

(Cover)

SUNSHINE COAST - THE NATURAL ADVANTAGE

Regional Economic Development Strategy 2013-2033

CONTRIBUTING PARTNERS

MEMBERS OF THE SUNSHINE COAST ECONOMIC DEVELOPMENT STRATEGY TASKFORCE:

Sunshine Coast Council

Sunshine Coast Economic Development Advisory Board

Sunshine Coast Business Council

Chambers of Commerce and Industry Queensland - Sunshine Coast

Urban Development Institute of Australia – Sunshine Coast

Property Council of Australia – Queensland Division, Sunshine Coast Committee

Regional Development Australia Sunshine Coast

University of the Sunshine Coast

Sunshine Coast Destination Limited.

NOTE TO READERS

The Research Compendium to *Sunshine Coast - The Natural Advantage* should be read in conjunction with this strategy. It provides an overview of some of the key research and evidence base for the goals and priorities in this document and is available online at www.sunshinecoast.qld.gov.au.

FOREWORD

A time for action

The Sunshine Coast is a growing region with enormous potential. Over the past 12 months, the region has considered its economic foundations and future opportunities and decided to take a new path - one which leads to greater prosperity and a new economy.

Working together, leading business and industry groups and the Sunshine Coast Council have developed the *Sunshine Coast – The Natural Advantage: Regional Economic Development Strategy 2013-2033*.

This Strategy represents a first of its kind for the Sunshine Coast region. Regional business, industry and council have worked hand-in-hand to guide the development of a new evidence-based economic plan with targeted and measurable actions which will lead the Sunshine Coast towards a new economy in 2033.

Bold thinking and real action are needed to develop the new economy – one which leverages our region’s natural advantages, industry strengths and emerging opportunities, existing expertise and future potential.

The Sunshine Coast is well placed to secure strategic investment in high-value industries to support our ‘game changing’ infrastructure projects, with an aim of 100,000 jobs in these new sectors. The region is also ideally located to attract international business attention, including new export and trade partnerships.

This Strategy is the blueprint for the new economy – which we want to see nearly triple in size by 2033.

There is much to do – and the time to act is now.

Senior representatives of the following stakeholder organisations have collectively and collaboratively contributed to the development of this Strategy. Each organisation commits to support the Strategy and embraces its goals towards securing future economic prosperity for the Sunshine Coast.

We look forward to working with our stakeholders and partners to deliver a bold new economic vision for the Sunshine Coast.

LOGOS of all organisations

CONTENTS

Executive Summary

A Blueprint for Change

Building the New Economy

A Vision for the New Economy

Pathways to the New Economy

Leadership, Collaboration and Identity

Capital Investment

High-Value Industries

Local-to-Global Connections

Investment in Talent and Skills

Tracking our progress

EXECUTIVE SUMMARY

The Sunshine Coast is one of Australia's most desirable regions, renowned for its natural attributes and diverse, vibrant communities. Like many regional economies however, the Sunshine Coast has faced a number of challenges in the last five years as a result of volatile global financial conditions.

This has inspired regional leaders to look at new ideas that will deliver a stronger economy for the Sunshine Coast – and create a more prosperous community.

Sunshine Coast – The Natural Advantage: Regional Economic Development Strategy 2013-2033 (the Strategy) provides a 20-year vision and blueprint for long-term sustainable economic growth. Its goals and aspirations encompass – and benefit - all areas of the Sunshine Coast region - from the rural hinterland to its urban coastal areas. The Strategy has been developed by regional business, industry and local government leaders and informed through valuable contributions from Sunshine Coast residents and community organisations.

The Strategy seeks to ensure the region realises its full potential – with a confident future and as an active participant in the global economy – which in turn will deliver the lifestyle and opportunities for local residents and businesses alike. To do this, the region will pursue five essential pathways:

1. Leadership, Collaboration and Identity
2. Capital Investment
3. High-Value Industries
4. Local-to-Global Connections
5. Investment in Talent and Skills.

The Strategy aims to strengthen and extend the construction, retail and tourism industries – all of which will remain significant elements of the regional economy for the foreseeable future. The region will also vigorously seek new investment opportunities associated with seven high-value industries:

- Health and well-being
- Education and research
- Knowledge industries and professional services
- Tourism, sport and leisure
- Agribusiness
- Clean technologies and
- Aviation and aerospace.

All of these industries have the potential to generate higher-paying, enduring employment opportunities on the back of the region's 'game changer' projects - the development of the Sunshine Coast University Hospital; the Maroochydore Central Business District; upgrade of the Bruce Highway; and expansion of the Sunshine Coast Airport and University of the Sunshine Coast.

The Strategy provides a program of action over the next five years to drive progress towards 2033. The program of action will be reviewed annually to ensure it remains on target to deliver a strong new economy for the Sunshine Coast region.

A BLUEPRINT FOR CHANGE

During the past 30 years, the Sunshine Coast has undergone extraordinary change. The region has experienced significant population growth and urban development, and now proudly represents a regional economy worth more than \$13 billion.

Recent years have revealed the vulnerability of the Sunshine Coast economy to external pressures and the risks this poses for a region with a heavy reliance on population-responsive industries— such as retail and construction - and an entrenched dependency on tourism.

Illustrating the case for change

The region's current core industries – construction, retail and tourism - presently account for approximately 37% of total employment. Being highly dependent on population growth and visitation, these industries are typically lower value-adding and highly exposed when growth rates and consumer confidence decline.

Like many regional centres, the economic conditions of recent years have inspired the need for change. In that time, the Sunshine Coast region has experienced:

- ◆ a slowing of the regional population growth rate since 2007 to below that of the State*
- ◆ fewer new dwellings required as a result of weaker population growth - meaning fewer new jobs in construction and other related sectors
- ◆ a volatility in tourism demand, impacting on new investment in accommodation stock, employment and the industry competitiveness
- ◆ fluctuating levels of regional unemployment, including high youth unemployment
- ◆ average income levels lower than those for south-east Queensland and Queensland as a whole.

Mapping a strong blueprint

The Sunshine Coast recognises the need to collaboratively develop and implement a clear and progressive blueprint for economic change.

The region has already embarked on delivering foundational projects to support this blueprint for change including new infrastructure, education programs, investment and business development initiatives.

These projects, combined with the strong actions proposed in this strategy, will enable the region to:

- secure high levels of investment and grow enduring employment opportunities
- invest in its communities – and deliver the essential infrastructure and services that communities require
- preserve the lifestyle and environment that is so highly valued on the Sunshine Coast.

* Source: AEC Group, Economic Profile for the Sunshine Coast, January 2013.

Learning from the past to chart the future

The Sunshine Coast economy was built on the back of its natural resources. From the first European settlement in the 1850s, a cattle and timber based economy gradually expanded with the introduction of agriculture and sugarcane. An economy that had a clear focus on servicing external markets developed and by 1947, the population had reached 27000 people.

A development boom in the 1960s and 1970s helped the Sunshine Coast expand as a holiday destination. Rapid growth occurred from the 1980s with the population more than doubling in 20 years from 118,000 in 1986 to 287,000 in 2006. In response to this population growth and the appeal of the destination, the economy has evolved to one that is dominated by the tourism, construction and retail sectors - with a primary focus on meeting the internal consumption needs of the existing community.

During the past 10 years, the Sunshine Coast economy has continued to evolve. While in the last four years the region has seen a flattening of tourism demand, a decline in some core industries and declining rates of population growth, it has also seen growth in new industries such as education, healthcare and professional services.

Equipped with the right building blocks and supported by the right actions, the Sunshine Coast can continue to advance its economy and achieve a competitive place in national and global markets.

BUILDING THE NEW ECONOMY

The New Economy for the Sunshine Coast will be responsive to national and global demand, with high-value employment and investment opportunities.

Moving towards 2033, the Sunshine Coast will take bold steps and chart a new direction.

