2013)



Figure 32 – Strawberry Farm, Wamuran
(Source: www.wamurancommunity.com.au)

Sustainable Business

Growth in key industry sectors can deliver high value development (i.e. business activities that bring a high degree of knowledge and generate products and services of a high value).

At the same time, it is important that key industry sectors are also sustainable, both in terms of their environmental responsibilities but also in terms of their operations (i.e. that their business operations are competitive in the long term, and also resilient). By focusing on these areas, economic development can generate greater economic returns for the community.

Growth in knowledge-driven, innovative companies will deliver more sustainable returns to the community. (AEC Group 2010), and sustainable business practice can strengthen regional supply chains and contribute to the region’s competitive business advantage in terms of a sustainable economy for the region.



Figure 33 – Woodford area
(Source: www.couriermail.com.au)

Australia in the Asian Century

Asia – Quick Stats

- By 2050 an additional 3 billion Asians could enjoy living standards similar to those in Europe.
- Asia’s per capita income could rise six-fold in purchasing power parity (PPP) to reach Europe’s level by 2050.
- Asia’s GDP could increase from \$17 trillion in 2010 to \$174 trillion by 2050, or half global GDP.
- Asia’s population is predicted to grow to over 5 billion people by 2050.

(Source: Australian Government, 2012)

The Moreton Bay region with access to strategic export infrastructure and regional investment opportunities is ideally placed to take advantage of the Asian Century.

“Asia’s rise is changing the world. This is a defining feature of the 21st century—the Asian century. These developments have profound implications for people everywhere.

Asia’s extraordinary ascent has already changed the Australian economy, society and strategic environment.

Within only a few years, Asia will not only be the world’s largest producer of goods and services, it will also be the world’s largest consumer of them.

For several decades, Australian businesses, exporters and the community have grown their footprint across the region. Today, for Australia, the minerals and energy boom is the most visible, but not the only, aspect of Asia’s rise. As the century unfolds, the growth in our region will impact on almost all of our economy and society

An increasingly wealthy and mobile middle class is emerging in the region, creating new opportunities. They are demanding a diverse range of goods and services, from health and aged care to education to household goods, and tourism, banking and financial services, as well as, high-quality food products.

Beyond economic gains, there are many valuable opportunities for building stronger relationships across the region, including through closer educational, cultural and people-to-people links” (Australia in the Asian Century White Paper 2012).

Community

"The sense of community in the Moreton Bay region is one of the reasons why I live and work in the Moreton Bay region. There are many diverse community groups working hard across the region to increase the well-being of its residents and contribute to the region being such a vibrant and safe place for families and individuals alike."

Shane Newcombe, Owner of Village Motors and Director of Our Village Foundation

The Moreton Bay is the most populous region in Queensland behind Brisbane and the Gold Coast with the region's population projected to grow by over 36% to 533,170 people in 2031. With a rapidly growing population and the age profile of the region predicted to grow significantly in the 65+ category, it will be important for the region to address these changes rather than be reactive.

Figure 35 on page 23 contains a SWOT Analysis of the Moreton Bay region's community profile.

Age Profile

The Moreton Bay region has a higher percentage of residents who are infants, children, teenagers and middle-aged adults - indicating the region is home to a number of young families. As at 30 June 2011, 21.7% of persons were aged 0 to 14 years, 65.9% were aged 15 to 64 years and 12.4% were aged 65 years and over.

The areas with the highest percentages of over 65s in 2011 were Bribie Island (32.1%), Clontarf (19%), Margate-Woody Point (19.4%), Redcliffe, and Scarborough-Newport (19.6%) (Regional Profile, 19 June 2013, Government Statistician).



Figure 34 – Bribie Island Seniors
(Source: www.ourbribie.com.au)

The proportion of the population aged 65+ is projected in the region to triple from 39,000 to 128,000 from 2006 to 2031, increasing from 11.7% to 24% of the population. This is expected to have significant impact on the region.

Families, Households and Housing Characteristics

In 2011, families totalled 79% of all households in the Moreton Bay region. Couple families were the most prominent, comprising 35% of all family types. This was slightly lower than the state average of 42%. In 2011, couples with children 15 years and under made up 31% of the Moreton Bay region (QLD 30%). Single parent families made up 16.5% of all families, which was comparable to the state average of 16.1%.

The larger proportion of residents who are infants, children, teenagers and middle-aged adults in the region, as compared to Queensland, in combination with the large number of couples with children, indicates that the region is attractive to families with children and is seen as an affordable place for family formation (Regional Profile, 19 June 2013, Government Statistician).

More families and young children require adequate and accessible community facilities (education, health, sport and recreation) and local services, including early childhood and child care, services and programs for mothers and family support and youth programs and services.

In 2011 separate dwellings dominated in the region, comprising more than 86% of all dwellings.

Lone-person households in 2011 made up 7.5% of the Moreton Bay region, a major decrease from 19.4% in 2006. It is projected that couple only and lone person households will grow as a proportion of all households from 48% to 58% over the 25 year period to 2031 (Department of Communities 2010). This should drive down average household sizes over time.

Compared to Queensland, households in the Moreton Bay region have similar household incomes. In 2011, nearly a quarter (25.3%) of households had an income between \$400 and \$999 per week, with 3.8% of households bringing in less than \$400, and 59.9% bringing in more than \$1000 a week.

20.2% of households in the region were classed as 'high income' in 2011 (over \$1700 per week before tax). The areas with the highest proportions of high income households were concentrated in North Lakes-Mango Hill, Narangba, Cashmere, and the Hills District (Regional Profile, 19 June 2013, Government Statistician).

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> ▷ Strong and committed community service organisations and service clubs in the region ▷ Number of networks in place that can be accessed for support and information ▷ MBRC Community department committed to supporting and improving community wellbeing ▷ Adaptability of community members, organisations and services in the face of difficulties and hardship ▷ Key Government agencies located in the region 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> ▷ Rapid growth and demand on services, programs and infrastructure ▷ Community facility provision gaps ▷ Social pressures placing demand on services that are at capacity (staffing, funds and space) ▷ Government agency cross-boundary differences in the region, and also organisations and agencies not working together strategically and collaboratively ▷ No comprehensive analysis and knowledge of regional social service provision, issues and gaps ▷ Continued pockets of disadvantage in the region ▷ Complexity of client needs ▷ Accessibility to employment opportunities and choices ▷ A lack of integrated and flexible community transport options
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> ▷ Outcomes of “Our Tomorrow” MBRC Community Plan 2011-2021 ▷ Government policies supporting social inclusion and strong, fair and connected communities ▷ Innovation and initiatives that can make a difference and find solutions for local issues ▷ Increased health services in the region ▷ Caboolture Hub for learning and capacity building programs – local, regional and wider regional programs 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> ▷ Change of Government priorities and funding ▷ Lacking of continued support and funding to services ▷ Ever increasing demand on services and growth pressures and structural ageing of the population ▷ Trend for State and Federal Government to fund larger agencies, often based outside of the region, could lead to a loss of smaller local services with local insights ▷ Cost of living impacts on community wellbeing ▷ Continued pockets of high and long-term unemployment

Figure 35 – SWOT Analysis of the Moreton Bay region’s Community

Residential Development

Residential development activity decreased over the 12 months to 30 June 2012, to 2534 dwelling approvals from 2748, in 2010 to 2011. 10.6% of Moreton Bay Regional Council area residents were renting their home from a government authority such as the Department of Housing. This percentage was similar to the state at 10.4%. Some areas have no public housing with the bulk of the stock in Bribie Island (3.1%), Caboolture (7.6%), Deception Bay (6.5%), and Margate-Woody Point (9.1%) (Regional Profile, 19 June 2013, Government Statistician).



Figure 36 – Family at North Lakes Residential Development (Source: Stockland)

Disadvantage

Analyses of the socio-economic index for advantage and disadvantage show local variation in the communities of the Moreton Bay region, with high levels of socio-economic disadvantage evident in some areas such as Caboolture Central and South, Bellara, Margate and Bongaree, mostly in the north and east of the region (ABS 2010).

In the Moreton Bay region in 2011, the proportion of households receiving less than \$400 per week (before tax) was 3.8%, of the region's households, compared to 4.4% in Queensland. While the region had a relatively lower proportion of low income households, it is important to note that this varied across the region. Proportions ranged from a low of 1.9% in Eatons Hills to a high of 7.9% in Deception Bay. The five areas with the highest proportions of low income households (less than \$400 a week) were concentrated in the north and east of the region (ABS 2010).

Housing and affordability issues are also impacting on the region, for the general community, as well as, in those areas experiencing disadvantage.

