Regional Development Australia

BRISBANE

REGIONAL ROADMAP 2013–2016

An Australian Government Initiative

Queensland Government

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Message from the RDA Chair

Brisbane is a driver of Queensland's competitiveness and is the centre of South East Queensland's hub of regional economic and social activity. The city is the gateway to the movement of goods and services in international trade and investment as well as a significant economic and cultural contributor to regional Queensland. With its valuable comparative advantages of climate, biodiversity, workforce, education and research institutions, Brisbane is well positioned to be placed on the world map for 'The Group of Twenty' world leaders summit, where leaders from 19 countries plus the European Union, their finance ministers, central bank governors and other invited countries will descend on our city for the G20's annual international economic cooperation and decision-making summit in November 2014.

The G20 Summit provides a unique opportunity to showcase Brisbane now and into the future as not only a world-class destination for tourism, education, trade and business investment, but an exceptional and welcoming lifestyle city, to the expected 7000 delegates and media contingent from around the world.

Nonetheless, work needs to be done to capitalise on our competitive and comparative advantages, to match our economic drive with social and cultural responsibility to make the city a highly inclusive and sought-after destination in which to live, work and do business.

As an organisation whose role it is to be a key contributor and collaborator for economic and community development, RDA Brisbane is confident that our aspirational goals and new priorities are responsive and directed towards Brisbane achieving its desired outcomes over the next three years.

Regional Development Australia is an important asset and ally to all levels of government, industry and the community throughout Australia. In particular, RDA Brisbane provides connections with and between the following:

- Business groups and government in addressing productivity
- Local, Federal and State Governments in developing project partnerships and information sharing
- The community sector to address disadvantage and capacity building
- Metropolitan and rural organisations, working together to build on comparative advantages and to maximise economic benefits.

The existing RDA structure enables metropolitan, rural and remote regions to operate and cooperate within a single but multi-faced framework. RDA Brisbane effectively engages within our region and cross-regionally with the three levels of government, business, industry and the community as well as with other RDAs, to bring a diverse range of regional solutions in areas such as future workforce needs, transport connectivity, business development, the digital economy, and business innovation.

In brief:

- *We work in our regions on issues that fill a regional gap or partner to address a regional need.* In Brisbane we work to foster engagement in the digital economy through a range of measures appearing in this document not the least of which is the CLICK! Digital Expo, now a signature event of RDA Brisbane for Brisbane and the wider SEQ region.

- *We engage in enduring regional partnerships that result in concerted action on regional issues*. RDA Brisbane hosts and manages the South East Queensland Regional Development Initiative. This project brings together the seven South East Queensland RDAs and RDA Northern Rivers NSW as a consortium. The consortium consults and partners with key stakeholders from business, government and the community to progress an identified regional framework and priorities for SEQ RDAs to take forward. As a result, it informs the forthcoming South East Queensland Regional Plan review processes. To formalise the important relationship between the seven SEQ RDAs, the Chairs have signed a memorandum of understanding which galvanises our ongoing work beyond the life of this project.
- *We identify and carry out research and partner with governments to inform regional planning and to implement solutions*. RDA Brisbane takes leadership in conducting valuable research to assist all levels of government. For example, in 2013 RDA undertook further labour market research, producing a 2013 update to the 2011 report Skills Shortages in the Greater Brisbane Labour Market 2012-2021. The revised report provides refreshed data and analysis and, based on current economic circumstances, predicts there may be a softening in the previously forecast level of skilled jobs growth to 2021. A supplementary report was prepared which analyses services to the mining industry, tertiary education patterns and structural changes, people not engaged in the labour market and gender segregation.

RDA Brisbane presents this three-year Regional Roadmap as a forward plan that is defined by a set of aspirational goals and takes into account the priorities of all levels of government and issues that are important to the community. It needs to be noted that the development of this document occurred prior to the change of Government, and as a flexible and responsive organisation, the RDA is poised to adapt to and incorporate the new Government’s priority directions.

This is the fourth Regional Roadmap/Update that I have had the pleasure to preside over, and I would like to pay tribute to the expertise and dedication of the staff, and to the volunteer Committee members who guide our strategic direction. Such is their commitment to executing the advancement of our strategy for a better Brisbane that over half of the founding members are still currently serving and actively promoting the RDA and its goals.

I look forward to working with all our stakeholders in the ongoing review and in delivering on this Regional Roadmap.

John Shepley
Chair
RDA Brisbane

Executive Summary

Brisbane is at the heart of the South East Queensland region – a fast growing ‘mega city’ region which is home to one in seven Australians, generates one-quarter of Australia’s population growth and one-fifth of the nation’s economic growth. Brisbane produces half of Queensland’s economic output and provides a third of its jobs. Its economy is the fourth most diversified of Australia’s 55 Regional Development Australia (RDA) regions. Brisbane’s port is fast becoming a major connection hub for trade with Asia, and Brisbane’s port infrastructure is rated the most competitive in the country.

The region’s biodiversity underpins quality of life and much of its identity. Brisbane’s environmental performance is strong. Overall energy use is down due to increased energy efficiency measures, and the use of energy from renewable sources is increasing. Brisbane’s ‘liveability’ remains one of the highest in the world. Brisbane has the least social disadvantage of any Local Government Area in Queensland and the second highest level of university qualifications in the country. Unemployment is just above the national average at around 5.8%. Population growth rates remain around the 2% level. Brisbane’s ‘technological readiness’ is rated second in the country out of Australia’s 55 RDA regions.

Despite this positive situation, there remain many challenges to address and opportunities to pursue. There is more to be done in the areas of: social disadvantage; digital readiness; efficiencies in coping with expected increased land freight movements; and in offsetting a forecast shortage of professional, technical and trades skills. Of course, the RDA will continue to collaborate with all levels of government to respond to these issues, as well as with the business/industry and community sectors.

Most of RDA Brisbane’s outcomes are achieved through a combination of strategic leadership, networking, convening and catalysing new ideas. It works in partnership with, and greatly values, its wide range of stakeholders.

RDA Brisbane has achieved considerable successes over the past year. Some highlights include:

- Bringing into greater relief details of Brisbane’s skills shortage, giving voice to some of the most pressing implications of this for the Brisbane economy and working with stakeholders to devise responses
- Leading with key partners in advancing Brisbane’s digital economy, including partnering in commissioning the Brisbane Digital Audit and organising the 2012 and 2014 CLICK! Digital Expos
- Convening the SEQ RDA Regional Development Initiative project. The project unified all seven South East Queensland RDAs in identifying a regional development framework. It is developing a consortia delivery strategy for the SEQ RDAs in areas including transport and logistics, smart manufacturing specialisations, digital capability and human capital. The outcomes of the project are being measured by a set of regional indicators which ranks each RDA region’s competitiveness
- Re-activating the Business Resilience Stakeholder Network set up in the wake of the 2011 Brisbane floods to pull together information on disaster assistance measures for business to respond to extreme weather events brought about by ex-tropical cyclone Oswald in January 2013.

The RDA Brisbane Regional Roadmap 2013–2016 draws on data, policy, results of consultations and the progress of recent project activities. The Roadmap serves as a planning instrument to pursue RDA Brisbane's six aspirational goals. It also draws on the direction and results of previous Roadmaps and is informed by a new Brisbane Regional Profile (Attachment 1). In particular, the Roadmap aligns with the key determinants for regional economic growth identified by the COAG Regional Australia Standing Council, namely:

- Human capital, particularly education and skills
- Sustainable (economic, environmental and social) communities and population growth
- Access to international, national and regional markets
- Comparative advantage and business competitiveness
- Effective cross-sectoral and intergovernmental partnerships (including through placed-based approaches) and integrated regional planning.

RDA Brisbane developed six aspirational goals for Brisbane:

1. A competitive city that promotes economic growth and opportunity embracing change
2. A liveable city offering a high quality of life centred on social inclusion and community well-being
3. A clean city that is emissions conscious and values its environment
4. A digital city actively engaging opportunities offered by the digital economy for the benefit of all
5. An enterprising city with an innovative and entrepreneurial culture driven by a highly skilled and engaged workforce
6. A connected city with appropriate transport infrastructure and transit efficiency providing access to employment and markets.

These six goals are supported by four priority areas that have been identified as a result of analysis of the Regional Profile, government priorities and stakeholder consultation:

1. Regional workforce planning to meet current and future skills challenges and human capital development through research, analysis and the development of partnerships
2. Planning for infrastructure needs and industry capacity to sustain population growth, competitiveness and alignment with the rise of Asia
3. Keeping pace with a transforming economy by embracing digital innovation, building resilience and promoting clean energy measures
4. Strengthening cross-sectoral networks and collaborative capacity for the development of a sustainable and inclusive region.

These goals and priorities form a strategic framework which identifies subordinate actions and project activities which align with the goals and priorities. These are set out in Section 8.

One of the areas of effort in the 2013-2016 period will be tracking and communicating Brisbane's economic and social performance, and competitiveness. RDA Brisbane has a key role to play in this regard and has developed an extensive set of regional indicators that will be used periodically to monitor and measure Brisbane's relative and absolute performance (Attachment 3). These indicators are drawn from different indices and employ a variety of data sources. RDA acknowledges the contribution of Brisbane City Council for providing access to their Global Cities Indicator Facility and for supplying other data. Further to this, Attachment 5 contains an extrapolated set of competitiveness indicators clustered under the four key determinants of the COAG Regional Australia Standing Council. This set of indicators ranks the RDA Brisbane region alongside the other capital city RDA regions (including Tasmania and the Northern Territory) and also against the other 54 RDA regions across Australia.

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1. Introduction

This three-year, 2013-2016 Regional Roadmap follows a series of one-year Roadmaps and Updates which, coupled with accompanying annual business plans, have guided RDA Brisbane's operational work since 2010.

The 2013-2016 RDA Brisbane Regional Roadmap is prepared according to the guidelines provided by the Australian Government.

The Roadmap incorporates a detailed 2013 Brisbane Regional Profile (Attachment 1) – incorporating social, economic and demographic trends – which is largely based on 2011 Census data and is arranged under four of the five key determinants of long-term regional economic growth as determined by the COAG Regional Australia Standing Council.

The Regional Australia Standing Council's framework is being extensively promoted for use by all jurisdictions in regional development and provides a common lens to design assistance for regional economies in transition. The analysis of the RDA Brisbane region is based on these key determinants (Section 4) which has contributed to identification of four key priorities and actions for RDA Brisbane to progress over the next three years towards meeting its long-term aspirational goals.

The RDA Brisbane Regional Roadmap is a living document that reflects input from stakeholders, analysis of relevant data and reports, and changes in policy directions that may occur from time to time – which articulates an overall strategic direction. Further input to the Roadmap will be collected on an ongoing basis.

1.1 Acknowledgment of Traditional Custodians

The Jagera and Turrbal peoples are acknowledged as the traditional custodians of the land on which Brisbane stands. Aboriginal people knew the area where Brisbane's CBD is now located as Mianjin, meaning 'place shaped as a spike'. In contemporary Brisbane, Aboriginal communities continue to maintain strong ties in and around the city, with particular cultural significance placed on river areas and other sites such as Musgrave Park in South Brisbane.

2. Vision for the Region

Brisbane is undergoing significant economic transformation driven by industry growth. At least 292,500 estimated new jobs will be required over the next decade to capitalise on this transformation. Retaining and attracting talent is one of Brisbane's greatest challenges and there needs to be a balance of the city's economic, social and environmental attributes in order to be recognised as both a lifestyle and investment destination. Brisbane continues to evolve as a globally recognised city. It is dynamic, and the RDA must be responsive to these changes. In particular, Brisbane is developing as a hub for all of South East Queensland and northern New South Wales, and so the RDA must be engaged with a wider range of stakeholders to ensure Brisbane's role is maintained and enhanced.

RDA Brisbane's organisational Vision and Mission set the parameters for the RDA to make a meaningful contribution to shaping Brisbane's economic, social and environmental future as a lifestyle and investment destination as well as an internationally recognised global city.

Vision Statement: *RDA Brisbane's Vision is to be a highly effective and respected collaborator with the community and all levels of government to realise Brisbane's unique economic, social and environmental potential.*

Mission Statement: *RDA Brisbane's Mission is to carry out independent and transparent engagement that promotes partnerships across all sectors of the community and all levels of government to develop Brisbane's economic, social and environmental prosperity.*

Against this background, RDA Brisbane set six aspirational goals to realise the long-term needs, opportunities and challenges of the Brisbane region. These six goals (Figure 1) continue to guide the RDA's work and will be reviewed on an ongoing basis for relevance in fulfilling the RDA's Vision and Mission.

Figure 1: RDA Brisbane's Six Goals for Brisbane

Source: RDA Brisbane Regional Roadmap, 2012.

3. Role of Regional Development Australia

There are 55 RDA Committees in the national network (Figure 2). RDA involves the Australian, State, Territory and Local Governments in growing and strengthening the regional communities of Australia. There are 12 RDAs in Queensland, including seven in South East Queensland, including RDA Brisbane. Each is made up of local leaders who volunteer their time and knowledge to address local and cross-regional issues. RDA Committees work with all levels of government, the private sector and the community to identify and encourage initiatives that contribute to the development of their regions.

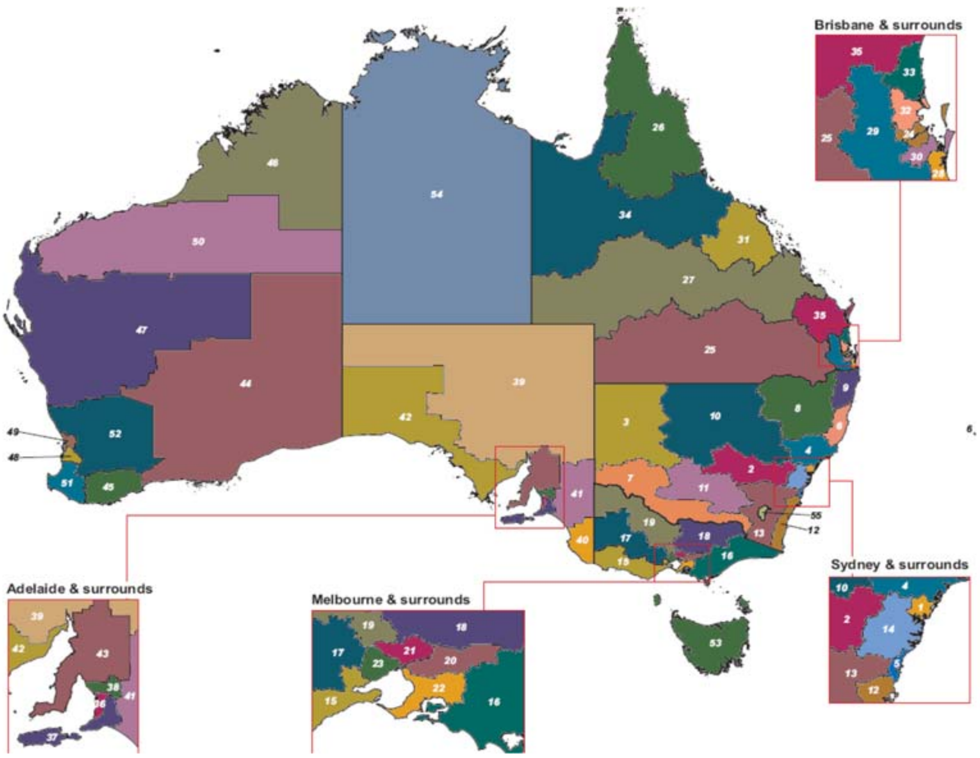

Figure 2: Map of Australia's 55 Regional Development Australia Committees

Source: Department of Infrastructure and Regional Development (www.regional.gov.au).

3.1 Building on RDA Brisbane's Success

RDA Brisbane's area coincides precisely with the area of the Brisbane City Council, the largest Local Government Area (LGA) in Australia. The map below illustrates where Brisbane sits in relation to adjacent LGAs. Most of the RDA's work can be divided loosely into a number of categories: catalysing, convening, networking, and researching and producing knowledge products.

Figure 3: Brisbane RDA Area

Source: Australian Bureau of Statistics

RDA Brisbane's significant achievements align with the context of the government policy frameworks for regional development. Over the last four years the RDA – through its members, staff and projects - has led or collaborated in numerous initiatives both within Brisbane and cross-regionally. These have all been in relation to addressing the broad-ranging goals and priorities set out in the RDA's Regional Roadmaps.

For example, the digital economy is a principal area of activity with the RDA organising and staging the Brisbane CLICK! Digital Expo in November 2012, coinciding with National Telework Week. This was the first such event of its kind in the region which was aimed at businesses and not-for-profit organisations to engage and 'survive and thrive' in the burgeoning digital economy. This event involved establishing partnerships with the three levels of government and engaging business and community sectors, resulting in a highly successful and effective event attended by over 600 representatives from small and medium-sized enterprises (SMEs) and not-for-profit (NFP) organisations. A third of attendees came from outside Brisbane, which made it a truly cross-regional event. In March 2013, the Brisbane City Council released its Digital Brisbane Strategy which was informed by the Brisbane Digital Audit. RDA Brisbane partnered with Brisbane Marketing in commissioning the Digital Audit, which was released by Brisbane's Lord Mayor at the CLICK! Digital Expo. RDA Brisbane is named as a partner in implementing the Digital Brisbane Strategy, and the 2014 CLICK! Digital Expo is listed as one of two key events for the city.

RDA Brisbane is hosting the SEQ RDA Regional Development Initiative, a joint project of the seven SEQ RDAs and involving RDA Northern Rivers NSW, in identifying a regional development framework of priority areas and which set and advanced goals across the key areas of:

- Transport and Logistics - improving the efficiency and effectiveness of existing and new transport infrastructure through improved logistics drawing on technology
- Smart Manufacturing Specialisations – 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

- Digital Capability - leadership and strategic intent to make SEQ a digitally capable region
- Regional Indicators - to assist in priority project identification and performance measurement.
- Human Capital - supporting initiatives to position the region for the Asian century.

The project will culminate in a consortia delivery strategy for the SEQ RDAs to take forward these areas of mutual commitment and will be put forward for the forthcoming review of the SEQ Regional Plan.

RDA undertook further labour market research to update its 2011 report: Skills Shortages in the Greater Brisbane Labour Market 2012-2021. The report had predicted that the Brisbane labour market will grow by 2.9% per annum over ten years and identified that there will be major skills shortages particularly in managerial and professional occupations. A 2013 update to the report provides refreshed data and analysis which, based on current economic circumstances, predicts a softening in the previously forecast level of skilled jobs growth in the next eight years and a shift in the skill shortage occupations toward trades and technical occupations as well as professionals and managers. A supplementary report was also prepared which analyses services to the mining industry, tertiary education patterns and structural changes, people not engaged in the labour market and gender segregation.

All these initiatives contributed and continue to contribute significantly to integrated regional planning outcomes for Brisbane and the broader SEQ region.

Figure 4 presents a summary of other key achievements and work undertaken by RDA Brisbane in 2012-13, and identifies momentum into 2013-2016, while Attachment 2 provides a more detailed table.

RDA BRISBANE'S WORK & KEY ACHIEVEMENTS IN 2012/13

Skills Shortages in the Greater Brisbane Labour Market 2012-2021 Update and **Supplementary Report** further analysed industry and occupation trends, tertiary education and structural change

Career Hunter, a national career navigation app developed in partnership with community & industry agencies and Federal & State Government education departments

Work Inspiration Queensland employer seminar support, to promote uptake of an innovative UK work experience model

SEQ Regional Development Initiative project across 7 SEQ RDAs, identified and examined regional issues and developed a regional development framework

Regional Indicators and a comprehensive **Regional Profile** developed for the Brisbane region

CLICK! Digital Expo – the first of its kind in Brisbane – which helped over 600 SMEs and NFP organisations "survive and thrive" in the digital economy

SEQ Digital Work Hubs project in partnership with SEQ RDAs

Business Resilience Stakeholder Network reactivated in January 2013 and posted one-stop business disaster assistance info on the RDA website

Strategic Investment Fund partnership with TAFE and 3 other RDAs delivered training to 269 SMEs and NFP organisations in carbon accounting, e-business health check and mobile apps development

NFP Digital Engagement survey which helped to inform sessions at the CLICK! Digital Expo

Vocational transport connectivity in the Australia TradeCoast southern area –stakeholder meeting following an earlier Bayside Industry Transport Forum

Brisbane Digital Audit of SMEs – in partnership with Brisbane City Council/Brisbane Marketing, which informed the Digital Brisbane Strategy

2012 Brisbane Innovation Scorecard - collaborating partner, enabling additional investigative research into Brisbane's high growth sectors, which was launched in August 2012

Brisbane Innovation Atlas pilot developed in association with Enterprise Connect as a demonstration tool

SEQ **transport and logistics forum** and briefings exploring freight movement efficiencies

MOMENTUM INTO 2013-2016

Share Skills Shortages report findings and work with government and industry to progress implementation measures

Enhance and make Career Hunter self-sustainable

Support Work Inspiration to its next level of national rollout

Implement cross-regional priorities and initiatives arising from the SEQ Regional Development Initiative, particularly profiling smart specialisations, optimising transport & logistics, digital capability and positioning the region for the Asian Century

Monitor and promote measures and benchmarks of Brisbane's performance

Organise a 2014 CLICK! Digital Expo – an extended event over 2 days at Brisbane City Hall, incorporating a masterclass program

Support the SEQ Digital Work Hubs project to establish digital workspaces and innovation hubs

Reactivate the Business Resilience Stakeholder Network if severe weather events impact business operations

Partner in establishing Business Excellence Roundtables, and in hosting an Energy Savers workshop for SMEs with sessions run by Energex and CitySmart's corporate partners

Strengthen NFP participation in the 2014 CLICK! Digital Expo

Address vocational transport connectivity in the TradeCoast south area, particularly with the utilisation of community transport options

Contribute towards implementing the Digital Brisbane Strategy

Partner in profiling the region's advanced industry specialisations

Investigate solutions for efficient freight movements around optimisation and technology

Figure 4: RDA Brisbane Achievements 2012-13 and Momentum into 2013-2016

3.2 Policy Context

It is a role of RDA to promote and support government policy and to incorporate new policy and directions in its strategic planning processes, with new priorities and actions cognisant of the current policy settings. RDA Brisbane's priorities and actions (Section 8) have been developed within this strategic context and in response to the needs of the community and stakeholders within a changing environment. RDA Brisbane has been particularly active in connecting stakeholders, creating networks and partnering to address key issues in the region (Attachment 2).

The Council of Australian Government (COAG)'s Regional Australia Standing Council (RASC) has developed an agreed five key determinants of long-term regional economic growth, which have informed the development of the RDA Brisbane Regional Roadmap:

1. Human capital, particularly education and skills
2. Sustainable (economically, environmentally and socially) communities and population growth
3. Access to international, national and regional markets
4. Comparative advantage and business competitiveness
5. Effective cross-sectoral and intergovernmental partnerships (including through place based approaches) and integrated regional planning.

Following is a summary of the policy frameworks of the three levels of government as they relate to regional development in Brisbane.

3.2.1 Australian Government

There are a number of major Australian Government policy frameworks which inform regional economic development thinking and the work of RDAs, including RDA Brisbane. Most recently, the Australian Government's 2012 White Paper, Australia in the Asian Century, noted that Australia's international trade flows (and investment flows) are increasingly to and from Asia and that 'the Asian century is an Australian opportunity'. In particular, Australia's regions are particularly exposed to the risks and opportunities posed by the 'Asian Century'.

The Australian Government also recently emphasised its focus on employment generation through its A Plan for Australian Jobs statement. This plan focuses on shoring up employment in the Australian manufacturing sector, promoting sales of Australian motor vehicles, and legislating minimum levels of Australian content in major business investment activities in Australia.

The work of RDAs includes developing strategic and targeted responses to their respective region's economic, social and environmental issues and opportunities.

The RDA Charter[1] states that RDA is 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 or bushfires)

[1] RDA National Charter www.rda.gov.au

- Social inclusion strategies, which will bring together and support all members of the community.

RDAs are tasked to achieve outcomes in the following areas:

- Consultation and engagement with the regional community on issues, solutions and priorities to identify the aspirations and potential of the region, help to develop a long-term vision for its future and connect the regional community with this vision
- Informed regional planning that identifies solutions which turn regional strengths and comparative advantages into a sustainable, innovative and competitive regional strategy for implementing the vision for the region
- An enhanced whole-of-government approach to regional issues based on strong and creative partnerships across and between all three levels of government – national, state/territory and local – which link governments to the regional community to better realise the opportunities created by regionalism and encourage regionally informed policy development
- Enhanced awareness of government programs that supports their use by the regional community to complement and build on regional strategies and aspirations, including leveraging funding between governments and the private sector
- Improved community and economic development that encourages soundly-based economic growth, environmental sustainability and social inclusion in the region by facilitating partnerships across all sectors - including the private sector and non-government organisations.

3.2.2 Queensland Government

In Queensland, following a change in government in March 2012, a number of new State Government priorities were set, including plans to:

- Reduce Queensland's unemployment to 4% within six years
- Grow a four pillar economy based on agriculture, tourism, resources and construction to drive the state's growth and prosperity
- Lower the cost of living
- Invest in infrastructure and pursue planning reforms
- Provide greater certainty for business and investors by streamlining approval processes, reducing regulatory burdens and establishing a competitive tax regime
- Revitalise front-line services
- Reinvest in accountability in government
- Encourage business activity and jobs creation.

In July 2013, the Queensland Government's Department of State Development, Infrastructure and Planning built on this initial policy direction and produced an economic framework statement, Governing for Growth. The statement listed the following parameters to respond to issues facing the Queensland economy:

- Provide leadership and certainty so that business can invest with confidence
- Reduce the cost of doing business
- Ensure government is efficient and effective

- Work with business and industry to communicate to Queenslanders the benefits of economic development.

It also focused its actions on six priority areas:

1. Simplifying business regulation
2. Minimising impediments to business growth
3. Fostering economic growth and resilience
4. Enabling infrastructure for economic growth
5. Driving productivity growth in the public sector
6. Communicating the importance of economic development.

The framework statement commits to a review process for the South East Queensland Regional Plan (2009-2031) in order to align it with the State Government's policy and planning reform agenda to deliver better planning for the state's continued growth and prosperity.

It also states that the Government is implementing key recommendations of the 2012 Skills and Training Taskforce Report to strengthen Queensland's vocational, education and training sector. Great skills Real opportunities is the Government's reform action plan for further education and training aimed at supporting Queenslanders to access and complete the skills training they need to obtain employment and address the state's skill needs. The Government is also planning to progress skilled and business migration reforms to encourage entrepreneurship, competition and address key skills gaps.

The contents of this recent economic framework statement correlate with some of the COAG RASC's key determinants of long-term regional economic growth. The RDA will also remain up-to-date with the progress of the recently announced 30-year Queensland Plan which the Queensland Government has started to develop and which is intended to be finalised before the end of 2013.

3.2.3 Local Government

As noted above, RDA Brisbane's region is the entire Brisbane LGA, the largest LGA in Australia. The community, economic and environmental work of the Brisbane City Council is guided by the following long-term planning frameworks:

- Our Shared Vision: Living in Brisbane 2026 - Council's integrated long-term vision for the city (its long-term community plan)
- Brisbane Economic Development Plan 2012-2031 - sets out Council's commitment to the actions that will deliver on the economic priorities identified for Brisbane
- Brisbane Long Term Infrastructure Plan 2012-2031 - aligns infrastructure delivery with Our Shared Vision: Living in Brisbane 2026
- Brisbane's Environmental Policy - aims to take environmental responsibility to manage the city and serve the community, and minimise environmental impacts associated with their activities, while conserving and enhancing the city's biodiversity.

All of the above plans are being drawn upon to create an overarching new city plan which is currently under development. The thrust of the city plan is facilitating 'economic growth and maintaining prosperity in Brisbane through sustainable development'.

In July 2012 Brisbane was one of the first cities in the world to appoint a Chief Digital Officer who has led the development of the Brisbane Digital Audit and the Digital Brisbane Strategy. The Digital Brisbane Strategy is a five year agenda to that focuses on digital innovation. It outlines programs and initiatives designed to provide Brisbane businesses with state-of-the art digital information, to encourage high-potential digital start-up companies and to improve the experiences of residents and visitors through digital technology.

4. Analysis of the Region

This section presents an analysis of the RDA Brisbane region, based on four of the five COAG Regional Australia Standing Council's key determinants of long-term regional economic growth:

- Human capital
- Sustainable (economic, environmental and social) communities and population growth
- Access to international, national and regional markets
- Comparative advantage and business competitiveness.

Key features of the RDA Brisbane region are outlined below:

- Brisbane is a highly educated region, which will be important in the development of the region as a 'knowledge economy'
- Brisbane is a strongly growing and diversifying city, which will be increasingly characterised by high-value professional services and skilled manufacturing
- Brisbane serves as hub for the South East Queensland region for employment / jobs, and it accounts for almost half of Queensland's economic output
- Brisbane is the third largest city in Australia, with a population over 1.1 million; population growth is expected to slow compared to Queensland to 2031
- Brisbane remains a highly 'liveable' city, despite more people living in flats, unit and apartments; its population is relatively socially advantaged and ageing less than Queensland as a whole
- Brisbane's environmental challenges relate to growing air conditioner ownership and usage
- Brisbane has good access to international, national and regional markets through the Port of Brisbane, the airport and the Australia TradeCoast industry and trade region
- Brisbane's access to e-commerce and the digital economy via communications infrastructure and the National Broadband Network is progressing
- Brisbane's comparative advantage and business competitiveness lies in the service-based industries and mining; manufacturing is declining and may require greater innovation and productivity to remain competitive.

4.1 Human capital

Managing Brisbane's predicted population growth over the next decade presents a series of challenges, including for employment, and health and education services. The data suggests a critical undersupply of trades and semi-skilled workers. Skills, training and education challenges for the RDA Brisbane region are as follows:

Table 1: Skills and Education Levels in Brisbane

Factor	
Proportion of residents aged 15+ with post-school qualifications	62%
- proportion of these with Bachelor degrees	55%
Skilled labour force - % of workforce employed as managers and professionals	39.4%
Projected future skills requirements to 2021	292,500 jobs
- % of which are in professional occupations	37%
- % of which are for technicians and trade workers	16%
- % of future job requirements relating to service-based industries	31.8%
Labour force participation rate	67.5%
Unemployment rate	5.5%
Youth unemployment rate	11.8%

Source: RDA Brisbane Regional Profile (Attachment 1).

4.1.1 Education and skills – increasing university qualifications but declining trade skills

Education and human capital are drivers of regional prosperity, with tertiary education in particular contributing to development of the knowledge economy, which is becoming increasingly important in Brisbane. Brisbane has a highly educated resident population - 55% of persons with a post-school qualification in 2011 held a bachelor degree or higher, compared with 37% for Queensland and 42% for Australia.[2] A key strength of the Brisbane population is the growing number of residents holding bachelor degree or postgraduate qualifications over the past decade (Figure 1).

2 ABS Census of Population and Housing, Time Series Profile, 2011.

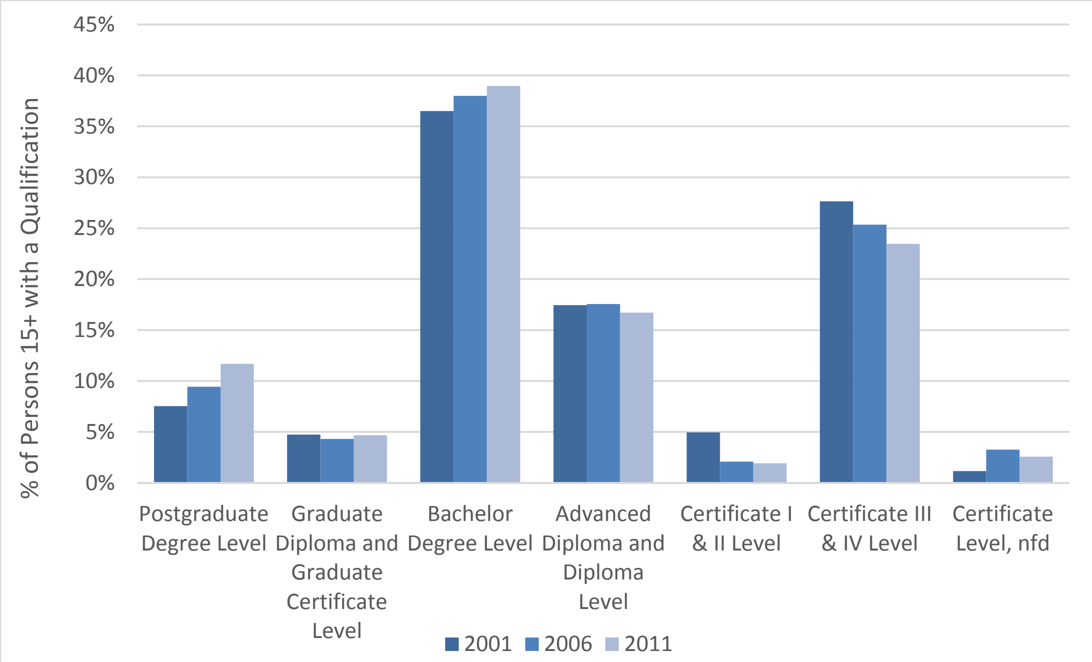

Figure 5: Tertiary Education Qualifications

Source: ABS Census of Population and Housing, Time Series Profile, 2011

However, certificate level qualifications have been declining, over 2001-2011, and there will be a significant future demand for technicians and trades workers. The analysis of skills shortages also shows that more jobs will be required to meet the demand in the growth of professional occupations which may represent a challenge in terms of sufficient levels of semi-skilled and trade-related workers - analysis of skills shortages suggests that more jobs will be required in professional occupations, but there will still be significant demand for technicians and trade workers, as discussed below.

4.1.2 Occupational profile - dominated by professional occupations

The occupational profile of Brisbane residents is dominated by professionals who account for 30% of resident workers compared to 19% for Queensland and 22% Australia-wide:[3]

- There has been an increase in residents working in professional occupations over the last decade (from 25% to 30%)
- The number of non-skilled and trade-related workers has either remained static or fallen slightly over the same period.