That direction is one that respects and nurtures the region's values and authenticity, but looks beyond its horizons and seeks to establish the region as part of the global community.

To build wealth and prosperity, the region will shift its focus from responding primarily to its own consumption to providing goods and services that respond to the demands of both the local and other economies.

This will:

- afford greater stability to the regional economy in terms of a broader industry and investment base
- generate investor confidence that the region and business are geared to respond to demand from a wider market place and
- provide the employment opportunities locally and enable the region to acquire the talent and skills to respond to the workforce demands of the new economy.

At the core of this change will be achieving the sustainability of the region's economy, community, environment and lifestyle.

These objectives go hand-in-hand.

Achieving a new economy

Clear objectives and priorities will help to move the region from a population-focused (or consumption-oriented) economy to one that is responsive to national and global demand, with enduring employment and high-value investment opportunities.

The New Economy will be built on:

- strong **leadership** embracing collaboration, agility and a determination to succeed
- the **essential infrastructure** to support growth and competitiveness
- investment in **high-value industries** that generate enduring employment
- a focus beyond the Sunshine Coast's boundaries to **domestic and global markets** where the region has a clear competitive advantage
- the **talent and skills** of its workforce and the contribution of community members.

Building on Solid Foundations

The region will embark on this program of change with some strong foundations, valuable assets and a suite of opportunities, including current infrastructure commitments and emerging investments in some of the high-value industries.

The Sunshine Coast is already recognised for offering an outstanding lifestyle and environment, supported by first-class environmental credentials.

A fresh approach and clear priorities will enable the region to also be recognised as a place that embraces investment, where business can succeed and things get done - and where government and industry share common goals.

Industry, business and government are unanimous in their view that the region must work together – to provide the leadership, direction and settings to deliver a new economy. Leadership, collaboration and partnerships are the cornerstone of this strategy and are essential for the region to secure a prosperous future.

Sunshine Coast - The Natural Advantage

In 2033, the Sunshine Coast is a prosperous, high-value economy of choice for business, investment and employment – while offering an enviable lifestyle and environment.

The vision for a new economy will be achieved:

By expanding the core - The Sunshine Coast will strengthen and extend the traditional construction, retail and tourism industries by securing the region’s infrastructure priorities and significantly enhancing the region’s attractiveness to investors – existing, new and home-grown. While small business will remain at the core of the economy, the region will attract a greater number of larger organisations - enhancing career opportunities for residents no matter where they live in the region and strengthening the foundations of the economy. The region will place a high value on entrepreneurship, talent and creativity, technology and innovative business practice. Increased access to worthwhile education and employment opportunities will be realised.

By seizing new opportunities - The Sunshine Coast will exploit opportunities to secure investment to build high-value industries - health and well-being; education and research; knowledge industries and professional services; tourism, sport and leisure; agribusiness; aviation and aerospace; and clean technologies. The region will take full advantage of an expanded tertiary education sector, the opportunities provided by access to broadband and digital technologies, its proximity to Brisbane and export facilities and the accessibility of its own international airport. The region will embrace opportunities which increase the wealth of the region and its residents and will have capitalised on both traditional and innovative investment solutions to deliver infrastructure of regional significance.

By changing the game – The Sunshine Coast will have an expanded outlook and position business, industry and its residents as part of a global community. The region will be recognised widely - not only for its natural beauty - but also as one of Australia’s most successful investment locations and its ability to harness new ideas and technologies to generate new opportunities. The region’s success will be based on its responsiveness to national and global markets - to strengthen the tourism, retail and construction industries and grow new opportunities in education and research services; combating preventative illness and disease; niche food production and processing; and clean technologies. The new economy will be less reliant on local consumption and generate wealth through export, tourism and new investment. The region’s infrastructure will support both its participation in the global economy and the needs of the local community.

Goals for the new economy	
2013	2033
A \$13.8 billion economy	→ A \$33 billion economy
High-value industries provide 59,000 employment opportunities	→ High-value industries provide at least 100,000 employment opportunities
13.6% of goods and services produced for export outside the region	→ 20% of goods and services produced for export outside the region
Household income levels 22.3% below the State average	→ Household income levels above the State average

PATHWAYS TO THE NEW ECONOMY

Features of a new economy

THE NEW ECONOMY will be guided by strong regional leadership and collaboration by business, industry and government which will champion and promote the region's competitive strengths. The local regulatory environment will also encourage investment and business success.

THE NEW ECONOMY will emerge on the back of major infrastructure investments - the delivery of the new Sunshine Coast University Hospital, an international airport, a new city centre in Maroochydore, expansion of the University of the Sunshine Coast and the upgrade of the Bruce Highway. These investments will provide a significant boost to the construction and retail sectors and will help encourage new investment and enduring employment in high value industries – particularly health and well-being; education and research; knowledge industries and professional services; tourism, sport and leisure; aviation and aerospace; agribusiness; and clean technologies. This investment and industry growth will strengthen the economy right across the region – from the rural hinterland to the urban coastal areas.

THE NEW ECONOMY will reinforce the investment potential and value of the Sunshine Coast – not only in traditional industries such as construction, retail and tourism, but also in emerging and high-value industries that will in turn shape the population that is attracted to live and work in the region.

THE NEW ECONOMY will be fully engaged with national and international markets – particularly the high-growth economies in Asia. Our strengths in world-class health and medical services, education and niche tourism and food production will enable the region to respond to the emerging needs of national and global markets.

THE NEW ECONOMY will strengthen and shape our future community. A nationally recognised education and training sector will provide the education and learning opportunities that respond to the skill needs of high-value industries and to the career and development needs of our residents. New investment and infrastructure will help the region to attract and grow a clever, productive and diverse population and enable the people who live here to pursue a worthwhile career locally.

Transitions to a new economy – what needs to change?

To build a new economy that is resilient and globally competitive, the region needs to change many of its current characteristics:

Transitions to build a new economy:	
CURRENT ECONOMY	NEW ECONOMY
Reliant on population growth	Built on investment and employment opportunities
Narrow, population-driven industry base	Higher-value, broadened industry base
Predominantly small business base	Diverse mix of small-to-large businesses
Lifestyle business culture	Growth-oriented, pro-business culture
Local market consumption focus	Demand-driven economy responsive to national and global markets
Lifestyle tourism identity	Recognised, competitive investment location
Concentration of low-value adding employment	Increased, high-value employment options
Low retention and attraction rates for skilled and productive workers	High retention and attraction rates of talent and skills
Low community participation in economic development activities	A community which is engaged with, and embraces, worthwhile economic development

(Break out box)

Drivers of the transition to a new economy

A number of clear opportunities will help achieve the transitions from where the Sunshine Coast is now to a new economy over the next 20 years:

1. Target large-scale investment in regionally significant infrastructure
2. Develop new employment and supply opportunities for local business arising from major projects
3. Create flow-on local demand for innovative professional services and knowledge-based solutions
4. Deliver business development and investment opportunities associated with the delivery of major projects
5. Grow demand from both within and outside the region for health, wellness, digital, education, training services and food product
6. Foster growth in emerging business and industry sectors and respond to changing global consumption patterns
7. Pursue innovative and clean technologies
8. Expand aviation and aerospace services.

The Sunshine Coast will ensure it exploits these opportunities to transition to the new economy through building local capacity, innovation and leadership.

Critical pathways to deliver a new economy

With change required across the economy, there are five essential pathways that need to be pursued to create a new, open, responsive and strong economy:

1. Leadership, Collaboration and Identity
2. Capital Investment
3. High-Value Industries
4. Local-to-Global Connections
5. Investment in Talent and Skills.

These pathways – or enablers of economic change – guide the actions the region will take over the next 20 years.

THE NEW ECONOMY IN 2033

STRATEGY DIAGRAM

The Essential Pathways to The New Economy

Leadership, Collaboration and Identity

“Strong regional leadership, solid partnerships and the advancement of a shared vision are the cornerstone of the New Economy.” Greg Livingstone - Chair, Sunshine Coast Economic Development Advisory Board.