Disadvantage within the region's indigenous community is generally higher than for the non-indigenous community, as per the following summary of key demographic indigenous household data:

- A significantly higher proportion rented public housing (12.8%) and private rental (40.4%) compared to non-Indigenous in the region (3.6% and 21.8% respectively) in 2006
- Less owned their own dwelling (11.2%) compared to non-Indigenous in the region (31.2%) in 2006
- There are over 16 percent more one parent families (31.1%) compared to the non-Indigenous community.

(Regional Profile, 19 June 2013, Government Statistician)

Volunteers

Moreton Bay has a relatively strong volunteering culture which is generally seen as an indicator of community wellbeing and social connection. At the time of the 2011 Census, there were 50,951 people who volunteer on a regular basis in the Moreton Bay region, an increase from 43,589 volunteers in 2006. This represented 17.5 % of the population compared to 18.5% in Queensland.

There is opportunity to increase the level of volunteering in the region to build capacity, support the demands of growth and ageing, and contribute to a safe and caring community.

Samford Futures

Samford Futures was initiated and facilitated by the ViVa Samford sub-committee of the Samford Progress and Protection Association Inc. in 2011 and involved extensive community consultation with the Samford community on their future vision for Samford.

The eight main areas that resulted were Samford Parklands, Development of Samford Valley and Village Identity, The Arts, People Movement, Sustainable Food Culture, Community Participation and Decision Making, Telecommunications and Digital Futures, and Sustainable Samford.

Samford Commons

The Samford Commons initiative is proposed to be located within the existing Samford Parklands precinct – a result of the former Pine Rivers Shire Council's 2004 "Samford Valley CSIRO Parklands Master Plan Study". Since 2007, the public component has been known as Samford Parklands.

The Samford Commons proposal is for a substantial area of the Samford Parklands that remains largely undeveloped. The proposed uses include recreation, culture and environmental sustainability initiatives such as an Urban Farming Centre, School of Sustainability, Arts Precinct, shared business facilities, and a "co-working" space.



The site proposed for development is located adjacent to existing bushland and a watercourse, and would be re-vegetated with indigenous species and feature picnic facilities, walking/exercise trails, a playground and skate park, and off-leash dog area, along with interpretive signage and public art installations.

For more information visit:
<http://www.samfordfutures.org/>

“The Pine Rivers Neighbourhood Centre works towards supporting connected, vibrant and resilient communities in the Moreton Bay region, and it is our mission to enable and encourage individuals and families to take informed control of their own lives. There are so many individuals at the Centre and individuals and community groups across the region that work tirelessly to enhance community well-being, of which I am proud to be a part of.”

Melinda Fleming, Director, Pine Rivers Neighbourhood Centre

Internet Connectivity

Internet connectivity is regarded by many as a social barometer of learning, growth and prosperity. In the 2011 Census, the proportion of households with an internet connection was 80.1% in the Moreton Bay region compared to 78.3% in Brisbane (Regional Profile, 19 June 2013, Government Statistician).



Queensland Health also provides community-based centres in Caboolture, Redcliffe, North Lakes and Pine Rivers. Aboriginal and Torres Strait Islander health services are established in the region, including the Community Health Service at Morayfield and Murri Teilah in Caboolture.

The \$53M North Lakes Health Precinct provides a wide range of community-based health care services in the centre of the Moreton Bay region, and is the first of its kind in Queensland – offering primary, community and specialist health care including a \$7M state-of-the-art renal unit.



Figure 38 – North Lakes Health Precinct (Source: www.northlakestimes.com.au)

Health

The Moreton Bay region has two public hospitals, one at Caboolture and another at Redcliffe. Private hospital services are currently provided from Caboolture Private Hospital, North Lakes Private Hospital, Marie Stopes International (day hospital), Northside Endoscopy Service, Peninsula Eye Hospital and Peninsula Private Hospital (Queensland Health 2013).



Figure 37 – Caboolture Hospital (Source: www.couriermail.com.au)

Ongoing community engagement has identified a need to expand health services in the Caboolture area and this needs to be progressed to meet demand from the growing and ageing population.

Environment

The environmental diversity of the Moreton Bay region, makes it attractive to both residents and visitors alike.

There is a significant diversity of environmental features in the Moreton Bay Region. The region relies on a healthy natural habitat as the essential building block for sustainable communities and sustainable local economies.

For a SWOT Analysis of the Moreton Bay region's environment, refer to **Figure 40** on **page 27**.



Figure 39 – Bunyaville Conservation Park Day Use Area
(Source: www.weekendnotes.com.au)

Ecological Footprint

The ecological footprint measures the area of productive land required to support the resource demands and absorb the wastes of a given population. Ideally, the amount of land required to support the global population should be less than or equal to the amount of productive land available. The average footprint for the population for the Moreton Bay Region, is estimated at approximately 8.3g ha per person (higher than for Queensland at 7.19g ha).

An intermediate target would be to reduce the footprint by 25-30% by the year 2026 to 5.5 global hectares (g ha) per person (Queensland State of the Region Technical Report, Qld Government, 2008).

Waste Management

One of the issues of concern to environmental groups and the community is waste management. The MBRC is working to reduce waste and its' carbon footprint and has undertaken a number of solutions:

- 12 waste facilities within the region, free for residents to use (up to 3m³ per visit to a waste facility). Facilities accept residential, commercial and industrial waste, including asbestos.

- Free mulch program for residents (using green waste dropped off by residents at waste facilities)
- Online and print resources for residents about composting and worm farming to re-use kitchen waste.

There have also been very successful outcomes in effective resource recovery of recyclable waste, as well as, a number of effective school programs in partnership with the Queensland Government to encourage waste reduction and resource recovery programs. MBRC also encourages residents to reduce household waste through the online Living Smart Homes program, a partnership with the Sunshine Coast Regional Council.

Climate Change

A recent report released by the Climate Commission, *The Critical Decade 2013*, highlights predicated risks of climate change being heatwaves, bushfire weather, decreasing rainfall patterns and sea-level rise. Rising sea-levels in the Moreton Bay region in particular will threaten agriculture and tourism, and a changing climate also poses risks for human and livestock health and natural ecosystems.

In 2009, Moreton Bay Regional Council adopted a climate change policy and Roadmap which provided direction for Council's action on climate change to reduce carbon pollution and prepare Council and its residents for a more variable climate. The Roadmap was adopted by Council in February 2013 and implementation is overseen by a Climate Change Leadership Committee to ensure the timeframes and targets are met.

A sustainable business strategy for the region commissioned by RDA Moreton Bay has been recently completed and will be implemented in partnership with MBRC to prepare the region's businesses for a low carbon economy through increasing business resilience, efficiency and reducing business environmental impact within the region.

The Federal Government Clean Energy Future Policy came into effect on 1 July 2012. RDA Committees will be expected to play a role in the implementation of any Australian Government Clean Energy Future initiatives, by assisting a transition, providing feedback on local effects and helping to facilitate solutions to local challenges.

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> ▷ Strong MBRC policies pertaining to waste management and natural area protection ▷ A number of environmental advocacy groups and organisations within the region ▷ Specific environmental education programs ▷ Leadership shown by some elected representatives ▷ Commitment and capability of many government staff ▷ Successful advocacy to limit inappropriate development in some areas ▷ Liveability and diversity ▷ Natural habitat has the potential to be conserved and also rebuilt where required ▷ Commitment to Sustainable Business Strategy 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> ▷ Loss of natural assets ▷ Insufficient infrastructure for transport by foot, bicycle, car and train ▷ Waste services to business are insufficient ▷ Legislation does not prevent inappropriate development of housing, industry and business ▷ Poor connectivity of green spaces and wildlife habitat corridors ▷ Insufficient protection of green belts ▷ Consumerism leads to unsustainable activity ▷ Focus on regional food production and consumption ▷ Government and community environmental groups acting in isolation
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> ▷ Implementation of the Sustainable Business Strategy ▷ Deliver diverse environmental education programs ▷ Use diverse environmental engagement methods with community and business about sustainability ▷ Government and utilities to provide incentives/rebates and support behaviour change on sustainable practice – households/businesses ▷ Conduct workshops for developers on legislation for development ▷ Moreton Bay Regional Council acquiring land for environmental use ▷ Opportunity to offer protection to environmental assets through new MBRC Planning Scheme 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> ▷ State legislation not strong enough to limit environmental damage ▷ Food and water security is problematic and lacking ▷ Lack of public and business awareness and acceptance of climate change and the need for sustainable practices

Figure 40 – SWOT Analysis of the Moreton Bay region’s Environment

Water Management

As the region continues to experience high population growth, the pressure on our waterways will also increase. Concerted management and action by government, community and industry can prevent, reduce or reverse the decline in waterway health. The MBRC has responded to the South East Queensland Regional Water Quality Management Strategy 2001, by preparing management plans for a range of catchments and waterways throughout the region and partnering in the SEQ Regional Ecosystem Health Monitoring program to monitor the Pine and Caboolture Rivers.