4.1.3 Future labour force challenges

RDA Brisbane's report, Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update, highlights that labour force needs are anticipated to grow by 2.5% annually, resulting in an additional 292,500 jobs being required in the Greater Brisbane labour market by 2021. Of these:

- 37% of jobs required in 2021 will be in professional occupations (104,156 jobs)

[3] ABS Census of Population and Housing, Working Population Profile, Time Series Profile, 2011.

- 16% of jobs required will be for technicians and trade workers (44,467 employees)
- 14% will be for managers (38,592 employees).[4]

By industry, the majority of future skills requirements are in the services sectors, notably the professional, scientific and technical services sector (46,741 employees or 16% of total requirements) and the health care and social assistance sector (46,410 employees or 15.8% of total requirements).[5]

The report finds that **expected labour force needs have been revised down from the previous estimate**, made in 2011, of 343,000 jobs, and a 2.9% annual growth rate.[6] Influencing factors are thought to be an easing in the mining boom, structural change in the economy and the Queensland public service retrenchments. However, the downward estimate is considered to be a short-term phenomenon, with an expected trend back towards the 343,000 figure in the future.[7]

4.1.4 Labour force participation and unemployment – declining participation and increased unemployment

Brisbane's unemployment rate of 5.5% in December 2012 is lower than that for Queensland (5.8%) but higher than that for Australia as a whole (5.2%).[8]

However, a key challenge is the increase in unemployment experienced recently. In December 2011, Brisbane's unemployment rate (then 4.7%) was lower than the Australian average (5.1%). While the Australian rate has remained virtually unchanged, Brisbane's rate (and Queensland's rate to a lesser extent) has increased steadily, rising 0.8% over a 12-month period.[9] Of concern is the high level of youth unemployment in Brisbane, at 11.8% [10] which correlates with double-digit youth unemployment rates in most other Australian capital cities. [11]

Table 2: Unemployment Rates, Brisbane, Queensland and Australia, 2011/2012

	Dec 2011	March 2012	June 2012	Sep 2012	Dec 2012
Brisbane	4.7%	4.7%	4.9%	5.2%	5.5%
Queensland	5.5%	5.5%	5.5%	5.6%	5.8%
Australia	5.1%	5.1%	5.2%	5.2%	5.2%

Source: Department of Education, Employment and Workplace Relations, Small Area Labour Markets Australia, December 2012

Unemployment is particularly problematic in the outer south-west and inner city-south side areas - for example, reaching 24% in Richlands and 23.5% in Inala. Unemployment in the outer south-west suburbs increased over 4% in the year to March 2013 in contrast to the majority of suburbs where the

4 RDA Brisbane, 2013, Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update.

5 RDA Brisbane, 2013, Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update.

6 RDA Brisbane, 2011, Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2011 Update.

7 RDA Brisbane, Regional Profile (Attachment 1).

8 Department of Education, Employment and Workplace Relations, December 2012.

9 Department of Education, Employment and Workplace Relations, December 2012.

10 ABS 2011 Census

11 Attachment 5 RDA Brisbane Capital City RDA Indicator Rankings

increase was less than 2%. In the western suburbs, by contrast, unemployment is generally below 2%.[12] .

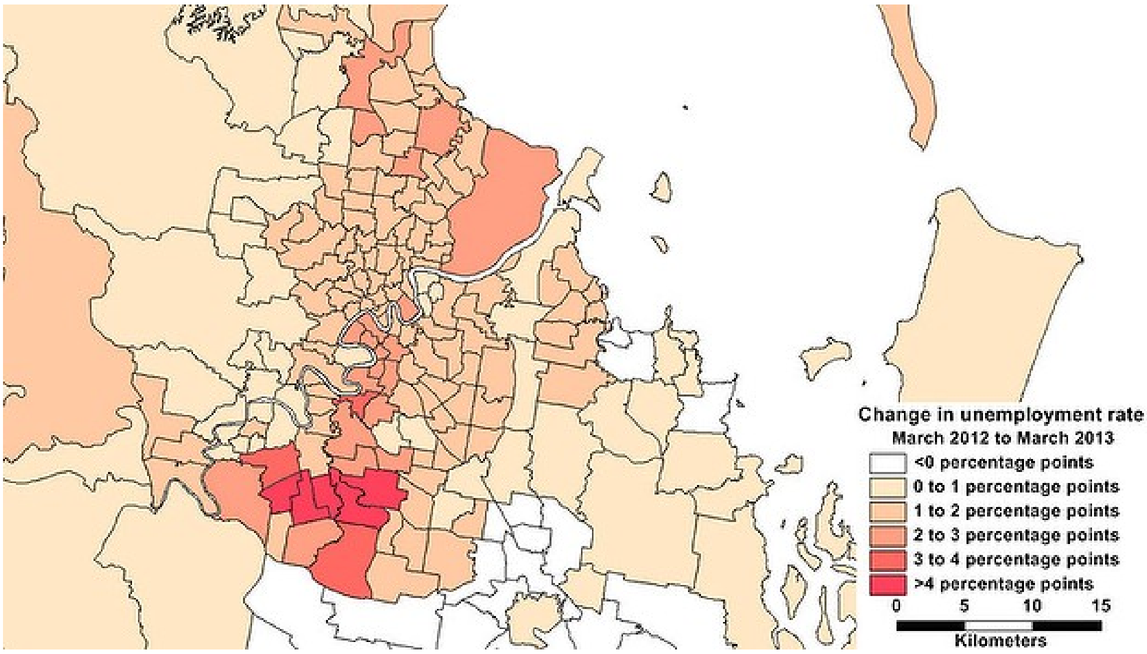

Figure 6: Change in unemployment rate in Brisbane suburbs March 2012 to March 2013

Source: Brisbane Times, 25 July 2013

Brisbane's labour force participation rate of 67.5% is higher than that for Queensland as a whole of 66.1%. However, in the last 12 months to March 2013, it has declined by 1.3%.[13]

One of the goals of the SEQ RDA Regional Development Initiative project framework relates to human capital: 'We will address regional skills shortages and employment issues and support initiatives to position the region for the Asian century.'[14]

4.2 Sustainable (economic, environmental and social) communities and population growth

4.2.1 Economic

As noted earlier, population growth and employment pressures create a particular set of challenges to Brisbane's sustainability. Brisbane accounts for almost half of Queensland's economic output and is a hub of regional economic activity in South East Queensland. [15] The importance of the knowledge-based industries and services are rapidly growing in Brisbane, both in terms of employment and contribution to Gross Value Added (GVA); mining sector growth was rapid in terms of employment and GVA, albeit from a small base, and the construction phase of several major projects is tapering

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12 Department of Education, Employment and Workplace Relations, Small Area Labour Markets March 2013

13 March 2013 Australian Regional Labour Markets data

14 SEQ RDA 2013, Regional Development Initiative framework

15 RDA Brisbane, Regional Profile, based on OESR Experimental estimates of GRP, Queensland Treasury and Trade, March 2013.

off.[16] Key challenges and strengths will be the increased reliance on knowledge-based jobs and supporting the continued growth in this area. The manufacturing sector remains significant, although declining compared to earlier periods, which also presents challenges.

Some key economic indicators are shown below, with key issues, challenges, strengths discussed below in more detail.

Table 3: Key Brisbane Economic Indicators

Indicator	Value
Size of the economy (greater metropolitan area - gross regional product)	$130 billion
GRP per capita (greater metropolitan area)	$63,600
City product as a percentage of the country's GDP	9.2%
Economic growth, 2001-2011	4.7% per annum
Number of jobs located in Brisbane LGA	632,015
Employment participation (percentage of working age population)	68.5%
Business size - percentage of businesses with >$2M turnover	6.7%

Source: RDA Brisbane Regional Indicators (Attachment 3)

Gross Regional Product

In 2010/11, Brisbane contributed almost half of Queensland's State Product (48%), with Gross Regional Product (GRP) of $129.7 billion. Brisbane's GRP grew 4.7% over 2000/01 to 2010/11, the third fastest Queensland region (after the Gold and Sunshine Coasts). This compares to average annual economic growth of 4.1% for Queensland and 2.9% for Australia during the same period. Growth has slowed over the last four years, compared to the earlier period.[17]

Key industries - by employment and by contribution to Gross Value Added

The key industries in terms of employment by industry sector in Brisbane are:

- **The services sector:** in terms of employment by industry in 2011, the top three industry sectors are health care and social assistance (13% of all jobs in Brisbane), professional, scientific and technical services (11%) and public administration and safety (9%).[18]
- **Manufacturing:** Brisbane's manufacturing sector is also prominent, accounting for just under 9% of all jobs located in Brisbane in 2011. However, there has been a **decline in the dominance of manufacturing in terms of employment by industry,** which has fallen 10% compared to 2006).[19]

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16 OESR Experimental estimates of GRP, Queensland Treasury and Trade, March 2013; and ABS Census of Population and Housing, Working Population Profile, Time Series Profile, 2011.

17 OESR 2013, Experimental estimates of GRP, Queensland Treasury and Trade, March 2013.

18 ABS Census of Population and Housing 2011.

19 ABS Census of Population and Housing 2011.

In the five years to 2011, Brisbane's stock of knowledge-based jobs increased in the professional, scientific and technical services sector by 28%; and in the health care and social assistance sector by 24%.[20]

Industries that contributed most significantly to GVA for the region reflect the same trends - the growing importance of services and knowledge-based industries and the continued though declining importance of manufacturing:

- The top three sectors in terms of contributions to GVA were financial and insurance services (9.6%); manufacturing (9.4%); and professional, scientific and technical services (9.2%)[21]
- Despite manufacturing being one of the top three sectors contributing to GVA in 2010/11, its contribution to GVA has declined by 3.4% since 2000/01. By contrast, the contribution to GVA of professional, scientific and technical services has grown by 2.5% since 2000/01.[22]

Overall, Brisbane's economic prosperity has become increasingly reliant upon its capacity to produce, distribute and use knowledge and information.

The mining sector

The mining sector is one of fastest growing industries, in terms of:

- Employment: over 2006-11, the mining sector in Brisbane added 8,830 jobs, the majority of which were in mining sector management and professional occupations. While this growth occurred from a small base, it was a significant increase.[23]
- Contribution to GVA growth: the mining sector's contribution to GVA has grown significantly, by 11.1%, over the decade, though its contribution to GVA remains fairly low, at 1.4%. However, supply chain linkages due to mining would result in a much higher economic contribution. For instance, a notable proportion of the jobs in the professional, scientific and technical services sector (which ranked second highest in terms of employment by industry rankings in 2011 and in skills shortage forecasts) are related to services providing to the Brisbane and Queensland mining sectors. [24]

Regional employment 'hub'

Brisbane LGA is part of the Greater Brisbane labour market and therefore relies on neighbouring LGA residents to help make up its labour force. In total, 190,840 workers from other LGAs, in particular Moreton Bay LGA (accounting for 37% of commuters), commute to Brisbane for their main location of work. Many of these are Queensland public sector workers.

Journey-to-work data highlights the importance of the Brisbane CBD as an employment location serving the wider region. Second in size to the CBD as an employment hub is the Australia

20 RDA Brisbane 2013, Regional Profile.

21 OESR 2013, Experimental estimates of GRP, Queensland Treasury and Trade, March 2013.

22 OESR 2013, Experimental estimates of GRP, Queensland Treasury and Trade, March 2013.

23 ABS Census of Population and Housing 2011.

24 OESR 2013, Experimental estimates of GRP, Queensland Treasury and Trade, March 2013.

TradeCoast, which is one of the fastest growing trade and industry regions in Australia (Attachment 1, Regional Profile).[25]

4.2.2 Social

Brisbane has a population of 1.1 million, making it the third largest city in Australia. Key social and population indicators are illustrated in Table 4.

Table 4: Demographic Statistics

Indicator	Value
Population	1,109,664
Population increase, 2002-2012	1.9% per annum
Number of households	380,775
Median age	34.7
Proportion of residents born overseas	33%
Indigenous population as proportion of the total population	1.4%

Source: RDA Regional Profile 2013

In terms of socially sustainable communities and population growth, the key emerging issues, trends and challenges for Brisbane are:

- Population growth: strong growth over last decade, though slower in last 5 years; expected to be slower than Queensland to 2031
- Age structure: fewer issues in terms of ageing population compared to Queensland - more people of working age
- Socio-Economic Indexes for Areas (SEIFA): performs in the top 10% across Australia for two out of the three SEIFA indexes
- Housing: a larger proportion of people are living in high density housing and paying mortgages compared to 10 years earlier
- Liveability: Brisbane is maintaining its status as a liveable city
- Growth of the knowledge economy: reflected by a significant proportion of people connected to the internet and having broadband services.

Population growth

Brisbane has experienced strong population growth over the last decade, growing at an average annual rate of 1.9%. This compares to slower Australian population growth of only 1.4% over the same period; although Queensland population growth was higher, at 2.1%. In the last five years (2007-12) of the preceding decade, population growth has been slowing compared to the first five year period (2002-2007).[26]

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25 RDA Australia, Digital Work Hub Project research, June 2013, based on ABS Census Journey to Work data 2011.

26 ABS Regional Population Growth Australia (Cat. no. 3218.0), ABS Census of Population and Housing, Time Series Profile 2011; see RDA Brisbane Regional Profile 2013.

Forecast population growth to 2031 (0.8% annual increase) is slower than that expected for Queensland as a whole (1.8%); Brisbane's population is expected to grow to 1.2 million by 2031, based on average annual increase of 0.8% - less than the increase expected for the state (1.8%).[27]

Age structure

Brisbane has a relatively young population compared to Queensland as a whole, with more people in the prime working age group (20-39 years). The median age is 34.7 years, compared to 36.6 years for Queensland - while the median age has increased slightly in Queensland over 2006-11 (by 0.6 year), it has remained steady in Brisbane.[28] This also applies to the Indigenous population, which makes up 1.4% of Brisbane's population (compared to 3.6% for Queensland) in 2011 - 45% of the Indigenous population in Brisbane is in the 20-49 year age group, compared to 38% for Queensland and 39% for Australia.[29] As a result, issues relating to the ageing population are less pressing than for Queensland and Australia as a whole.

Index of socio-economic disadvantage

Based on the index of socio-economic disadvantage, Brisbane City is the most advantaged LGA in Queensland in 2011, and had a SEIFA score in the top 10% of areas within Australia. However, challenges remain in relation to the 6.6% of the population which falls into the most disadvantaged quintile (the bottom 10%), concentrated around outer south west suburbs. Brisbane also performs well in terms of the other Index of Education and Occupation - again it is the top ranked LGA in Queensland, and within the top 20% in Australia. Comparatively, challenges may remain in relation to the Index of Economic Resources, although Brisbane is in the top 20% in Queensland and the top 30% in Australia.[30]

Income levels

The share of higher income earners in Brisbane is increasing. A higher proportion of residents (aged 15 and over) earned high incomes and a lower proportion earned low incomes, compared to Qld and Australia. Despite this, welfare dependence is among the highest in Australia, with the RDA Brisbane region ranking 45 out of 55 in the percentage of the population relying on government support as the main source of income [31]At the time of the 2011 Census:

- 32% of persons aged 15 and over in Brisbane had personal weekly incomes of less than $400, compared with 35% for Queensland
- 21.5% of persons relied on government support as their main income source
- 34% of Brisbane households had weekly incomes of $2,000 or more, compared to 25% for Queensland (and 26% for Australia); at the other end of the income scale, 16% reported a weekly household income of $600 or less compared to 20% for Queensland and 21% for Australia.[32]

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27 Queensland Government Population projections: Brisbane and Queensland 2001-2031.

28 RDA Brisbane Regional Profile 2013, based on ABS Census of Population and Housing, Time Series Profile 2011.

29 RDA Brisbane Regional Profile 2013, based on ABS Census of Population and Housing, Time Series Profile 2011.

30 ABS Census of Population and Housing 2011, Socio-economic Indexes for Areas (SEIFA) 2011.

31 Attachment 5: Capital City RDA indicator rankings, 2013; source of data RAI InSight Competitiveness Index

32 ABS Census of Population and Housing 2011.

Housing tenure and dwelling types

It is notable that fewer homes in Brisbane are owned outright in 2011 (28%) compared to 10 years earlier (38%) - a greater proportion is owned with a mortgage (34% in 2011 compared to 26% in 2001).[33] This is likely to reflect trends affecting most capital cities in Australia, given rising real estate values over the period. There has also been a shift to smaller dwelling types in Brisbane - in 2011, 29% of population lived in flats, units, apartments or semi-detached dwellings compared to 24% in 2000/01. This was a higher proportion of the population compared to Qld (20%) and Australia (24%) [34] reflecting changes in preferences amongst the population and an increase in inner-city living.

Liveability / lifestyle

While experiencing strong economic growth and diversification, Brisbane has maintained its 'feel' as a sub-tropical city with a relaxed and friendly lifestyle, which will be significant in continuing to attract and retain skilled workers and businesses. Brisbane performs well in terms of liveability / lifestyle indices - for example:

- In 2012 Brisbane ranked 8th in the world for 'quality of life' in FDI Intelligence's Asia-Pacific Cities of the Future report
- The Economist's Global Liveability report ranked Brisbane 20th internationally
- The Australian City Liveability Index survey found that most Brisbane residents feel their city has 'quality urban design, recreational and cultural opportunities and amenity' (68%) and a 'quality natural environment' (74%).[35]

Internet connections

Internet access is considered a strength for Brisbane, with 83% of all private occupied dwellings possessing an internet connection in 2011, compared to 78% for Queensland and 77% for Australia. The majority of these were broadband connections (92%), which is also higher than for Queensland and Australia. In fact Brisbane rated number two (second only to the Australian Capital Territory) in national competitiveness rankings of RDA regions (Table 7). This may be reflective of the growing knowledge economy in Brisbane.[36]

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33 ABS Census of Population and Housing 2011.

34 ABS Census of Population and Housing 2011.

35 RDA Brisbane 2013, Regional Profile, based on the Department of Infrastructure and Transport's Major Cities Unit, which surveyed residents in ten Australian cities.

36 ABS Census of Population and Housing, 2011.

4.2.3 Environmental

Brisbane enjoys high environmental values and is recognised as the most biologically diverse Australian capital due to its sub-tropical location and unique landscape.

Environmental challenges include the increasing use of air-conditioners with their impact on electricity demands, and the production of greenhouse gases. The Major Cities Unit reports that Brisbane is experiencing peak electricity demand issues during heatwaves and consecutive days of higher than normal temperatures - electricity demand can be up to 65% higher on hot days compared to cooler days, and is mostly attributable to air-conditioner use.

Brisbane City Council's Global City Indicators Facility (GCIF) also provides an indication of environmental performance.[37] By 2026, Brisbane City Council is aiming for its energy use per capita to be the lowest in Australia, to be carbon neutral and to have reduced the amount of direct greenhouse gases emitted from Council activities by 50% of the year 2000 levels. To achieve this, Brisbane City Council purchases approximately 100 gigawatt hours of electricity per year to power streetlights, traffic lights, data centres and buildings. This is equivalent to over 13,500 Brisbane households. All of this electricity is now from 100% renewable sources. Further, Council purchases carbon offsets to cover carbon emissions from its vehicle fleet, including buses, ferries, and corporate fleet, as well as from business air travel, machinery, asphalt plants and crematoria.

Table 5: Brisbane Environmental Performance

Indicator	Reference area	Value
Greenhouse gas emissions measured in tonnes per capita	Brisbane GCCSA	19.54
Total residential electrical use per capita (kWh/year)	Total Brisbane Metropolitan Area	2479 kWh
Percentage of city's solid waste that is recycled	Brisbane LGA	24%
% of the city's wastewater receiving tertiary treatment	Brisbane SA	99.7%
Green area (hectares) per 100,000 population	BCC	570.1

Source: RDA Regional Profile 2013

4.3 Access to international, national and regional markets

Two of the RDA's six aspirational goals for Brisbane are 'a connected city: with appropriate transport infrastructure and transit efficiency providing access to employment and markets' and 'a digital city: actively engaging opportunities offered by the digital economy for the benefit of all'. The growth of Brisbane's 'digital economy' has the potential to significantly assist Brisbane to achieve maximum market access. The SEQ RDA Regional Development Initiative also includes a goal related to transport and logistics, incorporating digital technology: 'We will partner to improve efficiency and effectiveness of new and existing transport infrastructure through improved logistics drawing on opportunities such as those provided by high capacity broadband'.

Indicators that are relevant to access to international, national and regional markets are in Table 6.

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[37] Brisbane City Council 2013, Global City Indicator Facility reporting.

Table 6: Transport and Communication Data

Indicator	Value
Growth in port freight, 2011-12	11.8% p.a.
Airport growth - growth in passengers, Brisbane Airport, 2012	4.5% p.a.
Aviation infrastructure (distance to and from CBD to nearest airport)	9.8km
Port infrastructure (distance to and from the CBD to nearest port)	9.8km
Road infrastructure (distance from the CBD to nearest major highway)	1.9km
Rail infrastructure (distance to nearest railway station/service)	8.4km
Broadband connectivity - % of households and businesses with broadband internet, 2011 (ABS Census)	76.6%

Source: RDA Regional Profile 2013 and Capital City RDA Indicator Rankings

4.3.1 Transport infrastructure

Brisbane has significant connections to international, national and regional markets through:

- **The Port of Brisbane:** the port is a significant container port plus a bulk commodities port for handling mineral resources and agricultural products:
  - In 2011-12, Brisbane's port handled 12.5 million tonnes of bulk imports and 506,607 containers (20 foot equivalent units, or TEUs), and 11.4 million tonnes of bulk exports and 499,275 containers.[38]
  - Over the four years to 2012, the volume of container imports through the port (in tonnes) increased, on average, by 3.3 per cent per annum, while exports increased by 3.6 per cent per annum. Overall, the volume of export trade grew by 23.1% over the 12 months to June 2012.[39]
  - The port's significance to Brisbane's regional development is evidenced by the fact that around 60% of import containers are unpacked within 40 kilometres of the port; only 7% of import containers are transported interstate.
  - Exports through the Port of Brisbane originate from Brisbane (39%), the rest of South East Queensland (34%) and regional Queensland and NSW (26%).[40]
  - Intermodal and multimodal terminals located at Acacia Ridge the Port of Brisbane (Fisherman Islands) are both key facilities that support import and export freight movements. Both have road and rail access, however while rail plays a key role in freight movements, it only accounts for a 5% share. There is little scope for modal shift to rail without investment in new infrastructure because of the nature of trans-urban freight movement. Consequently, distribution from and between the Brisbane Multimodal Terminal, Acacia Ridge and locations within the Brisbane region is predominantly by road which contributes to major network road congestion and is unsustainable in the long term. A dedicated rail freight corridor option is currently being investigated in order to lift the rail share of freight movement in and out of the Port.

[38] Department of Infrastructure and Transport, Major Cities Unit.

[39] RDA Brisbane Regional Profile 2013, based on Port of Brisbane data.

[40] Port of Brisbane, Total trade in tonnes, July 2011 to June 2012.

- **The Australia TradeCoast (ATC) trade and industry region**: The ATC region houses 1,500 businesses, which employ around 60,000 people, and it contributes an estimated $9.4 billion to the Queensland economy. It is one of the fastest growing trade and industry regions in Australia, and provides direct links to air, sea, road and rail networks.[41] However a 2011 survey of businesses identified worker public transport as the main inhibitor to business growth.
- **Brisbane Airport:** as well as transporting domestic and international passengers, Brisbane Airport serves as an important freight transport hub. In 2011/12, international air cargo imports through Brisbane Airport increased by 11%, while international air cargo exports increased by 7%. Total international air cargo movements through Brisbane Airport increased by 9% in 2011/12.
- **Road and rail infrastructure access**: RDA Brisbane's Capital City Indicator Rankings (Attachment 5) show that Brisbane ranks number one nationally for the close proximity of its CBD to the airport and port, while its rail infrastructure (distance to nearest rail service) ranks below every other mainland state capital city in Australia. Brisbane's distance of 1.9 km from its CBD to the nearest major highway is within 1 km of that of the highest ranking region.[42]

4.3.2 Digital economy and broadband

Increasingly, individuals, businesses, institutions and organisations are relying on the production and distribution of goods and services through electronic commerce, interacting and trading through information and communications technologies. Communications infrastructure and high speed internet access in particular are important as a driver of growth and indicator of access to international, national and regional markets.

Brisbane was among the first locations in Australia to receive the National Broadband Network (NBN), with service becoming available in 2013 in the Aspley 'fibre serving area' and in a number of green-field estates across Brisbane, with expanded areas of construction underway in Nudgee and Acacia Ridge.[43]

The Department of Broadband, Communications and the Digital Economy summarised the growth of the digital economy in Australia, and the benefits for businesses and not-for-profit organisations as follows:

'…by 2020, Australia will rank in the top five OECD countries in the percentage of businesses and not-for-profit organisations using online opportunities to drive productivity improvements, expand their customer base and enable jobs growth.'[44]

As noted above, a majority of households in Brisbane have internet access (83% of private dwellings), and the majority of these have broadband connections (92%).[45]

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41 RDA Brisbane Regional Profile 2013, based on Australia Trade Coast, 2012.

42 Regional Australia Institute InSight Competitiveness Index, 2013

43 RDA Regional Profile 2013, based on NBN Co.

44 The Department of Broadband, Communications and the Digital Economy website, 2013

45 ABS Census of Population and Housing 2011.

The 2012 Brisbane City Digital Audit reports on the extent to which businesses use broadband and conduct e-commerce. It found that:[46]

- 83% of surveyed businesses are using digital technologies
- Only 30% are selling products and services online
- 41% communicate electronically with customers and suppliers
- Overall, Brisbane was given a 'C' rating for its digital maturity score, with a score of 3.07 on a scale of 1 to 5. The industry breakdown reveals that 'Information and Telecommunications' is leading in terms of overall maturity, followed by 'Education and Training' and 'Rental, Hiring and Real Estate Services'. Industries that need to improve their digital capability include 'Manufacturing', 'Construction' and 'Health Care and Social Assistance'.

The challenge for Brisbane City's Digital Strategy will be to determine how to work with the business community to make Brisbane a high performing and pioneering city in the digital economy. Under the SEQ Regional Development initiative, one of the SEQ RDAs' key goals relates to the digital economy: 'We will facilitate leadership and strategic intent to make SEQ the most digitally capable region in Australia'. For instance, RDA Brisbane is among five SEQ RDAs partnering in the Digital Work Hub Project, alongside investigations by the Queensland Government. This project is seeking to explore a new model of work across the entire region. This new model would use subsidised and promoted telework to fund the development of privately-owned co-working centres – or Digital Work Hubs - in commuter zones north, south and west of Brisbane. These would include high-commuting areas such as the Sunshine Coast, Gold Coast and Ipswich. These hubs or collaborative workspaces/buildings have been described as 'libraries without books', 'Qantas lounges in the suburbs' or 'work clubs' and aim to bring the workplace to where people live.

4.4 Comparative advantage and business competitiveness

In the wake of the global financial crisis and changing government policies, Brisbane has a number of challenges to ensure that, drawing on its various comparative advantages, it translates this into durable business competitiveness.

The growth-share matrix shown in Figure highlights the relative size, growth and employment shares of Brisbane's industry sectors compared with Queensland. The figure indicates areas of comparative advantage and business competitiveness of Brisbane industries in terms of:

- *Expanding industries (top right quadrant)*: as noted above, Brisbane's expanding industries, characterised by higher average annual growth and higher than average level of specialisation, are its services industries, including financial and insurance services; professional, scientific and technical services; public administration and safety; and health care and social assistance. These are also the industries currently contributing most to employment and GVA, as noted above. Again, this highlights the importance of Brisbane as a knowledge-based economy and its service sectors.
- *Emerging industries (lower right quadrant)*: the mining sector in particular is a key emerging industry, along with education and training and construction, based on its high rate of growth in the five years to 2011, mining represents an emerging industry for Brisbane. As many of the

[46] Brisbane Marketing, Brisbane City Digital Audit, 2012

mining jobs located in Brisbane are in the managerial and professional occupations, there is scope for this sector to continue to grow and serve Queensland, national and international markets.

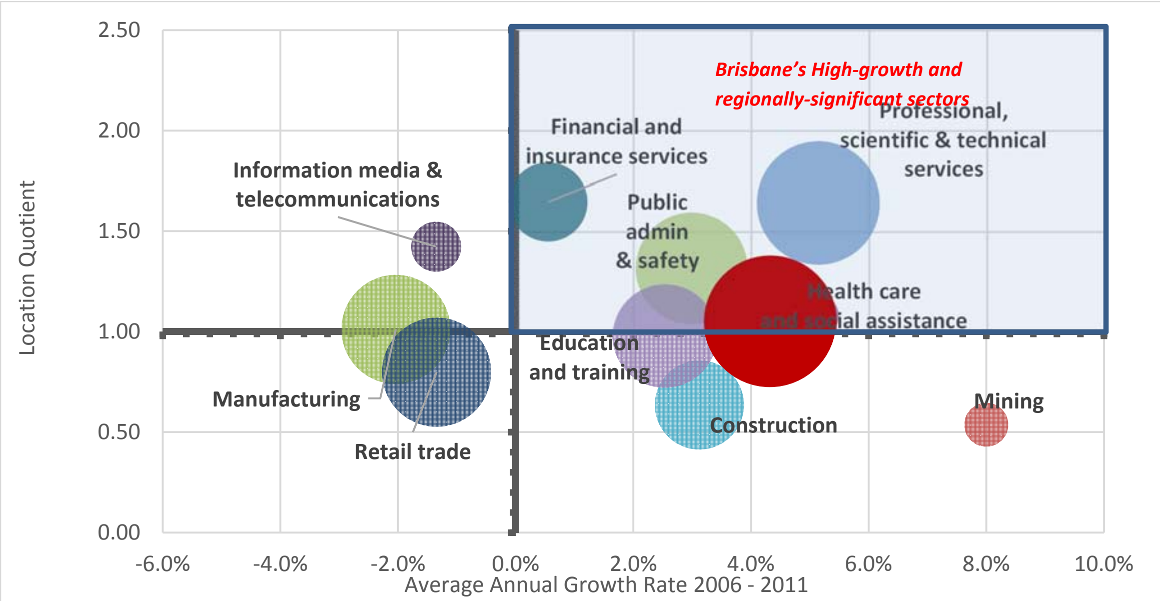

Figure 7: Industry Growth and Share, Brisbane, 2006 - 2011

Source: RDA, Regional Profile, based on ABS Census of Population and Housing, Time Series Profile, 2011

The top left and lower left quadrants indicate sectors that are transforming (at risk and needing to increase innovation and productivity to compete) or transitioning (not developed or growing).

Key industries in the transitioning sector are manufacturing and retail trade. Although these are two of Brisbane's largest sectors in employment terms, their relative rate of growth and specialisation shows them to be in a period of transition. However, Brisbane's manufacturing sector displays a positive location quotient - i.e. more jobs in Brisbane than residents in these jobs - which may indicate some promise for the industry's future in Brisbane. The SEQ Regional Development Initiative includes a Smart Manufacturing Specialisations goal, under which SEQ RDAs aim to '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.[47] Competitiveness is also a function of diversification. The map below shows Brisbane among the other South East Queensland RDA regions, by level of economic diversification.

Economic diversification is one factor in mitigating economic risk. Diversification suggests a low dependence on any given sector of economic activity such that if one sector suffers a downturn the whole economy does not suffer. Recent data, as depicted in Figure 7, shows RDA Brisbane, as well as all of the SEQ RDAs (except the Gold Coast), among the most diversified regions in Australia.

47 RDA Brisbane, 2013, SEQ Regional Development Initiative Framework.

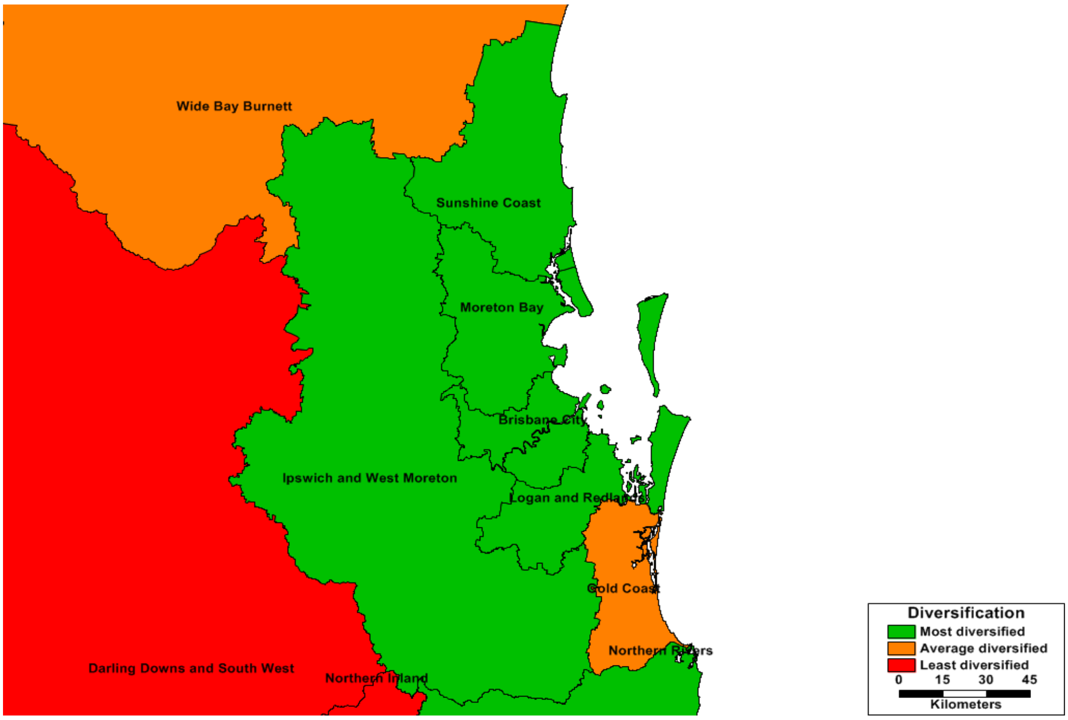

Figure 8: Economic Diversification in Brisbane and SEQ

Source: Marsden Jacob Associates, drawing on RAI Insight data

Ranking Brisbane's Competitiveness Nationally

In June 2013, the Regional Australia Institute (RAI) introduced 'InSight' – the nation's first online index tracking the competitiveness of Australia's 560 LGAs and 55 RDA regions. Modelled on the World Economic Forum's Global Competitiveness Report, InSight was developed in collaboration with Deloitte Access Economics and combines data from sources including the Australian Bureau of Statistics and the Social Health Atlas of Australia.