Strong economic leadership and collaboration by government, business and industry

Delivering the New Economy for the Sunshine Coast requires the commitment, leadership and collaborative efforts of regional business, industry, community organisations and all levels of government.

Regional leaders will play a key role in building the perception, understanding and reputation of the region. Collaboration and partnerships between regional business and industry groups and government will be critical in conveying a coherent and united view of the Sunshine Coast and its competitive advantages.

Regional leaders will champion the direction for the New Economy and work collectively to advance the vision for the future.

This will involve both showcasing the strengths and competitiveness of the region and working proactively to address any impediments to delivering a new economy. This includes ensuring the region’s planning frameworks and regulatory regimes support the Strategy’s goals and priorities.

Regional leaders will forge strong and enduring relationships with domestic and global partners as well as with government and industry partners in Brisbane, south-east Queensland and nationally. Cultivating robust and mature relationships with these parties is vital to build awareness of the region’s priorities and opportunities and securing investment to deliver the foundations of the New Economy. Partnerships and synergies will be pursued between the region and all levels of government – state, federal and other local authorities - to deliver collaborative and timely outcomes.

A regional economic leadership board will be established as the key vehicle to guide the region’s transition to a New Economy and to monitor its progress. This board will also provide a platform to support the emergence of the next generation of regional business and community leaders.

Priority actions in the Strategy will be led by partnership groups working with clear responsibilities and timelines for action.

Actions for 2013-2018

1. Establish and support a regional economic leadership board to guide the transitions to, and build the identity of, the New Economy.
2. Identify and mentor potential business and community leaders.
3. Support business excellence through highly competitive award and recognition programs.
4. Report annually to the community on the delivery of the actions contained in the Strategy.
5. Incorporate the principles and priorities of the Strategy into the Sunshine Coast Planning Scheme.

A recognised, competitive regional identity

The Sunshine Coast has a widely recognised brand built on its coastal and hinterland lifestyle and pristine natural environment. While retaining these qualities is important, the New Economy requires a much broader identity.

A new competitive and dynamic economic identity will challenge commonly held perceptions elsewhere of the Sunshine Coast as being solely a lifestyle or tourism destination. It will add to this picture and reveal exciting new investment opportunities.

A new regional economic identity will:

- be aligned with the vision for the New Economy
- clearly articulate the region’s competitive strengths, values and attributes
- work towards forging trade and investment links with domestic and global markets.

Regional leaders will drive the creation of this identity.

A greater awareness across wider markets of the Sunshine Coast as a high-value investment location will help build greater resilience and opportunities for the tourism, leisure and local construction and retail industries.

The region's competitive identity will capture the liveability of the region and demonstrate its accessibility to different cultures and the availability of unique experiences. The new regional economic identity will also highlight the importance of developing national and global partnerships and a diversity of business and cultural outcomes.

Promoting a new identity to local, domestic and global markets will be a priority. Equally as important will be ensuring business, industry and government representatives in the region are supported to advocate, represent and promote the vision and competitive strengths of the region.

Actions for 2013-2018

1. Develop a new regional brand that embodies the vision for the new economy.
2. Adopt a targeted program and approach to promoting the region's new identity and competitive advantages to potential investors and priority markets.
3. Establish a Sunshine Coast ambassadorial program – utilising local identities, business leaders and international students to promote the region.

Capital Investment

“Delivering ‘Game Changer’ projects will have a transformational effect on business, employment and investment growth.” Peter Bolton-Hall - Sunshine Coast Chair, Property Council of Australia

Securing investment in the region’s infrastructure priorities

When compared with similar (and some smaller) regions, the Sunshine Coast has a significant deficit in key economic infrastructure.

This can be partly attributed to:

- The impacts of the global economic downturn since 2008
- A lack of investment in regional infrastructure by successive State and Federal Governments
- Constricted financing policies of the major commercial lenders, and
- Low levels of private investor confidence in the region.

Most notably, the Sunshine Coast is experiencing existing shortfalls – given current and projected population levels - in tourism, digital, transport and community infrastructure. The risk posed by ageing tourism infrastructure alone (including hotels and visitor attractions) - coupled with limited private investment in accommodation stock - is substantial.

The upgrading of transport infrastructure and key transport links is required not only to meet future population needs but also to support high-value industry growth and investment on the Sunshine Coast.

Delivering on the region’s infrastructure priorities will however, necessitate the identification and adoption of different funding models to those previously pursued at a regional level.

Securing both private and public sector investment in regional infrastructure is a key priority to achieve future prosperity and to attract investment in high-value industries to build the new economy.

It will also drive significant opportunities to grow and enhance the region’s traditional construction, retail and tourism industry base.

Future infrastructure investment priorities must be carefully identified and targeted to deliver significant economic and community benefits to the region as a whole.

Of particular significance to all elements of the New Economy are the ‘game changer’ projects (see inset box) which are predicted to have transformational effects on business, employment and investment growth – and the economy overall.

Actions for 2013-2018

1. Identify alternative funding models for the expansion of the Sunshine Coast Airport and the development of the Maroochydore central precinct and address impediments to securing investment in these projects.
2. Seek a firm financial and delivery commitment from the federal and state governments to the expansion of the Bruce Highway from Caboolture to the Sunshine Coast and future transport solutions.
3. Develop a Regional Investment Prospectus for national and global markets to profile the infrastructure and commercial investment opportunities in the region.
4. Identify alternative funding sources, both institutional and offshore, to stimulate capital investment in the region.
5. Aggressively market the investment opportunities in the ‘game changer’ projects and secure investment partners.

Transformational Projects – the Game Changers

- The delivery of the Sunshine Coast University Hospital and adjacent health and medical precinct at Kawana.
- The expansion of the Sunshine Coast Airport to provide a domestic and international gateway to the region.
- The development of a new central business district in Maroochydore to provide a commercial, civic and entertainment city heart for the region.
- The expansion of the University of the Sunshine Coast to cater for a larger student population and to meet workforce demand that will be generated by other ‘game changer’ projects.
- The upgrade of the Bruce Highway from Caboolture to the Sunshine Coast to improve accessibility and connectivity with south-east Queensland and international port facilities.

Maximising the value to the region of key economic infrastructure

Over the next decade, 'game changers' will transform the Sunshine Coast economy, its employment base and its investment potential. These projects collectively equate to a minimum direct investment of over \$3 billion in the regional economy - but have the capacity to leverage associated investment of nearly double this amount.

The associated investment, supply chains, enabling industries and new employment and skills demand generated from these projects will provide the transformative value and opportunities to the region.

For example, the Sunshine Coast University Hospital (SCUH) will provide leading-edge research facilities and professional services and provide an attractant for allied professional services to co-locate in the region. The facilities and services offered via SCUH and the broader Oceanside Kawana Health Precinct will enable the region to respond to both domestic and global demand for health and well-being services, particularly in the area of chronic disease prevention. The specialist research capabilities of SCUH will further assist in establishing an international reputation and alliances and deliver careers and services not presently available.

An expanded Sunshine Coast Airport, with international capability, offers a suite of opportunities for tapping directly into a global tourist market including numerous international events. It will also provide the platform for a significant aviation and aerospace industry hub and play a contributory role in the formation of a south-east Queensland airport cluster, capable of servicing current and predicted growth in demand for passenger and freight services. This provides a new - and direct - international business and tourism gateway to the region, facilitating connectivity with international markets, greater visitation and wider exposure to potential investors in the new economy.

The region will move aggressively to secure the transformative value from these projects – providing a compelling investment proposition that maximises certainty for new investors and provides the region with a competitive edge over other locations.

A key plank in achieving this investment is the establishment of Priority Investment Areas surrounding and adjacent to relevant 'game changer' projects. Priority Investment Areas will afford highly competitive conditions to attract early, worthwhile investment in these locations – which in turn will provide a stimulus for activity in the region's traditional construction and retail industries.