In 2010 an Action Plan for the Caboolture River was formally endorsed by MBRC, as part of Council’s Caboolture River Recovery Plan. The Action Plan highlights 11 priority actions for MBRC to implement from 2011-2013. The Action Plan has a vision that by 2031 the health of the Caboolture River and associated catchment areas is greatly improved from 2009 levels.

Vegetation and Wildlife Management

MBRC manages 9162 hectares of natural area reserves, riparian corridors and road reserves with high biodiversity values in the region. MBRC also undertakes roadside clearing and spraying where required.



Figure 41 – Stoney Creek Day Use Area
(Source: RDA Moreton Bay)

Natural Area Management and associated support services in the region is mainly undertaken by MBRC in partnership with the community through various programs such as Bushcare volunteer groups (natural area planting and weeding), Backyards for Wildlife, Land for Wildlife, conservation agreements and research partnerships programs such as the Moreton Bay Koala Conservation Partnership Project and the Shorebird Research Project. MBRC also operates five community nurseries and the Redcliffe Botanical Gardens.

“As the owner of NACC Sustainability and long-time resident of Samford in the region, the natural areas of the region were one of the drawcards for locating my family here, along with the strength of the various community groups that work to protect and educate about our region's environment. It is also a region where businesses care about the impact they have on the environment and work to be more sustainable.”

Howard Neilsen - Principal, NACC Sustainability and Creator of the Greenstreets program

Open Space, Outdoor Recreation and Walking Trails

The provision of open space in the region sees 85% of residents living within a walking distance of 500m to a park. The MBRC currently has over 500 kilometres of Recreation Trails; 2678 ha of Recreation parkland; 976ha Sports land; 1202ha Conservation land; and 1172ha Bushland Recreation/Outdoor Recreation land (Sports, Recreation and Outdoor Space, MBRC 2013).

Current studies for open and recreation space developed by MBRC include the Sport and Recreation Strategy 2010-19 and the Skate and BMX Strategy 2010. There are also numerous Park and Open Space Master Plans existing or under development which outline a future vision for these areas and include Park and Open Space Master Plans outlining a future vision for the area.

A key outdoor recreation initiative for the region, once completed, will be the Moreton Bay Cycleway. This will enable cycling activity within the region and surrounding local government leisure areas.

Another recently completed initiative is Moreton Bay Recreational Trails, which consists of various brochures on the region's trails, along with an interactive Recreational Trail Map, and a summary of Open Space Areas.

Environmental Education

There are some examples of excellent environmental sustainability practice in the region, particularly within community and education contexts. However, there is a strong need for local government, businesses and communities to embrace sustainability practices, which will lead to more sustainable communities and more sustainable local economies.

There are a diverse number of environmental education programs and activities run by MBRC and community groups to improve and protect the environment and encourage sustainable practices. MBRC and the Sunshine Coast Regional Council run the Living Smart Homes program, a free online program providing information to residents to be more sustainable and reduce their footprint on the local community.

MBRC also operates three community-supported regional Environmental Education Centres and runs a comprehensive schools environmental education program around waste, sustainability biodiversity and energy efficiency.



Figure 42 – Woorim Beach, Bribie Island
(Source: www.ourbribie.com.au)

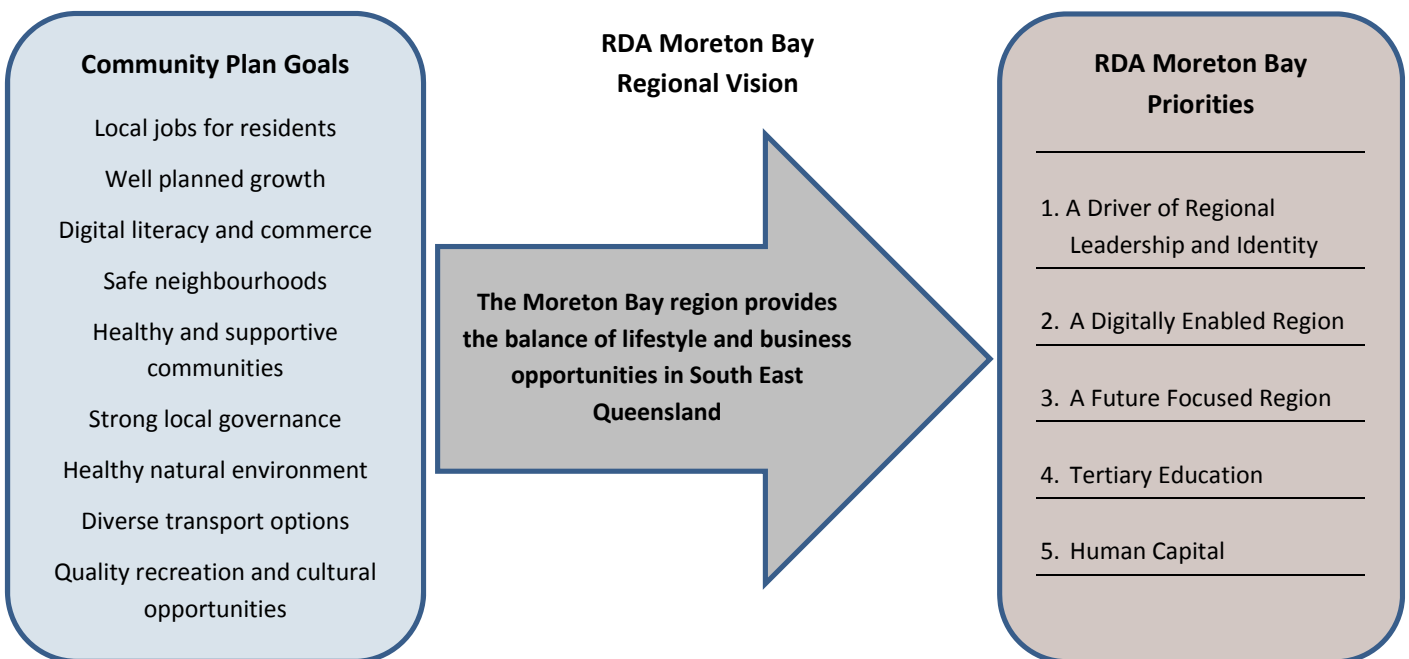
REGIONAL PRIORITIES

The Regional Roadmap priorities have been developed on the premise of the “Quadruple Bottom Line”, and structured around the COAG key determinants of long-term regional economic growth:



Figure 43 - COAG Key Determinants of Long-Term Regional Economic Growth

RDA Moreton Bay covers the same geographic area as Moreton Bay Regional Council (MBRC), it is therefore essential that the organisation’s regional priorities reflect those of MBRC – its key regional partner. The following diagram clearly identifies the linkages between the goals contained within the MBRC Community Plan, the regional vision and the regional priorities to be taken forward by RDA Moreton Bay.



The RDA Moreton Bay priorities have been refined and developed through extensive stakeholder consultation and engagement. **Appendix 1 – Stakeholder Consultation and Engagement** clearly outlines this process and how RDA Moreton Bay works across government and with other regions.

The following narrative is designed to briefly connect the vision for the region, role of RDA and the analysis of the region to demonstrate how the regional priorities were identified and how in turn they relate to the regional strengths, challenges, needs and opportunities.

Moreton Bay Region: Regional Leadership and a Future-Focused Region

Regional Development Australia Moreton Bay based on the charter of RDA and through stakeholder discussions has a key role to play in driving:

- National and international recognition for the region; and
- Leadership in the shaping and influencing the future of the region.

“Leadership capacity building is important for the Moreton Bay region, which is why Mission Australia decided to fund the Leadership Exposed series of breakfast workshops, an RDA Moreton Bay initiative.”

Kit Ison, Area Manager, North and Outer North Brisbane Region, Mission Australia

Being future focused will enable the region to:

- Provide a consistent framework to guide regional planning, action and innovation
- Identify and understand the major forces that will shape the big picture environment and the local community into the future
- Place context around regional growth
- Detect social changes before they become trends.

The Moreton Bay region is a relatively new region and RDA Moreton Bay is working with Moreton Bay Regional Council to build regional leadership through advocacy, regional marketing, investment attraction, and through the advancement of the Peak Advisory Body concept to foster a shared sense of regional focus across the three levels of government, Chambers of Commerce, business groups and community organisations fostering collaboration and cooperation for the net benefit of the region.

The development of the regional logo (**Figure 44**) is an example of how RDA Moreton Bay is working with Moreton Bay Regional Council to enhance the identity of the region, which also includes the development of a range of investment attraction marketing collateral.