InSight spans ten themes and 59 indicators specifically tailored to reflect the fundamentals of sustainable growth in Australia, capturing the competitiveness of LGAs and RDAs according to current economic performance and drivers of future success.

Table 7 has been prepared drawing on the RAI InSight data, and ranks Brisbane's competitiveness vis-a-vis the other 54 RDAs. A score of 1 is the highest ranking and a score of 55 is the lowest. Brisbane scored impressively across a range of key areas, while in other areas ranked lower than the national average.

Table 7: RDA Brisbane Competitiveness Rankings against all 55 RDA regions

Indicators	National Rank	Indicators	National Rank
NATURAL RESOURCES		**HUMAN CAPITAL**	
Mineral resources	27	University qualification	2
Timber resources	39	Technical qualification	51
Commercial fishing and aquaculture	41	Lifelong learning	39
Coastal access	6	Early school leavers	2
National Park	14	Health	11
Net primary productivity	39	English proficiency	44
ECONOMIC FUNDAMENTALS		Early childhood performance	38
Building approvals	2	School performance: Primary	5
Wage/labour costs	10	Secondary	4
Business confidence	4		
INFRASTRUCTURE & ESSENTIAL SERVICES		**INNOVATION**	
Aviation infrastructure	1	Human resources in science &technology	5
Port infrastructure	1	Research & development managers	2
Access to tertiary education services	2	Presence of research organisations	5
Access to technical or further education	38	Expenditure on R&D	10
Access to hospital services	1	**BUSINESS SOPHISTICATION**	
Access to allied health services	15	Economic diversification	4
Access to GP services	17	Dominance of large employers	54
Police services	3	Exporters, importers, wholesalers	7
Road infrastructure	8	Income source – own business	2
Access to primary education services	3	Access to local finance	3
Access to secondary education services	7	Exports	2
Rail infrastructure	13	**TECHNOLOGICAL READINESS**	
INSTITUTIONS		Internet connection	2
Public services	12	Broadband connections	2
Local government expenditure	16	Businesses in technology & related industries	2
Development applications	n.a.	Workers in ICT and electronics	5
Regional government influence at state/national level	1	**LABOUR MARKET EFFICIENCY**	
Transparency of local government policy	4	Unemployment rate	26
Clear roles and responsibilities in regional governance	4	Young unemployment	29
Financial burden of local government	n.a.	Participation rate	5
Local government assistance for businesses	1	Skilled labour	2
MARKET SIZE		Welfare dependence	45
Size of economy	4		
Population	5		

Source: Compiled from Regional Australia Institute 'InSight' Competitiveness Index

4.5 'State of play' in Brisbane – identifying key issues

Brisbane makes up approximately half of the Queensland economy, as noted above. Taken as a whole, the Brisbane region is performing highly across a mix of social and economic fronts. However, as noted in the analysis above, there is a range of challenges to be addressed, risks to be mitigated and opportunities to be realised as discussed below.

4.5.1 Comparative advantages, specialisations and economic clustering

Brisbane is the fourth most economically diversified region in the country. This presents opportunities for a focus on specialisation and economic clustering. While manufacturing is one of Brisbane's largest employing industries, it is in a state of transition (at risk and needing to increase innovation and productivity to compete) and future employment projections indicate slowing growth. However with manufacturing displaying a positive location quotient, there is potential to arrest a projected decline through strategies to boost manufacturing investment in innovation-led advanced specialisations. There is a relatively strong research sector (Brisbane ranks 5th nationally in the number of research organisations) and many of them are seeking greater connections with industry, which will contribute further to the region's innovation potential. The data and anecdotal evidence suggests Brisbane's role as a 'hub' is becoming reinforced by a growing South East Queensland region and greater coupling with northern New South Wales. It is noted that infrastructure readiness is staying ahead of that growth curve, particularly transport infrastructure (as mentioned below) and social infrastructure to meet population growth and liveability needs.

4.5.2 Human capital, education and skills

The region's human capital is vital to realising the capabilities and skills of an efficient labour market and future skill needs. Although current indications are that the local labour market mostly has the skills to meet current demands, there are predictions of strong jobs growth to 2021, particularly in the professional, technical, health and social assistance areas. Further, and as noted in the RDA's Skills Shortages Report 2013 Update, there are predicted deficiencies in Brisbane's pool of workers with vocational and technical skills. This is borne out by Brisbane ranking 51st out of 55 RDA regions nationally in the percentage of its labour market with technical and certificate qualifications, and 38th for access to technical and further education. The international student market is Brisbane's largest export industry, and recent working visa changes now enable students to work in Australia post-graduation which will help recent negative impacts on the sector brought about by the GFC and the high value of the Australian dollar.

Currently Brisbane ranks number 38 out of 55 regions across Australia in early childhood performance, with 27.4% of children identified as 'developmentally vulnerable' on one or more domains (Regional Australia Institute's InSight Competitiveness Index 2013, University of Adelaide, Social Health Atlas of Australia 2011). Queensland children are considered to be in 'catch up' mode as Queensland is one of the last states to introduce a prep year as part of the school curriculum, although it has not been made compulsory at this stage.

4.5.3 Unemployment and disadvantage

While population growth is continuing in Brisbane, albeit at a lower rate than Queensland overall, the level of unemployment in Brisbane has risen significantly in the last 18 months, possibly led by downsizing in the Queensland public service and cutbacks in Brisbane-based resource sector roles.

Information received from RDA stakeholders suggests that there is 'hidden' unemployment at professional and management levels that is not being addressed through current labour market processes. Those most vulnerable are retrenched workers, women returning to the workforce and workers in the 45+ age group. Tertiary graduates are finding it difficult to secure employment in their chosen fields and are travelling interstate or overseas for opportunities. This is also borne out in RDA Brisbane's supplementary report to the Skills Shortages in the Greater Brisbane Labour Market 2013 Update.

The projected increases in job creation and the efficient management of this, not least as a way of mitigating social problems that flow from unemployment, will be critical for Brisbane over the next several years, especially with young unemployment (those in the labour market aged 15 to 24 years) currently at double-digit percentage rates.

The data clearly indicates that the growing pool of young unemployed need to be channelled into training where there is a demand for skills, such as trade occupations, and into high growth industries such as health care and social assistance.

While data shows that Brisbane is the least socially disadvantaged LGA in Queensland, there are pockets of suburban areas with high unemployment, high welfare dependency and other indications of relative socio-economic disadvantage.

4.5.4 Infrastructure, port and freight

Trade through Brisbane's port continues to grow at a fast rate. Intermodal and multimodal terminals are key facilities that support import and export freight movements and both have road and rail facilities. However, with rail only accounting for a 5% share of freight movements in and out of the Port of Brisbane, there is growing road freight transport contributing to Brisbane's traffic congestion. While there is a need for dedicated freight rail infrastructure, there are opportunities for digital technologies to play a role in optimising logistics and freight movements, thereby reducing transport congestion.

4.5.5 Digital economy and business resilience

Brisbane's digital readiness appears high by national standards. Brisbane's Digital Audit conducted in 2012 revealed the city scored 3.07 on a scale of 1 to 5, giving it an overall 'C' digital maturity rating and indicating that more needs to be done to make Brisbane, and indeed South East Queensland, a highly digitally capable region.

4.5.6 Asian century and competitiveness

As noted in the Asian Century White Paper, Australia's fortunes are strongly linked to Asia. This connection is relevant to all the key COAG economic growth determinants. Particularly in the context of its growing role as a transport hub and close proximity to Asia, Brisbane's Asian 'connectedness' will only become more important over time. Business resilience and competitiveness needs to keep pace in order to capitalise on the opportunities and challenges presented by the rise of Asia. Supporting Brisbane's role in growing Australia's connections with Asia will therefore be a core way of responding positively to the other risks and opportunities facing the region.

Section 5 draws on the analysis and opportunities identified in this section to develop the priorities for RDA Brisbane.

5. Strategic Framework: Regional Priorities

RDA Brisbane has dedicated considerable energy to developing a flexible and robust planning framework for implementing its strategy. This has been validated through the regional analysis, drawing on current evidence gathered through detailed desktop research of the current and dynamic policy environment including government priorities, assimilation of current data addressing economic and social indicators and trends, and stakeholder consultation and engagement across a diverse range of sectors.

This framework presents a high-order set of regional priorities that outlines a streamlined and integrated approach to the delivery of RDA actions against key performance indicators (KPIs) for the forthcoming annual Business Plans which will operationalise this Regional Roadmap.

The four regional priorities which the RDA has identified to take Brisbane forward towards realising its six visionary goals are:

1. Regional workforce planning to meet current and future skills challenges and human capital development through research, analysis, and the development of partnerships.
2. Planning for infrastructure needs and industry capacity to sustain population growth, competitiveness and alignment with the rise of Asia.
3. Keeping pace with a transforming economy by embracing digital innovation, building resilience and promoting clean energy measures.
4. Strengthening cross sectoral networks and building collaborative capacity for the development of a sustainable and inclusive region.

Figure 9 shows the priorities and goals framework, and represents the strategic intent of the organisation. It indicates how the four priorities align against the previously discussed six goals (shown in Figure 1).

		Goals					
	RDA Brisbane Priorities	*1 Competitive City*	*2 Liveable City*	*3 Clean City*	*4 Digital City*	*5 Enterprising City*	*6 Connected City*
1	**Regional workforce planning to meet current and future skills challenges and human capital development through research, analysis, and the development of partnerships**	●				●	●
2	**Planning for infrastructure needs and industry capacity to sustain population growth, competitiveness and alignment with the rise of Asia**	●	●	●	●	●	●
3	**Keeping pace with a transforming economy by embracing digital innovation, building resilience and promoting clean energy measures**	●		●	●	●	
4	**Strengthening cross-sectoral networks and collaborative capacity for the development of a sustainable and inclusive region**		●			●	

Figure 9: Priorities and Goals Framework

The strategic framework also aligns closely with the COAG RASC key determinants of long-term regional economic growth.

6. RDA Priorities and Actions

RDA Brisbane's work plan for 2013-2016 has been developed around parameters of:

- Building on existing momentum, wherever logical and supported by stakeholders

  Being mindful of the need to leverage available resources in order to widen the scope and capacity to deliver for the region
- Drawing on recent stakeholder feedback and analysis of the 2013 Regional Profile
- Selecting activities where it is perceived there is the greatest value-adding potential
- Avoiding replication of the efforts of others and supporting the extant initiatives of stakeholders which are in line with Roadmap goals
- Aligning all activities to the six Roadmap goals
- Selecting those activities where RDA involvement is most likely to generate outcomes.

The actions derived for the work plan are presented under each of the four RDA Brisbane priorities and identifies in which period they will be undertaken. The work plan also identifies which of the six goals for Brisbane the actions address.

Priority 1				
Regional workforce planning to meet current and future skills challenges and human capital development through research, analysis, and the development of partnerships				
Realising our Goals: A Competitive City | An Enterprising City				
		2013-14	**2014-15**	**2015-16**
1.1	Build upon labour market research and analysis towards strengthening the region's human capital	X	X	X
1.1.1	Finalise and release the *Skills Shortages in the Greater Brisbane Labour Market – 2013 Update* and *Supplementary Report* and widely promote the findings to government, industry and education sectors	X		
1.1.2	Work with relevant agencies to identify and contribute further data and analysis to inform future workforce development and skill needs research.		X	
1.2	Progress implementation measures and recommendations from the Skills Shortages reports	X	X	X
1.2.1	Work with stakeholders to inform the implementation of reform agendas for further education and training, aimed at supporting access to employment and addressing industry skill needs	X	X	X
1.2.2	Foster community-industry-government partnerships to develop initiatives to encourage successful education-career transitions	X	X	X
1.3	Address transport limitations to enable workers, jobseekers and students to access opportunities in the Australia TradeCoast employment area.	X	X	

Priority 2
Planning for infrastructure needs and industry capacity to sustain population growth, competitiveness and alignment with the rise of Asia

Realising our goals: A Competitive City | A Liveable City | A Clean City | An Enterprising City | A Digital City | A Connected City

		2013-14	2014-15	2015-16
2.1	Monitor and promote various measures and benchmarks of Brisbane's performance, including a Regional Profile and regional indicators, to inform regional planning processes		X	
2.2	Convene a 'Brisbane Futures' foresighting event to contribute to future planning and profiling	X		
2.3	Respond to regional economic, social and environmental infrastructure needs including promoting any infrastructure funding programs as required by the Australian Government		X	X
2.4	Participate in cross-regional priorities and initiatives arising from the SEQ Regional Development Initiative as they relate to goals and priorities for Brisbane	X	X	X
2.4.1	Provide input to the review of the South East Queensland Regional Plan	X	X	
2.5	Partner to profile the region's advanced industry specialisations	X	X	X
2.5.1	Implement the Smart Manufacturing Specialisations Joint Action Plan, arising from the SEQ Regional Development Initiative project	X	X	
2.6	Support the efficiency and capacity of Brisbane's freight transport and logistics systems	X	X	X
2.6.1	Undertake a multi-faceted investigation aimed at improving freight movements in and out of the Port of Brisbane including options for optimisation using digital technologies and supporting new rail infrastructure	X	X	

Priority 3 ***Keeping pace with a transforming economy by embracing digital innovation, building resilience and promoting clean energy measures***				
Realising our goals: A Competitive City |A Clean City| A Digital City |An Enterprising City				
		2013-14	**2014-15**	**2015-16**
3.1	Support the positioning of Brisbane as a major digital investment destination by partnering to implement the Digital Brisbane Strategy including:	X	X	X
3.1.1	Convening the 2014 CLICK! Digital Expo to assist business and NFP engagement in the digital marketplace	X		
3.1.2	Facilitating digital work hubs to ease commuter traffic congestion and to encourage collaboration and entrepreneurship	X		
3.2	Support the Digital Enterprise and Digital Hubs programs in raising digital engagement of Brisbane enterprises and residents	X	X	
3.3	Promote Brisbane as a clean city and highlight successes and innovation	X	X	X
3.3.1	Partner with CitySmart (the Brisbane City Council's sustainability arm) in their Watt Savers program by conducting an energy savers workshop for SMEs	X		
3.4	Partner to foster business growth and resilience including:	X	X	X
3.4.1	Establishing Brisbane Business Excellence Roundtables to encourage business connections and engagements	X		
3.4.2	Maintaining and reactivating the Brisbane Business Resilience Stakeholder Network if severe weather events or economic shocks occur which threaten business continuity			
3.4.3	Promoting and supporting Indigenous enterprise and economic development initiatives.		X	X

Priority 4 Strengthening cross-sectoral networks and collaborative capacity for the development of a sustainable and inclusive region				
Realising our goals: A Liveable City | An Enterprising City | A Connected City				
		2013-14	**2014-15**	**2015-16**
4.1	Build community capacity and enhance social inclusion among Brisbane’s not-for-profit service providers	X	X	X
4.1.1	Map Brisbane’s NFP service provider organisations and work to improve their sustainability and resilience		X	X
4.1.2	Partner to host workshops for NFP organisations on community asset building and social enterprise development	X	X	
4.2	Build RDA organisational capacity by:			
4.2.1	Adopting sustainability reporting through the Global Reporting Initiative		X	
4.2.2	Forging stronger links with the Indigenous community through developing a Reconciliation Action Plan	X		
4.3	Contribute actively to support whole of government and community networks, such as the Government Industry Business Information Network (GIBIN)	X	X	X
4.4	Collaborate with other capital city RDAs to advocate for the common needs and priorities of growing metropolitan regions including partnering in national initiatives or projects	X	X	X

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(Additional sources are listed at Attachment 1: Brisbane Regional Profile 2013)

8. Attachment 1: Regional Profile

Brisbane Regional Profile

July 2013

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RDA Brisbane would like to acknowledge SC Lennon & Associates Pty Ltd for compiling the Regional Profile.

www.sashalennon.com.au

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BACKGROUND

The RDA Brisbane Regional Roadmap 2013-2016

This regional profile forms part of RDA Brisbane's new three-year Regional Roadmap, 2013-2016. The Roadmap is a long-term regional planning instrument which reflects RDA Brisbane's six goals for Brisbane and identifies priorities and actions for RDA Brisbane to take forward for implementation. The Roadmap provides an evidence base – through the analysis of regional data, consultations and government policy – to support its direction.

About RDA Brisbane

RDA Brisbane is part of a national network of 55 committees established by the Australian Government under the Regional Development Australia (RDA) initiative. RDAs bring together all levels of government, business and the community to identify opportunities, challenges and priorities for action in their regions. They are local people developing local solutions to local issues.

RDA Brisbane works within the Brisbane Local Government Area and its role is to:

- Support regional planning across all levels of government;
- Work with the community to identify and take action on critical economic, social and environmental issues;
- Provide advice to local communities and government on programs and services which will help develop new opportunities in the region; and
- Contribute to workforce skilling and participation strategies, innovation and technology opportunities and social inclusion strategies.

RDA Brisbane builds relationships across all spheres of government, the private sector and the community and, in doing so, has set the following six goals as expressions of long-term aspirations for the region:

These goals address RDA Brisbane's Vision Statement:

RDA Brisbane's Vision is to be a highly effective and respected collaborator with the community and all levels of government to realise Brisbane's unique economic, social and environmental potential.

The six goals also inform RDA-Brisbane's Mission:

RDA Brisbane's Mission is to carry out independent and transparent engagement that promotes partnerships across all sectors of the community and all levels of government to develop Brisbane's economic, social and environmental prosperity.

The Brisbane Regional Profile and the Key Determinants of Long-term Regional Economic Growth

This regional profile has been prepared to help inform the preparation and implementation of the RDA Brisbane Regional Roadmap 2013-2016 as well as serving as a stand-alone resource for the region. Specifically, it will enable RDA Brisbane to identify Regional Priorities, including those outside the scope of the RDA's direct influence, to provide a strategic framework for RDA Brisbane's focus for its 3-year Regional Roadmap.

The information contained in this regional profile is presented under the following four headings:

1. Human Capital;
2. Sustainable (economic, environmental and social) communities and population change;
3. Access to international, national and regional markets; and
4. Comparative advantage and business competitiveness.

These four headings represent four of the five key determinants of long-term regional economic growth as determined by the Council of Australian Governments (COAG) Regional Australia Standing Council (RASC). These key determinants provide a common lens through which to analyse a region and identify regional economic development priorities. Each is briefly explained in turn.

Human capital

Improvements in human capital can enhance the innovative and productive capacity of a workforce. Developing a highly skilled and educated workforce assists with building the resilience of a region. Individuals with greater education and skills can pursue a wider range of employment opportunities, adapt to new processes and technologies which improve productivity, and improve their standard of living.

Sustainable communities and population change

'Sustainable communities' refers to the ability of a region to endure in the long-term. It has economic, environmental and social dimensions. 'Population change' refers to change in the size of a population over time, caused by migration and natural change through births and deaths.

Population is one of the most important resources of a region. Population change can be a significant factor in the long-term viability of the local community in terms of economic, environmental and social sustainability. Population change affects demand for regional infrastructure and services, and can influence the amenity or liveability of regions. Growth in a region's working age population can boost the labour force and expand the productive capacity of the region's economy.

Access to international, national and regional markets

Access to markets is the ability to trade goods and services in a given market. It includes access to trading partners, clients and labour. Improving access to markets broadens trade, allows competitive industries to grow, and can increase the availability of goods and services.

Comparative advantage and business competitiveness

Regional comparative advantage can be considered as a region's area of relative strength or specialisation, such as access to natural resources. Business competitiveness is the ability of a business to sell and supply goods and services compared to a competitor. A business has a competitive advantage when its products or services cannot be easily duplicated by competitors.

Efforts to develop regional economies are most successful when they focus on building on their strengths or comparative advantage. Businesses can also use a region's comparative advantage to build a competitive advantage, which is also developed through the combination of factors such as knowledge, resources, skills and the ability to innovate.

THE REGIONAL PROFILE

Overview of the RDA Brisbane Region

A hub of regional economic activity in South East Queensland and a driver of the State's competitiveness, Brisbane accounts for almost half of Queensland's economic output. With a population of well over one million – making it the third-largest city in Australia - Brisbane has experienced strong economic growth and diversification, while maintaining its 'feel' as a sub-tropical city with a relaxed and friendly lifestyle, confirming its place as Australia's 'new world city'.

The gateway to Queensland, Brisbane is the State's key cultural, civic and business centre, attracting a significant number of leisure and business visitors throughout the year. Complementing the city's economic prosperity, Brisbane enjoys high environmental values and is recognised as the most biologically diverse Australian capital due to its sub-tropical location and unique landscape.

Key statistics, which illustrate Brisbane's social, demographic and economic standing and diversity, are summarised below.

Factor	Brisbane Profile
Population **	1,109,664
Population increase, 2002-2012 **	1.9% per annum
Households *	380,775
Median age *	34.7
Proportion of residents born overseas *	33%
Indigenous population as proportion of the total population *	1.4%
Proportion of residents aged 15+ with post-school qualifications *	62%
Labour force participation rate^	67.5%
Unemployment rate^	5.5%
Number of jobs located in Brisbane *	632,015
Number of resident workers *	576,490
Employment self-sufficiency *	110%
Number of businesses ~	114,041
Size of the economy (gross regional product) ^^	$130 billion
GRP per capita``	$63,600
City product as a percentage of the country's GDP``	9.2%
Economic growth, 2001-2011^^	4.7% per annum
Tourism visitors, 2012 ***	5.9 million

Sources:

*** Tourism Queensland

** ABS Regional Population Growth data, 2012

* ABS Census of Population and Housing, 2011

^ Dept. Education, Employment and Workplace Relations, Small Area Labour Markets data, December 2012

^^ Queensland Treasury

~ ABS Counts of Australian Businesses, 2007-2011

`` Brisbane City Council

Human Capital

Education, Labour Force and Skills and Income

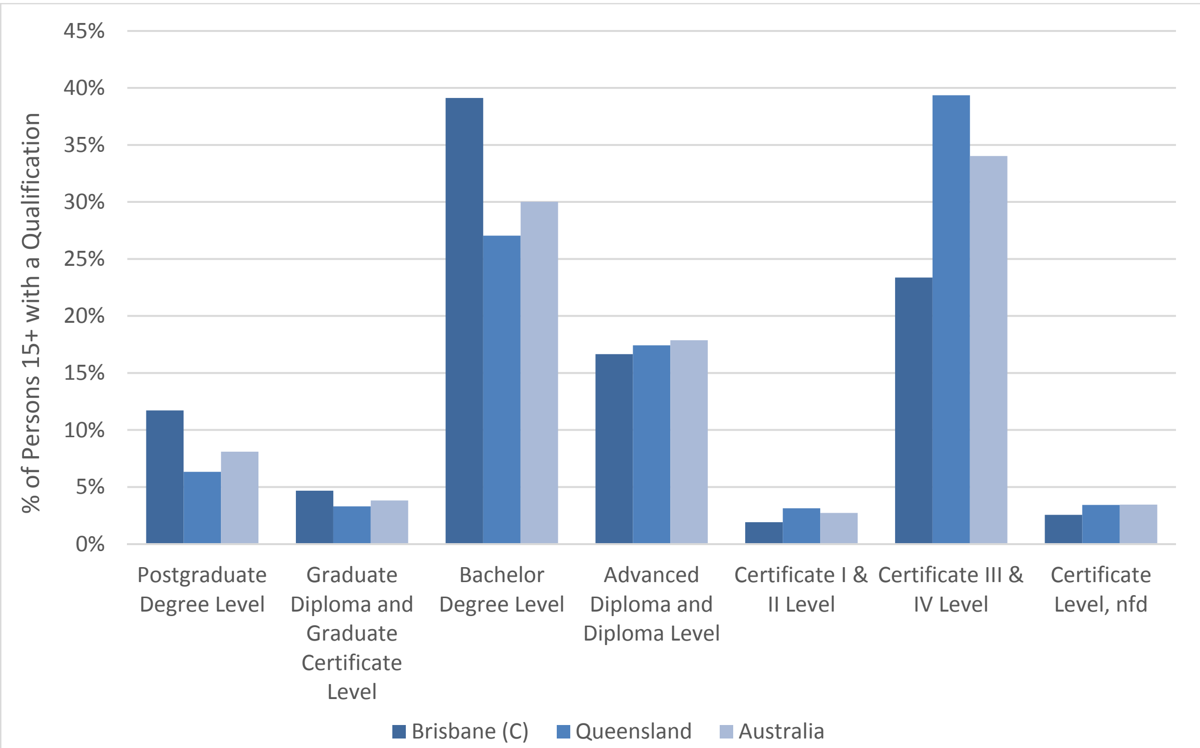
Post-school Education Qualifications

Education is a driver of regional prosperity and all levels of education – primary, secondary and tertiary - contribute to regional development. But it's the tertiary education sector that is at frontier of economic development in the knowledge economy. Universities and technical colleges, together with other research organisations and think tanks as well as innovation centres and industry incubators play a fundamental role in determining a region's knowledge economy capabilities.

Brisbane's resident population is highly-educated with 55% of persons with a post-school qualification holding a Bachelor Degree or Higher in 2011. By comparison, Australia-wide, persons holding a Bachelor Degree or higher represent 42% of those with post-school qualifications, while for Queensland the figure is only 37%.

Bachelor Degree qualifications account for the largest share of post-school qualifications held by Brisbane residents (39%) followed by Certificate III & IV Level (24%) and Advanced Diploma qualifications (17%). By comparison, Certificate III & IV Level qualifications account for the largest share of tertiary qualified residents in Queensland and Australia.

FIGURE 6. POST-SCHOOL EDUCATION QUALIFICATIONS, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

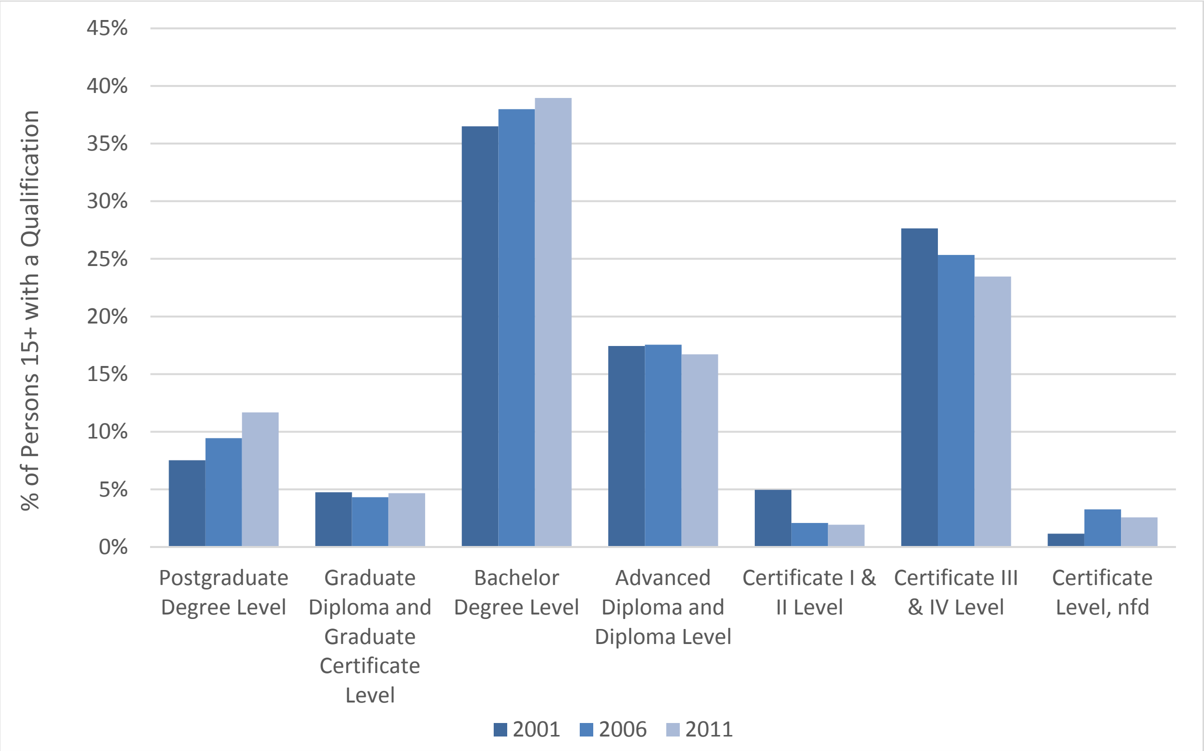
Trends in Post-school Education Attainment

Brisbane's tertiary education profile has demonstrated a trend over the five years to 2011 for a greater proportion of tertiary-educated residents with Bachelor Degree level qualifications and Postgraduate Degree level qualifications.

In 2011, 39% of Brisbane's tertiary-qualified residents held a Bachelor Degree compared to 38% in 2006 and 36.5% in 2001. The number of Brisbane residents holding Postgraduate Degrees in 2011 represented 11.7% of tertiary-educated residents compared to 9.4% in 2006 and 7.5% in 2001.

The proportion of tertiary-qualified Brisbane residents holding Certificate Level qualifications fell over the ten year period to 2011 while the proportion holding Graduate Diplomas and Graduate Certificates was static.

FIGURE 7. POST-SCHOOL EDUCATION QUALIFICATIONS, BRISBANE, 2001, 2006 AND 2011



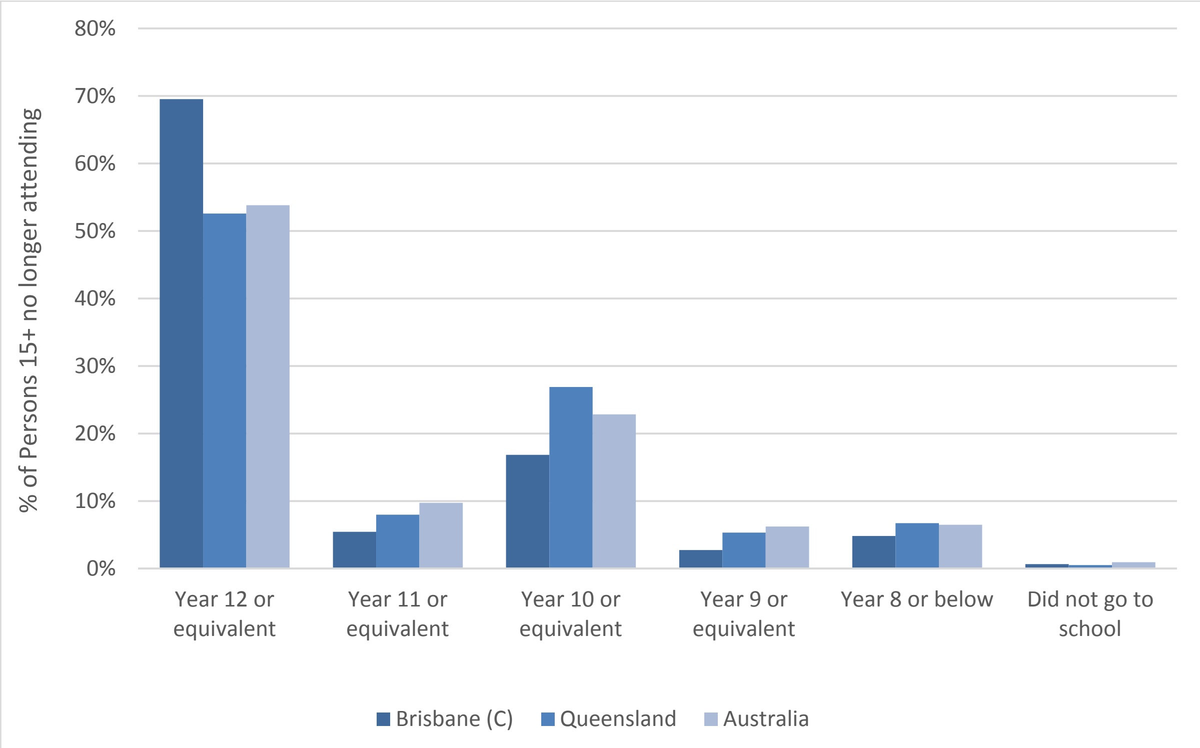
Source: ABS Census of Population and Housing, Time Series Profile, 2011

Secondary School Qualifications

Brisbane is well-endowed with the highest-quality secondary schools and colleges in both the private and State systems.

In 2011 69.5% of Brisbane residents had completed Year 12 or equivalent compared to 53% of for Queensland and 54% of people Australia-wide. In Brisbane 92% of the population have completed Year 10 or above compared to 88% in Queensland and 86% of people throughout Australia as a whole.

FIGURE 8. SECONDARY SCHOOL QUALIFICATIONS, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

Labour Force Participation, Employment and Unemployment

According to the Department of Education, Employment and Workplace Relations' Small Area Labour Markets data, the Brisbane region had a total labour force (persons employed plus those unemployed but actively seeking work) of 1,137,900 at as December 2012. Of those, 1,075,400 were employed and 62,500 were registered as unemployed.

Brisbane's unemployment rate of 5.5% in December 2012 is lower than that for Queensland (5.8%) and higher than that for Australia as a whole (5.2%). Over the 12 months to December 2012, Brisbane's rate of unemployment increased steadily – by 0.8% - since December 2011 when it was 4.7%. According to ABS 2011 Census data, youth unemployment is relatively high, with 11.8% of persons in the labour force aged 15-24 looking for work.

TABLE 8. UNEMPLOYMENT RATES, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011/2012

	Dec 2011	March 2012	June 2012	Sep 2012	Dec 2012
Brisbane	4.7%	4.7%	4.9%	5.2%	5.5%
Queensland	5.5%	5.5%	5.5%	5.6%	5.8%
Australia	5.1%	5.1%	5.2%	5.2%	5.2%

Source: Department of Education, Employment and Workplace Relations, December 2012

More recent data, from the March 2013 Australian Regional Labour Markets data, shows Brisbane's labour force participation rate of 67.5% is higher than that for Queensland as a whole of 66.1%. However, in the 12 months to March 2013, Brisbane's labour force participation rate declined by 1.3%.

Broken down to Statistical Local Area (SLA level), those SLAs with the highest unemployment rates (above 10%) are concentrated in outer south-west Brisbane and the inner city-southside areas, while the SLAs with the lowest rates of unemployment (below 2%) are in the western suburbs.