The investment focus associated with these projects will place an emphasis on high-value industries that provide more enduring employment opportunities and higher remuneration levels.

Actions for 2013-2018

1. Establish Priority Investment Areas associated with 'game changer' projects - with each area offering development conditions that are directed primarily at facilitating appropriate commercial investment outcomes.
2. Clarify and map the supply chains for each of the 'game changer' projects and identify gaps and opportunities for local business supply and priorities for new investment.
3. Establish and develop the research capability and reputation of the Sunshine Coast University Hospital and once developed, profile this to targeted national and global markets.
4. Work with telecommunications providers to ensure the delivery of world-class broadband infrastructure and services, with a specific focus on 'game changer' project locations.
5. In partnership with the Queensland Government, investigate a south-east Queensland airports strategy to better enable tourism and business connectivity to the region.

High-Value Industries

“High-value industries have the greatest potential to generate enduring career opportunities and higher-paying jobs for the local community.” Gwyn Jarrott - Director, Sunshine Coast Business Council

Targeting the attraction and development of High-Value Industries

Securing capital investment to deliver the region’s infrastructure priorities will provide a unique opportunity for the region to expand its industry base and attract investment in high-value industries.

Attracting and developing high-value industries is a critical building block for the New Economy.

High-value industries have the potential to generate a range of enduring career opportunities and higher-paying jobs for the local community. Many are also regarded as ‘clever’ industries which attract a workforce with high levels of knowledge and skills and generate unique intellectual property with significant commercial value.

Many of these industries also produce the goods and services that are predicted to be in high demand from a number of large international markets – particularly China, Indonesia, India and the Middle East.

The high-value industries that the region will pursue present the greatest potential for success in the new economy, leverage off major capital investments and, in many cases, can develop from an existing capability in the region. The scope of the high-value industries and targeted areas for development will be detailed in individual industry and investment plans.

Industries that will feature significantly in the New Economy are:

- **Health and well-being** – comprising health, medical and specialist wellness services supported by clinicians, researchers and ancillary businesses - is predicted to double its share of the employment market by 2033 and become the region’s largest employer.
- **Education and research** – will expand on the back of significant existing infrastructure investments and demand for quality teaching services and research expertise - and is predicted to become the region’s second largest employer by 2033.
- **Tourism, sport and leisure** – will remain a significant feature of the regional economy and authentic characteristic of the region – underpinned by a strong regional reputation for staging both international and home-grown events.
- **Knowledge industries and professional services** – comprising a diverse range of creative, knowledge, digital, technology and professional services - are critical enablers of the other high-value industries and will grow in response to demand generated by the ‘game changer’ capital projects and from international markets.
- **Agribusiness** – focusing on niche food and beverage product and value-adding production – which has a strong foundation in the region and is a key part of the economic future of the hinterland communities. This sector will expand in response to burgeoning national and global demand for a clean and safe food supply.
- **Aviation and aerospace** – for which the region is already gaining a reputation and with further growth predicted on the back of the expansion of the Sunshine Coast Airport. Growth opportunities are forecast predominantly in the areas of passenger services, helicopter engineering, advanced pilot training, aircraft engineering training, maintenance repair and overhaul and knowledge-based aviation technology.
- **Clean technologies** – in which the region is gaining a national reputation and which will expand in response to forecast national and global demand for technologies and solutions that avoid, reduce or remediate environmental impacts.

Characteristics of High-Value Industries

- An established or existing capability in the region which provides a competitive foundation for significant investment growth
- Recognised high-level industry capabilities or specialist offerings in the marketplace
- Strong potential for growth emanating from ‘game changer’ projects
- Capacity to generate flow-on economic opportunities (eg. in the supply chain, for broader business, industry and community benefit on the Sunshine Coast)
- Capacity to generate high-value employment - characterised as durable in fluctuating economic conditions and generally offering higher income levels for the workforce
- Capacity to respond in a sustained manner to market demand from outside the region.

Actions for 2013-2018

1. Develop and aggressively implement industry and investment plans for each of the high-value industries - focussing on addressing impediments to growth, workforce requirements, supply chains, market opportunities and the identification of key investment targets.
2. Develop a clear investment proposition and compelling marketing material for each high-value industry to attract and generate new investment.

Providing a regulatory environment that encourages investment and growth in high-value industries in appropriate areas

The New Economy – based on attracting and expanding investment in high-value industries – will only be achieved through the creation of an investment-friendly regulatory environment.

By offering an investment location that understands commercial realities, can respond quickly to worthwhile proposals and is not overburdened with unnecessary regulatory hurdles, the region can secure a competitive edge over other locations in attracting high-value industries.

The region will therefore, adopt a different – and pragmatic – approach to local regulation given the transitions required to build a new economy.

The first step is the recognition of a defined Enterprise Corridor stretching primarily along the coastal strip from north of the Sunshine Coast Airport to Caloundra South and bounded to the west by the Bruce Highway. This corridor will represent the key area for commercial and residential growth over the next 20 years and provide the location for many of the high-value industries to establish, expand and mature.

Within the Enterprise Corridor, the regulatory settings in appropriately designated areas (including in the Priority Investment Areas associated with the 'game changer' projects) will be based primarily on core economic considerations.

Flexibility will be the underlying principle that will guide the regulatory settings in appropriately designated areas in the Enterprise Corridor. Market conditions will be a driver of the nature and scale of development in these areas. Development assessment levels will be geared to stimulate investor interest and confidence and unnecessary layers of prescription (such as detailed design elements and non-viable site requirements) will be removed from local regulatory instruments relating to these areas in the Enterprise Corridor. Similar principles will apply to those major activity centres that are located outside the Enterprise Corridor.

Enhancing the connectivity between urban centres in the Enterprise Corridor will also be essential to support future investment and planning prospects. Thorough planning for future transport needs within the Enterprise Corridor – and across the region more broadly – will be a key priority for all levels of government.

Investment in certain high-value industries – such as agribusiness and niche tourism and leisure experiences – will necessarily occur outside the Enterprise Corridor. Local regulatory settings will reflect the needs and characteristics of these industries to facilitate new investment to enable the region to position itself as a global supplier of niche food and beverage products and rural and eco-tourism experiences.

Actions for 2013-2018

1. Establish the Enterprise Corridor in the Sunshine Coast Planning Scheme, with development requirements in appropriately designated areas to be based on strong commercial investment principles.
2. Identify and preserve future priority public transport corridors to connect major business, tourism, education and population centres within the Enterprise Corridor.
3. Ensure local regulatory fees and charges relating to development of high-value industries remain at the forefront of contestability with those of other regions in Queensland and the east coast of Australia.
4. Ensure the regulatory settings outside the Enterprise Corridor do not unduly inhibit or constrain investment in agribusiness and niche tourism and leisure experiences.

Promoting innovation, research and digital participation

Innovation is critical to growing world-class businesses. According to the Department of Industry, Innovation, Science and Research (2011), innovative businesses are:

- twice as likely to increase productivity
- 41% more likely to increase profitability
- twice as likely to export, and
- up to four times more likely to increase employment.

Research also indicates that highly digitally-engaged small businesses are:

- two times more likely to be growing revenue
- likely to earn two times more revenue per employee than those with low engagement and
- four times more likely to be hiring than those with low engagement.

The creation of an entrepreneurial culture in the region will foster more innovative businesses, product development and employment growth. Similarly, the deployment of new and enabling technologies, including digital solutions, will support innovation and transformation across high-value industry sectors.

Business and industry will be actively encouraged to embrace new technologies, including digital and broadband, in order to expand their markets and compete nationally and globally.

The capacity building of business, including existing and new businesses across the region, is a critical part of this process.