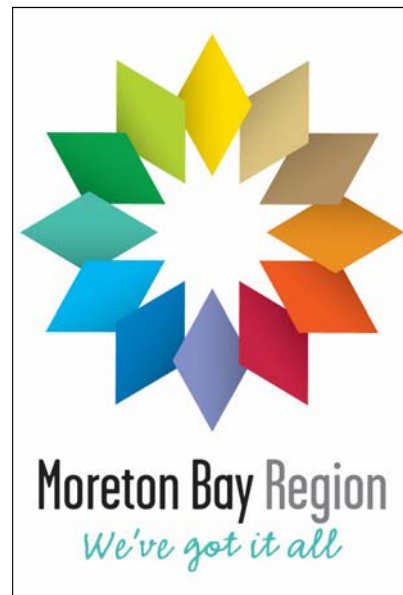


Figure 44 – Moreton Bay Region Logo (Source: Moreton Bay Regional Council)

Infrastructure to Support Growth

A key challenge for this high growth region is to secure the investment in infrastructure which is required to support its population growth. The Charter of RDA makes the organisation ideally placed to work alongside Moreton Bay Regional Council to support its regional planning and to advocate on the region’s behalf for investment in the infrastructure required to support the region’s growth.

Ranked 29th
 in Australia for road infrastructure (KM from region’s business centre to nearest major highway)
 (Source: RAI)

The region’s key infrastructure project is the Moreton Bay Rail Link – a \$1.1B investment by the three levels of government and is a prime example of the type of infrastructure required to support the needs of the region.

Different models of funding infrastructure also need to be considered, alongside using technologies for example to improve the efficiency of existing infrastructure. Demographic change, changing tax revenues and increasing demand for the infrastructure dollar requires the development of alternative funding models beyond the public purse.

Human Capital - Jobs for the Future

The most significant economic development challenge facing the Moreton Bay region is the creation of a broader diversity of employment opportunities to meet the needs and aspirations of its residents, including the 100,000+ workers who leave the region each day for employment. The Moreton Bay Regional Council Economic Development Strategy is seeking to increase the employment self-containment rate from 50-70% by 2031.

Figure 46 on page 32 indicates the numbers and destinations of professional and government workers who live in and commute outside of the region each day. These numbers are set to increase ahead of the rate of population growth placing significant strain on infrastructure, increasing commuter times and costs. This in turn increases congestion, impacts on the region’s sustainability, the quality of life of residents and places additional costs on doing business in the region.

The majority of these jobs will be created by small business which also needs the confidence to invest and create these opportunities. Investment attraction, new and emerging industries and digital technologies through the use of more flexible work patterns, for example, can also provide a broader range of employment options, and reduce the need to commute on a daily basis.

The Deloitte Access Economics report, *Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions (2013)*, indicated that the following occupations will increasingly be in demand between 2011-12 and 2031-32:

- Professionals
- Managers
- Technicians and Trade workers

Predictions for the industrial structure of employment in the Moreton Bay Region in 2011-12 and also in 2031-32 are shown in **Figure 45**.

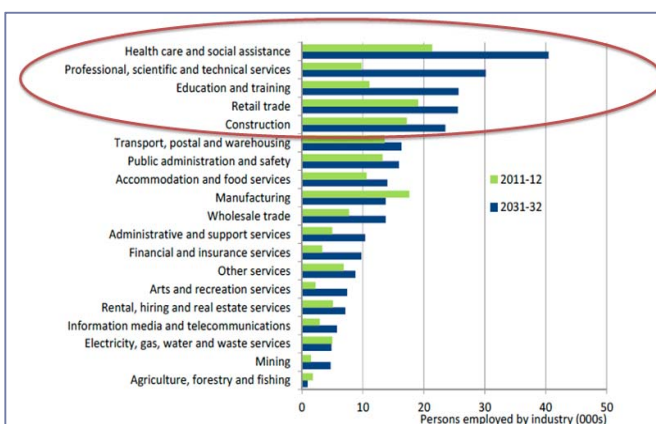


Figure 45 – Industrial Structure of Employment in the Moreton Bay region 2011-12 and 2031-32 (Deloitte Access Economics 2013)

The report also detailed the following expected labour force developments for the Moreton Bay region:

- Declining employment in agriculture, manufacturing and utilities.
- An increasing dominance in the current largest employing sectors within the region, including health care and social assistance, professional, technical and scientific services, education and training, and retail trade. The manufacturing sector is forecast to contract.
- Potential skill shortages amongst the ten most common occupations in the region in 2032, including managing directors, electricians, cleaners and primary and secondary teachers.
- “Transformational” projects within the region (including the Moreton Bay Rail Link, The Corso at North Lakes, and North East Business Park) forecast to raise employment levels by 1.5% around base case projections.
- Mining employment growth remaining well below the State average, however, there is potentially greater opportunities for supply of goods and services to the resources sector.
- Skills gaps in resources sector key occupations such as engineers, drillers and geologists are likely to persist, which may provide opportunities for training providers in the region.
- A rising labour supply challenge with a working-age population which is on average older, and therefore at greater risk of not participating in the labour force.
- Skilled workers remaining difficult to find, with the areas of strongest labour demand generally expected to be areas where there are high skill requirements.

With the Moreton Bay region having a lower percentage of employment by profession in the managerial and professional category, an increase in employment opportunities in the region through teleworking and investment attraction will create employment for professional workers in the region.

Ranked 45th
in Australia for
skilled labour (%of
workforce employed
as managers and
professionals
(Source: RAI)

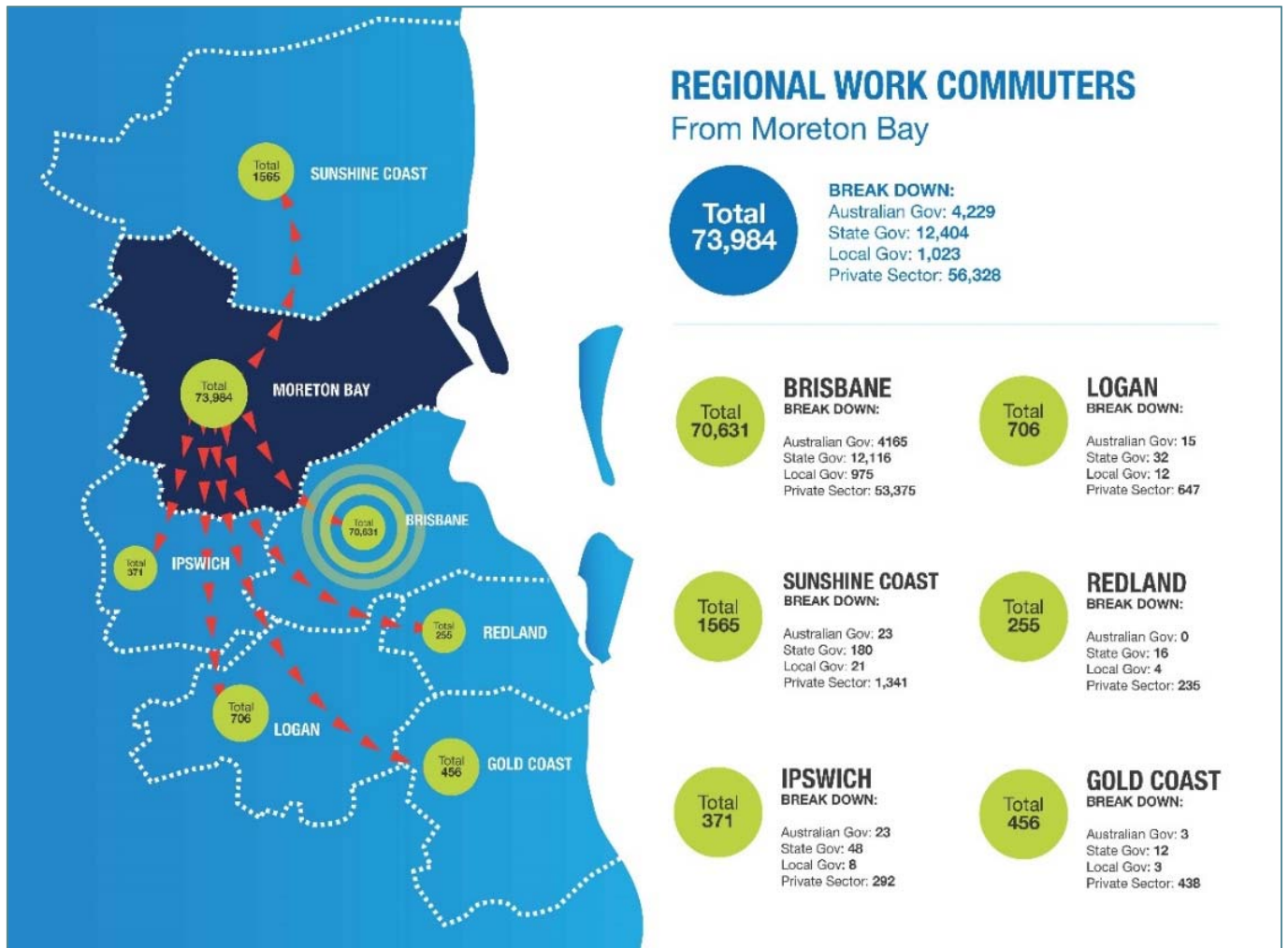


Figure 46 – Place of Work of the Moreton Bay Region’s Workforce (Government and Professional workers)
(Source: RDA Sunshine Coast)

The region also has a number of communities which continue to experience unemployment higher than 10%, long term unemployment and also under employment, including residents from an Aboriginal & Torres Strait Islander background, strategies need to be developed to tackle these issues if the region’s population is to fully benefit from the predicted growth of the region.