TABLE 9. HIGHEST AND LOWEST UNEMPLOYMENT RATES IN BRISBANE BY SUBURB, DECEMBER 2012

Suburb / SLA	% unemployed	Suburb / SLA	% unemployed
Darra-Sumner	11.5	Brookfield	1.7
Durack	23.5	Burbank	1.8
Dutton Park	10.2	Chapel Hill	1.7
Inala	23.5	Fig Tree Pocket	1.7
Pallara-Heathwood-Larapinta	11.2	Kenmore	1.7
Richlands	24.0	Kenmore Hills	1.7
Wacol	11.3	Pinjarra Hills	1.8
Willawong	18.7	Pullenvale	1.7
Woolloongabba	10.4		

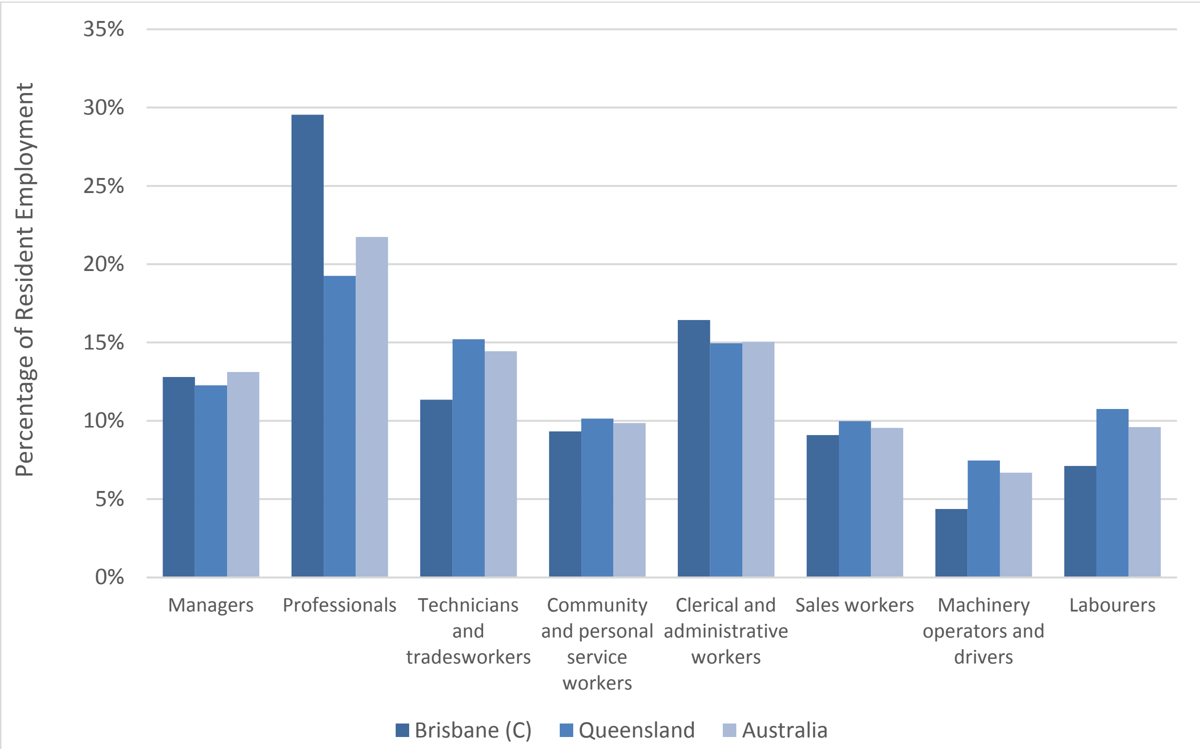
Source: Department of Education, Employment and Workplace Relations, December 2012

Occupational Profile

The occupational profile of Brisbane residents is dominated by professionals who account for 30% of resident workers compared to 19% for Queensland and 22% Australia-wide.

Other occupations which feature more prominently in Brisbane compared to Queensland and Australia include managers and clerical and administrative workers, reflecting the relative strength of Brisbane's services sector.

FIGURE 9. OCCUPATIONAL PROFILE, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

Occupational Trends

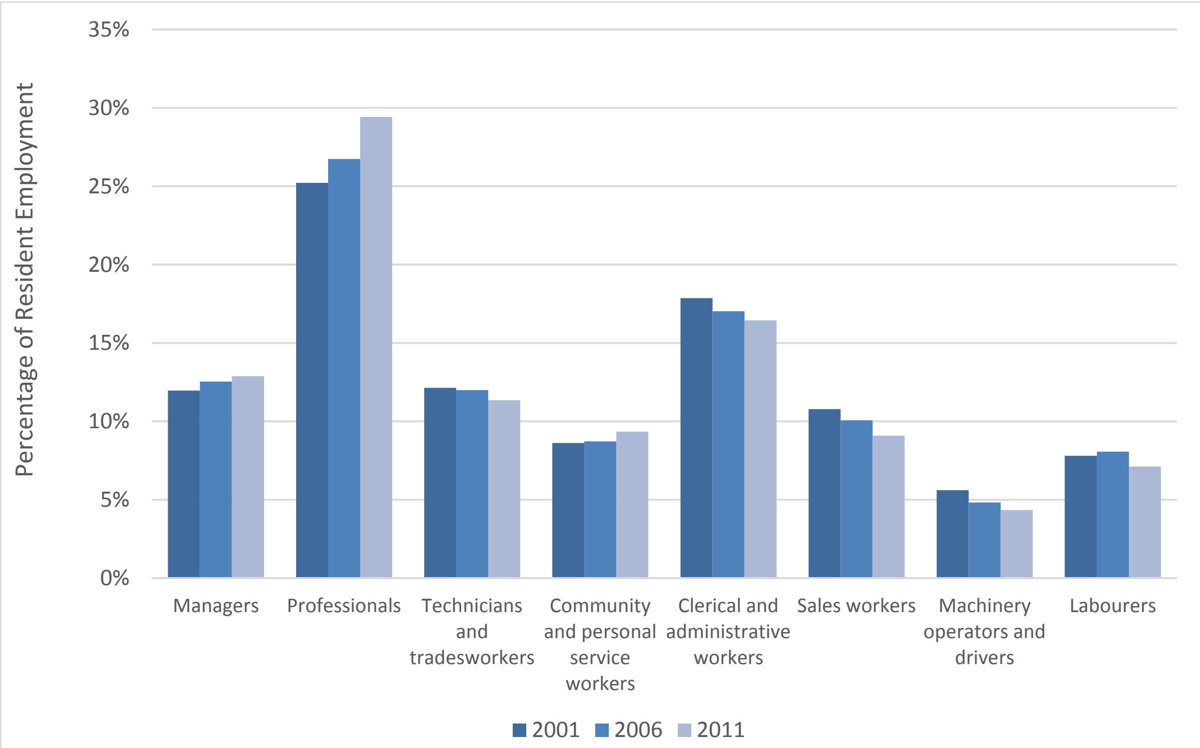
Over the ten year period to 2011, Brisbane has displayed an increase in the number of residents working in professional occupations, from 25% of employed residents in 2001 to 30% in 2011.

The number of resident managers as a proportion of Brisbane's workforce has also increased over time, as has the number of community and personal service workers.

Despite accounting for a significant share of occupations amongst Brisbane residents, the proportion of clerical and administrative workers has fallen, from 18% in 2001 to 16% in 2011. The number of sales workers has also fallen steadily over the ten years to 2011.

The number of Brisbane's non-skilled and trade-related workers has either remained static or fallen slightly as a proportion of total resident workers over the ten year period to 2011.

FIGURE 10. OCCUPATIONAL PROFILE, BRISBANE, 2001, 2006 AND 2011



Source: ABS Census of Population and Housing, Time Series Profile, 2011

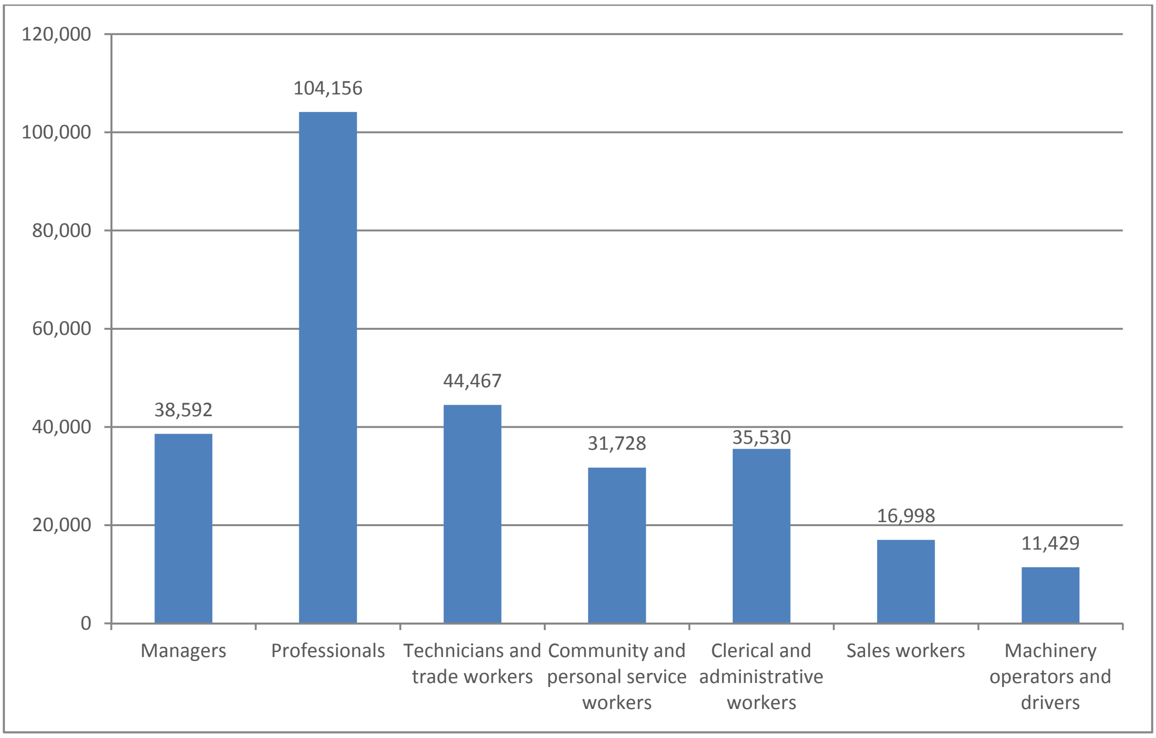
Forecast Skills Requirements by Occupation

RDA Brisbane recognises Brisbane's skills base and labour force availability as critical to the region's economic future. In July 2013 RDA Brisbane released a labour force capability study update titled *Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update*. The study, undertaken by Synergies Economic Consulting headed up by Professor John Mangan, focuses on the Greater Brisbane labour market (based on the Brisbane Statistical Division) and updates the Skills Shortages report released by RDA Brisbane in 2011.

The study estimates the expansion of the Greater Brisbane labour market by 2021 to 292,500 jobs, based on projections of a 2.5% annual growth rate in labour force needs. This is down from the projected 343,000 jobs based on a 2.9% annual growth rate predicted in the 2011 report. Influencing factors include an easing in the mining boom, structural change in the economy and the State Public Service retrenchments. However, the downward estimate is considered to be a short-term phenomenon, with an expected trend back towards the 343,000 figure in future.

The skills shortages report update identifies Brisbane's skills needs by occupation. It is estimated that between 2013 and 2021 104,156 of Greater Brisbane's forecast 292,500 jobs required will be in the professional occupations. This is more than one-third (37%) of forecast requirements. Forecast demand for skills in other occupations is also high amongst technicians and trade workers (44,467 employees or 16% of total requirements) and managers (38,592 employees or 14% of total requirements).

FIGURE 11. GREATER BRISBANE'S FORECAST SKILLS REQUIREMENTS BY OCCUPATION, 2013-2021



Source: Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update

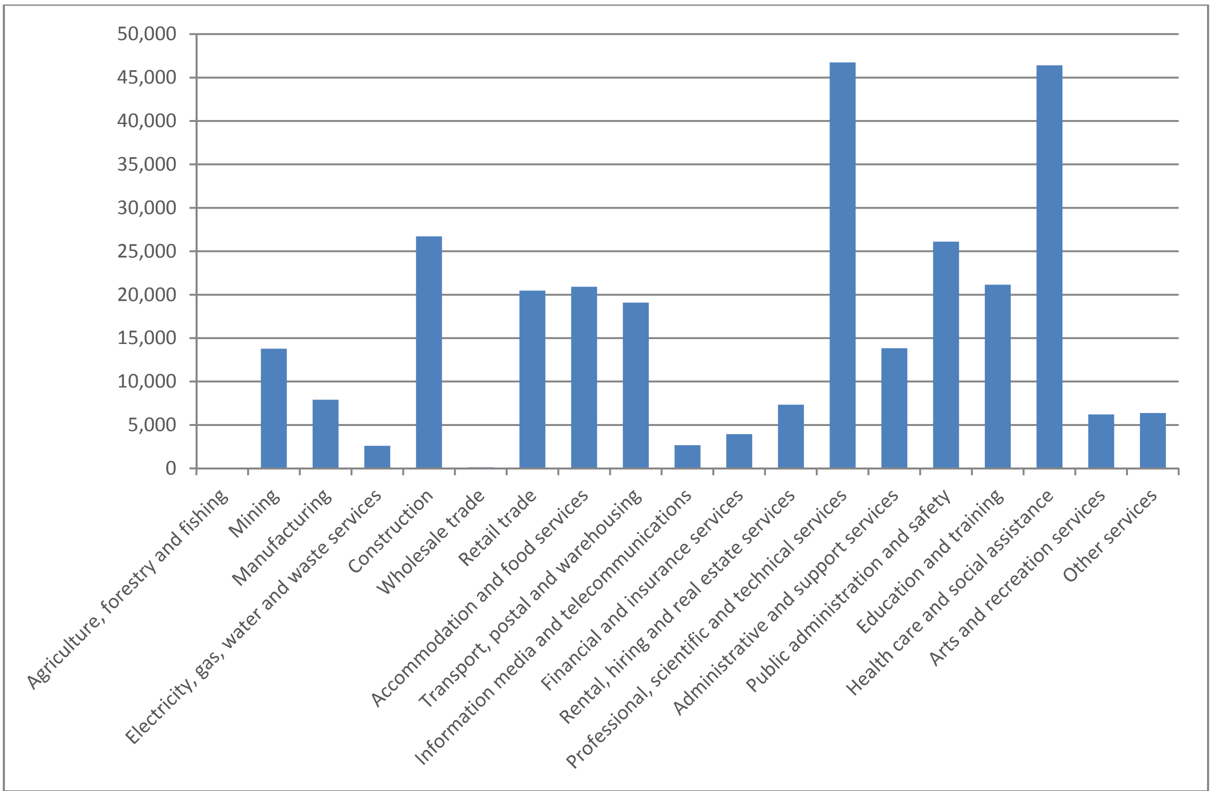
Forecast Skills Requirements by Industry

The skills shortages report also identifies Brisbane's skills needs by industry. The majority of Greater Brisbane's future skills requirements are in the services sectors, notably the professional, scientific and technical services sector (46,741 employees or 16% of total requirements) and the health care and social assistance sector (46,410 employees or 15.8% of total requirements). Together these industries account for almost one-third (32%) of Brisbane's employee requirements by industry by 2021.

Brisbane's mining services sector forms an important component of the professional, scientific and technical services sector. Data from the Queensland Resources Council reveals almost 34% of the inputs consumed by Queensland's resources sector are drawn from scientific, technical and professional services to mining. The skills shortages report for Greater Brisbane identifies services to mining as a major source of labour demand as a means of maintaining the growth of the mining industry.

Forecast demand for skills in other industries is also high in the public administration and safety sector (26,114 employees or 9% of total requirements), the construction industry (26,720 or 9% of total requirements) and the education and training sector (21,153 employees or 7% of total requirements by industry).

FIGURE 12. GREATER BRISBANE'S FORECAST SKILLS REQUIREMENTS BY INDUSTRY, 2013-2021



Source: Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update

Early Childhood Education and Care Services

As at 28 February 2013, Brisbane had a total of 653 early childhood education and care services, compared with 2,677 in Queensland. The most common early childhood education and care services in the region were long day care services with 313 services, followed by school aged care services with 206 services.

TABLE 10. EARLY CHILDHOOD CARE SERVICES BY TYPE, BRISBANE, 28 FEBRUARY 2013

	Family Day Care	Kindergartens	Long Day Care	School Aged Care	Limited Hours Care	Child Care & Family Support Hubs	Total
Brisbane	25	100	313	206	7	2	653
Queensland	100	461	1,372	692	42	10	2,677
Brisbane as % of Queensland	25%	22%	23%	30%	17%	20%	24%

Source: Office of Early Childhood Education and Care, Department of Education, Training and Employment

Aged Care Services

As at 30 June 2011, Brisbane had 214 aged-care service providers with a total of 11,431 places in operation. In comparison, Queensland had 1,048 aged-care service providers with a total of 44,856 places in operation. During 2010–11, the aged-care service providers in the region received $406.3 million in Australian government recurrent funding.

Volunteers

At the time of the 2011 Census, Brisbane had 176,460 volunteers aged 15 years and over. This represented 21% of total persons aged 15 years and over in the region. In comparison, Queensland recorded 645,543 volunteers, 19% of total persons aged 15 years and over.

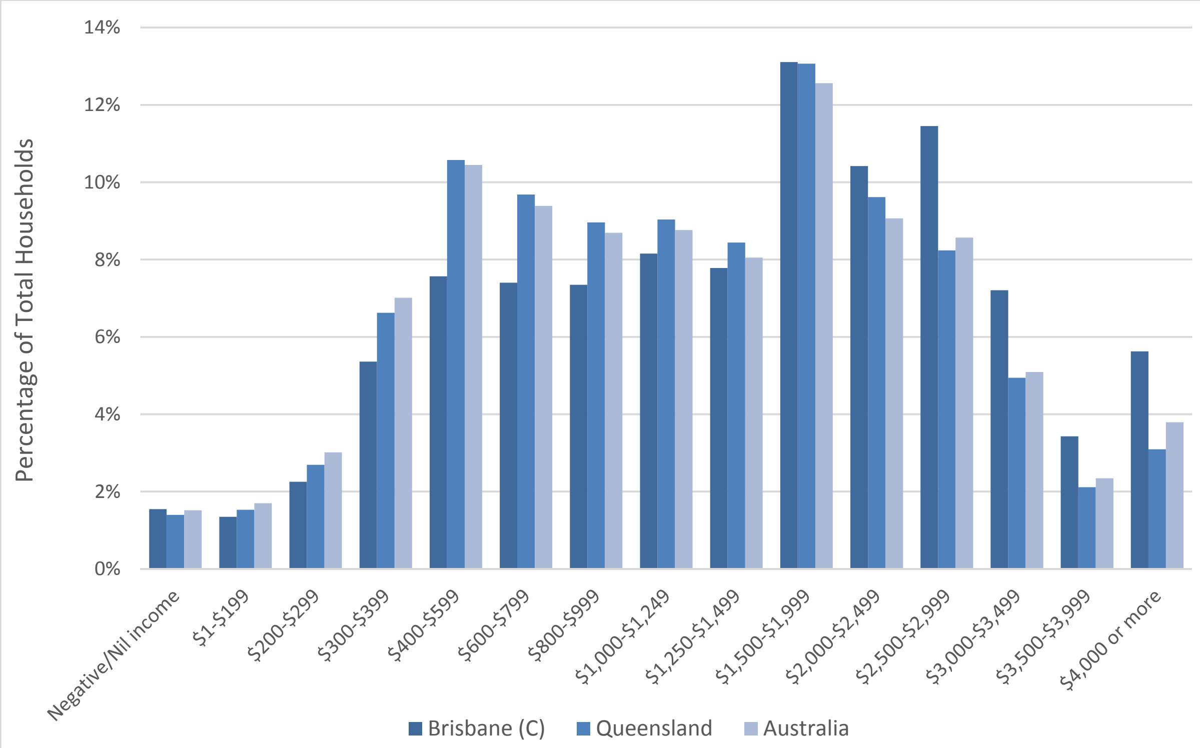
Individual and Household Income

At the time of the 2011 Census, Brisbane had 269,487 persons aged 15 years and over who stated that their total personal weekly income was less than $400 (32% of all persons aged 15 years and over). This was lower than proportion for Queensland (35%).

At the time of the 2011 Census, 34% of Brisbane households reported a weekly income of $2,000 or more compared to 25% of Queensland households and 26% of households Australia-wide.

At the other end of the income scale, 16% of Brisbane households reported a weekly income of $600 or less compared to 20% of Queensland households and 21% of households Australia-wide.

FIGURE 13. HOUSEHOLD WEEKLY INCOME PROFILE, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

Welfare Dependency

According to the 2013-14 State of the Regions report, 6.8% of Brisbane's population aged 16-24 receives some form of income support from Centrelink.

Sustainable Communities and Population Change

Economic

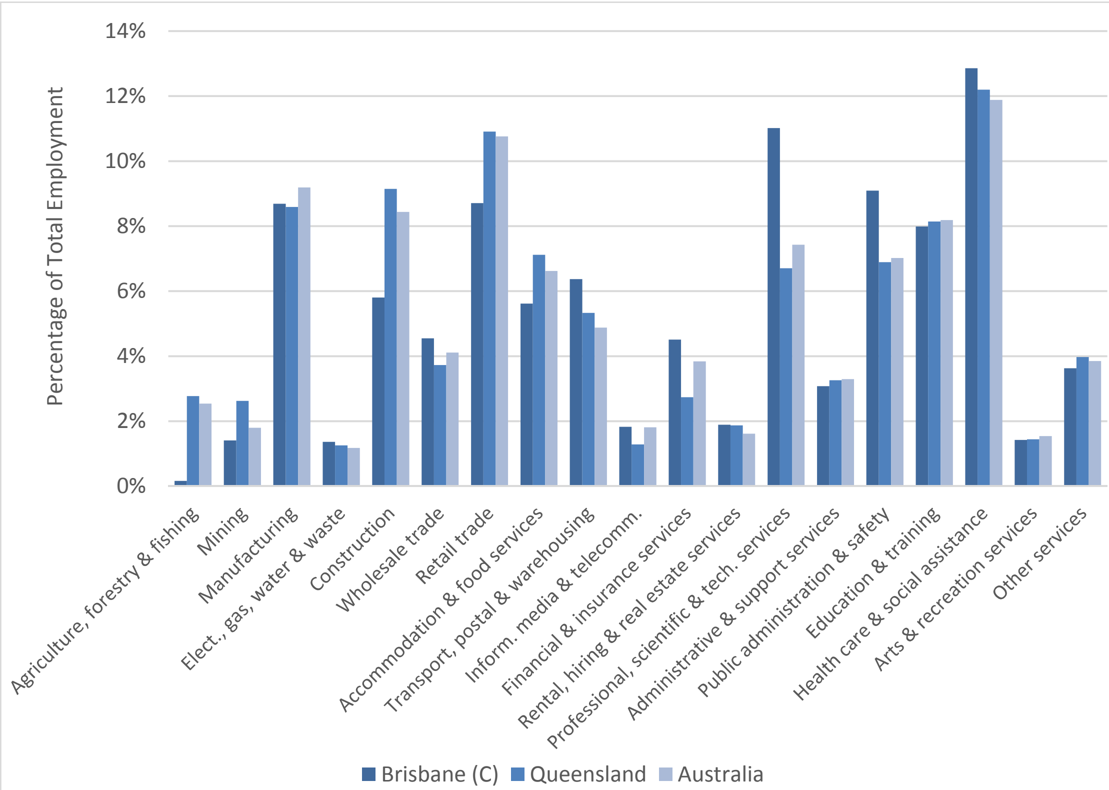
Employment by Industry

According to the Census of Population and Housing, in 2011 there were 632,000 jobs located in Brisbane, an increase of 9.6% on five years earlier.

Brisbane's jobs profile is dominated by the services sector, namely health care and social assistance (13% of all jobs in Brisbane), professional, scientific and technical services (11%) and public administration and safety (9%). Brisbane's manufacturing sector is also prominent, accounting for just under 9% of all jobs located in Brisbane. The presence of a significant manufacturing sector alongside 'knowledge-based' industries such as the professional services reflects a depth and diversity of industry in Brisbane.

Other industries which account for a large share of the Brisbane's employment include retail trade (8.7%) and education and training (8%). However, proportionally speaking, Brisbane is far less reliant on its retail trade sector for employment compared to the Queensland and Australian averages.

FIGURE 14. EMPLOYMENT BY INDUSTRY, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, Working Population Profile, 2011

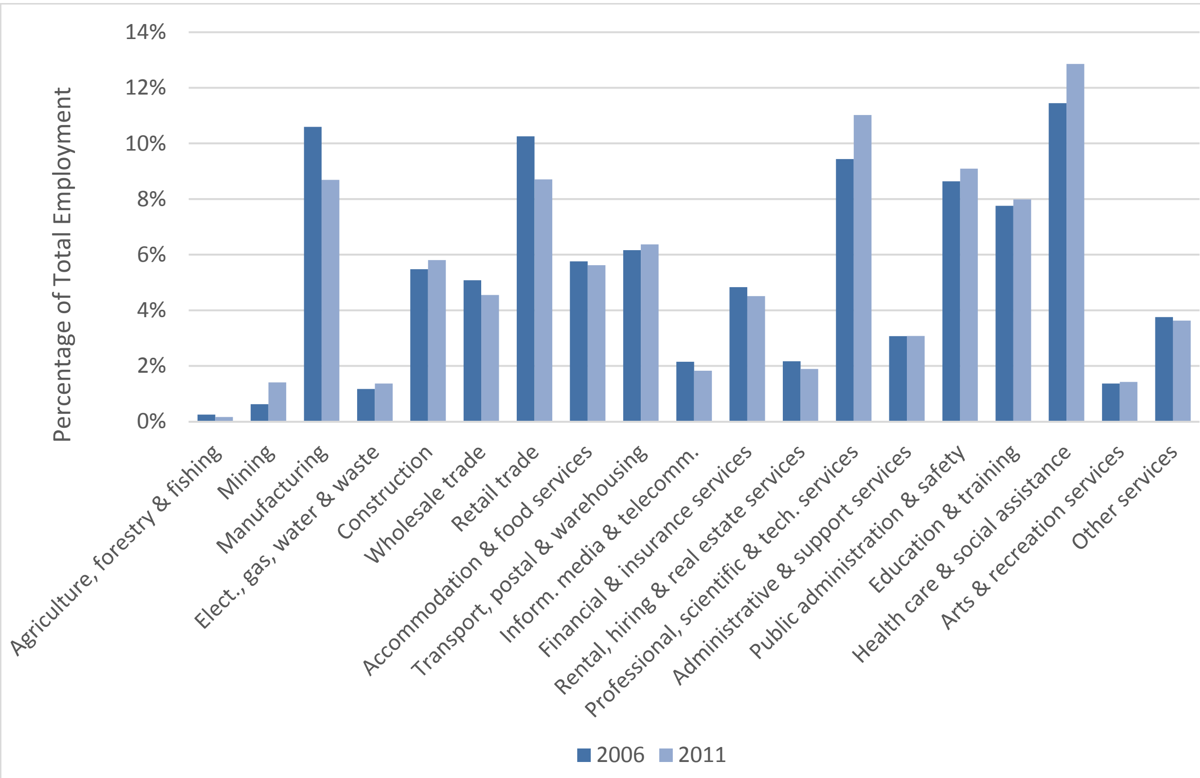
Employment Growth and Decline

As Queensland's gateway to the global economy, Brisbane's economic prosperity has become increasingly reliant upon its capacity to produce, distribute and use knowledge and information. In the five years to 2011, Brisbane's stock of knowledge-based jobs increased – in the professional, scientific and technical services sector by 28%; in the health care and social assistance sector by 24%; and in the arts and recreation services sector by 15%.

Brisbane's mining sector experienced a significant increase in employment between 2006 and 2011 (although from a relatively small base), adding 8,830 jobs over the period, an increase of 147%. The large majority of these jobs are in the mining sector's management and professional occupations. In-depth analysis of Brisbane's professional, scientific and technical services sector reveals that a notable proportion of these jobs provides services to Brisbane's (and the State's) mining sector.

Brisbane-based industries which showed a fall in employment numbers over the five years to 2011 include retail trade (down 7%), manufacturing (down 10%) and information, media and telecommunications (down 7%).

FIGURE 15. EMPLOYMENT BY INDUSTRY GROWTH AND DECLINE, BRISBANE, 2006 - 2011



Source: ABS Census of Population and Housing, Working Population Profile, 2011

Employment Self-sufficiency

Employment self-sufficiency refers to the ratio of locally provided jobs (i.e. jobs in the Brisbane LGA) to the number of employed residents living in the region. The total number of jobs per industry is assessed against the number of employed residents in each industry sector. Brisbane has a rate of employment self-sufficiency of 110%. This shows that the Brisbane LGA statistically is a net importer of workers, providing more jobs than the number of its resident workforce and drawing on a labour pool from the wider South East Queensland region. However, the Brisbane Greater Capital City Statistical Area (GCCSA) contains a broad labour market catchment area which identifies as a single economy, so 'employment self-sufficiency' of the Brisbane LGA is not a relevant measure in this instance. However, it does highlight the importance of transport routes and public transport for the efficient movement of workers.

TABLE 11. EMPLOYMENT SELF-SUFFICIENCY RATES BY INDUSTRY, BRISBANE, 2011

Industry	Resident Employment	Total Jobs	Differential	Self-Sufficiency
Agriculture, forestry and fishing	1,417	1,042	-375	73.5%
Mining	3,572	8,830	5,258	247.2%
Manufacturing	60,301	54,403	-5,898	90.2%
Electricity, gas, water and waste services	6,660	8,546	1,886	128.3%
Construction	31,183	36,365	5,182	116.6%
Wholesale trade	28,920	28,504	-416	98.6%
Retail trade	58,358	54,540	-3,818	93.5%
Accommodation and food services	32,786	35,187	2,401	107.3%
Transport, postal and warehousing	35,089	39,890	4,801	113.7%
Information media and telecommunications	12,253	11,447	-806	93.4%
Financial and insurance services	27,492	28,253	761	102.8%
Rental, hiring and real estate services	12,352	11,848	-504	95.9%
Professional, scientific and technical services	53,723	69,005	15,282	128.4%
Administrative and support services	17,485	19,264	1,779	110.2%
Public administration and safety	49,156	56,942	7,786	115.8%
Education and training	44,140	50,022	5,882	113.3%
Health care and social assistance	65,166	80,511	15,345	123.5%
Arts and recreation services	7,773	8,915	1,142	114.7%
Other services	21,366	22,719	1,353	106.3%
Inadequately described/Not stated	7,298	5,782	-1,516	79.2%
Total	**576,490**	**632,015**	**55,525**	**109.6%**

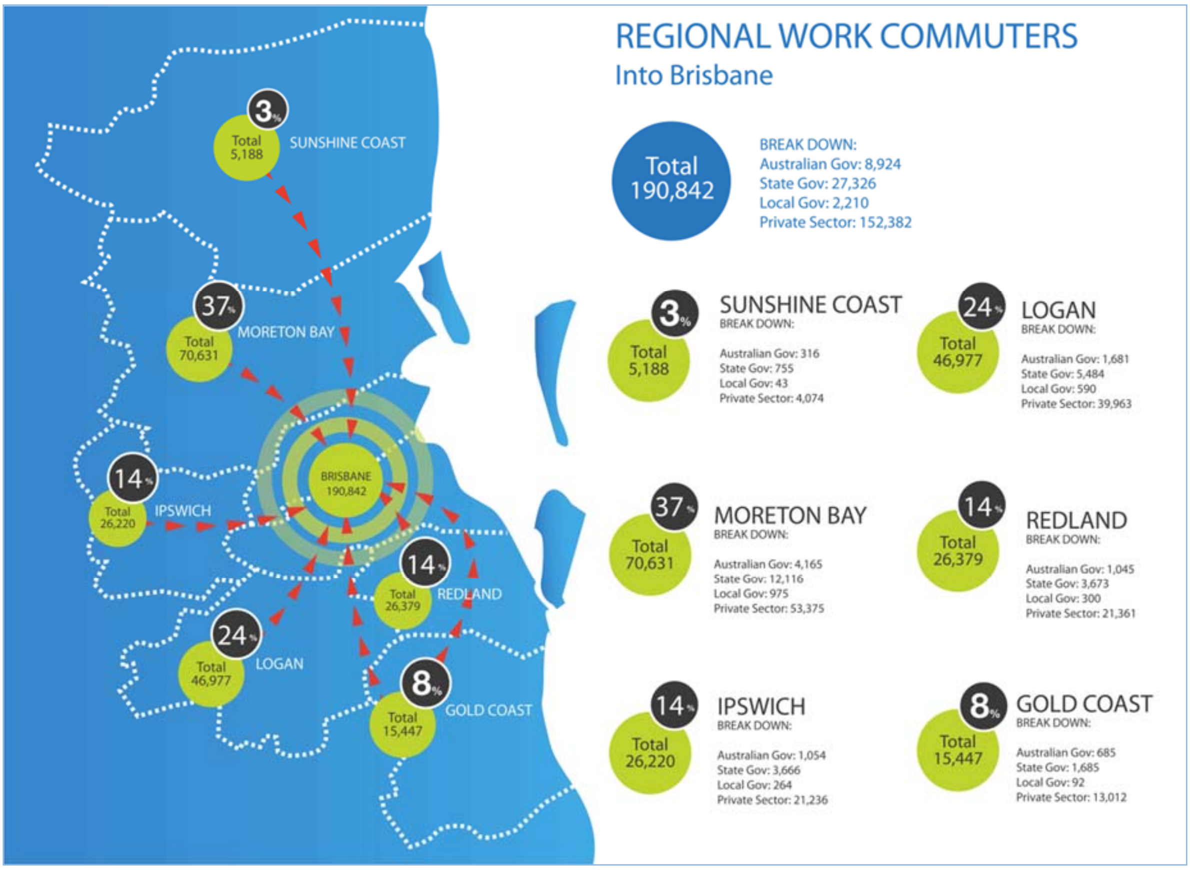
Source: ABS Census of Population and Housing, 2011

Journey to Work: Commuter Flows to Brisbane

The total number of workers from all local government areas (LGAs) who commute to Brisbane for their main location of work is 190,840.