World-class research also holds the key to addressing challenges such as increasing industry innovation and productivity improvement. Productive research partnerships between the higher education sector and industry can provide the confidence, evidence and foundations to innovate and turn research into commercial products and services (Department of Industry, Innovation, Science, Research and Tertiary Education, 2013). To this end, the region will work to establish strong linkages between Sunshine Coast businesses and research institutions to support high-value industry innovation and development.

Actions for 2013-2018

1. Develop and implement a Digital Economy Participation Plan for business and industry.
2. Support targeted professional mentoring, entrepreneur and angel investor programs.
3. Develop innovation, best practice and business skills for existing and new regional business, including rural and hinterland businesses, to increase their sustainability.
4. Increase links and collaboration between research institutions, business and industry in the region.

Local-to-Global Connections

“Connecting the Sunshine Coast with domestic and international markets is a vital link in building the New Economy.” Bill Darby – Executive Member, Chambers of Commerce and Industry -Sunshine Coast and Chair, Caloundra Chamber of Commerce (Tourism and Events).

Positioning the Sunshine Coast in key national and global markets as a competitive source of high-demand goods and services

To achieve a quantum shift in investment, employment, infrastructure provision and community prosperity, the region must adjust its focus to respond to external demand – to introduce new wealth and new careers.

Increasing the region’s connectivity to national and global markets will not only strengthen its business base, but will also develop a wider brand recognition of all the Sunshine Coast has to offer.

Growing the region’s domestic markets and international export and investment base will require a clear and focussed approach with all levels of government to ensure productive relationships and connections are established and maintained. These relationships will require considerable time to establish and grow, prior to major commercial undertakings being pursued.

Markets that offer the best prospects for success will be pursued. Brisbane and the southern capitals are logical domestic markets for the Sunshine Coast. On a global stage, the high-growth Asian markets offer potential opportunities for valuable and recurring trade and export in areas of established capability for the region. These include tourism opportunities, food exports, and education and research services.

In the context of Asia, the region has an established historical connection with Xiamen in China. This relationship will shift from a focus on cultural exchange to a focus on areas of economic mutual interest and valuable gateways for Sunshine Coast businesses to gain access to the lucrative China market.

Actions for 2013-2018

1. Create a regional network and inventory of existing international expertise and relationships to help forge stronger commercial linkages outside the region and leverage new business, trade, clients and public and private investment.
2. Establish an annual program of business and export missions – led by Council – to grow awareness of the region’s products and services and investment opportunities.
3. Ensure Queensland Government Trade Commissioners have access to up-to-date information on the strengths and competitiveness of the Sunshine Coast.

Developing export-ready businesses and market-responsive industries

Targeted actions to expand the Sunshine Coast’s domestic markets and international export and investment base will help strengthen the region’s business foundations and local employment opportunities.

The Federal Government’s White Paper, *Australia in the Asian Century*, indicates strong Asian demand for Australia’s natural resources, education, tourism and agriculture.

The Sunshine Coast already has some particular industry strengths – in education and tourism and an emerging capability in niche food products – that are in line with key focus areas identified by federal and state governments for export development.

The Sunshine Coast is well placed to capitalise on these opportunities and exploit its current advantages. Direct action to generate an appropriate mix of export-ready businesses and market-responsive industries will occur to better enable regional businesses to respond successfully to domestic and global demand.

A Sunshine Coast International Business Development Program has been developed to enable the region to build its competitive strengths in a global market place. This program will primarily focus on expanding the breadth of Sunshine Coast businesses that have the potential to access trade and export opportunities.

Engaging with wider markets has the potential to strengthen business resilience, generate wealth and lead to new employment opportunities for the local community.

Actions for 2013-2018

1. Support specific regional market development and export programs and access to trade and investment networks, advice and opportunities.
2. Promote the capabilities, products and services of the region's export-ready businesses and suppliers to key markets.
3. Pursue government support programs, and link with government agencies with an in-market presence in target markets, to assist Sunshine Coast businesses to enter new markets nationally and globally.

Investment in Talent and Skills

“A highly skilled workforce is essential for the transition to the New Economy. It is equally important in attracting capital investment in ‘game changer’ projects and growing high-value industries”. Professor Mike Hefferan – Pro Vice Chancellor (Engagement) and Professor, Property and Development, University of the Sunshine Coast.

Attracting and retaining skilled workers to support the growth of high-value industries

The Sunshine Coast industry structure is expected to change significantly in the next two decades - with the top growth industries predicted to include healthcare and social assistance; education and training; and professional services.

Research indicates that labour demand for professionals will be strong over the next 20 years, followed by community and personal service workers and managers. Registered nurses and electricians are expected to increase their share of employment as well as primary and secondary school teachers. Retail sales assistants and managers are expected to remain the most common occupations in the region, but their share of total employment is projected to decline (Deloitte Access Economics, May 2013).

While the regional population continues to grow, the demographic profile underpinning this growth needs to change to support the demands of the New Economy. The ageing population and under representation of 20 to 39 year olds has many implications for regional workforce participation and productivity. The Sunshine Coast’s relatively high unemployment levels and low workforce participation coupled with the demographic profile outlined above, needs to adjust to position the region to provide an appropriate workforce to meet future economic demand.

Accordingly, the region will focus on developing and attracting a workforce with the skills and expertise to meet the demands of the New Economy. The region will nurture entrepreneurial talent through the Innovation Centre Sunshine Coast and support skills and mentoring programs developed to respond to the demand of high-value industries and ‘game changer’ projects. The experience and expertise of the older resident population and existing professionals will be utilised in these programs as important community contributions to the economy. The region will also promote options to attract skilled migrants through federal and state government programs to provide specialist skills and business expertise.

Government, industry and business will work collaboratively on innovative measures to retain skills and talent within the resident population by:

- ensuring community awareness of local opportunities and
- maximising local participation in education, training and industry skills programs that are targeted at supporting the demands of ‘game changer’ projects and high-value industries.

Actions for 2013-2018

1. Seek a commitment from the Federal Government to regularly monitor skills and labour shortages (and ensure workforce gaps and early solutions are identified) for high-value industries and ‘game changer’ projects.
2. Develop migration program options to enhance the skills and business needs of the region in conjunction with federal and state government agencies.
3. Leverage opportunities in Asia and other key markets to increase the intake of international students in tertiary, technical and secondary schools.

A regional education and training system geared to the demands of the new economy

Improving education and training options through industry-specific courses and programs - as well as promoting career pathways and links between formal education, skills development and work - are foundational ingredients for economic growth.

The region’s education and training sector is currently equipped with the facilities and capabilities to provide a range of regional training and career planning activities to boost the foundations of the Sunshine Coast’s labour force and economy.

Work will occur to recalibrate aspects of the education and training sector’s offerings to ensure these are clearly targeted at addressing critical gaps in the region’s workforce profile. This will also assist in developing viable options for local and meaningful career pathways within the region.

All regional education and training sector participants - including tertiary, vocational education and training and schools – will play a part in providing the skilled and qualified workforce to meet the needs of ‘game changer’ projects and high-value industries.

A whole-of-region Education Coordination Project will not only seek to better coordinate and advance the regional education sector, but will also look at key issues such as the loss of talent to Brisbane and other areas. The education and training sector will also play a key role in promoting leadership and the skilling of the future workforce.

To support future growth, the region will focus on developing its education and training reputation beyond the region and strengthening relationships with all levels of government to support the leveraging of Commonwealth and State investment.

Actions for 2013-2018

1. Implement the Regional Education and Training Project to ensure collaboration between the region’s education and training sectors to improve educational access, relevancy and outcomes in support of a future skilled workforce.
2. Develop skills and training programs, through education providers and federal skills initiatives, designed to meet projected industry skills shortage needs.
3. Raise awareness in the middle phase of schooling (Years 8-10) of local career options and associated skills requirements.

TRACKING OUR PROGRESS

Aspirational Goals

The strategy presents aspirational goals for a new economy in 2033, namely:

- A \$33 billion economy (based on gross regional product)
- High-value industries contribute at least 100,000 employment opportunities
- 20% of goods and services produced for export outside the region
- Household income levels above the State average.