Ranked 40th
in Australia for
unemployment (and
41st for youth
unemployment)
(Source: RAI)

A clear focus for the region is to support the growth of its existing businesses fostering an environment of confidence in the future which enhances productivity, innovation, digital literacy and collaboration including through business

clustering. Businesses will also require increasing levels of infrastructure with a focus on innovation, access to knowledge and training, digital technologies and increasing global connectivity.

A further focus for the region required to increase the availability of skilled workers for employers is to increase the percentage of residents attending vocational institutions to address the decrease from 14.1% for vocational qualifications in 1991 to 6.2% in 2011.

Ranked 41st
in Australia for
access to technical
or further education
(% of working age
population attending)
(Source: RAI)

Investment Attraction

“As President of Commerce Caboolture and an Associate with SRJ Accountants and Business Advisors, I believe the Moreton Bay region offers real opportunities for all businesses. The region is strategically located and offers a wealth of resources available for growing businesses to help them increase productivity, expand their workforce, and generally improve their business. There are many active and supportive Chambers of Commerce in the region ready to make new businesses welcome.”

Robert Pitt, President of Commerce Caboolture, and Associate, SRJ Accountants and Business Advisors

The Moreton Bay region is ideally placed for businesses to access international, national and regional markets. The attraction of new investment to take advantage of the region’s strategic location and competitive advantages is therefore a priority and activity focuses on adding economic value and diversity, building on the region’s strengths, and creating a broader range of employment opportunities.

The Moreton Bay region provides the perfect balance between business and lifestyle:

- 1 Location:** a strategic location that provides access to the world.
- 2 Land:** plenty of room to grow with over 1,800ha of land for commercial and industrial uses.
- 3 Workforce:** a large, highly skilled and accessible workforce of 185,000.
- 4 Business:** cost advantages that add to your bottom line.
- 5 Lifestyle:** a great lifestyle in a beautiful region.

Through an economic analysis, the following have been identified as key target sectors for investment attraction:

- **Building Product Manufacturing:** metal products; cement, lime, plaster and concrete; pre-fabricated buildings
- **Machinery and Equipment Manufacturing:** industrial, medical devices, professional equipment, speciality transportation equipment, and solar
- **Food and Beverage Manufacturing:** baked goods, processed foods, beverages including bottling, niche products and health food drinks
- **Professional Services:** professional services (accounting, banking, legal, property), back office/processing centres, business customer service centres, training centres (IT, engineering, financial, insurance)
- **Transport and Logistics:** distribution centres and logistics operations (warehousing and distribution for import and export).



The region is ideally placed to link into the economic opportunities created through the Asian Century.

Regional Marketing Strategy

In an increasingly competitive and connected global community, the region requires a long term strategy to more effectively utilise its strategic location and competitive advantages to attract investment, businesses, entrepreneurs and visitors to support the future sustainable economic growth of the region. A proactive approach to population growth should also be considered – attracting new residents with the skills required by business and money to invest for example.

The Moreton Bay Digital Vision

Digital technologies including broadband services can help regions to create better futures, realise their visions and pursue their priorities. The most successful regions are those that adopt a strategic approach, with projects and actions that match their unique local characteristics and opportunities. That is why RDA Moreton Bay partnered with the Moreton Bay Regional Council and the Queensland Government to commission the region’s first Digital Futures Plan (see **page 36**).

Digital technologies are both disruptive and transformational. They are changing our lives – how we live – how we learn – the way we work – types of industries we work for – the skills we need – creating new industries, new opportunities and fresh challenges.

Businesses that integrate internet tools into their business models grow twice as fast as those which do not.
(Advancing Australia as a Digital Economy, Dept of Broadband, Communications and the Digital Economy)

The roll out of the NBN has already commenced in the region providing a competitive advantage over other regions in Australia, notwithstanding both residents and businesses have access to digital technologies through existing infrastructure, however, blackspots across the region also exist.

Digital Economy in Australia

- By 2020 the Australian Government’s aim is that Australia will be among the world’s leading digital economies[~]
- Increased cloud computing adoption will grow the Australian economy by \$3.3B by 2020[~]
- The direct contribution of the internet to the Australian economy is expected to grow from \$50B to over \$70B per year by 2016[~]
- If 10% of Australian employees were to telework 50% of the time, there could be total annual productivity gains of up to \$1.9B[~]
- Widespread adoption of broadband-enabled enhancements in information technology can return Australia to its long-term average productivity growth of 1.7% by 2020⁺
- 91.2% of Australian businesses have an internet connection[>]
- *56.9% of Australian businesses have no online presence at all*[#]

Digital Economy in the Moreton Bay Region

- 80.1% of occupied private dwellings had an internet connection[>]
- 82% of businesses have a website[#]
- 50% of businesses transact online daily with customers[#].

(Sources: [~]Access Economics (2010), [~]DBCDE; [~]Deloitte Access Economics (2011) ⁺IBIS World (2012), [>]Government Statistician (2013); [#]Boardroom Business (2011))

The Australian Government has adopted a National Digital Economy Strategy with goals in 8 areas:

1. The connection of homes to broadband services
2. The use of online services by businesses and not for profit organisations to drive productivity improvements, to expand their customer base and to enable jobs growth
3. The access to smart technology to manage energy use
4. The use of digital technology to improve health services
5. The use of digital technology to improve education

There is a wide variation in the adoption of digital technologies by the region’s businesses. Some businesses are using digital technologies in agile and transformational ways but many

businesses lack fundamental capacities for adopting technologies in effective ways.

As a result of increasing uptake by consumers of digital technologies and the strength of the Australian dollar, pressure for business uptake of online trading is growing.

With over 82% of businesses in the region reporting in the December 2011 Moreton Bay Business Confidence Survey that they had a website, the region is in a position to take advantage of online trading. However, this figure indicates that 18% of businesses do not have a website, and the survey results also show that 8% of business have no online presence at all and only 50% of survey respondents use online technology to transact online daily with customers.

“One third of the Australian economy faces imminent and substantial disruption by digital technologies and business models”

(Deloitte Australia 2012)

During 2013-14, RDA Moreton Bay will proactively work with other regions to implement digital strategies; sharing knowledge and experience, and creating efficiencies in service delivery.

Strong progress is being made in the use of online services by government and community organisations. The Moreton Bay Regional Council now provides a rich array of online services.

Ranked 49th
in Australia for
broadband connections
(% of households and
businesses with
broadband internet)
(Source: RAI)

Moreton Bay Digital Futures Plan

This plan proposes a vision for the Moreton Bay Region's future, enhanced by broadband and digital technologies:

The Moreton Bay Region will be a thriving region of opportunity where people and businesses in the diverse communities confidently use digital technologies to connect within and beyond the region to support prosperous, sustainable and vibrant lifestyles.

The following goals are proposed to support this vision:

Capable people: The people of the Moreton Bay Region will have the confidence, capability and access to use digital technologies to support fulfilling, creative, healthy and socially connected lives.

Connected communities: The region's communities will actively use digital technologies to promote and celebrate their localities to residents and visitors.

Transformed work: A higher proportion of residents will work within the region through the availability of digitally equipped working spaces in "tele-centres" and in their own homes.

Thriving economy: The region's economy will be thriving and diversifying as existing and new businesses use digital technologies to grow their market shares, to improve productivity, to enhance their knowledge resources and to build new networks of suppliers and partners.

Social inclusion Social disadvantage and isolation will be reduced by using online services to better connect people, improve the delivery of community services and help provide people with basic skills.

Environmental sustainability: Lifestyles will be more sustainable and the understanding of the region's natural assets and ecosystems will be higher, through the use of digital technologies, online information resources and smart infrastructure.

Access to services: The people and businesses of the region will have improved access to education, health and other services, delivered efficiently using digital technologies.

Transforming Work Patterns

By 2020-21 Telework enabled by high speed broadband will create 25,000 full time jobs. If 10% of Australian Employees were to telework 50% of the time, the total annual gain to the Australian Economy would be around \$1.4 - \$1.9B.
(Advancing Australia as a Digital Economy, Dept of Broadband, Communications and the Digital Economy)

A high priority for the Moreton Bay Region is to significantly improve the level of employment self-containment and reduce the number of residents commuting out of the region each day.