Moreton Bay LGA has the highest commuter figures, with 70,631 workers travelling to Brisbane (37% of the total). Logan City has 46,977 residents who commute to Brisbane to work (24% of the total) while Redland City (26,379) and Ipswich City (26,220) each represent 14% of the total number of people who commute to Brisbane to work.

FIGURE 16. REGIONAL WORK COMMUTERS INTO BRISBANE, 2011



Source: Regional Development Australia (RDA) Sunshine Coast, South East Queensland Digital Work Hub Project research, www.digitalworkhubproject.org.au, June 2013 based on ABS Census Journey to Work data, 2011

The public and private sector breakdown illustrates the high number of State public service workers travelling to Brisbane for work, compared with federal and local government employees.

Moreton Bay has the highest figures with 12,116 State and 4,165 Federal government workers, followed by Logan City (5,484 State and 1,681 Federal government employees). Redland and Ipswich again share similar commuter numbers, with approximately 3,600 State and 1,000 Federal Government workers, respectively.

Regional figures illustrate that the majority of commuters travel into the Brisbane area. However, there is a significant daily criss-cross of workers into other LGAs, including Brisbane residents who commute to the surrounding regions. In particular, a high proportion of workers commute from the Gold Coast (6,581) to Ipswich, with 6,297 workers travelling from Logan to the Gold Coast.

The majority of Moreton Bay workers commute to Brisbane, with significantly smaller proportions to the Sunshine Coast (1,565) and other LGAS, while 1,700 workers commute from Ipswich to Logan. More than 1,000 Redland commuters travel to Ipswich (401) and the Gold Coast (976) each day.

The journey to work movements highlights the importance of the Brisbane CBD / inner Brisbane area as a location of employment serving the wider region. Approximately half of the commuters from LGAs outside Brisbane, who travel to Brisbane for work, commute to the inner city area. For example, 52% of people who travel from the Sunshine Coast to work in Brisbane commute to Brisbane's inner city area, as do 42% of commuters from Moreton Bay and 49% of commuters from the Gold Coast.

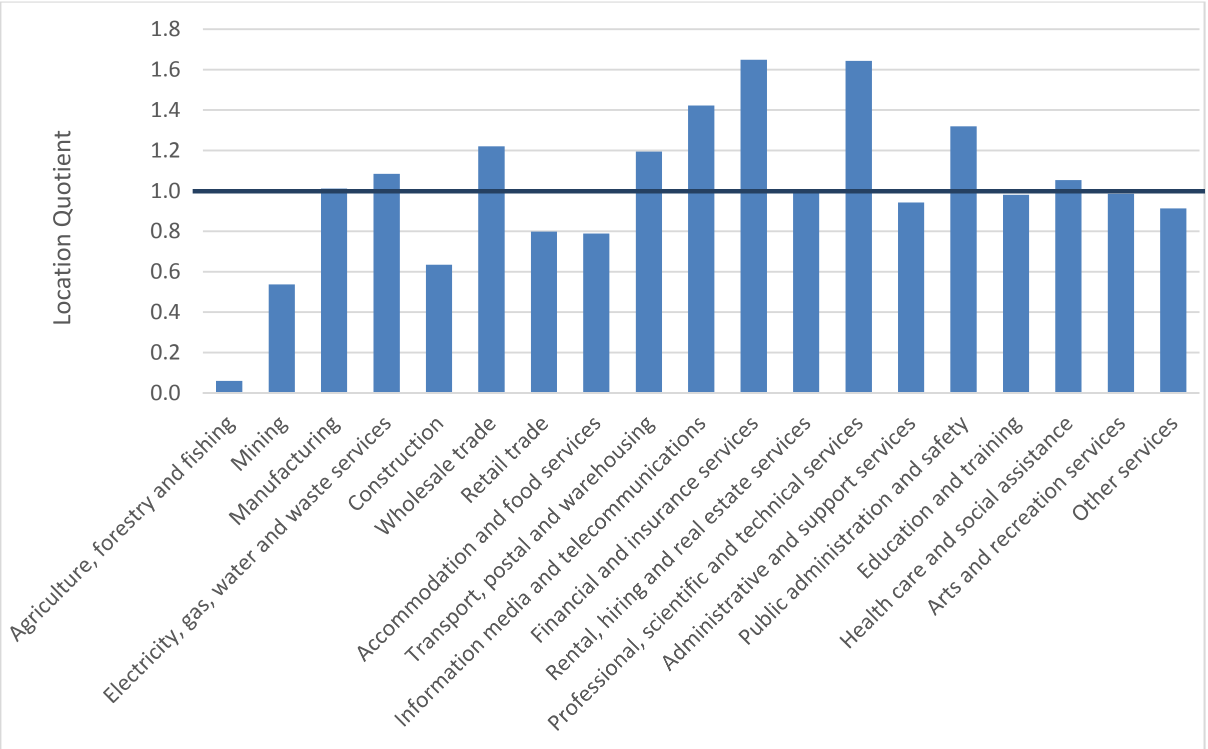
Industry Location Quotients / Specialisations

Location quotient analysis provides a useful indicator of Brisbane's inter-regional export propensity and competitiveness, or relative specialisation. A location quotient (LQ) is an index or ratio which derived by comparing the proportion of jobs in each industry sector in Brisbane with the proportion of jobs in the same sector in Queensland. A location quotient greater than 1.0 indicates an over-representation of jobs in that sector, suggesting a quantum of those jobs is generated by external inter-regional export (non-local) demand.

Comparing Brisbane to the Queensland averages, it is evident Brisbane's industry specialisations are the 'knowledge-based' professional services sectors including: financial and insurance services; professional, scientific and technical services; and information, media and telecommunications.

Brisbane also has relative specialisations in the public administration and safety sector and the health care and social assistance sector.

FIGURE 17. LOCATION QUOTIENT OF INDUSTRIES, BRISBANE COMPARED TO QUEENSLAND, 2011



Source: ABS Census of Population and Housing, Working Population Profile, 2011 with interpretations by SC Lennon & Associates

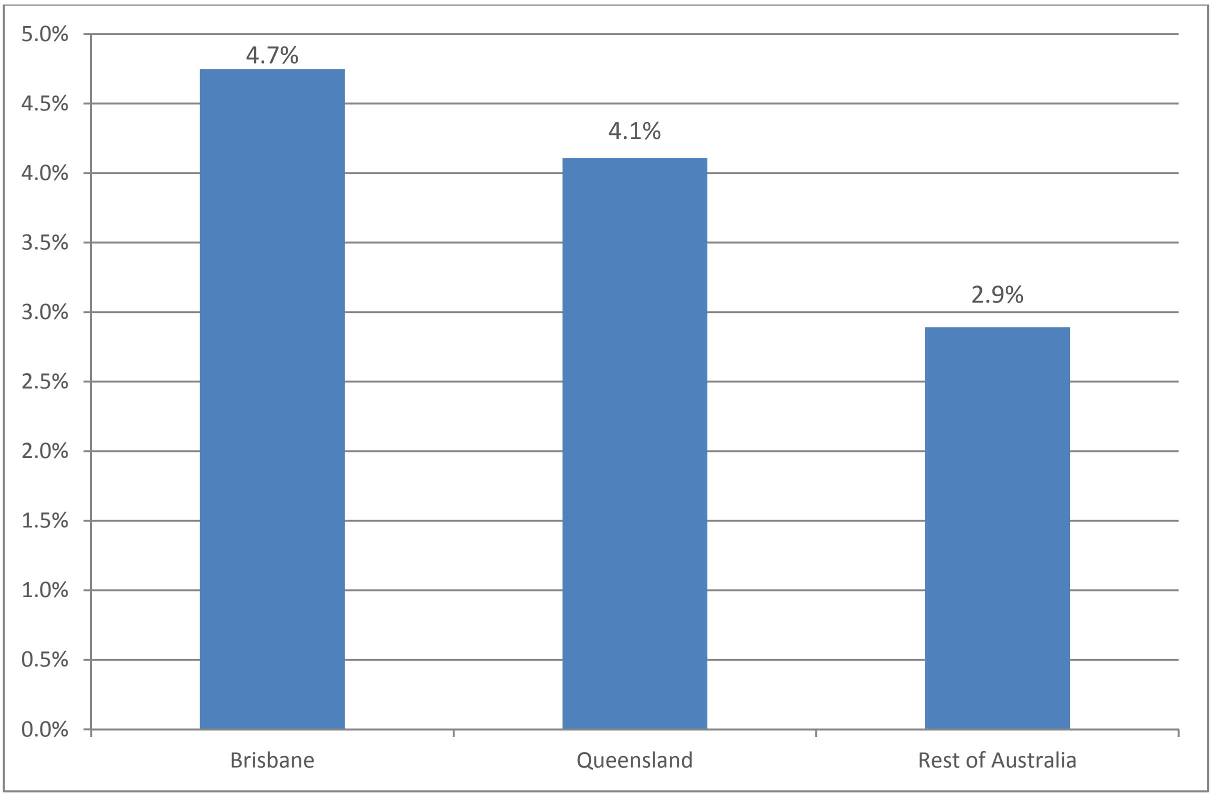
Economic Growth and Gross Regional Product

In 2010/11, Queensland's Gross State Product (GSP) totalled $269.9 billion and recorded average annual growth of 8.8% over the 10 years to 2010/11. This compares to an average annual growth rate for the rest of Australia during the same period of 6.7%. The combined gross regional product of three regions – Brisbane, the Gold Coast and Sunshine Coast – together accounted for $167.6 billion in 2010/11, representing almost two-thirds or 62% of Queensland's total GSP.

On an individual basis, Brisbane was the largest region accounting for $129.7 billion or 48% of GSP, followed by the Gold Coast accounting for 9.4% and then Mackay accounting for 8.5%. In real terms (accounting for inflation), Brisbane's gross regional product (GRP) grew by 4.7% between 2000/01 and 2010/11, the third fastest growing region in Queensland after the Sunshine Coast and Gold Coast. In comparison, Queensland's average annual economic growth was 4.1% over the same period while for the rest of Australia, the rate of economic growth was 2.9% over the ten years to 2010/11.

Over the four years to 2010-11, Brisbane's economic growth moderated to an average of 2% per annum compared with 6.6% over the earlier period 2000/01 to 2006/07.

FIGURE 18. REAL AVERAGE ANNUAL GROWTH IN GRP, BRISBANE, QUEENSLAND AND AUSTRALIA, 2000/01 - 2010/11



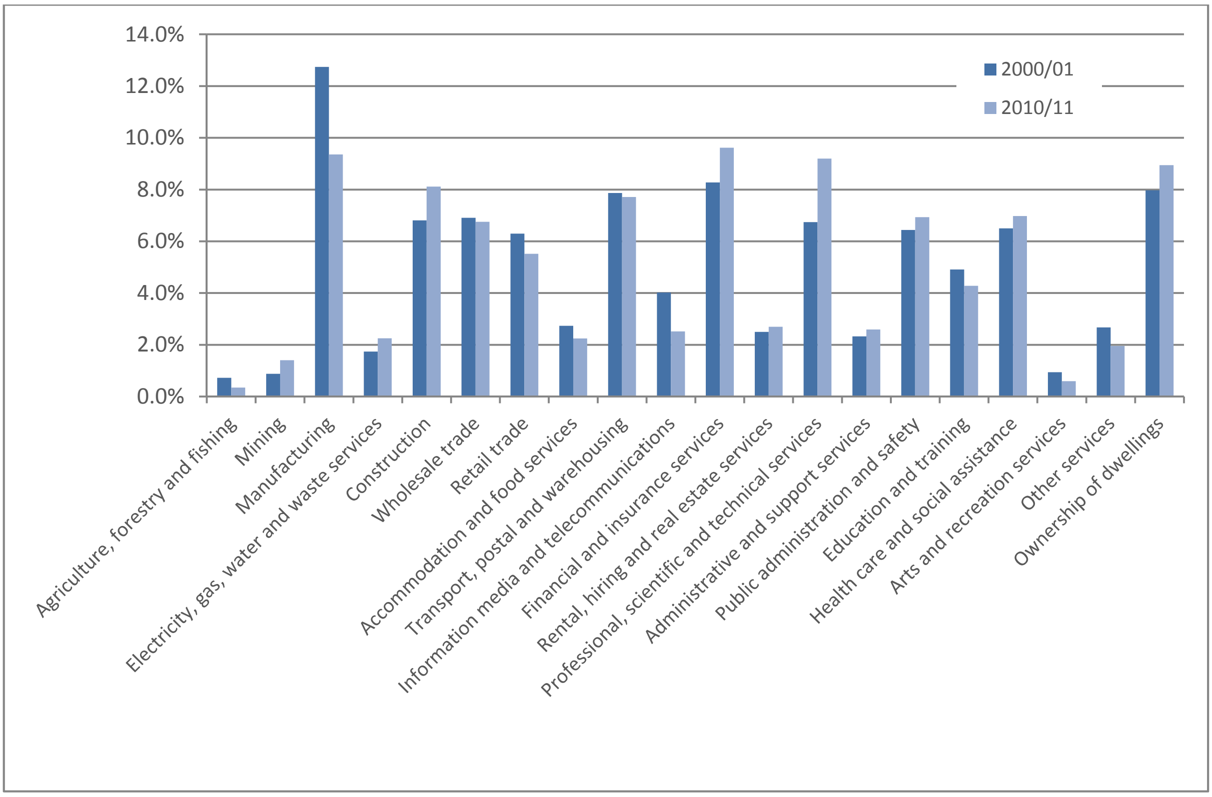
Source: OESR Experimental Estimates of GRP, Queensland Treasury and Trade, March 2013

Industry Contribution to Gross Value Added

The industry composition of the Brisbane economy based on current price estimates of gross value added (GVA) shows the largest industry contribution to the Brisbane economy came from financial and insurance services (9.6% of nominal gross value added) followed by manufacturing (9.4%) and professional, scientific and technical services (9.2%). Ownership of dwellings and construction were other key contributors to Brisbane's gross value added, comprising 8.9% and 8.1 % respectively.

The largest compositional change was shown in Brisbane's manufacturing industry with a decline in its share of the total industry contribution to GVA of 3.4% from the previous period, while the professional, scientific and technical services industry share rose 2.5% over the same period. This could be indicative of a rise in the contribution of 'knowledge-based' professional services to Brisbane's economic growth and production over the ten years to 2010/11.

FIGURE 19. INDUSTRY CONTRIBUTION TO GROSS VALUE ADDED, BRISBANE, 2000/01 AND 2010/11



Source: OESR Experimental Estimates of GRP, Queensland Treasury and Trade, March 2013

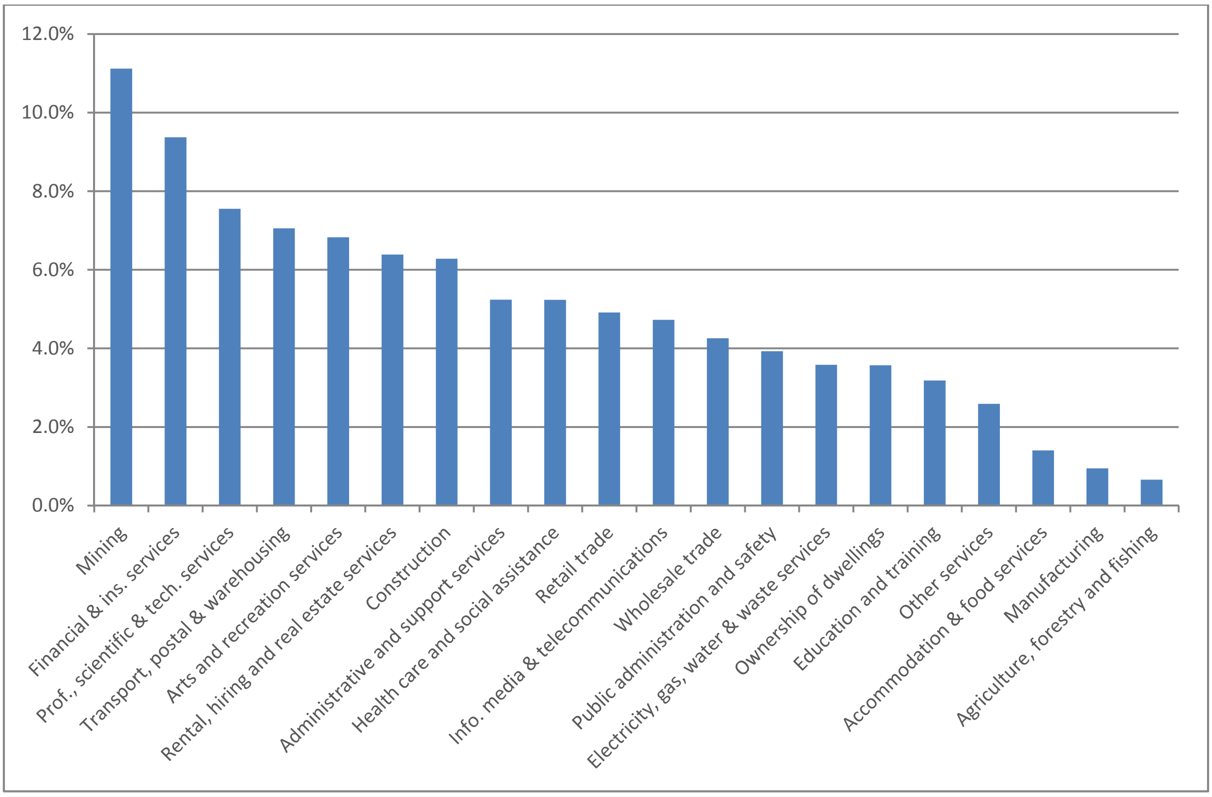
Industry Contribution to Growth in Real Gross Value Added

Brisbane's 4.7 per cent growth in GRP in the 10 years to 2010/11 is a result of all industries experiencing average annual growth. While Mining was the fastest growing industry in Brisbane with 11.1%, its contribution to regional growth was negligible as it only accounts for 1.4% of the Brisbane economy (not accounting for the supply chain linkages to mining which results in a much higher economic contribution). While the financial and insurance services industry was the second fastest growing industry in Brisbane with average annual growth of 9.4% between 2000/01 and 2010/11, it made the largest contribution to growth of 0.7 percentage point per annum.

Professional, scientific and technical services was the second highest contributor towards growth in Brisbane, adding 0.6 percentage point, followed by transport, postal and warehousing at 0.5 percentage point and construction at 0.4 percentage point.

Several industries contributed 0.3 percentage point each to Brisbane's growth: wholesale trade; retail trade; public administration and safety; and health care and social assistance. Approximately half of Brisbane's industries had a negligible or neutral impact on regional growth between 2000/01 and 2010/11.

FIGURE 20. INDUSTRY CONTRIBUTION TO GROWTH IN GROSS VALUE ADDED, BRISBANE, 2000/01 - 2010/11

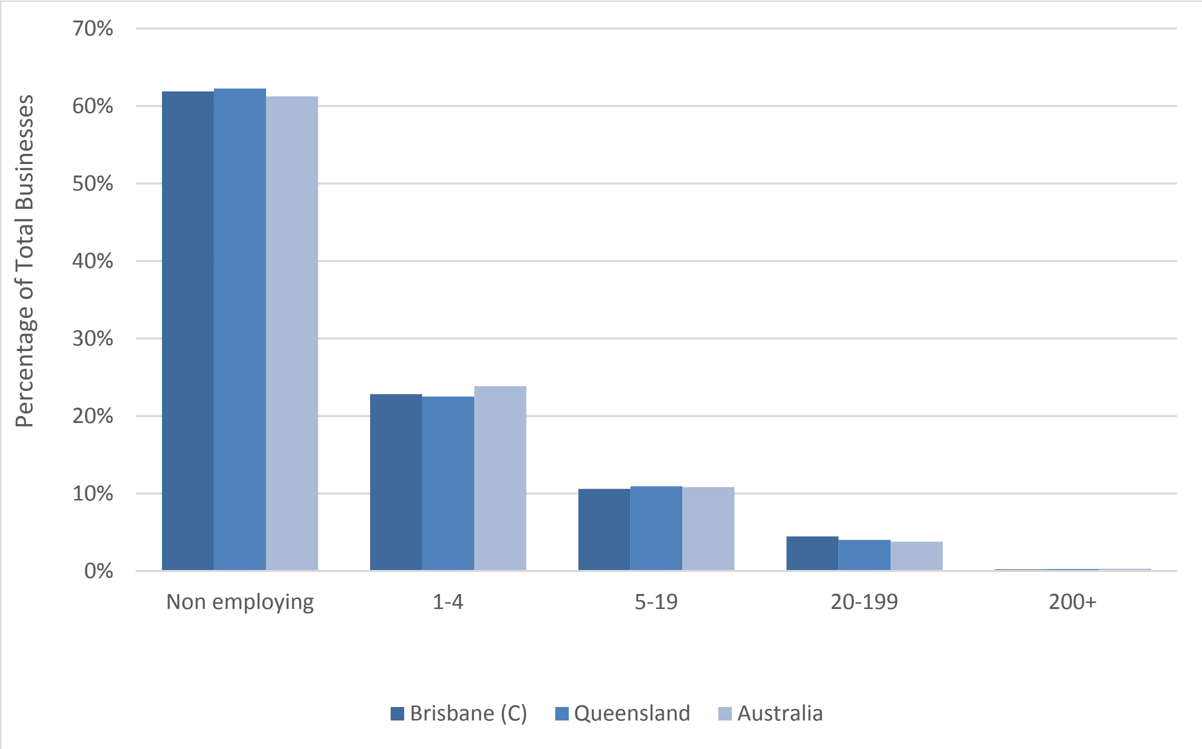


Source: OESR Experimental Estimates of GRP, Queensland Treasury and Trade, March 2013

Business Size and Numbers

In 2011, there were approximately 114,000 registered businesses in Brisbane City Local Government Area (LGA). Of these businesses, around 108,700 were small businesses, 5,090 were medium businesses and 251 were large businesses. The percentage of small businesses in the region was 95 per cent, the same level as for Queensland.

FIGURE 21. BUSINESS COUNTS BY NUMBER OF EMPLOYEES, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



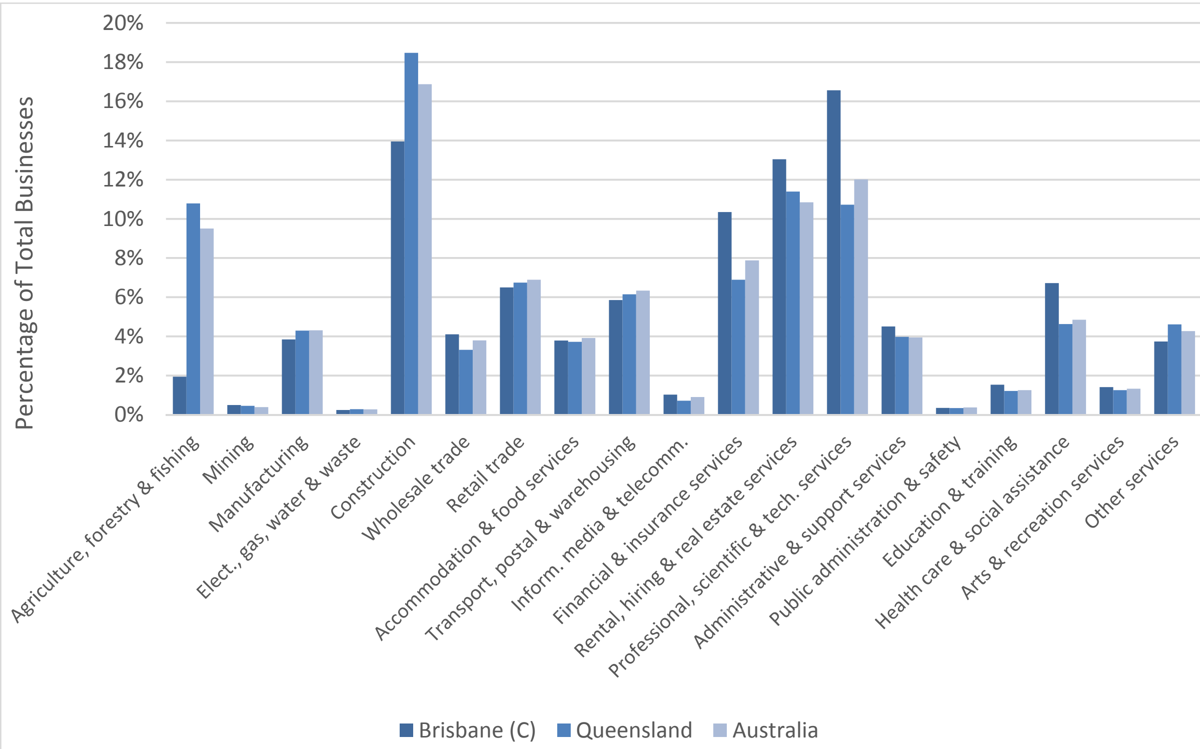
Source: ABS Counts of Australian Businesses, including Entries and Exits, Jun 2007 to Jun 2011 (Catalogue No: 8165.0)

Business Counts by Industry

The Professional, Scientific and Technical Services industry had the largest number of businesses in Brisbane, with 18,382 businesses or 16% of the total number of businesses. Other industries with relatively large numbers of business counts included Construction (15,487 businesses or 14%) and Rental, Hiring and Real Estate Services (14,481 businesses or 13%).

A specialisation ratio measures the representation of an industry's share within Brisbane, relative to Queensland's industry share. The highest specialisation ratios in the region occurred in the industries of Professional, Scientific and Technical Services (1.54), Financial and Insurance Services (1.49) and Health Care and Social Assistance (1.44).

FIGURE 22. BUSINESS COUNTS BY INDUSTRY, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011

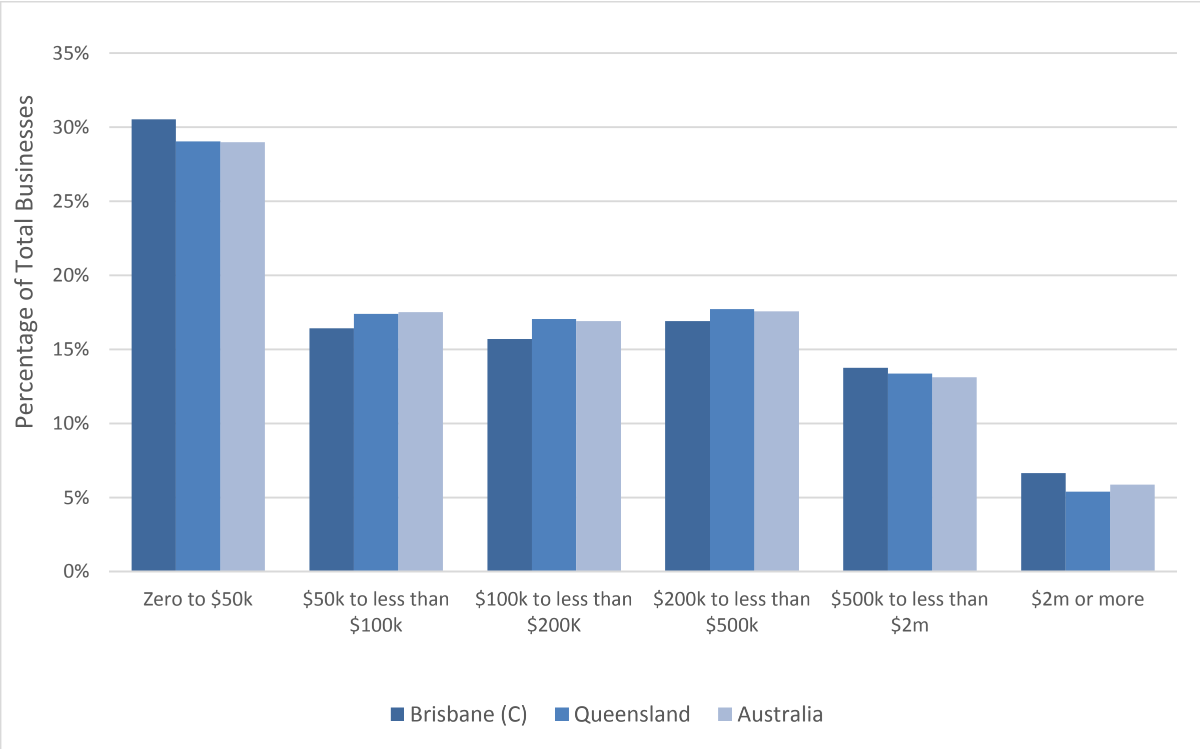


Source: ABS Counts of Australian Businesses, including Entries and Exits, Jun 2007 to Jun 2011 (Catalogue No: 8165.0)

Business Turnover

In 2010/11, there were 114,041 registered businesses in Brisbane compared with 430,406 businesses in Queensland. Brisbane contained 53,564 businesses with a turnover under $100,000 and 52,890 businesses with a turnover between $100,000 and $2 million. There were 7,587 businesses with a turnover of $2 million or more (6.7% compared with 5.4% for Queensland).

FIGURE 23. BUSINESS COUNTS BY TURNOVER, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Counts of Australian Businesses, including Entries and Exits, Jun 2007 to Jun 2011 (Catalogue No: 8165.0)

Social

Population and Recent Trends

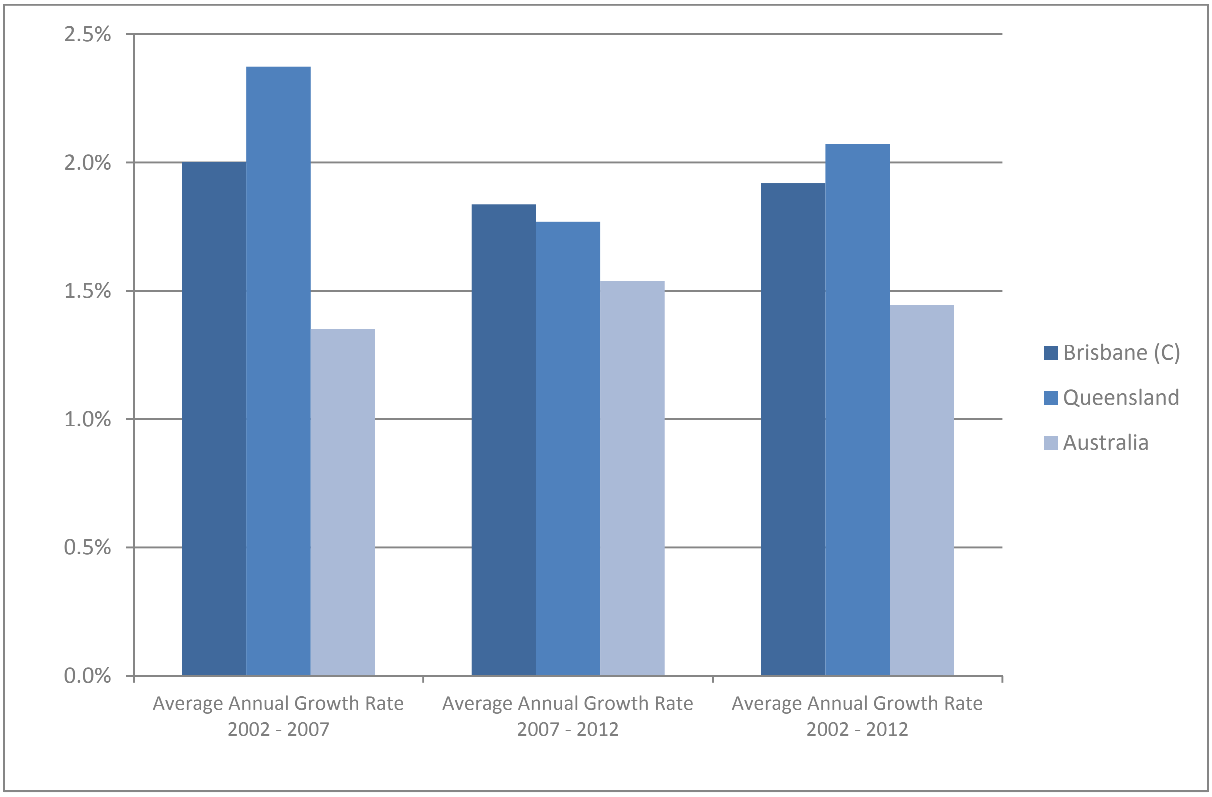
The resident population of Brisbane in 2012 was 1,109,664. Between 2002 and 2012, Brisbane's population increased at an average annual rate of 1.9%. By comparison, over the same period, Queensland's population increased by 2.1% per annum and Australia's population increased at a rate of 1.4% per annum. During the ten year period to 2012, Brisbane's population growth slowed.