These goals present a strong indication of the value added to the economy – over time - as a result of actions to strengthen economic resilience, such as investment in industries and projects that are responsive to the demand generated by national and global markets.

Progress towards achieving each of these goals will be tracked over time using credible and independent agencies including the Australian Bureau of Statistics.

Priority Actions for Year 1

Six key actions have been identified as the top Strategy priorities for implementation in Year 1. They are the key projects to kick-start the transition to the New Economy and are the precursors to the majority of other actions.

In Year 1, Strategy stakeholders will:

1. Establish and support a regional economic leadership board to guide the transitions to, and build the identity of the new economy
2. Incorporate the principles and priorities of the Strategy into the Sunshine Coast Planning Scheme.
3. Develop a new regional brand that embodies the vision for the new economy.
4. Develop a Regional Investment Prospectus for national and global markets to profile the infrastructure and commercial investment opportunities in the region.
5. Commence the development of and aggressively implement industry and investment plans for each of the high-value industries - focussing on addressing impediments to growth, supply chains, market opportunities and the identification of key investment targets.
6. Implement the Regional Education and Training Project to ensure collaboration between the region's education and training sectors to improve educational access, relevancy and outcomes in support of a future skilled workforce.

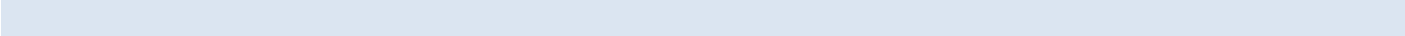
Nine other key projects are planned for implementation in Year 1 of the strategy. Further details of these and the remaining actions scheduled for implementation during 2013-2018 are contained in the following Implementation Plan.

Headline projects already in progress

The Sunshine Coast is already laying the foundations for the New Economy through a number of headline initiatives. These foundational projects place the region on a sound footing to generate investment and economic growth and work towards achieving the region's aspirational goals in 2033.

Headline projects and activities include the:

- commencement of the \$1.8 billion Sunshine Coast University Hospital, the development of the new Sunshine Coast private hospital, and the planned development of the Oceanside Kawana Health Precinct adjacent to both hospitals
- declaration of the Maroochydore City Centre as a Priority Development Area under the *Economic Development Act 2012*, which will streamline the planning and development process and help provide greater certainty to future investment in the city centre
- roll-out of the region's Major and Regional Events Strategy to better position the Sunshine Coast as one of Australia's premier regional event destinations
- delivery of the region's new Rural Futures Strategy to strengthen and enhance the hinterland and rural areas of the Sunshine Coast
- introduction of the region's first International Business Development Program as the platform to grow export and investment opportunities for the region.

- introduction of a Build it and Benefit Scheme that offers targeted reductions in infrastructure charges making it easier, more efficient and less costly to do business
 - an investment by the Commonwealth of \$54 million in the University of the Sunshine Coast (USC) to boost learning and teaching in two critical fields of nursing and allied health and engineering and related programs – which is expected to increase student numbers by 10 to 15 per cent annually. \$5.5 million of Commonwealth funding over three years will also be used by the USC to boost research capacity building by working with partner universities.
- 

FIVE YEAR IMPLEMENTATION PLAN - 2013-2018

Delivering the Plan

The delivery of this plan will be overseen and monitored by a regional economic leadership board that will build on the partnerships that have already been established between business, industry and Council in developing this Strategy.

The key role of this board will be to: ensure there is a rigorous focus on implementation of the actions in this Strategy; and through the specialist expertise of its membership, bring critical advice and intelligence to the region (particularly in relation to capital raising and global financial markets) to inform, guide and enable delivery of specific actions.

This board will also oversee the development of an annual report to the Sunshine Coast community on overall implementation progress and in doing so, include recommendations for any amendments to the Implementation Plan that it may consider necessary to accommodate changes in economic conditions and/or unforeseen implementation issues.

In relation to the development and delivery of high value industry and investment plans (which is a key action of this Strategy) there will be a need for a clear brief, timetable and defined milestones for each plan. This work will be overseen by a specialist taskforce, with appropriate skills, expertise and resources.

Accountability for the delivery of individual actions in the plan resides with the organisation that (in each case) is assigned lead responsibility in the implementation table below. Partners for each action are expected to provide input, specialist advice and information, contacts and linkages to enable the delivery of the specific action – and to proactively advocate to other parties (where necessary and required) to progress delivery.

Timeframes:

- Year 1 commences 1 October 2013 and concludes on 30 June 2014.
- Years 2 to 5 are based on financial years and conclude on 30 June 2018.

Definitions:

- *High-Value Industries comprise:* Health and Well-being; Education and Research; Tourism, Sport and Leisure; Knowledge Industries and Professional Services; Agribusiness; Aviation and Aerospace; and Clean Technologies.
- *Game Changers comprise:* Sunshine Coast University Hospital; Sunshine Coast Airport expansion; Maroochydoore Central Business District; University of the Sunshine Coast expansion; and upgrade of Bruce Highway.

Acronyms and Abbreviations:

CCISC—Chambers of Commerce and Industry Queensland-Sunshine Coast

DEEWR – Department of Education, Employment and Workplace Relations

DETE -Department of Education, Training and Employment

Innovation Centre –Sunshine Coast Innovation Centre

NBN Co–National Broadband Network Corporation
PCASC - Property Council of Australia–Queensland Division, Sunshine Coast Committee
RDASC–Regional Development Australia Sunshine Coast
SCBC – Sunshine Coast Business Council
SCC – Sunshine Coast Council
SCDL - Sunshine Coast Destination Limited
SC1 – Sunshine Coast First
TA–Tourism Australia
TEQ–Tourism and Events Queensland
TIQ –Trade and Investment Queensland
UDIA – Urban Development Institute of Australia Sunshine Coast
USC – University of the Sunshine Coast
VET –Vocational Education and Training

FIVE YEAR IMPLEMENTATION PLAN - 2013-2018

PATHWAY AND PRIORITIES	ACTIONS	PERFORMANCE MEASURES	TIMEFRAMES	LEAD RESPONSIBILITY	PARTNERS
<p>LEADERSHIP, COLLABORATION AND IDENTITY</p> <p>A. Strong economic leadership and collaboration by government, business and industry</p>	<p>1. Establish and support a regional economic leadership board to guide the transitions to, and build the identity of, the new economy.</p> <p>2. Identify and mentor potential business and community leaders.</p> <p>3. Support business excellence through highly competitive award and recognition programs.</p>	<p>Governance, business model, expertise mix and membership for the board determined by December 2013.</p> <p>Board established by 1 January 2014.</p> <p>Governance model and performance of the board reviewed and adjusted (if required)</p> <p>Program established and identification criteria implemented.</p> <p>Implement region-wide CCI-Sunshine Coast Business Excellence Awards and Recognition Program</p>	<p>Year 1</p> <p>End of Year 2 and biennially thereafter</p> <p>Year 1</p> <p>Years 2 -5</p>	<p>SCC</p> <p>USC</p> <p>CCISC</p>	<p>To inform the establishment of the board:</p> <ul style="list-style-type: none"> • CCISC • PCASC • RDASC • SCBC • SCDL • UDIA • USC <p>• Innovation Centre</p> <p>• VET sector</p> <p>• Individual Chambers</p> <p>• SCDL</p>