Digital technologies are enabling new patterns of work, with employees of private and public sector organisations being productive and connected while away from their employers' premises. There are also opportunities for freelancers and micro-businesses to thrive without traditional offices. The work arrangements can take a number of forms, including home based working, working while travelling, working while on the premises of clients and working in "third spaces" such as SMART Work Centres and co-worker hubs, which promote collocation, collaboration and innovation.

SMART Work Centres also provide opportunities for government workers to collocate outside of the traditional Brisbane CBD locations thereby reducing costs and commute time, whilst providing increased flexibility and productivity.

SMART Work Centres

RDAs Sunshine Coast, Logan & Redlands, Gold Coast, Moreton Bay and Brisbane have jointly funded a project to support the development of SMART Work Centres across South East Queensland.

SMART Work Centres, or Digital Hubs, are third workspaces between a commuters home and usual place of work, allowing employees the flexibility to divide the working week between a central base office, a SMART Work Centre and at home.

A typical SMART Work Centre is consists of co-located office facilities equipped with the latest information and telecommunication technology, meeting room facilities, event space, kitchens and cafes.

Strengthening the Economy

Many existing businesses in the Moreton Bay Region face particular challenges and threats due to global market conditions, the strength of the Australian Dollar and the disruptions arising from new technologies. The economic profile of the region means that the region is vulnerable.



The strategic and carefully planned use of digital technologies can provide many opportunities for established and emerging businesses. The report of the international Broadband Commission for Digital Development, *Broadband: A Platform for Progress*, highlighted 3 areas of business benefit:

- Productivity
- Innovation
- The restructuring of value chains.



Manufacturing is a key sector for the Moreton Bay Region. The *Smarter Manufacturing for a Smarter Australia* report from the Prime Minister's Manufacturing Taskforce identified that two of the key challenges in sustaining the manufacturing sector in Australia were:

- Applying knowledge by value adding through innovation
- Driving collaboration to develop new capabilities, new cultures and competitiveness.

Digital technologies provide powerful opportunities in both of these areas.

National Food Plan

The Australian Government's National Food Plan presents opportunities for the region's food industry through a roadmap defining sixteen goals and new initiatives. Initiatives capitalise on opportunities such as exporting to Asian markets, and support the creation of a national food brand, food industry trends analysis, grants for community food initiatives, supply chain reform, State of the Food System annual reporting, youth education and establishment of the Australian Council on Food.

Business Clusters

During 2012-13, RDA Moreton Bay managed 7 workshops facilitated by international business cluster expert, Ifor Ffowcs-Williams. The workshops raised the awareness of opportunities to develop business clusters across the Moreton Bay region.

Business clusters (or "Smart Specialisations") are 'Geographic concentrations of interconnected companies, specialised suppliers, service providers, firms in related industries and associated institutions...in particular fields that compete but also cooperate' (Prof Michael E Porter)

Business clusters generate:

- More employment
- Higher economic growth
- Higher wages
- Better productivity
- Higher levels of innovation
- Increased levels of entrepreneurship
- More start-up's/new business formation/higher survival rates
- Attract more investment/new industries emerge
- Tend to be faster growing as they service a larger market
- Patent levels tend to be higher (indication of innovation levels)

(Ifor Ffowcs-Williams)

Cluster Opportunities (Smart Specialisations) in the Moreton Bay region:

- Manufacturing (Advanced Manufacturing)
- Building Product Manufacturing
- Sustainable / Lean Construction
- Machinery & Equipment Manufacturing
- Food & Beverage Manufacturing
- Professional Services
- Transport & Logistics
- Aged Care
- Cleantech/Climate Smart Technologies

Despite increasing pressures on the competitiveness of Australian manufacturing, the SEQ manufacturing sector continues to be a major employer and the **most significant contributor to regional exports**. 72% of Queensland's manufacturers and 15% of Australian's total manufacturing is performed in SEQ and there are more than 13,350 businesses involved. Unlike many industries manufacturing has extensive linkages across the economy both as suppliers to and purchasers from other businesses and as such underpins much

economic activity. Today, manufacturing is focussed on innovation in products, processes and services.

More importantly, manufacturers must be positioned to capture the emerging opportunities arising from the Asian Century, by leveraging our natural resource advantages and world class engineering, and sophisticated design skills the region has a unique opportunity to meet many of the needs of rapidly developing Asian communities and their growing middle classes. A dynamic high value export oriented manufacturing industry will be key to the region's economic sustainability.

Smart Specialisations

“Smart Specialisations are about generating unique assets and capabilities based on a region’s distinctive industry structures, natural assets and knowledge bases. The concept is premised on the economic trend that by concentrating knowledge resources and linking them to a number of priority economic activities, countries and regions can become – and remain – competitive in the global economy. This type of specialisation allows regions to take advantage of scale, scope and spill overs in knowledge production and use, which are important drivers of productivity. In essence, they are drivers of future regional economic growth.”

(Guide to Research and Innovation Strategies for Smart Specialisations, Regional Policy, EU Commission, May 2012)

Connecting Varied Communities

The Moreton Bay region is an extensive region, made up of many different communities with their own identities and heritages. The challenge for the region is to harness the power, connections and efficiencies of a large region with a single strong local government authority, while preserving and celebrating the identities of the diverse local places and communities.

Digital technologies provide opportunities to support efficient community and government services that are regionally coordinated but locally available. These include a range of social, education, health, cultural and development services.

Tertiary Education

It is recognised that as one of Australia’s fastest growing regions, the Moreton Bay region is under-served by the tertiary education sector and that significant opportunities are available to improve the availability of both education and vocational training which better meet the needs of an increasing population. The vast majority of students need to travel to a point outside of the region to access both higher education and training.

The tertiary education sector is undergoing a period of significant global change, and the Moreton Bay region is in a position to develop a future based Tertiary Education model which takes advantage of the following drivers of change within this sector:

- Democratisation of knowledge and access
 - Digital technologies
 - Integration with industry
 - Global mobility
 - Contestability of markets and funding.
- (University of the Future, Ernst & Young, 2012)

The tertiary education sector has the potential to play a significant role in the development of the Moreton Bay region:

- Tertiary education institutions are often the major regional employer and purchaser of goods and services
- Driver of the knowledge economy to the region
- Promotion of innovation through new skills, research and development through relationships with industry
- Builder of new and emerging industries
- Ability to promote business clusters through collaboration and integration
- Promotion of regional identity through specialisation and regional leadership

Ranked 27th
in Australia for access
to tertiary education
services (% of working
age population
attending higher
education institution)
(Source: RAI)

Ranked 27th
in Australia for
presence of
research
organisations
(Source: RAI)

- Widening the employment base of the region and providing opportunities for employment and retention of graduates in their home region
- Provider of educational opportunities for disadvantaged population and areas.

Education is also Australia’s largest export, and the fourth largest export earner overall. As a result of Asia’s growing middle class, it is expected to increase its share of the economy. Already, 79% of the income generated by the education sector is linked to Asia, mostly through universities. Regional universities, schools and vocational education institutions will play an important role in growing Australia’s education services industry.

Sustainable Business

With businesses responding to the July 2012 Moreton Bay Business Confidence survey indicating that rising overheads and costs, the carbon tax, price pressure from competitors and rising production costs as some of the major constraints to the growth of their business, it is imperative that businesses become more financially viable and more efficient by adopting sustainable business policies and practices.

RDA Moreton Bay is partnering with MBRC to deliver the organisation’s Sustainable Business Strategy to businesses in the Moreton Bay region.



Figure 47 – Howard Neilsen facilitating a Sustainable Business Strategy Focus Group Workshop
(Source: RDA Moreton Bay)

Evidence suggests that businesses that have streamlined their business practices and reduced their operating costs, and their environmental impact by implementing efficient processes in their business activities alongside accounting for their use of energy and water and their production of waste will most likely be more resilient to the effects of climate change.

Businesses are also more likely to increase their supply chain competitiveness in a low carbon economy; reduce the likelihood of being a carbon pricing liable entity (or at least reduce their costs due to paying a premium for carbon-intensive products), and may also become responsive to consumer demand for businesses that assume environmental responsibility for their products and business practices.

These benefits combined can contribute to real business growth, resilience and survivability of businesses in the Moreton Bay region, as well as, supporting the growth of the green technology sector and encouraging business innovation in adoption of sustainable business practice.

Thinker in Residence Program

The Moreton Bay Thinkers in Residence program is based on the South Australian Government model and is designed to bring new ideas into the Moreton Bay region and translate them into practical solutions to improve the economic and community well-being of the region.



Figure 48 – Ifor Ffowcs-Williams presenting on business clustering at the Thinker In Residence Event “Moreton Bay Fresh”
(Source: RDA Moreton Bay)

The program set out to generate new thinking, inspire momentum, provoke changes, and activate results for the residents of the Moreton Bay region.