TABLE 12. POPULATION, BRISBANE, QUEENSLAND AND AUSTRALIA, 2002, 2007 AND 2012

	2002	2007	2012	Av. Annual Growth Rate, 2002-2007	Av. Annual Growth Rate, 2002-2007	Av. Annual Growth Rate, 2002-2012
Brisbane	917,554	1,013,119	1,109,664	2.0%	1.8%	1.9%
Queensland	3,714,798	4,177,089	4,560,059	2.4%	1.8%	2.1%
Australia	19,651,438	21,015,936	22,683,573	1.4%	1.5%	1.4%

Source: ABS Regional Population Growth, Australia (Catalogue No: 3218.0)

FIGURE 24. AVERAGE ANNUAL POPULATION GROWTH RATES, BRISBANE, QUEENSLAND AND AUSTRALIA, 2002 - 2012



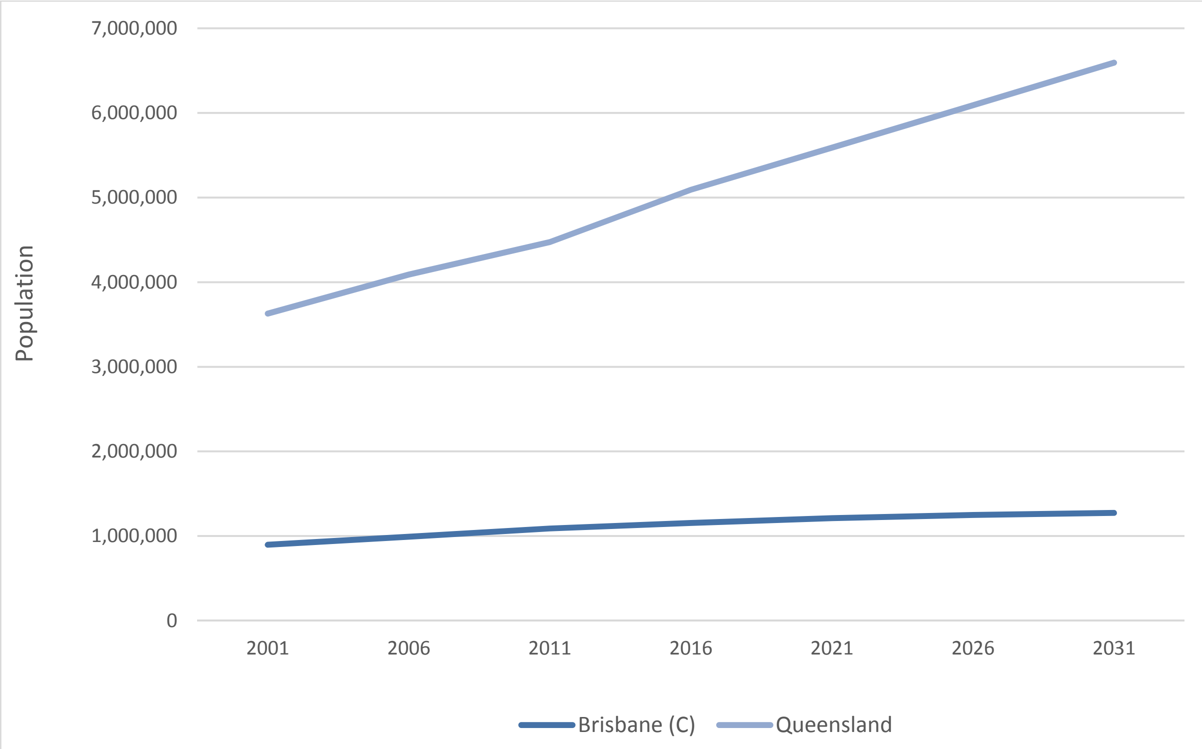
Source: ABS Census of Population and Housing, Time Series Profile, 2011

Population Projections

According to official government forecasts, the resident population of Brisbane is expected to grow from just under 1.1 million in 2012 to around 1.2 million in 2031, representing an average annual increase of 0.8 per cent.

This compares to a projected rate of population growth for Queensland of 1.8 per cent per annum to 2031.

FIGURE 25. POPULATION PROJECTIONS, BRISBANE AND QUEENSLAND, 2001 - 2031



Source: Queensland Government population projections

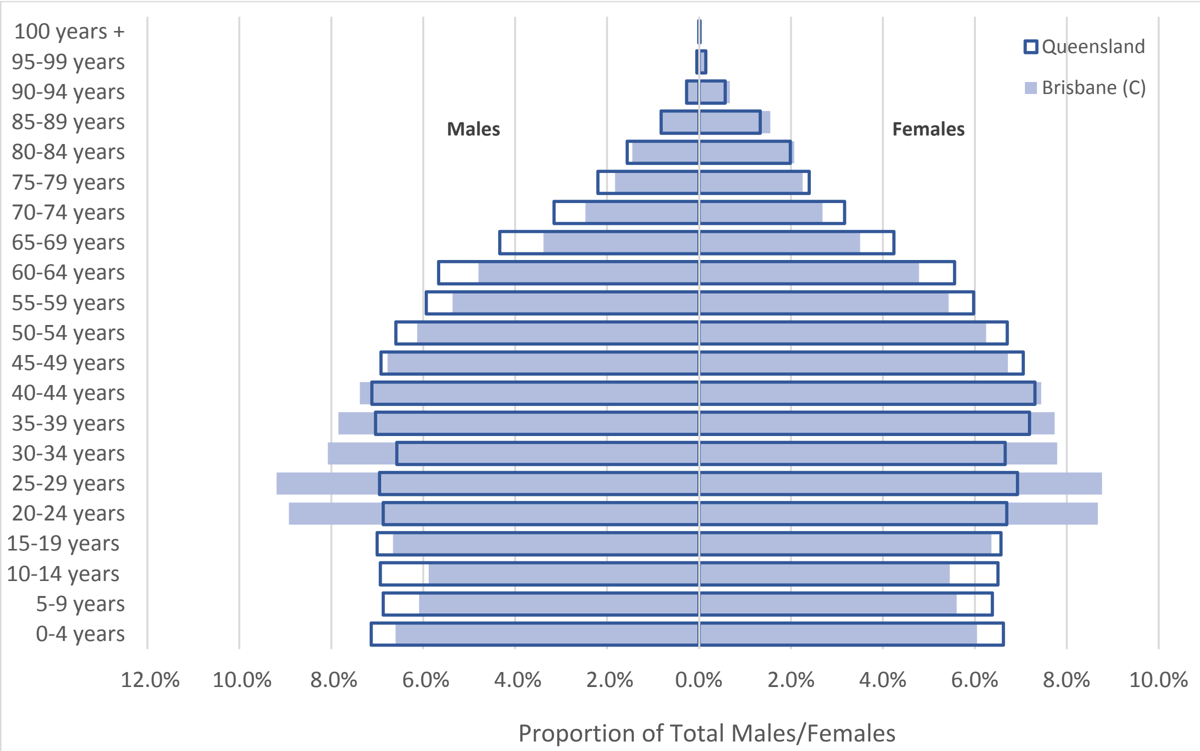
Age/Sex Structure

As at 30 June 2011, the median age for Brisbane was 34.7 years, representing no change in the median age over the five year period from 30 June 2006 to 30 June 2011. The median age in Queensland as at 30 June 2011 was 36.6 years, an increase of 0.6 year over the same period.

Compared to Queensland, Brisbane has a relatively young population. Brisbane has a relatively high proportion of residents of 'prime working-age', most notably in the age cohorts of 20-39 years. Brisbane also has a lower proportion of residents aged 45-64 years and fewer residents of retirement age (65 years and above). Compared to Queensland, Brisbane also has a smaller proportion of residents aged 19 years and under.

Brisbane's population is evenly split between males and females with 49% of the population male and 51% female. This is a similar split to that for both Queensland and Australia.

FIGURE 26. AGE / SEX STRUCTURE, BRISBANE AND QUEENSLAND, 2011

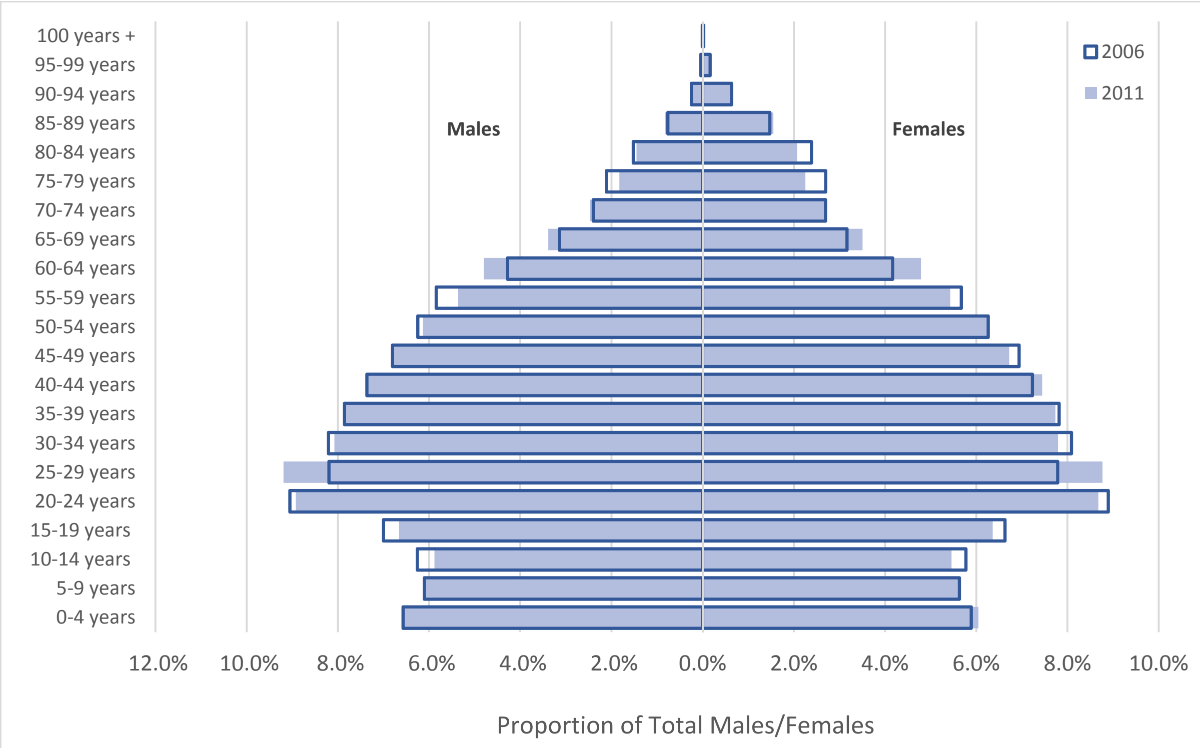


Source: ABS Census of Population and Housing, 2011

Age Structure Trends

Between 2006 and 2011 Brisbane's age/sex structure changed only marginally. The most notable change over the five year period was the increase in the proportion of Brisbane residents aged 25 - 29 years and those aged 60-64 years. Brisbane also experienced a decline in the proportion of its residents aged 10-19 years.

FIGURE 27. AGE / SEX STRUCTURE, BRISBANE, 2006 AND 2011



Source: ABS Census of Population and Housing, Time Series, 2011

Migration

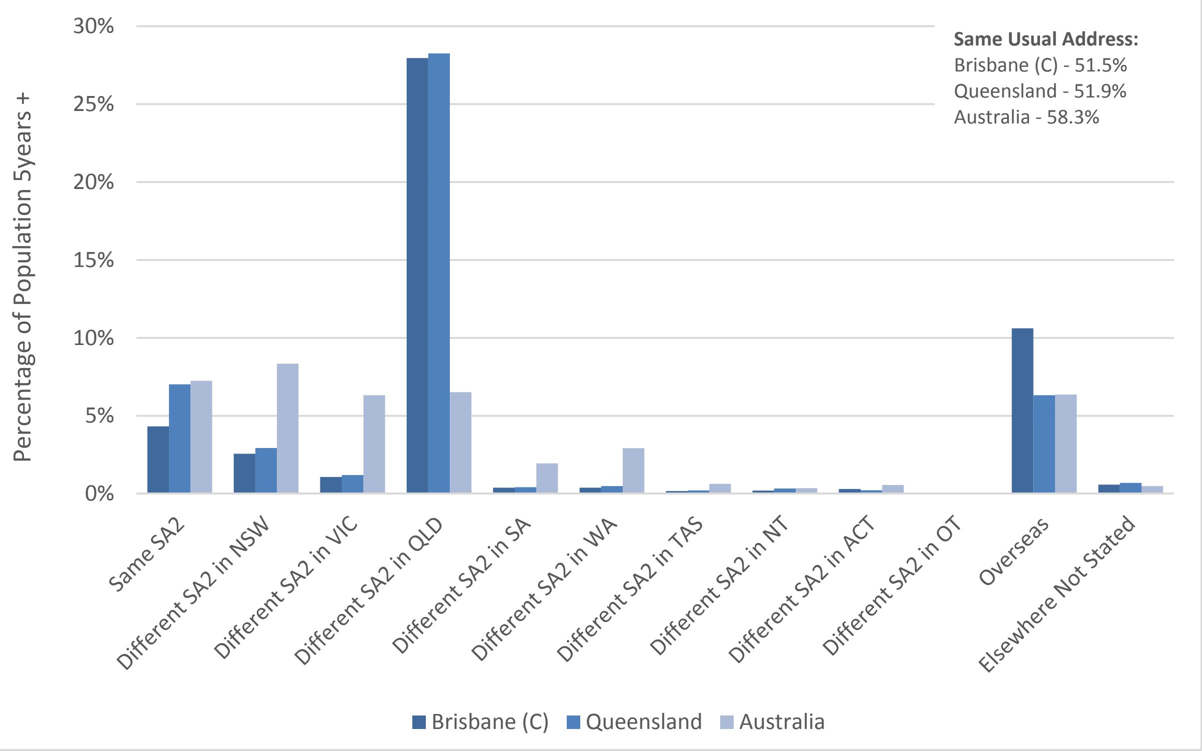
At the time of the 2011 Census, Brisbane had 446,442 residents or 48.5% of the population who stated they were living at a different address five years earlier.

Of all residents, 28% stated they were living in a different address in Queensland five years earlier while 5% said they had lived in a different address interstate, compared to 6% for Queensland.

Brisbane had a relatively higher proportion of residents who had moved from overseas with 10.6% of residents stating they were living overseas five years earlier compared to 6.3% for Queensland.

The majority of Brisbane residents who had been living at a different address five years prior to the 2011 Census (28%) stated they were living in a different locality within Queensland, which is comparable to the proportion for Queensland.

FIGURE 28. PLACE OF USUAL RESIDENCE FIVE YEARS EARLIER, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

Indigenous Population

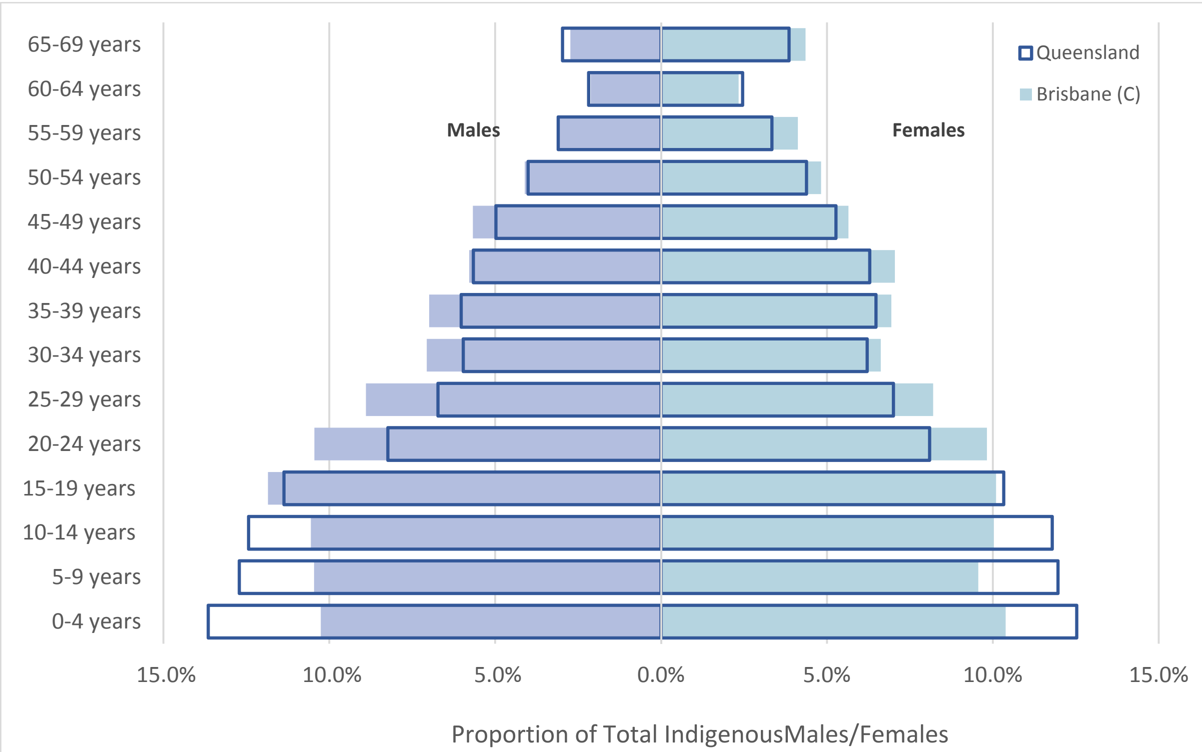
At the time of the 2011 Census, Brisbane had 14,630 persons who stated they were of Aboriginal or Torres Strait Islander origin. Indigenous persons made up 1.4% of the total population compared with 3.6% in Queensland.

Of the 14,630 persons usually resident in Brisbane who stated they were of Indigenous origin, 12,598 persons stated they were Aboriginal, 1,196 persons stated they were Torres Strait Islander and 836 persons stated they were both Aboriginal and Torres Strait Islander.

Brisbane had a higher proportion of Indigenous residents aged 20 to 49 years (45%) compared to Queensland (38%) and Australia (39%). Brisbane had a notably higher proportion of Indigenous residents aged 20 to 29 years old (19% of Indigenous persons) compared to Queensland (15%) and Australia (16%).

Brisbane had fewer Indigenous residents aged 0 to 14 years (30% of the Indigenous population) compared to Queensland (38%) and Australia (36%).

FIGURE 29. INDIGENOUS POPULATION AGE / SEX STRUCTURE, BRISBANE AND QUEENSLAND, 2011



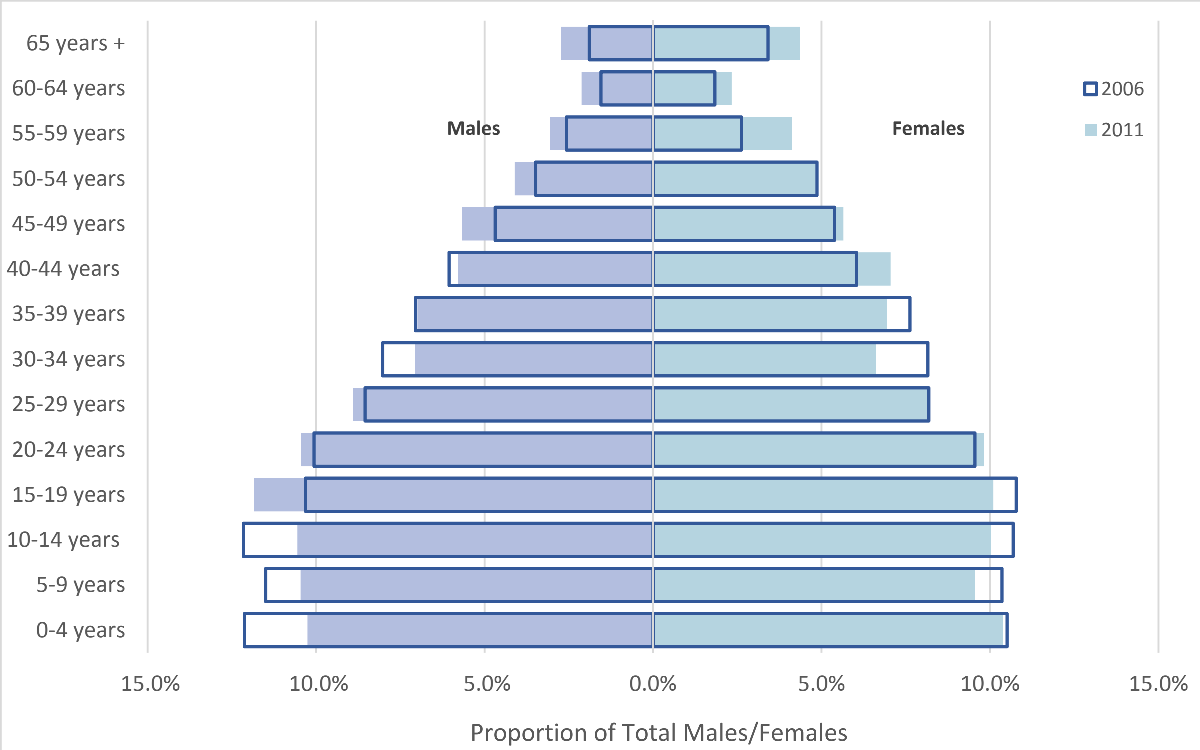
Source: ABS Census of Population and Housing, 2011

Indigenous Population Trends

Between 2006 and 2011, Brisbane's Indigenous population dynamic has changed marginally, with a higher proportion of persons aged 19 years and under in 2011 (42% of Brisbane's Indigenous population) compared to 2006 (44%).

In 2011, Brisbane had more Indigenous residents aged 50 years and over (14% of the Indigenous population) compared to 2006 when the 50+ cohort accounted for 11% of Indigenous persons.

FIGURE 30. INDIGENOUS POPULATION AGE / SEX, BRISBANE, 2006 AND 2011

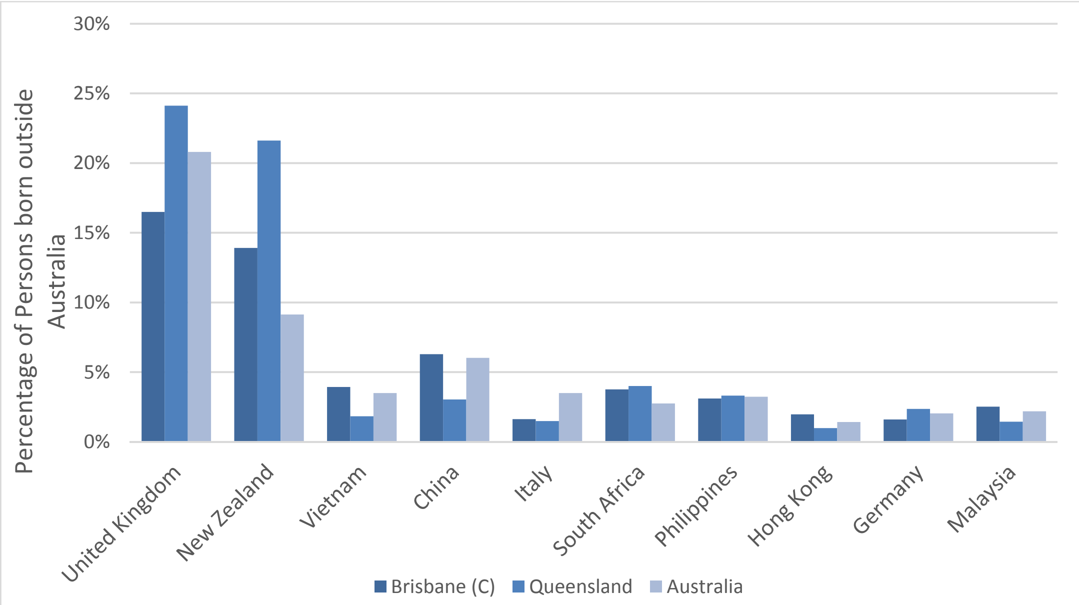


Source: ABS Census of Population and Housing, Time Series, 2011

Place of Birth

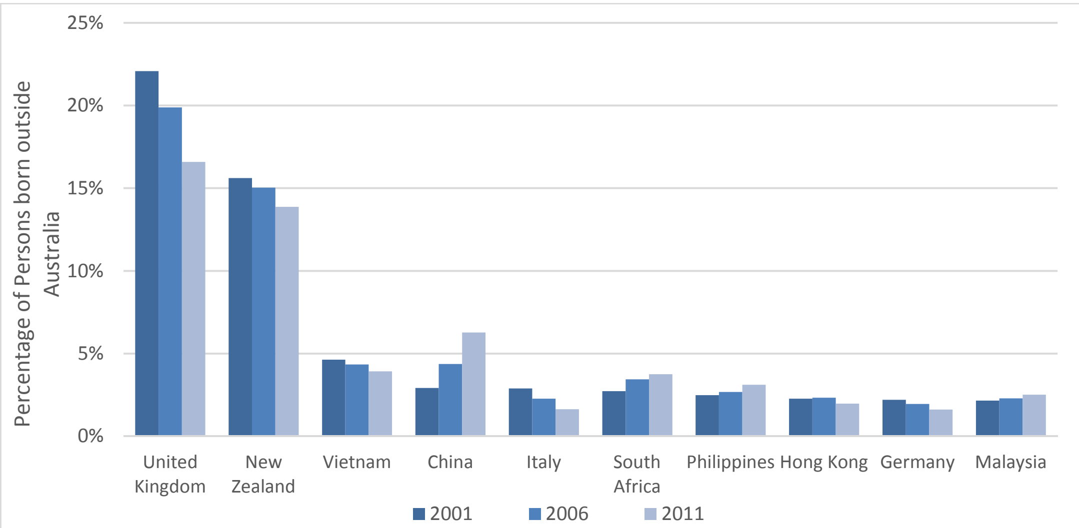
According to the 2011 Census 67% of Brisbane residents were born in Australia, a marked decline since 2001 when 73% of Brisbane residents were Australian-born. Of those Brisbane residents who were born overseas, the majority (17%) came from the United Kingdom followed by New Zealand (14%), though these proportions are much lower in Brisbane than in Queensland and Australia. Compared to Queensland and Australia, Brisbane has a notably higher proportion of residents who were born in China (6.3% of overseas-born residents). Since 2001, the number of Chinese-born residents living in Brisbane has increased as a proportion of the total.

FIGURE 31.   PLACE OF BIRTH, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

FIGURE 32.   PLACE OF BIRTH, BRISBANE, 2001, 2006 AND 2011



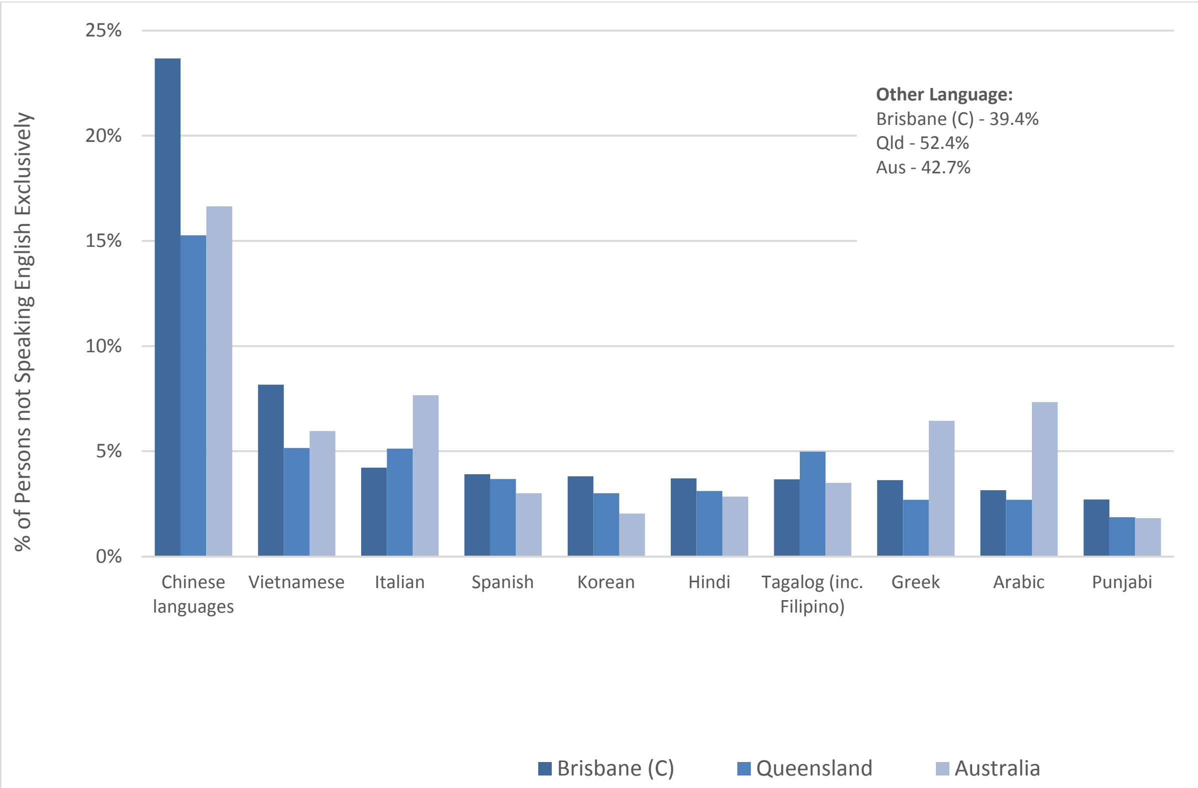
Source: ABS Census of Population and Housing, Time Series Data, 2011

Languages Spoken at Home

According to the 2011 Census 39.4% of Brisbane residents speak a language other than English, compared to 52.4% of Queensland residents and 42.7% of Australians. Of those Brisbane residents who do speak a language other than English at home, the majority (24%) speak a Chinese language compared to 15% of Queensland residents and 17% Australia-wide.

Other prominent languages other than English which are spoken at home by Brisbane residents include Vietnamese and Italian although these languages have fallen as a proportion of the total since 2001.

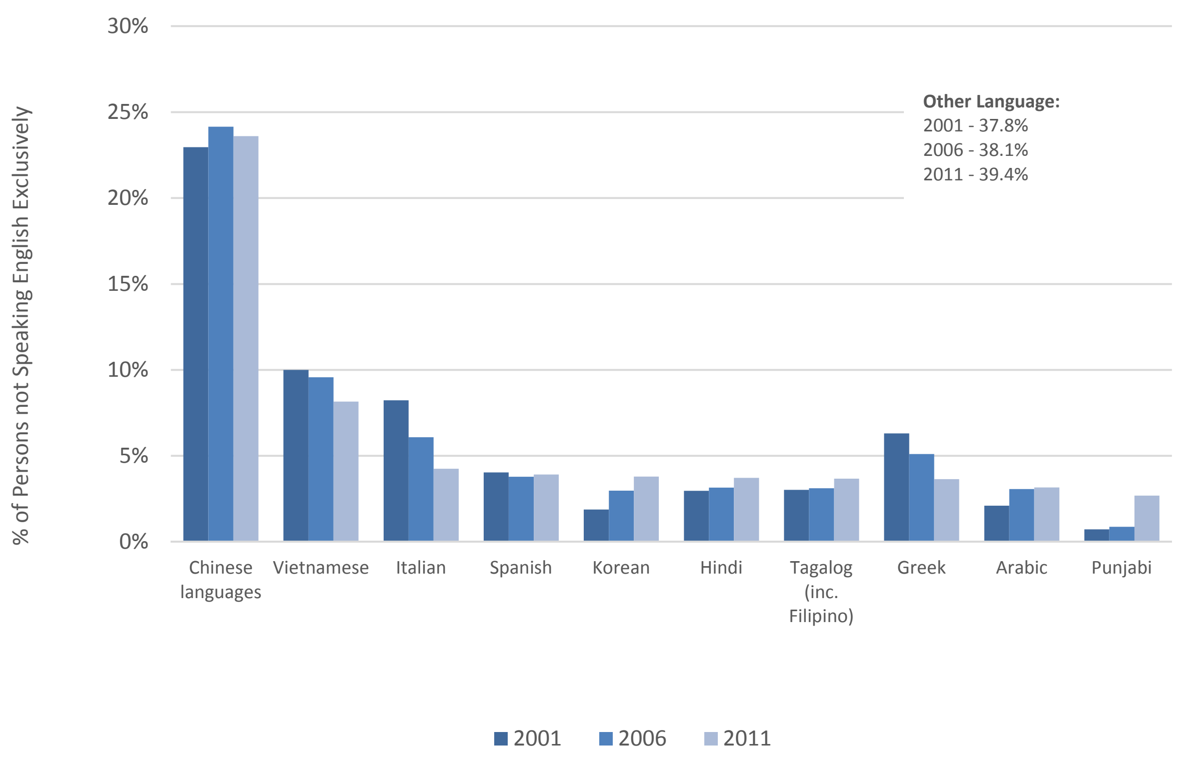
FIGURE 33. LANGUAGES SPOKEN AT HOME, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

Census data on the proficiency of spoken English of overseas-born residents shows that, compared to Queensland as a whole, Brisbane has a higher proportion of overseas-born residents who speak English well or very well (43%) compared to 30% for Queensland.

FIGURE 34. LANGUAGES SPOKEN AT HOME, BRISBANE, 2001, 2006 AND 2011



Source: ABS Census of Population and Housing, 2011

TABLE 13. PROFICIENCY IN SPOKEN ENGLISH OF OVERSEAS-BORN RESIDENTS, BRISBANE AND QUEENSLAND, 2011

			Speaks other language at home and speaks English			
	Speaks English Only		Very Well or Well		Not Well or Not at All	
	Number	%	Number	%	Number	%
Brisbane	141,864	48.1	126,915	43.0	23,772	8.1
Queensland	565,544	63.6	269,847	30.4	45,927	5.2
Brisbane LGA as % of QLD	25.1	..	47.0	..	51.8	..

. . = not applicable
C = City

(a) Based on place of usual residence.
(b) Includes proficiency in English not stated.
(c) Excludes persons who did not state their country of birth.

Source: ABS Census of Population and Housing, 2011

Socio-Economic Indexes for Areas (SEIFA)

Socio-Economic Indexes for Areas (SEIFA) is a summary measure of the social and economic conditions of geographic areas across Australia. SEIFA ranks areas in Australia based on the relative socio-economic advantage and disadvantage within an area. The higher an area scores the greater its level of socio-economic advantage compared to disadvantage. The area with the highest scoring is designated the largest ranking whilst the area with the worst score is given a ranking of one. The score for an area is determined by a number of indicators derived from the 2011 Census of Population and Housing conducted by the ABS.

Brisbane City ranks as the most advantaged local government area in Queensland and in 2011 had a score in the top 10% of areas within Australia. With regards to the Index of Socio-economic Disadvantage by itself, Brisbane remains highly ranked suggesting it has minimal disadvantage compared with other areas. However, the index shows that 6.6% of Brisbane's population falls within the most disadvantaged quintile (i.e. bottom 10%).

The Index of Education and Occupation compares the educational and occupational level of communities. Brisbane is the top ranked local government area in Queensland with respect to this index, and within the top 20% in Australia.

The Index of Economic Resources focuses on the financial aspects of relative socio-economic advantage and disadvantage. With regard to this index Brisbane is ranked within the top 20% in Queensland and the top 30% in Australia.