	<p>4. Report annually to the community on the delivery of the actions contained in the Strategy.</p> <p>5. Incorporate the principles and priorities of the Strategy into the Sunshine Coast Planning Scheme.</p>	<p>Implement annual public reporting program on strategy delivery. First report by end of July 2014.</p> <p>Sunshine Coast Planning Scheme amended to incorporate and support the principles and priorities of the strategy.</p>	<p>Year 2</p> <p>Year 1</p>	<p>Regional economic leadership board supported by SCC</p> <p>SCC</p>	<ul style="list-style-type: none"> • All lead partners for strategy actions.
<p>B. A recognised, competitive regional identity</p>	<p>1. Develop a new regional brand that embodies the vision for the new economy.</p> <p>2. Adopt a targeted program and approach to promoting the region's new identity and competitive advantages to potential investors and priority markets.</p> <p>3. Establish a Sunshine Coast ambassadorial program – utilising local identities, business leaders and international students to promote the region.</p>	<p>Competitive regional branding and positioning statements developed for target markets and sectors.</p> <p>Targeted marketing, promotional activities that reinforce the new identity and showcase the region are developed, focus tested and implemented.</p> <p>Ambassadorial program - representative of key focus areas of strategy – established by July 2014.</p> <p>Ambassadors equipped with necessary tools and information</p>	<p>Year 1</p> <p>Years 1 and 2</p> <p>Year 2</p> <p>Year 2</p>	<p>SCC</p> <p>SCC</p> <p>SCC and SCDL</p>	<ul style="list-style-type: none"> • Specialist Advisory Panel • CCISC • USC • SCDL • SCBC • PCASC • Other relevant industry groups in each case • USC • RDASC • Relevant industry groups in each case

PATHWAY AND PRIORITIES	ACTIONS	PERFORMANCE MEASURES	TIMEFRAMES	LEAD RESPONSIBILITY	PARTNERS
CAPITAL INVESTMENT A. Securing investment in the region's infrastructure priorities	1. Identify alternative funding models for the expansion of the Sunshine Coast Airport and the development of the Maroochydore central precinct and address impediments to securing investment in these projects.	Alternative investment models identified, regulatory approvals obtained and financial commitments sourced.	Years 1 and 2	SCC	<ul style="list-style-type: none"> • Queensland Government • Australian Government • SC1 • Regional economic leadership board • RDASC
	2. Seek a firm financial and delivery commitment from the federal and state governments to the expansion of the Bruce Highway from Caboolture to the Sunshine Coast and future transport solutions.	Advocacy program, targets and communication strategy established for Bruce Highway upgrade.	Years 1 – 5	SCC to lead advocacy program	<ul style="list-style-type: none"> • RDASC • Queensland Government • SCBC • SCDL • Transport bodies • Council of Mayors SEQ
	3. Develop a Regional Investment Prospectus for national and global markets to profile the infrastructure and commercial investment opportunities in the region.	Future transport solutions reviewed and developed.	Years 1 – 5	SCC	<ul style="list-style-type: none"> • Regional economic leadership board • PCASC • UDIA
	4. Identify alternative funding sources, both institutional and offshore, to stimulate capital investment in the region.	Purpose built investment prospectus developed for marketing nationally and globally	Year 1	SCC	<ul style="list-style-type: none"> • Regional economic leadership board • Queensland Government

		investment activities and networks.			
		Tactical advice and specialist expertise in investment markets sourced, as required, to address capital investment needs and priorities.	Years 2 - 5	SCC	Consultancies and partner investment networks
	5. Aggressively market the investment opportunities in the 'game changer' projects and secure investment partners.	Targeted marketing plan for each game changer project developed and implemented.	Years 2 - 5	SCC and principal land owners	<ul style="list-style-type: none"> • USC • SCDL • Relevant industry groups in each case • Queensland Government
B. Maximising the value to the region of key economic infrastructure	1. Establish Priority Investment Areas associated with game changer projects - with each area offering development conditions that are directed primarily at facilitating appropriate commercial investment outcomes.	Priority Investment Areas and their development conditions established in new Planning Scheme.	Year 1	SCC	<ul style="list-style-type: none"> • Queensland Government • Project proponents
	2. Clarify and map the supply chains for each of the game changer projects and identify gaps and opportunities for local business supply and priorities for new investment.	Supply chain analysis, opportunity identification and business matching to local initiatives undertaken for game changer projects – linked to project timelines.	Years 2 – 5	Project proponents and owners for each game changer project and SCC	<ul style="list-style-type: none"> • Sunshine Coast Health and Hospitals Board • USC • RDASC • Queensland Government • SCBC

	<p>3. Establish and develop the research capability and reputation of the Sunshine Coast University Hospital and once developed, profile this to targeted national and global markets.</p>	<p>Tertiary medical partnership for Skills, Academic and Research Centre secured.</p> <p>Sunshine Coast University Hospital research and capability prospectus promoted to target investors, tertiary professionals and concept champions.</p>	<p>Years 2 - 3</p> <p>Years 3 - 5</p>	<p>USC and Queensland Government</p>	<ul style="list-style-type: none"> • Sunshine Coast Health and Hospitals Board
	<p>4. Work with telecommunications providers to ensure the delivery of world-class broadband infrastructure and services, with a specific focus on 'game changer' project locations.</p>	<p>Delivery of high-speed broadband infrastructure commitments within project locations.</p> <p>Ongoing activity.</p>	<p>Years 1 - 5</p>	<p>SCC</p>	<ul style="list-style-type: none"> • NBN Co • Telstra • Optus • Other providers and project proponents • RDASC
	<p>5. In partnership with the Queensland Government, investigate a south-east Queensland airports strategy to better enable tourism and business connectivity to the region.</p>	<p>SEQ Airport Strategy explored and pursued including better domestic airports coordination and global airport connections.</p>	<p>Years 2 - 5</p>	<p>Queensland Government and SCC</p>	<ul style="list-style-type: none"> • SCDL • TIQ

PATHWAY AND PRIORITIES	ACTIONS	PERFORMANCE MEASURES	TIMEFRAMES	LEAD RESPONSIBILITY	PARTNERS
<p>HIGH-VALUE INDUSTRIES</p> <p>A. Targeting the attraction and development of high-value industries</p>	<p>1. Develop and aggressively implement industry and investment plans for each of the high-value industries - focussing on addressing impediments to growth, workforce requirements, supply chains, market opportunities and the identification of key investment targets.</p> <p>2. Develop a clear investment proposition and compelling marketing material for each high-value industry to attract and generate new investment.</p>	<p>Health and Well-being; Tourism, Sport and Leisure; and Education and Research industry and investment plans developed by May 2014</p> <p>Remaining four high-value industry and investment plans developed by November 2014.</p> <p>Appropriate project delivery model determined through the development of each industry and investment plan</p> <p>Investment proposal and marketing materials for Top 3 high-value industries completed by July 2014.</p> <p>Investment proposal and marketing materials</p>	<p>Year 1</p> <p>Year 2</p> <p>Year 1 and 2</p> <p>Year 2</p> <p>Year 2</p>	<p><u>For Actions A1 and A2:</u></p> <p>Industry lead Taskforce in each case supported by SCC and specialist expertise (as required)</p>	<p><u>For Actions A1 and A2:</u></p> <ul style="list-style-type: none"> • SCDL • USC • Sunshine Coast TAFE • RDASC • SCBC • CCISC • PCASC • UDIA • Sunshine Coast Airport • Cleantech Industries Sunshine Coast • Seasons of the Sun • Sunshine Coast Health and Hospitals Board • Queensland Government • DEEWR

		for remaining high-value industries completed by December 2014.			
B. Providing a regulatory environment that encourages investment and growth in high-value industries in appropriate areas	1. Establish the Enterprise Corridor in the Sunshine Coast Planning Scheme, with development requirements in appropriately designated areas to be based on strong commercial investment principles.	Enterprise Corridor and development requirements established in new Sunshine Coast Planning Scheme by January 2014.	Year 1	SCC	Queensland Government
	2. Identify and preserve future priority public transport corridors to connect major business, tourism, education and population centres within the Enterprise Corridor.	Feasibility study and submission to Council completed by end of 2015. Review and assessment of preservation corridor completed.	Years 2 and 3 Years 2 – 5	SCC	<ul style="list-style-type: none"> • Commonwealth Department of Infrastructure and Transport • Department of Transport and Main Roads
	3. Ensure local regulatory fees and charges relating to development of high-value industries remain at the forefront of contestability with those of other regions in Queensland and the east coast of Australia.	Benchmark and set local regulatory fees and charges at competitive levels with key markets by February 2014. Ongoing monitoring arrangements established.	Year 1	SCC	<ul style="list-style-type: none"> • Queensland Government • PCASC • UDIA • CCISC
	4. Ensure the regulatory settings outside the Enterprise Corridor do not unduly inhibit or constrain investment in agribusiness and niche	New Sunshine Coast Planning Scheme establishes principles and settings to encourage and support	Years 1 - 5 Ongoing activity	SCC	Queensland Government