During 2012-13, the Digital Futures Forums and Moreton Bay Fresh clusters workshops were based on this program. The events were designed to engage businesses, industry, government agencies, not-for-profit organisations and the community in a series of workshops that examined how these groups can collaborate to achieve economic and community wellbeing outcomes for the region through clustering and also using digital technologies leveraged by high-speed broadband.

PROJECTS & INITIATIVES

The following is designed to summarise how each individual priority will be progressed during the 2013 – 14 financial year. Further detail will be contained in the organisation’s Business Plan.

Priority One: A Driver of Regional Leadership and Identity

RDA Moreton Bay is a champion for enhanced regional recognition and identity.

<p>Advocate for the region</p>	<ul style="list-style-type: none"> • Establish the Moreton Bay Peak Advisory Body to better enable the three levels of government, business leaders and key community groups to collaborate to support the future development of the region • Consult and engage with the region on issues, solutions and priorities to promote regionalism and encourage regionally informed policy development
<p>Enhance and develop strategic partnerships</p>	<ul style="list-style-type: none"> • Builder of key strategic relationships across government, other regions, other RDAs to promote joined up regional development • Enhance awareness of government programs that supports their use • Implement programs to promote and develop regional leadership in partnership with MBRC, Mission Australia and Volunteering Queensland
<p>Investment Attraction</p>	<ul style="list-style-type: none"> • Strategically partner with MBRC to develop and implement an investment attraction program designed to both build regional identity/brand, and to attract new investment based on this region's competitive advantages.

Priority Two: A Digitally Enabled Region

RDA Moreton Bay and MBRC will implement the Digital Futures Plan to support the digitalisation of the region.

<p>Digital Futures Plan</p>	<ul style="list-style-type: none"> • Implement the Digital Futures Plan developed by Explor Consulting.
<p>SMART Work Centres</p>	<ul style="list-style-type: none"> • In partnership with the SEQ RDAs implement the outcomes of its SMART Work Centre (Co-location office space) research across SEQ • Partner with MBRC to open a Colocation Space in Redcliffe
<p>Broadband Investment</p>	<ul style="list-style-type: none"> • Strategic partner with the NBN Co and MBRC to maximise the benefits from the NBN roll-out across the region • Work with MBRC and telecommunications companies to support strategic investment which meets the region's digital and mobile needs.

Priority Three: A Future Focused Region

RDA Moreton Bay will take a leadership role in shaping and influencing the future of the region.

Regional Marketing Strategy	<ul style="list-style-type: none"> •Key partner of MBRC in the development of the Region's Marketing Strategy as the basis for undertaking the promotion of the region to build regional identity and awareness, alongside the attraction of new business, visitors and residents.
Sustainable Business Strategy	<ul style="list-style-type: none"> •Implement in partnership with MBRC the Sustainable Business Strategy developed by NACC Sustainability and funded by RDA Moreton Bay across the following sustainability strategies: online sustainability toolkit, regional sustainable business and communities networks, and sustainable business precincts. •Promote the development of business clusters (Smart Specialisations) as a driver of business growth, sustainability and competitiveness, including the Manufacturing Moreton's Future project.
Strategic Regional Development	<ul style="list-style-type: none"> •RDA Moreton Bay supports regional planning and development, including regionally significant projects, investments and the development of the new MBRC Planning Scheme. •Take forward the "Thinker in Residence" initiative to enhance regional engagement and consultation.

Priority Four: Tertiary Education

Both RDA Moreton Bay and MBRC recognise that the significant enhancement of both tertiary education and training facilities, and opportunities is critical to the future sustainable economic and community development of the region.

Tertiary Education Strategy	<ul style="list-style-type: none"> •To initially develop a strategic document which articulates a clear strategy for the future development of tertiary education within the Moreton Bay region •To advocate and influence investment decisions to enhance the provision of both tertiary education and training infrastructure within the Moreton Bay region.
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Priority Five: Human Capital

RDA Moreton Bay is a collaborator in the development of strategic interventions to build the capacity of the region to create more employment opportunities for the regions resident workforce.

Workforce Development	<ul style="list-style-type: none"> •Key stakeholder in the implementation of the: Aboriginal & Torres Strait Islander Employment Strategy for the region & Workforce Planning Research for Moreton Bay and the Sunshine Coast. •Key strategic partner of DEEWR, DET and other organisations to support the strategic development of the region's workforce.
Digital Technologies	<ul style="list-style-type: none"> •The development of digital workforces is a key priority within the Digital Futures Plan including transforming work patterns, flexible and tele-working, building business capacity, and supporting new and emerging industries.
Business Growth	<ul style="list-style-type: none"> •Advocate for small business to be provided with the environment to have the confidence to create new employment opportunities •Attract new investment to create employment options to meet the demands and aspirations of the regions growing population.

APPENDICES

APPENDIX 1 – STAKEHOLDER CONSULTATION AND ENGAGEMENT

Moreton Bay Regional Council

“RDA Moreton Bay is a key strategic partner of Moreton Bay Regional Council in the economic development of the Moreton Bay region.”

Alan Sheridan - Director, Economic Development and Commercial Services, Moreton Bay Regional Council

Moreton Bay Regional Council (MBRC) is RDA Moreton Bay’s key strategic partner as the organisation covers the same local government area. RDA Moreton Bay works at a strategic and operational level with MBRC and the priorities contained within the regional roadmap reflect the priorities of both MBRC and its Community Plan document developed through extensive community consultation.

Regional Stakeholders

Figure 51 on page 43 demonstrates the range of stakeholders which the organisation has worked with during the last three financial years. The content of this Regional Roadmap is the result of ongoing engagement and consultation within the region. There is also the danger of consultation fatigue - residents, businesses and other groups would like to see action to tackle the well documented issues, challenges and opportunities facing this region.



Figure 49 – RDA Moreton Bay Chair Neil Hoddinett speaking at the Moreton Bay Fresh Business Cluster Breakfast
(Source: RDA Moreton Bay)

The region is well served by numerous chambers of commerce, business groups, community and environmental organisations to name but a few. The Regional Roadmap aims to capture within the national template for the document the issues, challenges, needs, opportunities and aspirations of the region.



Figure 50 – Digital Futures Forum
(Source: RDA Moreton Bay)

Stakeholder Engagement

During 2012 -2013, RDA Moreton Bay has consulted extensively across the region to support the development of key strategies which form the basis of the priorities, projects, and initiatives contained within this Regional Roadmap. This process of engagement included:

- Annual Roadmap Review attended by 80 stakeholders
- The Moreton Bay Thinkers in Residence program, which is based on the South Australian Government model and is designed to bring new ideas into the Moreton Bay region and translate them into practical solutions to improve the economic and community well-being of the region. The program sets out to generate new thinking, inspire momentum, provoke changes, and activate results for the people of the Moreton Bay region. The following events were held as part of the Thinkers in Residence program:
 - 7 workshops to foster the concept of Business Clustering attended by 107 representatives from government, business, education, not-for-profit organisations and the community (**Figure 48 on page 38 and Figure 49 this page**)
 - 7 workshops to support the development of the region’s Digital Futures Plan attended by 104 representatives from government, business, education, not-for-profit organisations and the community (**Figure 50 above**)
- 4 workshops to support the development of the regions Sustainable Business Strategy attended by 57 representatives from government, business, education, not-for-profit organisations and the community (**Figure 47 on page 38 and Figure 51 on page 42**)
- Regional Summit to support the development of the Aboriginal & Torres Strait Islander Employment Strategy, attended by 88 community, business, education, training and government representatives
- Business Confidence Surveys: 1065 businesses in total responded to the surveys conducted in June 2011, December 2011 and July 2012.

- Online consultation to support the development of this document with key stakeholders across government, business, community, environment and not-for profit sectors
- RDA Moreton Bay produces monthly E-Newsletters and provides regular Twitter and Facebook postings alongside regular updates to its website.

This process of engagement and consultation will continue during 2013-2016 to support revisions to this document, and to test progress against the regional vision, priorities and actions.



Figure 51 – Sustainable Business Strategy Forum
(Source: RDA Moreton Bay)

Regional Identity

MBRC is working to develop an identity for the region, however, this will be a long-term process as the residents and business communities still refer to the former Council areas of Redcliffe, Caboolture and Pine Rivers, alongside their own localities and communities, rather than the Moreton Bay region.

Intergovernmental Partnerships

As previously indicated, RDA Moreton Bay works closely with Moreton Bay Regional Council and both the Australian and Queensland Governments. The end of the Regional Managers Coordination Network within the region has increased the difficulty of engaging across the Queensland Government. Government boundaries which include the region as part of a wider region can cause issues and do not assist in the development of regional awareness and identity. The Moreton Bay region has a population larger than the ACT and Northern Territory and its scope and size should be reflected in the development of governmental areas recognising the region in its own right.