TABLE 14. SOCIO-ECONOMIC INDEXES FOR AREAS – BRISBANE, 2011

Brisbane (C)	Index of Relative Socio-economic Advantage and Disadvantage	Index of Relative Socio-economic Disadvantage	Index of Economic Resources	Index of Education and Occupation
Score	1056.9	1047.7	1018.3	1072.5
Ranking within Australia:				
Rank	513	504	443	504
Decile	10	9	8	9
Percentile	91	90	79	90
Ranking within QLD:				
Rank	74	73	66	74
Decile	10	10	9	10
Percentile	NA	98	89	99
Minimum score for SA1s in area	481.5	410.3	628.4	694.6
Maximum score for SA1s in area	1210.3	1165.0	1257.4	1289.4
% Usual Resident Population without a SA1 level score	0.8%	0.8%	0.8%	0.8%

Source: ABS Census of Population and Housing: Socio-Economic Indexes for Areas (SEIFA), 2011

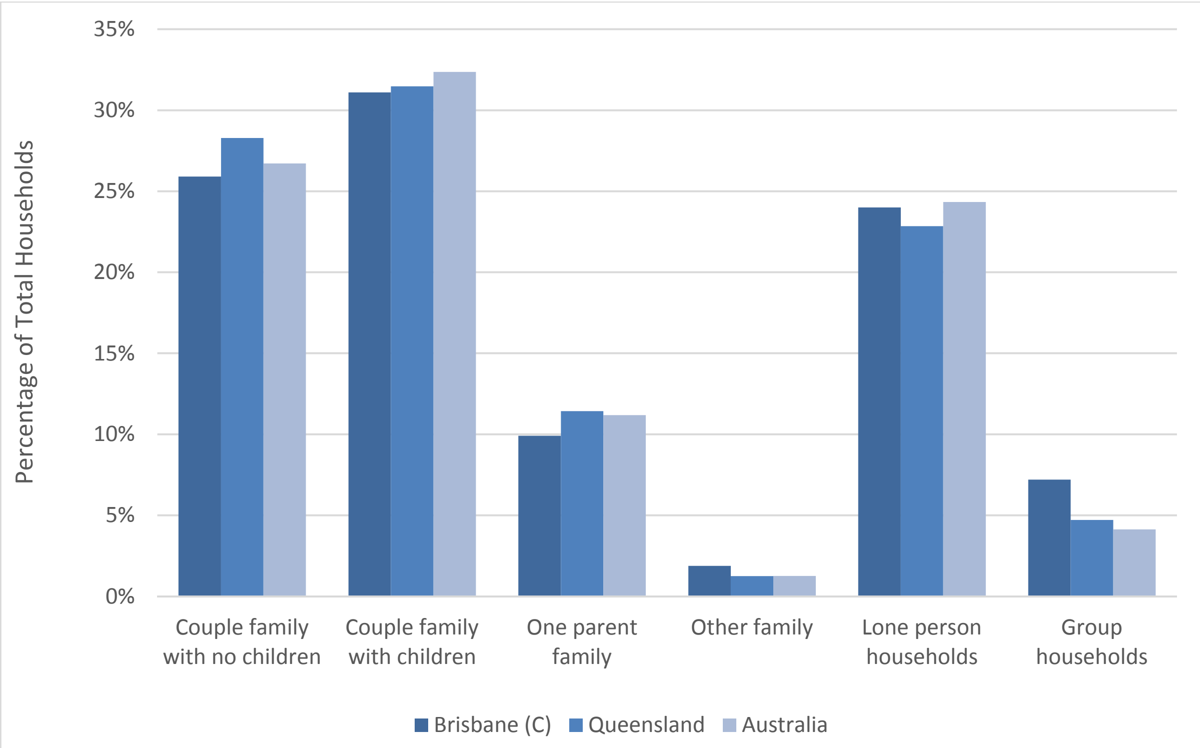
Household Composition

Brisbane has 380,775 households with an average household size of 2.86 persons. By comparison, the average household size for Queensland is 2.89 persons while Australia-wide, the average household size is 3.0 persons per household. Brisbane's average household size has fallen marginally from 2.72 persons per household in 2001.

Brisbane's household composition is similar to that for Queensland and Australia with family households accounting for the greatest share. Brisbane's household composition is largely made-up of couple families with children (30% of all households) followed by couple families without children (25%).

Compared to Queensland and Australia as a whole, Brisbane has a higher share of group households. Brisbane also has a higher proportion of lone person households compared to Queensland, though fewer lone households, proportionally-speaking, than the Australian average.

FIGURE 35. HOUSEHOLD COMPOSITION, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

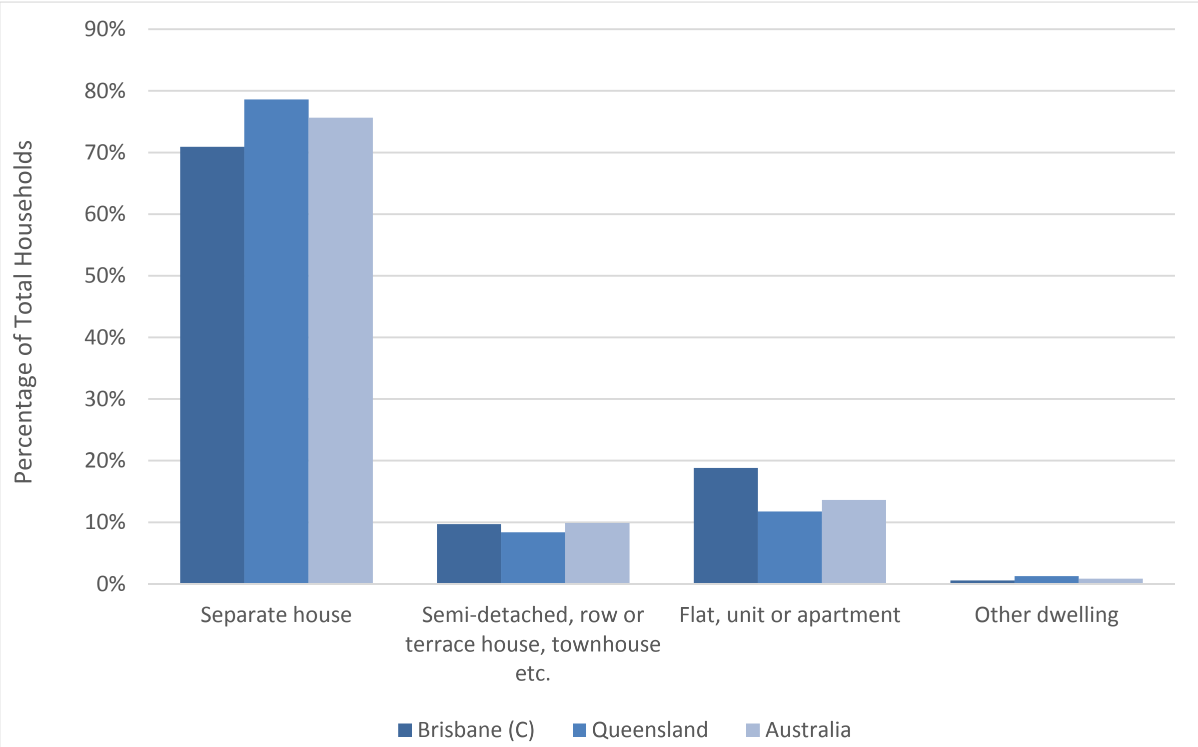
Dwelling Type

Separate hoses dominate Brisbane's dwelling profile with 70% of all occupied private dwellings being a separate house. Flats, units and apartments account for a further 20% of private occupied dwellings in Brisbane with the remainder accounted for by semi-detached, row, terrace houses and townhouses or other dwellings.

Brisbane's dwelling profile is similar to that for Queensland and Australia, but, not surprisingly, with a relatively higher proportion of flats, units or apartments and semi-detached dwellings (29% of the total) compared to 20% for Queensland and 24% of dwellings Australia-wide.

Over the ten-year period to 2011, there has been a shift towards smaller dwelling types in Brisbane. The number of flats, units or apartments and semi-detached dwellings in Brisbane as a proportion of the total has increased from 24% in 2001 to 29% in 2011. Conversely, detached houses have declined as a proportion of total occupied dwellings in Brisbane, from 75% in 2001 to 70% in 2011.

FIGURE 36. DWELLING TYPE, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

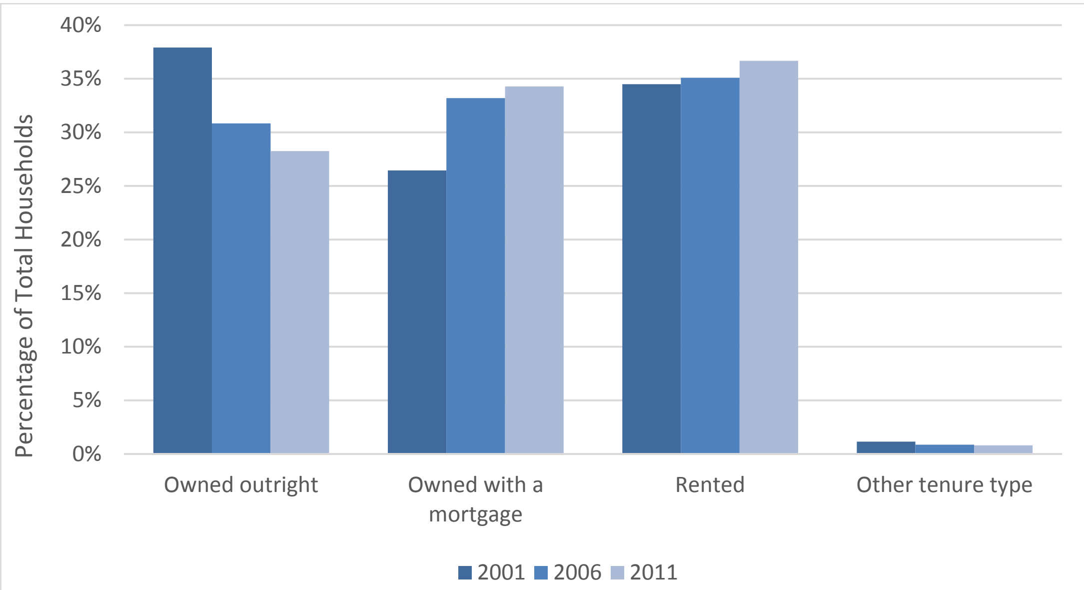
Housing Tenure

Rented accommodation accounts for the largest share of housing tenure in Brisbane (37%) followed by housing owned with a mortgage (34%) and housing owned outright (28%). This is a marked change from ten years earlier when more homes were owned outright (38%) and fewer homes were owned with a mortgage (26%). Fewer homes were also being rented as a proportion of the total in 2001 (35%) compared to 2011 (37%).

FIGURE 37. HOUSING TENURE, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011

Source: ABS Census of Population and Housing, 2011

FIGURE 38. TRENDS IN HOUSING TENURE, BRISBANE, 2001 - 2011



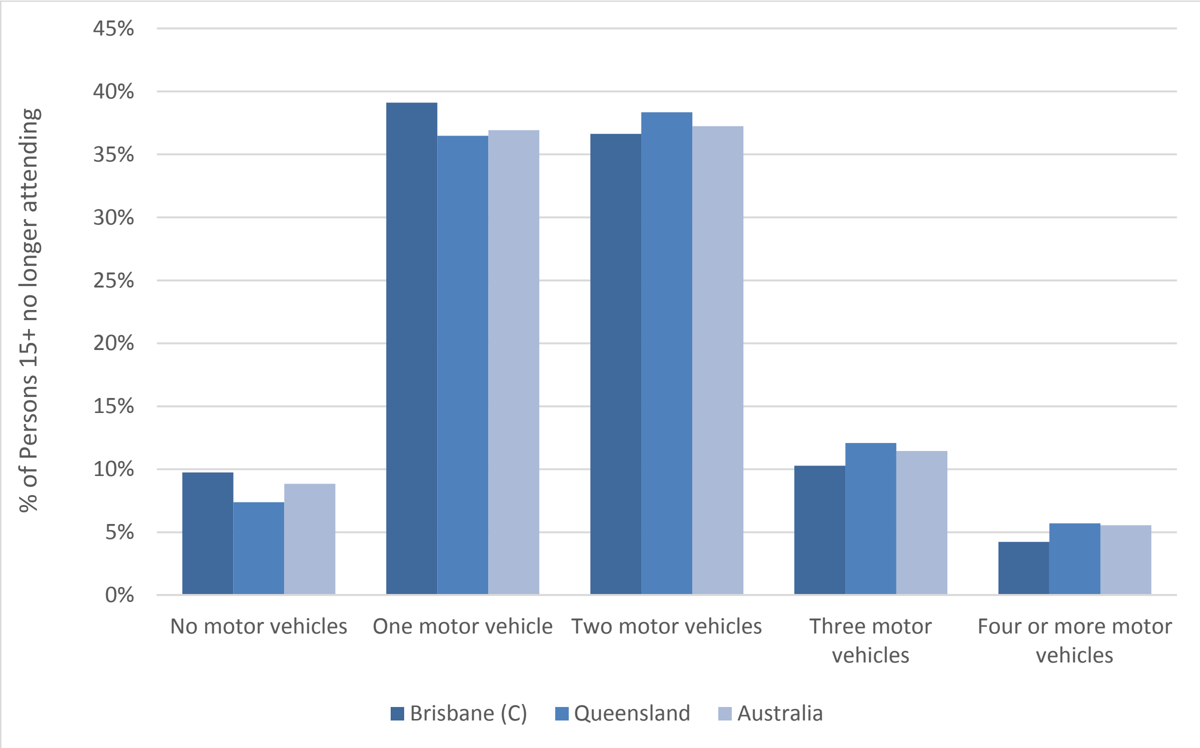
Source: ABS Census of Population and Housing, 2011

Motor Vehicle Ownership

At the time of the 2011 Census, Brisbane had 36,163 occupied private dwellings with no motor vehicles, or 9.5% of all occupied private dwellings. In comparison, 7.4% of occupied private dwellings in Queensland had no motor vehicles while Australia-wide, 8.8% of occupied private dwellings had no motor vehicles.

In 2011, 51% of occupied private dwellings in Brisbane had two or more motor vehicles compared to 56% for Queensland and 54% Australia-wide.

FIGURE 39. MOTOR VEHICLE OWNERSHIP, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



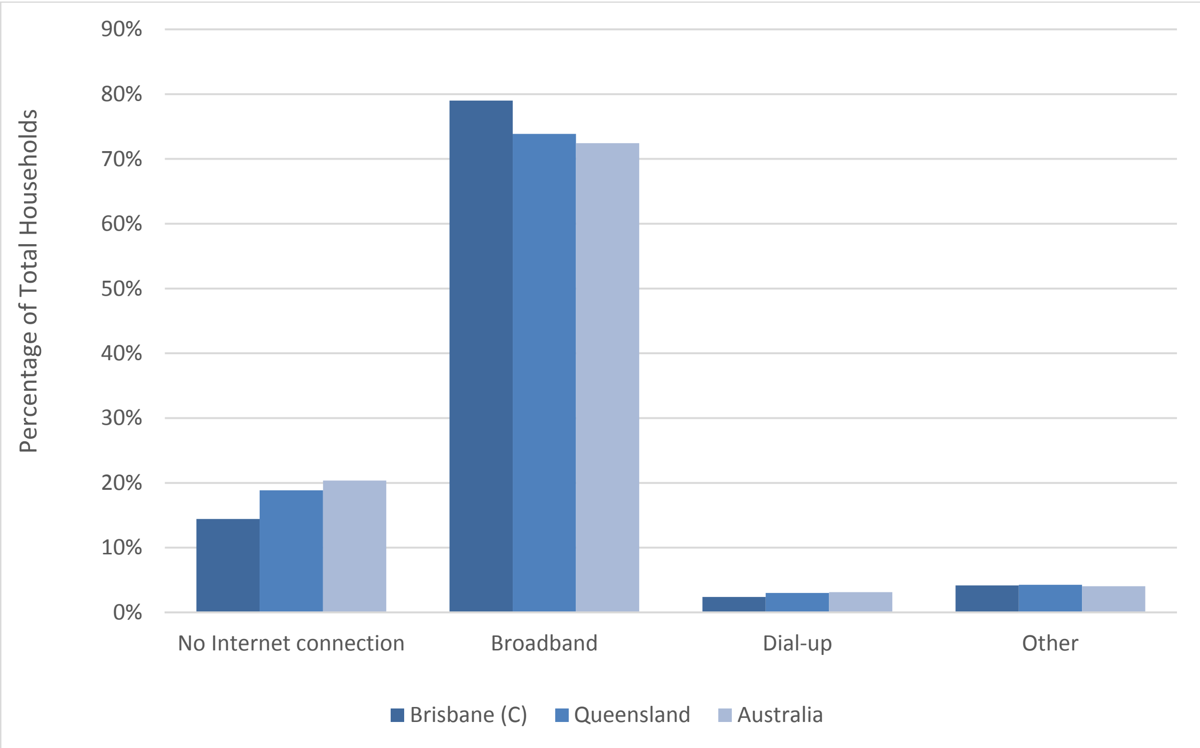
Source: ABS Census of Population and Housing, 2011

Internet Usage

At the time of the 2011 Census, Brisbane had 315,953 occupied private dwellings with an internet connection, or 83% of all occupied private dwellings. In comparison, 78% of the occupied private dwellings in Queensland had an internet connection while Australia-wide 77% of all occupied private dwellings had an internet connection.

Of the 315,953 internet connections in Brisbane, there were 291,681 broadband connections (92%) and 8,862 dial-up connections (3%), the remainder being 'other' types of connection. Brisbane's broadband connectivity is proportionally higher than that for Queensland and Australia.

FIGURE 40. INTERNET CONNECTIVITY, BRISBANE, QUEENSLAND AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011

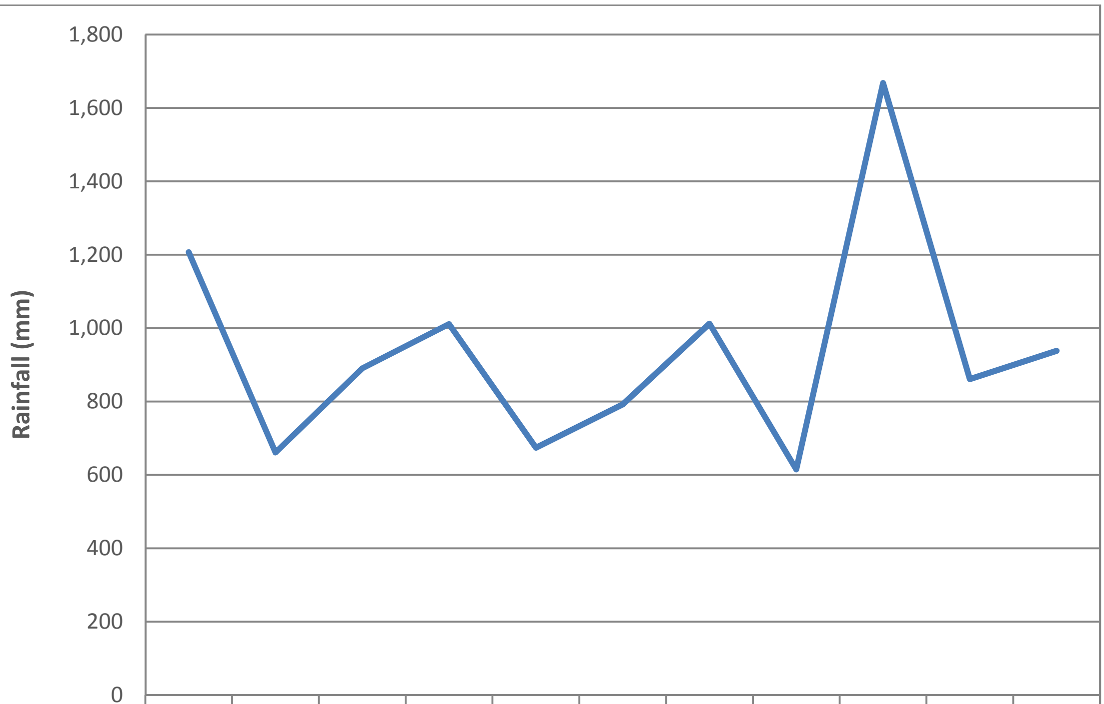
Environmental

Climate

According to the Department of Infrastructure and Transport's Major Cities Unit, the trend for Brisbane's average annual maximum temperature increased slightly between 1952 and 2011, while the trend for its average annual minimum temperature decreased slightly. Brisbane's average annual rainfall trended down between 1952 and 2011.

Over the ten year period to 2013, Brisbane's average annual rainfall has ranged from 615 millimetres per annum to 1,668 millimetres when it peaked in 2011. Brisbane's average daily temperature has remained fairly constant at between 20 and 22 degrees Celsius.

FIGURE 41. AVERAGE ANNUAL RAINFALL, BRISBANE, 2003 - 2013



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Rainfall (mm)	1,207	661	890	1,011	674	792	1,012	615	1,668	861	938

Source: ALGA and National Economics, State of the Regions 2013-14

According to Brisbane City Council, 24% of the city's solid waste is recycled (in 2012) while 99.7% of the city's wastewater receives tertiary treatment.

Clean Energy Future

The Major Cities Unit reports that Brisbane is experiencing peak electricity demand issues during heatwaves and consecutive days of higher than normal temperature. It states the difference in electricity demand that can occur between hot days and cooler days can be as much as 65 per cent and that this is mostly attributable to air-conditioner use. According to Brisbane City Council, the Brisbane metropolitan area experienced total electricity use per capita of 2,479 kilowatt-hours (kWh) in 2012. It also reports Brisbane's greenhouse gas emissions measured in tonnes per capita of 19.54 in 2012.

The Australian Government has produced The Clean Energy Map which is an online, map-based tool that shows the location of projects from 16 programs and initiatives to cut greenhouse gas emissions, reduce energy costs and invest in new technologies for a clean energy future. There are currently 22 projects either underway or completed with an investment of over $21 million by the Australian Government. The map is available at http://www.cleanenergymap.gov.au/.

Lifestyle and Liveability

Brisbane is an evolving city with a growing 'knowledge economy', one which will increasingly be characterised by high-value professional services and skilled manufacturing. As knowledge is embodied in individuals, it is vitally important for Brisbane to be able to attract and retain skilled workers. Achieving this ultimately relies on more than just investment and employment opportunities. Quality of life and lifestyle opportunities need to be afforded to prospective new businesses and importantly, new residents.

In 2012 Brisbane ranked 8th in the world for 'quality of life' in FDI Intelligence's Asia-Pacific Cities of the Future report while The Economist's Global Liveability report ranked Brisbane 20th internationally. Brisbane City Council reports the city has 570.1 hectares of green space per 100,000 population.

As reported by the Department of Infrastructure and Transport's Major Cities Unit, according to the *Australian City Liveability Index* survey of residents in 10 Australian cities:

- Most Brisbane residents feel their city has 'quality urban design, recreational and cultural opportunities and amenity' (68%) and a 'quality natural environment' (74%).

- Only 35 per cent of Brisbane residents agree that the city provides 'good transport infrastructure and services'. This is consistent with the views of residents in most capital cities.

The Major Cities Unit also reports that according to the 2012 *AMP NATSEM Income and Wealth Report's* analysis of typical household goods and services, Brisbane is among the most expensive of the capital cities for electricity and other utilities costs.

Access to International, National and Regional Markets

A Connected City: Australia TradeCoast

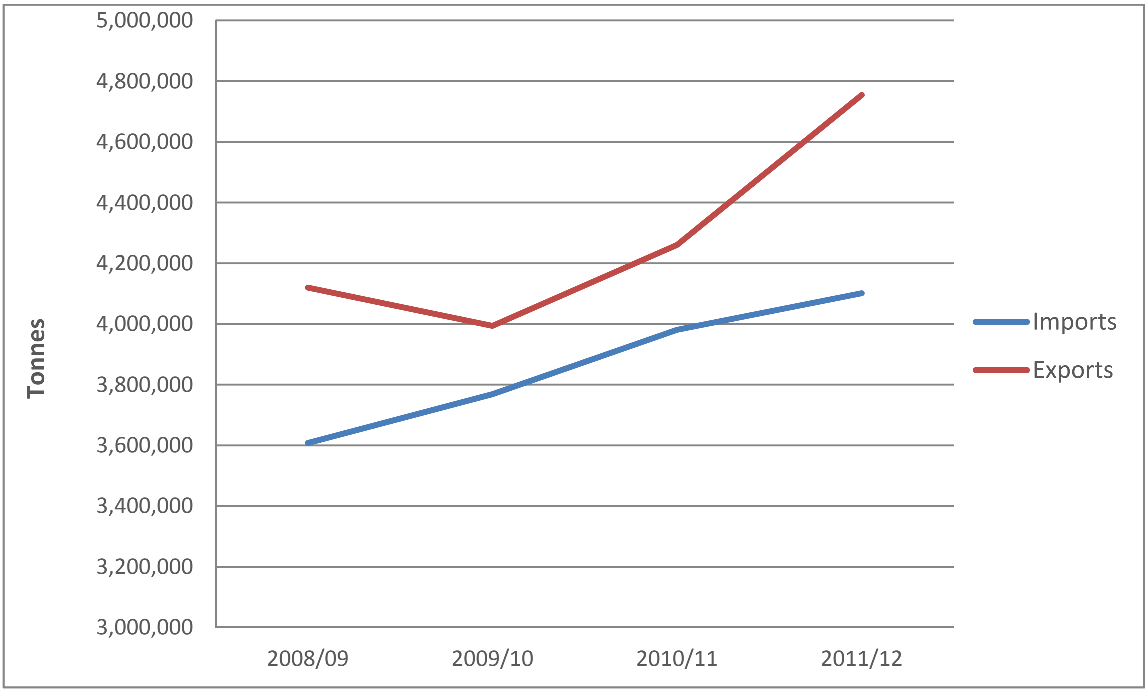
The Australia TradeCoast Region (ATC) is a unique 8,000 hectare trade and industry region six kilometres from the Brisbane CBD. ATC contributes an estimated $9.4 billion to the Queensland economy (Australia TradeCoast, 2012). It is home to 1,500 businesses and the location for around 60,000 employees. This is projected to grow to 110,000 by 2026. One of the fastest growing trade and industry regions in Australia, ATC has direct links to air, sea, road and rail networks, including the Port of Brisbane and Brisbane Airport.

Trade through the Port of Brisbane

The Port of Brisbane is a significant container port plus a bulk commodities port for handling mineral resources and agricultural products. In 2011-12, Brisbane's port handled 12.5 million tonnes of bulk imports and 506,607 containers (TEUs), and 11.4 million tonnes of bulk exports and 499,275 containers (source: Department of Infrastructure and Transport, Major Cities Unit). From July 2012 to the end of April 2013, the Port of Brisbane handled an increase in total trade of 0.7% while total container trade increased by 3% (Port of Brisbane Monthly Trade Report, April 2013).

Historical data from the shows that over the four years to 2012, the volume of container imports through the port (in tonnes) increased, on average, by 3.3 per cent per annum while exports increased by 3.6 per cent per annum. Overall, the volume of export trade grew by 23.1% over the 12 months to June 2012 (Port of Brisbane Total Trade in Tonnes, July 2011 to June 2012).

FIGURE 42. PORT OF BRISBANE CONTAINER IMPORTS AND EXPORTS (TONNES), 2008/09 – 2011/12



Source: Port of Brisbane Pty Ltd, 2013

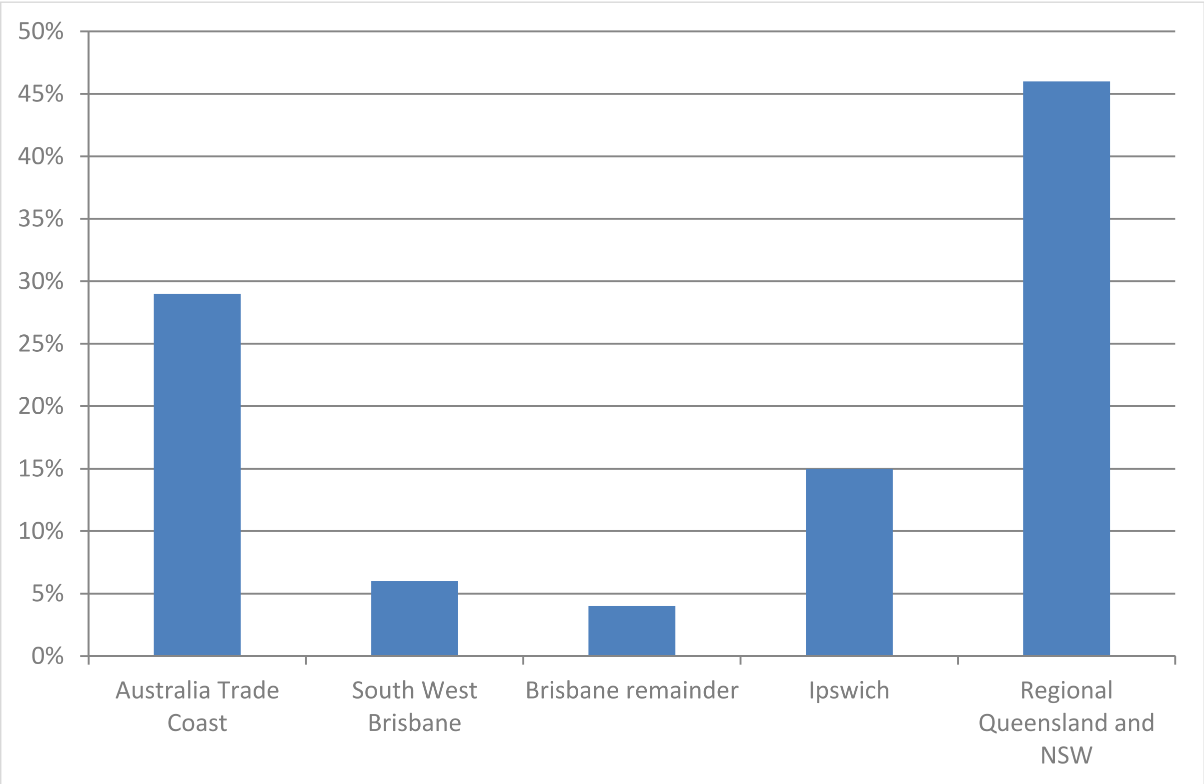
The significance of the Port of Brisbane to Brisbane's regional development is evident in the freight transport movements to and from the port. Approximately 60% of import containers are unpacked within 40 kilometres of the port, a large proportion of that in the Australia TradeCoast South area (Lytton-Hemmant) as well as Brisbane's south-west and Ipswich. Only 7 per cent of import containers through the port are transported interstate.

Exports through the Port of Brisbane originate from: Brisbane (39%); the remainder of South East Queensland (34%); and regional Queensland and New South Wales (26%).

The majority of export containers through the Port of Brisbane originate from regional Queensland and New South Wales followed by the Australia TradeCoast area. The intermodal terminal located at Acacia Ridge and the Brisbane Multimodal Terminal at the Port of Brisbane (Fisherman Islands) are key facilities that support import and export freight movements. Both have road and rail facilities, however while rail plays a key role in freight movements, it only accounts for a 5% share.

There is little scope for modal shift to rail without investment in new infrastructure because of the nature of trans-urban freight movement. Consequently, distribution from and between the Brisbane Multimodal Terminal, Acacia Ridge and locations within the Brisbane region is predominantly by road which contributes to major network road congestion. A dedicated rail freight corridor option is currently being investigated in order to lift the rail share of freight movement to and from the Port.

FIGURE 43. EXPORT CONTAINER ORIGINS, PORT OF BRISBANE



Source: Queensland Transport and Logistics Council, 2013

Brisbane Airport: Domestic and International Passenger Movements

Brisbane Airport has direct connections to 29 international destinations, operating 24 hours a day with no curfew. Airtrain connects Brisbane Airport's domestic and international terminals to the Brisbane CBD via a high-frequency rail service while Airport Link can reduce travel time from the CBD to the Airport by more than 20 minutes (Airport Link, 2007).

In 2011/12, 16.5 million domestic passengers and 4.5 million international passengers passed through Brisbane Airport. Domestic passenger movements at Brisbane Airport grew by 4.5% during 2011-12 while international passenger movements grew by 4.6%.

TABLE 15. PASSENGER MOVEMENTS, BRISBANE AIRPORT, 2009/10 TO 2011/12

Passengers	2009/10	2010/11	2011/12
International	4,139,902	4,287,681	4,483,094
Growth	1.0%	3.6%	4.6%
Domestic	14,913,590	15,800,845	16,516,320
Growth	1.1%	5.9%	4.5%

Source: Brisbane Airport Corporation, Annual Review 2012

Brisbane Airport: International Cargo Movements

Brisbane Airport serves an important role as a freight transport hub. In 2011/12, international air cargo imports through Brisbane Airport increased by 11% while international air cargo exports increased by 7%. Total international air cargo movements through Brisbane Airport increased by 9% in 2011/12.

TABLE 16. INTERNATIONAL AIR CARGO MOVEMENTS, BRISBANE AIRPORT, 2009/10 TO 2011/12

Passengers	2009/10	2010/11	2011/12
Imports (tonnes)	35,265	42,172	46,871
Growth	12.7%	19.6%	11.1%
Exports (tonnes)	41,654	39,506	42,285
Growth	2.1%	-5.2%	7.0%
Total	**76,919**	**81,678**	**89,156**
Growth	6.7%	6.2%	9.2%

Source: Brisbane Airport Corporation, Annual Review 2012

Domestic and International Visitors to Brisbane

Tourism's Contribution to the Economy

Tourism in Queensland contributes $17.5 billion to the Queensland economy and accounts for 6.6% of Queensland's Gross State Product (Tourism Research Australia, State Tourism Satellite Accounts 2010/11). Brisbane accounts for a significant share of Queensland's tourism activity. Tourism accounts for 1.9% of the Brisbane region's economy, compared to 3.7% for Queensland and 3.0% for the national average. This ranks Brisbane 71st among the 77 tourism regions in Australia in terms of economic importance of its tourism industry.

Tourism Expenditure

According to Tourism Research Australia (2012), Australia's five largest tourism regions—Sydney, Melbourne, Brisbane, Gold Coast and Perth—account for almost half (47%) of total tourism expenditure in Australia's regions, but the economic diversity of these regions means that tourism is less important compared with most other regions in Australia. Data on expenditure by tourism region shows Brisbane ranks third on the list of Australia's top 20 tourism regions by expenditure, with $5.9 billion worth of tourism expenditure to the year ending March 2012, compared to $11.1 billion for Melbourne and $13.1 billion for Sydney, which ranks number 1.

According to Tourism Research Australia, for the year ending June 2012, domestic overnight visitors to Brisbane spent $3.2 billion, domestic day visitors spent $1.3 billion and international visitors spent $1.5 billion, totalling $6.0 billion or $16.4 million per day.