	tourism and leisure experiences.	development and growth of agribusiness and niche tourism and leisure businesses outside the Enterprise Corridor.			
C. Promoting innovation, research and digital participation	<p>1. Develop and implement a Digital Economy Participation Plan for business and industry.</p> <p>2. Support targeted professional mentoring, entrepreneur and angel investor programs.</p>	<p>Digital Participation Plan, to develop digital literacy and innovation in business and industry, is developed and implemented from July 2014. Ongoing activity.</p> <p>Online information portal established to ensure widespread access to key information on broadband infrastructure and services.</p> <p>Implement inaugural Sunshine Coast Mentoring for Investment and Mentoring for Growth programs in conjunction with Queensland Government partners. Ongoing activity.</p>	<p>Year 2</p> <p>Year 2</p> <p>Year 1</p>	<p>SCC</p> <p>Queensland Government and SCC</p>	<ul style="list-style-type: none"> • Queensland Government (DSIITA) • USC • Innovation Centre • CCISC • SCBC • RDASC • SCDL • NBN Co. • Telcos • Digital industry and regional bodies • Professional angel investor networks • Innovation Centre • CCISC

	<p>3. Develop innovation, best practice and business skills for existing and new regional business, including rural and hinterland businesses, to increase their sustainability.</p>	<p>Business innovation, best practice and support services and programs are enhanced and delivered to existing and new business, including hinterland businesses. Ongoing activity.</p>	<p>Years 1 - 5</p>	<p>Innovation Centre and SCC</p>	<ul style="list-style-type: none"> • Business networks • CCISC
	<p>4. Increase links and collaboration between research institutions, business and industry in the region.</p>	<p>Program established to develop ongoing collaborations between research institutions and business and industry to support business and industry initiatives, innovation and growth. Ongoing activity.</p>	<p>Year 2</p>	<p>USC</p>	<ul style="list-style-type: none"> • Innovation Centre • Business groups

PATHWAY AND PRIORITIES	ACTIONS	PERFORMANCE MEASURES	TIMEFRAMES	LEAD RESPONSIBILITY	PARTNERS
LOCAL-TO-GLOBAL CONNECTIONS A. Positioning the Sunshine Coast in key national and global markets as a competitive source of high-demand goods and services	1. Create a regional network and inventory of existing international expertise and relationships to help forge stronger commercial linkages outside the region and leverage new business, trade, clients and public and private investment.	Existing regional high-value international relationships are articulated and renewed. Increased trade and investment leveraged through existing international relationships and networks of value. Ongoing activity	Years 1 – 5	SCC and Business Leaders	<ul style="list-style-type: none"> • USC • CCISC • SCDL • SCBC • Queensland Government • Austrade • Business Leaders in Export
	2. Establish an annual program of business and export missions– led by Council – to grow awareness of the region’s products and services and investment opportunities.	Annual program of outbound and inbound missions developed and implemented. Ongoing activity.	Years 2 - 5	SCC	<ul style="list-style-type: none"> • USC • CCISC • SCDL • SCBC • Queensland Government and TIQ • Austrade
	3. Ensure Queensland Government Trade Commissioners have access to up-to-date information on the strengths and competitiveness of the Sunshine Coast.	Annual briefing program on the Sunshine Coast for Queensland Government Trade Commissioners implemented. Ongoing activity.	Year 1 - 5	SCC and TIQ	<ul style="list-style-type: none"> • Queensland Government • Austrade • SCDL – conduit to TA and TEQ and partners.

B. Developing export-ready businesses and market-responsive industries	1. Support specific regional market development and export programs, and access to trade and investment networks, advice and opportunities.	Programs accessed regionally through government and business networks to develop local businesses' trade and export capabilities.	Years 2 - 5	Queensland Government, TIQ	<ul style="list-style-type: none"> • SCC • Austrade • CCISC • SCBC • Regional industry associations • SCDL
	2. Promote the capabilities, products and services of the region's export-ready businesses and suppliers to key markets.		Years 2 - 5	SCC and Queensland Government	<ul style="list-style-type: none"> • Australian Government • Business and industry organisations
	3. Pursue government support programs, and link with government agencies with an in-market presence in target markets, to assist Sunshine Coast businesses to enter new markets nationally and globally.	Ongoing activity	Years 1 - 5	SCC	<ul style="list-style-type: none"> • Queensland Government • Austrade • TIQ • DEEWR- Enterprise Connect

PATHWAY AND PRIORITIES	ACTIONS	PERFORMANCE MEASURES	TIMEFRAMES	LEAD RESPONSIBILITY	PARTNERS
<p>INVESTMENT IN TALENT AND SKILLS</p> <p>A. Attracting and retaining skilled workers to support the growth of high-value industries</p>	<p>1. Seek a commitment from the Federal Government to regularly monitor skills and labour shortages (and ensure workforce gaps and early solutions are identified) for high-value industries and 'game changer' projects.</p> <p>2. Develop migration program options to enhance the skills and business needs of the region in conjunction with federal and state government agencies.</p> <p>3. Leverage opportunities in Asia and other key markets to increase the intake of international students in tertiary, technical and secondary schools.</p>	<p>Program advocacy and regional process established to monitor and identify skills and labour shortages for high-value industries and 'game changer' projects.</p> <p>New investor and skilled migration programs promoted through, and integrated into, high-value Industry and Investment plans.</p> <p>Marketing of regional education opportunities with key stakeholders increased international student placements in the region</p>	<p>Year 2</p> <p>Years 3 - 5</p> <p>Years 2 - 5</p>	<p>DEEWR</p> <p>Queensland and Australian Governments</p> <p>USC</p>	<ul style="list-style-type: none"> • RDASC • Sunshine Coast TAFE and USC • SCDL • Queensland Government • SCC • RDASC • DEEWR • DETE • Federal Training Department • TAFE • Private VET providers

<p>B. A regional education and training system geared to the demands of the new economy</p>	<p>1. Implement the Regional Education and Training Project to ensure collaboration between the region's education and training sectors to improve educational access, relevancy and outcomes in support of a future skilled workforce.</p>	<p>Education industry group and milestones established by end of December 2013.</p> <p>Project development completed by July 2015.</p>	<p>Year 1</p> <p>Year 2 - 3</p>	<p>USC</p>	<ul style="list-style-type: none"> • TAFE • Private providers • DETE • Public and private schools
	<p>2. Develop skills and training programs, through education providers and Federal skills initiatives, designed to meet projected industry skills shortage needs</p>	<p>Targeted programs developed by providers and through enterprise skills initiatives, to meet the projected needs of game changer projects and high-value industries – linked to project timeframes. Ongoing activity.</p>	<p>Years 2 - 5</p>	<p>Regional Education and Training Project Committee</p>	<ul style="list-style-type: none"> • Regional public and private education and training providers • DEEWR
	<p>3. Raise awareness in the middle phase of schooling (Years 8-10) of local career options and associated skills requirements.</p>	<p>Careers information program developed and implemented for Years 8 – 10 on future regional jobs opportunities from mid-2014.</p> <p>Aligned with progress in other areas of strategy and reviewed in mid-2015.</p>	<p>Years 2 - 3</p>	<p>Regional Education and Training Project Committee</p>	<ul style="list-style-type: none"> • Regional public and private education and training providers • SCC • Regional industry associations