RDAs have a very broad charter with limited resources. Both the Australian and Queensland Governments have the obligation to improve their engagement of RDAs to enable them to be more effective in meeting the needs of their charter and operational contracts. This could for example be through additional service delivery and as organisations to better inform government planning and policy development.

Local Government should also be formally recognised as the third level of government within the RDA charter through a three tier of government agreement with RDAs. This would provide a true platform for RDAs to work across the three levels of government. Currently, RDAs have been imposed on local governments with the expectation that they will work with RDAs but with no formal requirement for them to do so.

Cross-Border Relationships

RDA Moreton Bay is working closely with RDA Sunshine Coast to support a number of aligning priorities, including:

- Human Capital – jointly funded with the Department of Education, Employment and Workplace Relations and the respective Regional Councils, Deloitte Access Economics to undertake Workforce Planning Research for our respective regions
- Advocacy for key regional infrastructure upgrades including the Bruce Highway, Rail Corridor, National Broadband Network and infrastructure to support regional population growth
- Building the role and scale of tertiary education within our regions
- Implementation of digital strategies, including the completion of the SMART Work Centre project.

Both regions also face similar challenges with population growth and the need to create additional employment for residents to support enhanced regional sustainability, and to become less reliant on Brisbane for employment.

The Moreton Bay region also naturally has a number of linkages with Brisbane with a focus on accommodating significant population growth and housing to support the growing demand for employment within the Brisbane CBD. The region's competitive advantages also stem in the main from proximity to key export infrastructure which Brisbane provides. The Moreton Bay region also needs to attract some of the investment and employment opportunities away from the Brisbane CBD to a lower cost region thereby supporting its own future sustainability to avoid becoming increasingly a commuter suburb for Brisbane.

Failure to tackle these issues will result in the numbers of residents commuting outside of the region to work increasing ahead of population growth resulting in increased commuter times and costs, increased business costs, further labour and skills shortages for Brisbane businesses as the daily commute becomes less attractive, increases negative environmental impacts, and the need for additional infrastructure which the public and private purses are unable or unwilling to fund. In the long term the Moreton Bay region and SEQ will increasingly become less attractive for residents and businesses, if these issues are not tackled.

Regional Roadmap – Stakeholders

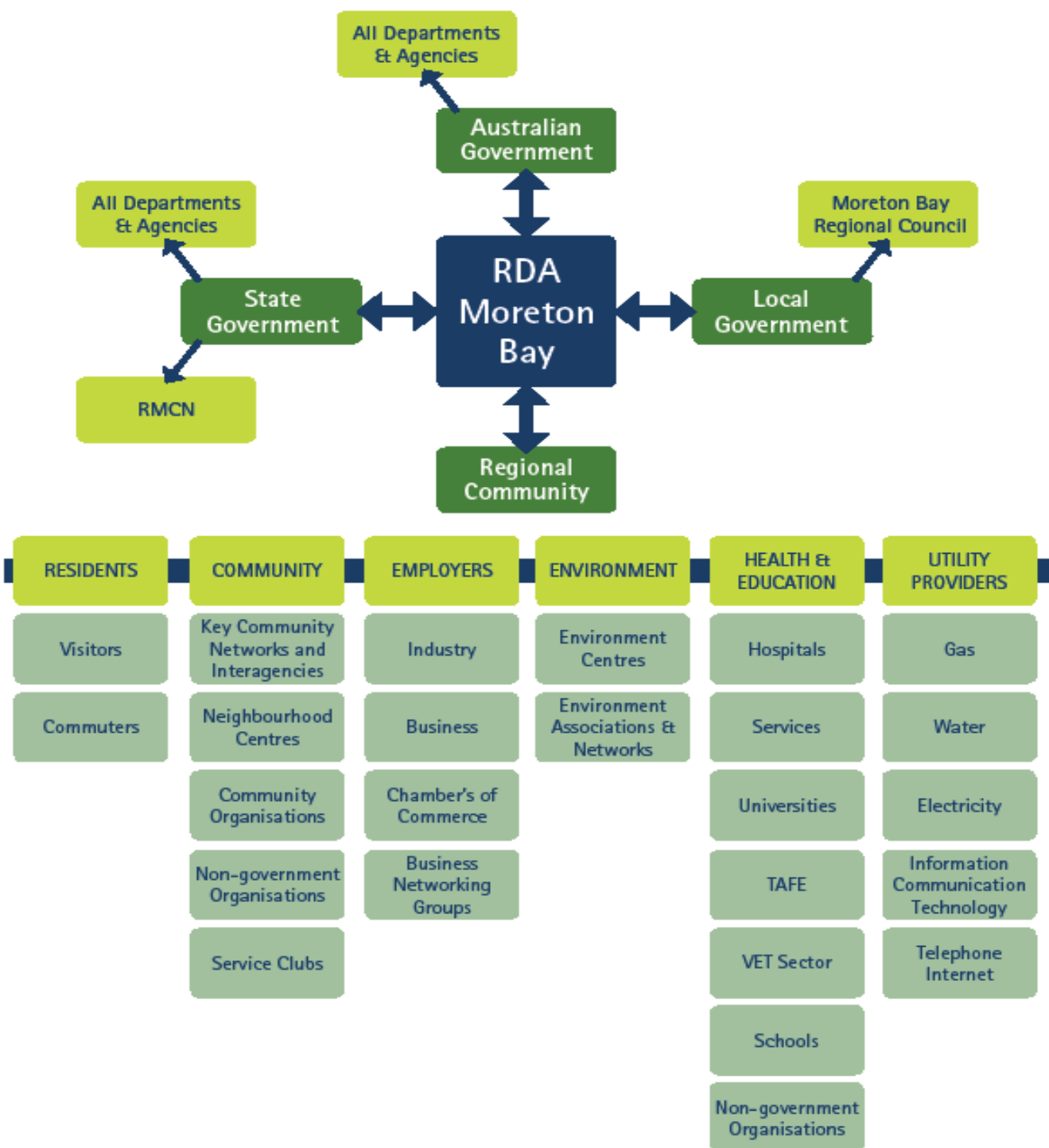


Figure 52 - Stakeholders that RDA Moreton Bay has engaged with 2010 – 2013
(Source: RDA Moreton Bay)

South East Queensland RDAs

The SEQ RDAs work strategically together and have employed an SEQ RDA Coordinator to present a united voice on shared issues effecting South East Queensland and the Northern Rivers of NSW, alongside a focus on six linked themes forming the SEQ Regional Development Framework:

Smart Manufacturing Specialisations

Goal: *We will partner to position the region as a viable destination for manufacturing investment in specialisations that will secure and extend businesses into local and global supply chains that will be sustainable in the long-term.*

Transport and Logistics

Goal: *We will partner to improve the efficiency and effectiveness of existing and new transport infrastructure through improved logistics drawing on opportunities such as those provided by high capacity broadband.*

Digital Capability

Goal: *We will facilitate leadership and strategic intent to make SEQ the most digitally capable region in Australia.*

Regional Indicators

Goal: *We will develop an agreed set of indicators for regional development to assist in priority project identification and performance measurement.*

Human Capital

Goal: *We will address regional skills shortages and employment issues and support initiatives to position the region for the Asian century.*

Cross Border Projects

Goal: *We will collaborate with Northern New South Wales on projects where there is common interest.*

The Framework embraces the COAG Standing Council of Regional Australia's key determinants for regional economic growth, identifying opportunities for collaborative effort at the meta-regional level for long term sustainable economic growth.

The Framework also positions the South East Queensland region to seize the new opportunities emerging in the Asian Century as outlined in the Australia in the Asian Century White Paper.

An interim report will be presented and discussed at a forum "SEQ in the Asian Century" in July 2013 – the final report will be presented in August 2013.

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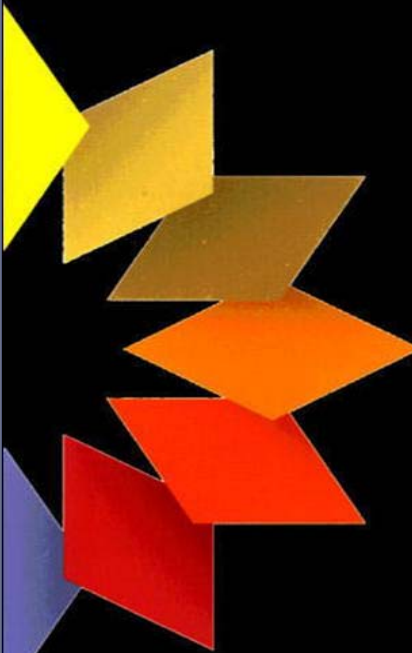
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Moreton Bay Region



An Australian Government Initiative

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