Tourism Employment

According to Tourism Queensland, in 2007/08 tourism directly accounted for 36,100 jobs, or 29.4% of Queensland's direct tourism employment of 122,600 people. Retail trade had the largest share of Brisbane's tourism employment (18.8%), followed by education (12.7%) and accommodation (11.8%).

Tourism-related Businesses

According to Tourism Research Australia, as at June 2011, there were 23,819 tourism-related businesses in Brisbane, of which nine in ten are small businesses employing less than 20 people.

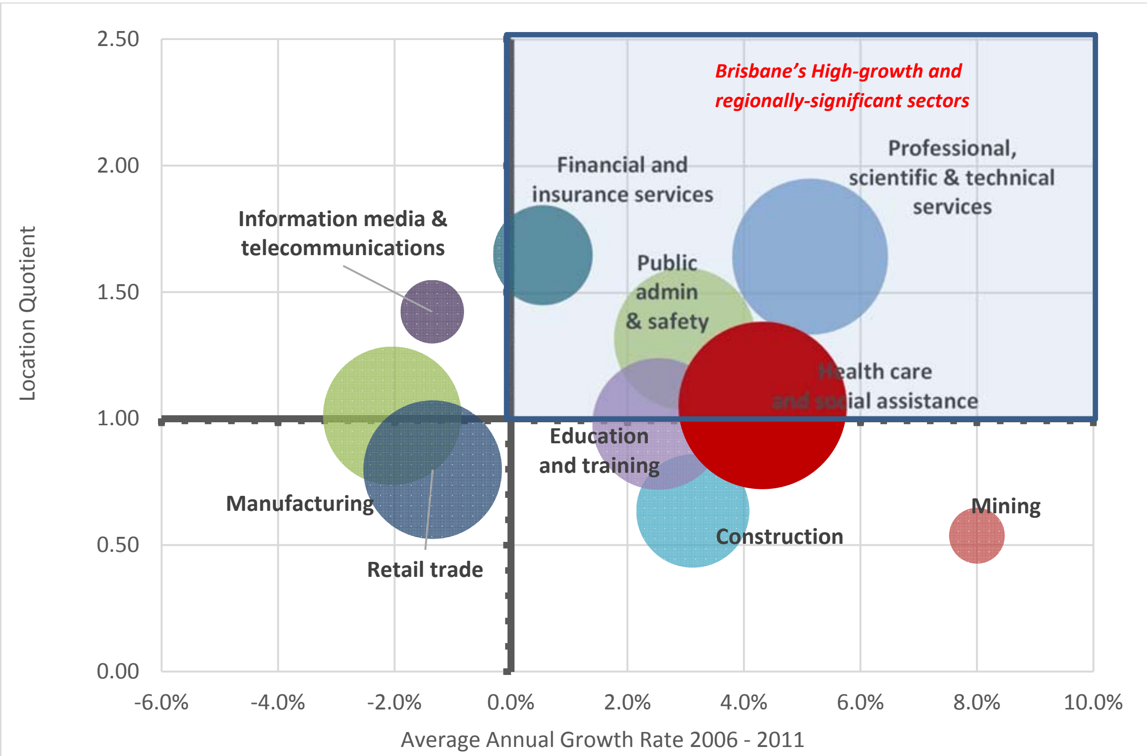
Comparative Advantage and Business Competitiveness

Industry Growth and Share

A 'growth-share matrix', highlights how each of Brisbane's industry sectors (as defined by the ABS 1-digit ANZSIC classifications) differs from the rest of Queensland with respect to its relative size, growth and employment share. Stages shown in the growth-share matrix as follows:

- **Expanding**: If in the top right quadrant (high average annual growth/higher than average concentration – as defined by the industry's location quotient). This is excellent news, implying a strong, adaptive industry sector.
- **Emerging**: If in the lower right quadrant (high average annual growth/below average concentration), this is also good news, implying an emerging, growing industry that may need some assistance to mature.
- **Transforming**: If in the upper left quadrant (lower than average annual growth/above average concentration), this is not good news, implying the industry is at risk (overall) and needing to increase innovation and productivity to compete with other regions.
- **Seed or Transitioning**: If in the lower left quadrant (lower than average annual growth/lower than average concentration), this could imply that the industry is neither developed nor growing in Brisbane, or it could also mean that the 'seed' industry has some potential for growth.

FIGURE 44. INDUSTRY GROWTH AND SHARE, BRISBANE, 2006 - 2011



Source: ABS Census of Population and Housing, Time Series Profile, 2011 with interpretations by SC Lennon & Associates

The preceding chart illustrates where selected industry sectors in Brisbane sit relative to the Queensland average with respect to their rate of employment growth between 2006 and 2011 and their level of specialisation as indicated by their location quotient.

Brisbane's dominant industry sectors - those that are growing and which demonstrate a high level of specialisation in Brisbane relative to Queensland, and which drive the city's economic prosperity - include:

- Professional, scientific and technical services;
- Public administration and safety;
- Health care and social assistance; and
- Financial and insurance services.

Brisbane also has some emerging or potential new drivers of prosperity - those industries that are expanding - which include education and training and the construction sector.

Although Brisbane's retail trade and manufacturing sectors are two of Brisbane's largest sectors in employment terms, their relative rate of growth and specialisation shows them to be in a period of transition. Both these sectors demonstrate below-average growth while the retail trade sector shows a relative lack of specialisation compared to the Queensland average. However, given the highly dispersed and localised nature of retailing, this is to be expected. The fact Brisbane's manufacturing sector displays a positive location quotient is promising for the industry's future in Brisbane.

Brisbane's mining sector, not surprisingly, is a relatively small employer despite its significance as an economic driver. As shown above, based on its high rate of growth in the five years to 2011, mining represents an emerging industry for Brisbane. As many of the mining jobs located in Brisbane are in the managerial and professional occupations, there is scope for this sector to continue to grow and serve Queensland, national and international markets. In July 2013 RDA Brisbane released a labour force capability study update titled *Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update*. The study, undertaken by Synergies Economic Consulting identifies services to mining as a major source of labour demand as a means of maintaining the growth of the mining industry.

Brisbane's Digital Economy

A digital economy is defined as one that is based on the production and distribution of goods and services through electronic commerce. It is characterised by a high propensity for individuals, businesses, institutions and organisations to interact and trade with suppliers, partners and customers through information and communications technologies.

The role of information and communications technology / broadband communications is vital in this regard. Broadband communications infrastructure is one of the fundamental preconditions for or enablers of regional economic development, along with other critical infrastructure. To be competitive in the global economy, organisations and individuals must aim to use the internet at the highest level of intensity. The communications infrastructure that is particularly important as a driver of growth is that part which enables the delivery of high speed internet access.

The Department of Broadband, Communications and the Digital Economy summarised the growth of the digital economy in Australia, and the benefits for businesses and not-for-profit organisations:

'…by 2020, Australia will rank in the top five OECD countries in the percentage of businesses and not-for-profit organisations using online opportunities to drive productivity improvements, expand their customer base and enable jobs growth.'

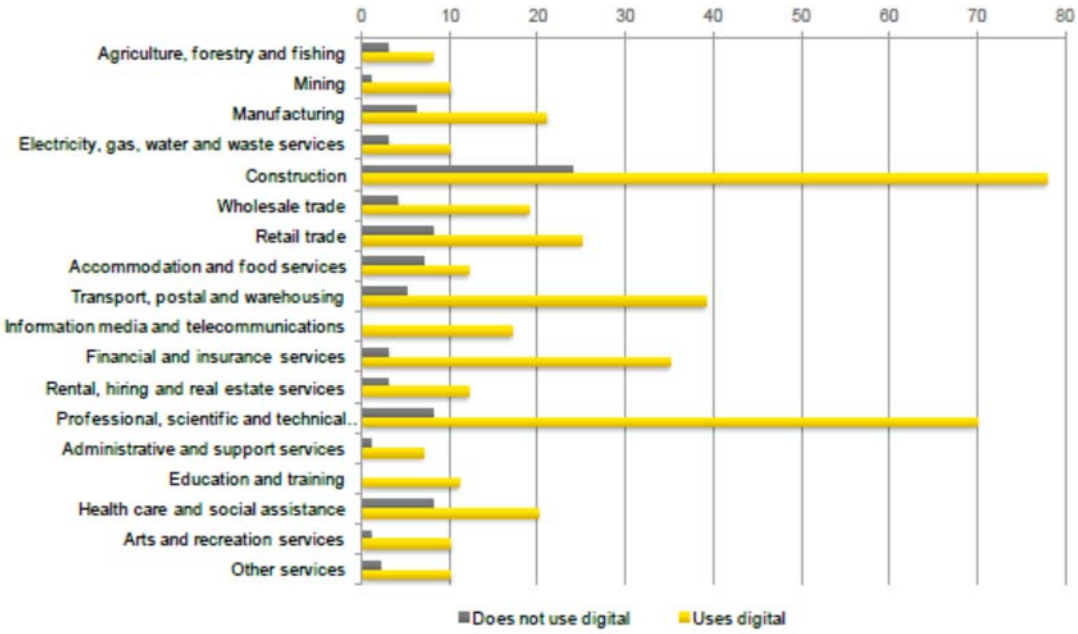
As Brisbane businesses embrace the digital economy, developing and implementing a coherent digital strategy will become increasingly important to inform the strategic choices to be made to stay competitive and prosper. The Brisbane City Digital Audit, prepared on behalf of Brisbane Marketing in 2012, reveals the following:

- 83% of surveyed businesses are using digital technologies but only 30% are selling products and services online and 41% communicate electronically with customers and suppliers. While digital adopters are experiencing positive impacts on their businesses, the majority of the 17% non-adopters provided no reason for the lack of adoption.

- Businesses with a high 'digital strategy' maturity are leading those with a medium to low maturity across all remaining seven dimensions of the Digital Capability Maturity Framework. 55% of businesses surveyed do not have a documented digital strategy. Of that 55%, close to a quarter (23%) having not considered one and 16% understand the importance of one but do not yet have one in place.

- Irrespective of the industry sector and business size, there is a need for Brisbane businesses to transform existing business models digitally and uplift their business capability to compete successfully in the digital economy. As the industrial economic model converges with the digital economy, traditional businesses are being disrupted and new models are emerging. The challenge ahead is not a technology one but rather (i) designing a differentiated end-to-end customer experience, (ii) seamlessly integrating multiple channels of delivery and (iii) accelerating the digitisation of business operations.

FIGURE 45. USE OF DIGITAL TECHNOLOGIES ACROSS INDUSTRIES, BRISBANE, 2012



Source: Brisbane City Digital Audit, November 2012

- The digital economy presents exporting companies with new opportunities. In a recent study published by UQ Business School, a key finding was that compared to firms without a web presence, firms using the web to engage customers were: (i) more profitable, (ii) 2.5x more likely to innovate and (iii) 4.8x more likely to export. The audit revealed that businesses involved in export activities rated a higher level of digital capability maturity across all eight dimensions of the framework compared with those not involved in export activities.

- Overall as a city, based on an overall weighted average digital maturity score, Brisbane is a 'C' with a score of 3.07 on a scale of 1 to 5. The challenge for Brisbane City's Digital Strategy will be to determine how to work with the business community to make Brisbane a high performing and pioneering city in the digital economy.

- The industry breakdown reveals that 'Information and Telecommunications' is leading in terms of overall maturity, followed by 'Education and Training' and 'Rental, Hiring and Real Estate Services'.

- 'Manufacturing', 'Construction' and 'Health Care and Social Assistance' are three industries that would require further attention to uplift their digital capability.

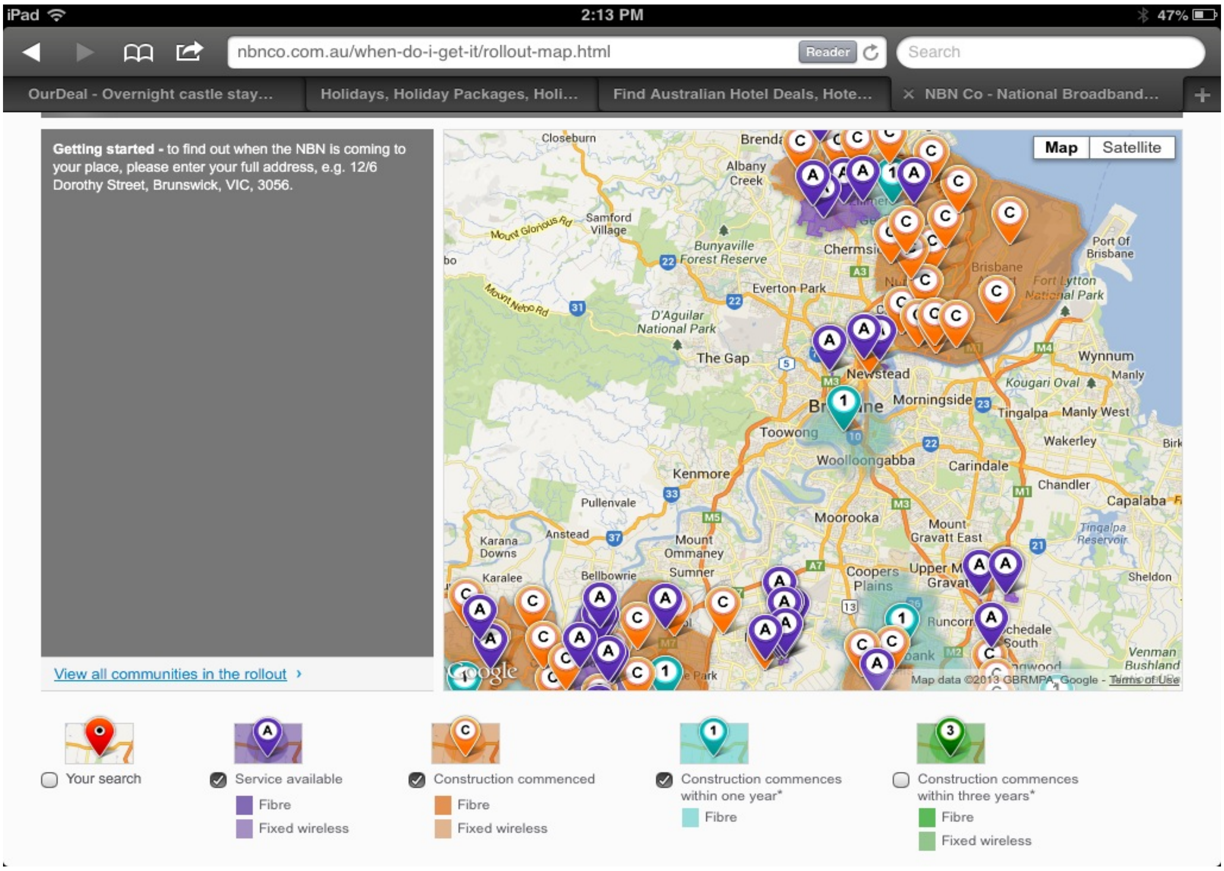
To help facilitate Brisbane's transition to a 'Digital City', the City is embarking on a variety of activities to deliver on three underlying objectives, being:

- Empowering companies to engage in the digital economy;
- Creating an ecosystem that supports digital start-ups with global potential; and
- Improving the public's experience of Brisbane through digital technology.

National Broadband Network (NBN)

Brisbane is among the first locations in Australia to receive the NBN, with service becoming available in 2013 in the Aspley fibre serving area and in a number of Greenfield estates across Brisbane, and expanded areas of construction underway in Nudgee and Acacia Ridge.

FIGURE 46. NBN ROLLOUT, BRISBANE



Source: NBN Co

Regional Innovation

Patent Applications

Brisbane's relatively high level of innovation relative to the Australian average is apparent from the number of patent applications per head of population.

Between 1994 and 2012 Brisbane had an average of 35.51 patent applications per capita compared to 22.79 Australia-wide. Brisbane had a higher number of high-tech patent applications at 6.82 per capita compared to the Australian average of 4.22 per capita, and 2.57 info tech patent applications per capita compared to the Australian average of 1.72.

Brisbane's propensity for innovation was higher than average between 2003 and 2012 with an average number of patent applications per capita of 48.36 exceeding the Australian average of 31.05 per capita over the same period.

TABLE 17. PATENT APPLICATIONS, BRISBANE AND AUSTRALIA, 1994 - 2012

	Brisbane	Australian Average
Average p.a, 1994-2003	352.24	4,732.52
Average p.a, per capita	35.51	22.79
Hi Tech p.a, 1994-2012	66.00	854.45
Hi Tech p.a, per capita	6.82	4.22
Info Tech p.a, 1994-2012	25.31	351.67
Info Tech p.a, per capita	2.57	1.72
Average per capita, 1994-2003	2.57	1.72
Average per capita, 2003-2012	48.36	31.05
2003-2012 avg./1994-2003 avg.	18.84	18.07

Note: p.a = 100,000 people per year

Source: ALGA and National Economics, State of the Regions 2013-14

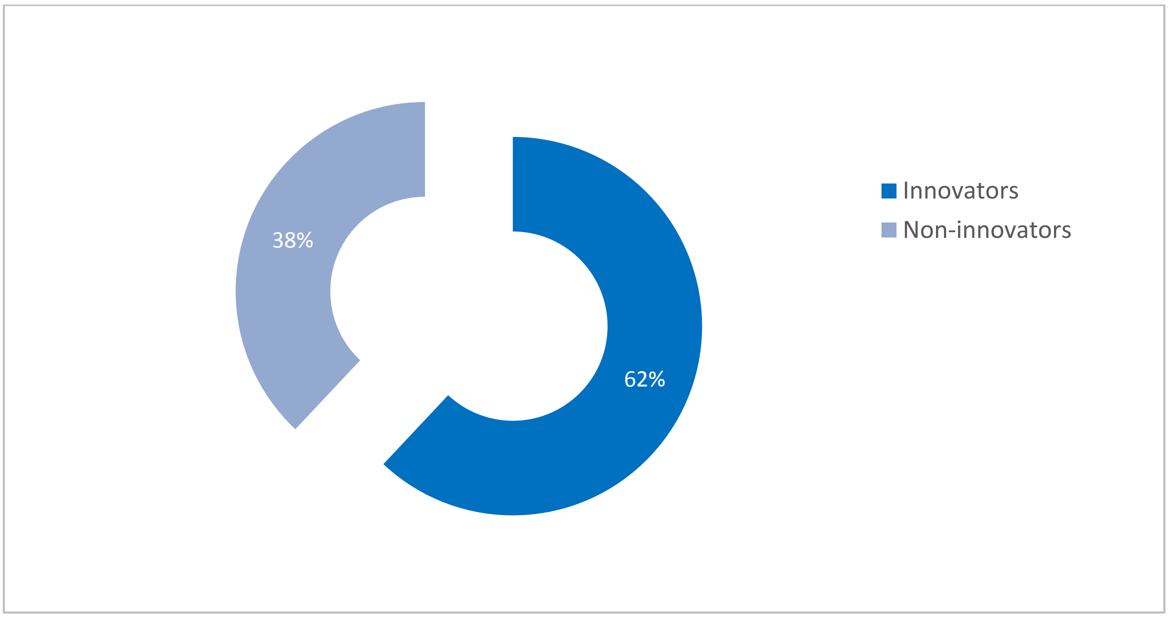
Brisbane's Innovation Scorecard

Innovation plays a key role in driving Brisbane's economy. Brisbane's businesses identify, develop and implement a broad range of innovations to capture international market share, to propel their expansion, grow sales and increase revenue. Innovation creates a platform for Brisbane businesses to compete globally. Implementing new or improved products or services and innovating across processes, has enabled Brisbane-based firms to improve their competitive position both in the domestic and international markets.

A survey of innovation in Brisbane businesses on behalf of Brisbane City Council asked businesses to nominate and discuss a significant innovation undertaken by their business during the past three years. A total of 301 Brisbane businesses, that had not been surveyed previously, were contacted to investigate the role of innovation in the export sector of the economy. Businesses sampled for the 2012 Brisbane Innovation Survey were selected from trade exposed sectors such as manufacturing, professional and scientific services and the businesses that supply them (e.g. transport, logistics, training). These were chosen in order to investigate how innovation activity and efficiency improvements in local supply chains may contribute to business performance in the parts of the Brisbane economy that are most directly exposed to national and international competition.

A total of 188 of the 301 surveyed businesses in Brisbane, equivalent to 62% of the total sample, reported introducing one or more significant innovation within the past three years. Though slightly lower than the 65% of businesses reporting innovation activity in the 2011 Brisbane Innovation Scorecard, this is consistent with the findings at both the state and national levels, where reported innovation activity in 2012 was lower than reported in previous years.

FIGURE 47. BREAKDOWN OF BRISBANE BUSINESS SURVEY RESPONDENTS REPORTING INNOVATION



Source: Brisbane Innovation Scorecard 2012

The 2012 Brisbane Innovation Scorecard highlights include:

- 62% of Brisbane businesses reported significant innovation within the past three years. Though lower than in previous years, it is a strong result given the impact of the global financial crisis during this period.

- 78% of businesses reporting innovation activity were undertaking novel (new to their industry) innovations.

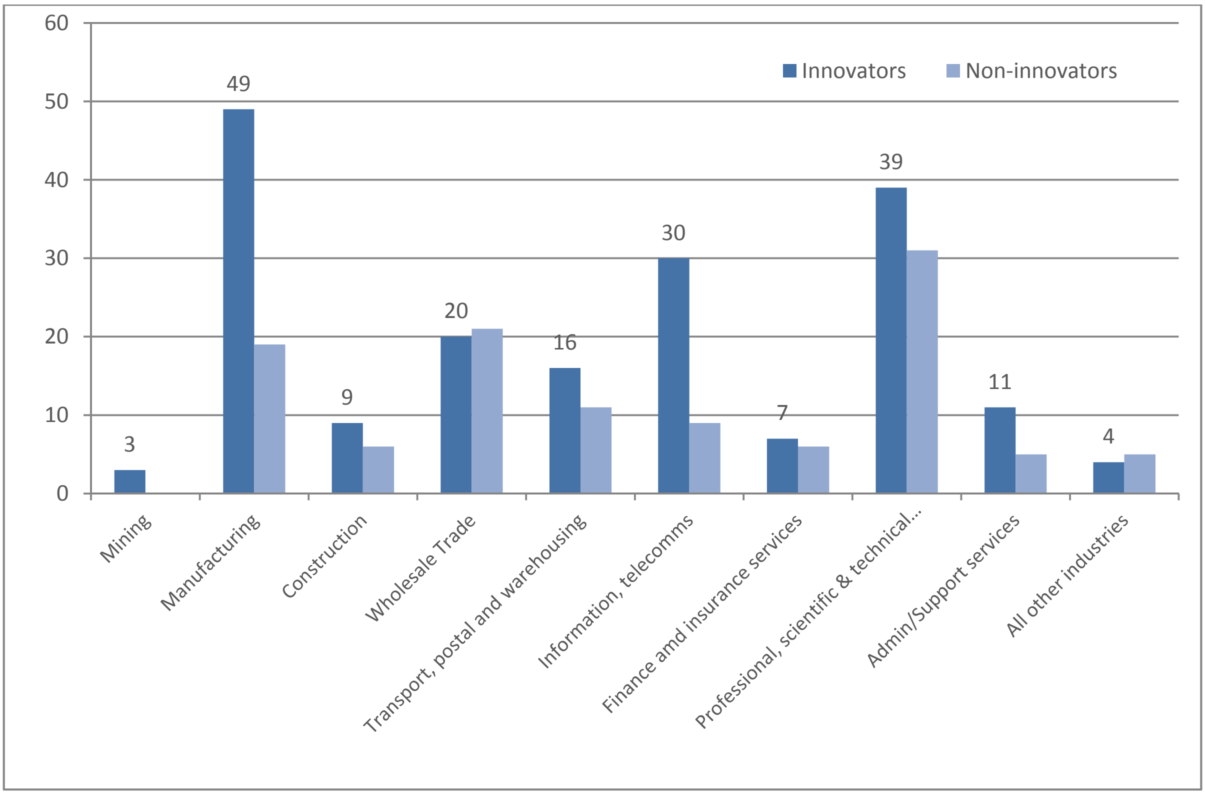
- Businesses operating in international markets indicated higher levels of innovation that were new to their industry.

- Larger businesses demonstrate strong innovation culture with innovation activity across many parts of the business.

- Application of information/digital technology was a significant innovation opportunity for many businesses.

- The highest numbers of innovating businesses were reported in manufacturing, professional scientific and technical services and in information, media and telecommunications. These three sectors accounted for 118 businesses, almost 50% of respondents.

FIGURE 48. NUMBER OF BRISBANE BUSINESSES REPORTING INNOVATION BY MAJOR INDUSTRY GROUP



Source: Brisbane Innovation Scorecard 2012

Brisbane's Global Innovation Ranking

The Innovation Cities Index 2012-2013 is the world's largest city classification and global ranking of cities' potential as innovation economies. The Index rates 66 Asian cities - including Australian cities - from a total of 450 benchmark cities classified.

According to the Index, Brisbane's 'innovation status' has been upgraded from a 'node' city to a 'hub' city – 'dominance or influence on key economic and social innovation segments' - when it comes to innovation capability and commitment to keeping pace with change and technology.

Brisbane's score was equal to that of Moscow and Zurich and just three points away from being classified as a 'first tier nexus city' - the highest classification on the index. Globally, Brisbane is ranked 85th out of the 450 benchmark cities classified.

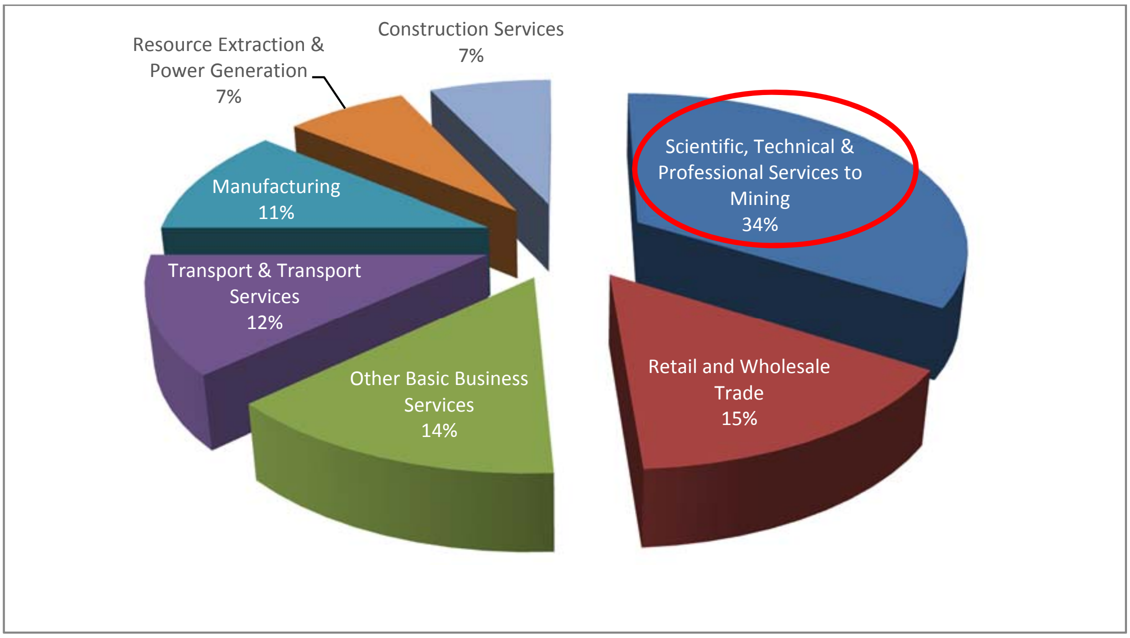
Brisbane's Mining Services Sector

As the gateway to Queensland's mineral wealth, Brisbane is home to 178 mining and energy regional headquarters. According to the Queensland Resources Council, in 2011/12, the resources sector contributed $30.3 billion (total estimated value added) to the greater Brisbane economy, accounting for over 40% of the total contribution to Queensland.

Census data on employment by industry shows Greater Brisbane's mining sector contributes only 1.4% of the region's total employment. However, when the supply chain flows between industries in the economy are examined, it is apparent the resources sector (mining) is in fact a major contributor to metropolitan Brisbane's job stock. Queensland Resources Council data shows that in 2011 Queensland's mining sector employment is heavily concentrated in the Brisbane metropolitan region – which hosts 204,444 full time equivalent resources sector jobs, or 43% of Queensland's resources sector employment. When supply chain dynamics are taken into account, the resources sector is shown to provide 19% of total industry employment in the metropolitan Brisbane region. Of all the regions in Queensland, the Brisbane metropolitan region displays the highest resources sector employment multipliers, with 11.1 jobs created for each direct resources sector job.

Breaking down the mining sector's value chain into the dollar shares of component industries (using the 2010/11 Queensland Resources Council data), explains why such a large share of mining sector employment and production value is generated in Brisbane. Almost 34% of the inputs consumed by Queensland's resources sector are drawn from Scientific, Technical & Professional Services to Mining; a further 14% are drawn from Other Basic Business Services. These industries are an important part of Queensland's growing knowledge economy.

FIGURE 49. BRISBANE'S RESOURCES SECTOR VALUE CHAIN SHARE BY INDUSTRY



Source: Queensland Resources Council, 2011

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9. Attachment 2: Consultation and Partnerships

RDA Brisbane's Partnerships and Relationship Building Outcomes

Every initiative and project undertaken by RDA Brisbane involves collaboration and cross-sectoral and intergovernmental partnerships with and between key stakeholders drawn from the three levels of government, business/industry and community sectors.

Over the past 12 months the RDA – through its members, staff and projects - has led or collaborated in numerous initiatives both within Brisbane and cross-regionally. These have all been in relation to addressing the broad-ranging goals and priorities as set out in the 2012-13 Regional Roadmap Update.

The digital economy was the principal area of activity and contribution to integrated regional planning outcomes for RDA Brisbane in 2012-13. The RDA organised and staged the Brisbane CLICK! Digital Expo – the first such event of its kind in the region which was aimed at businesses and not-for-profit organisations to help them engage and 'survive and thrive' in the burgeoning digital economy. This event involved establishing partnerships with the three levels of government and harnessing the involvement business and community sectors, resulting in a highly successful and effective event attended by over 600 representatives from SMEs and NFP organisations, including a third of attendees coming from outside Brisbane, which made it a truly cross-regional event. RDA Brisbane also partnered with Brisbane Marketing to bring about the Brisbane Digital Audit and in launching the Digital Brisbane Strategy Brisbane, where the 2014 CLICK! Digital Expo is cited as one of two key events for the city.

The section below sets out details of key partnerships (cross-sectoral and intergovernmental), activities, engagement and relationship building that occurred in 2012-13, and their outcomes.

Stakeholder contribution to the Regional Roadmap

1. Developing Readiness for future labour force skills challenges

- Participated in an *SEQ Cross Regional Youth Taskforce*, comprising Partnership Brokers: The Smith Family, Worklinks and QYILS, DSDIP and RDA Logan & Redlands which helped to progress interest in and involvement in meeting skill needs of the future
- Participated in a *Skills Alliance Workforce Development Conference* where RDA gained useful information on how a particularly industry (Fitness) addressed its workforce development needs
- Liaised extensively with *The Smith Family Partnership brokers* in the development of:
    - an Industry Facts & Job Pathways App (named 'Career Hunter') and formed a partnership with DETE (State Govt), DEEWR (Federal Govt), Busy at Work to guide its development
    - *Work Inspiration* - RDA supported the Queensland employer seminar of the Work Inspiration work experience model (following success of pilot programs), encouraging businesses take-up. RDA participated on the *working party* with The Smith Family to arrange the event. The program has now received Australian Government (DEEWR) seed funding to roll out nationally. RDA will continue to support and promote Work Inspirations to Brisbane employers
- Participated in the Australian Government's '*Moving Forward Together' Skills Connect Brisbane workshop* and connected with the *Queensland Department of Education, Training and Employment (DETE)* where recommendations of the Skills and Training Taskforce were compared with the RDA's Skills Shortages Report action and implementation agenda, finding that some items had been addressed by the Taskforce with a view to uptake by the Government. RDA and DETE undertook to liaise closely in the release of the RDA's Update and Supplementary reports.

- Assisted the *Department of Human Services* with stakeholder contact details and promotion of their Brisbane North Jobs and Skills Expo. The Expo was attended by 1800 jobseekers and had over 80 exhibitors from training, jobs providers and employers.

2. Representing the region's strategic interests to all levels of government

- *Regional Development Australia (RDA) Fund* **-** RDA Brisbane hosted two information sessions attended by 24 representatives from NFP organisations and local government in November 2012 to brief potential applicants for Rounds Three and Four of the RDAF. Four EOIs were received for Round 4 (Round 3 was not applicable to Brisbane) and 3 were shortlisted which proceeded to full application. Feedback was provided to all applicants and guidance equally provided to the 3 shortlisted EOI applicants (Cancer Council Queensland, Hear and Say, Kyabra Association). Unfortunately none of these projects were funded, but the organisations maintained close contact with RDA and provided advice of feedback they had received. They were subsequently prioritised by the RDA for Round 5B.
- *The Brisbane City Council and Queensland Dept of Treasury* (Office of Economic & Statistical Research) provided guidance to the RDA in the development of its Regional Indicators project, with advice on relevant indexes and the provision of data/data sources. These Regional Indicators address RDA Brisbane's six goals and are being used in the Roadmap process as a framework to monitor progress towards realising the goals. They have also been shared with the other capital city RDAs
- RDA Brisbane strengthened its relationship with the other seven *South East Queensland RDAs and RDA Northern Rivers* in a joint project: SEQ Regional Development Initiative – managed by RDA Brisbane and with the Executive Officer serving as Secretary of the Steering Committee. This project which is due to finish in September 2013 has built and leveraged new and existing stakeholder relationships cross-regionally for the benefit of the eight RDAs. See also 5. Below where the project is contributing to profiling regional strengths
- Because of the common issues of metropolitan regions, the *capital city RDA EOs (11 RDAs) have established a Community of Practice* (initially facilitated by the Department) to share best practice and collaborate on projects/activities:
  - Value proposition – RDA Brisbane has led the development of a briefing document which discusses the valuable role played by metro RDAs both within and cross-regionally or across the entire state/territory.
  - Regional Indicators – RDA Brisbane has researched and developed a set of Regional Indicators to inform its planning processes – these were shared with the other capital city RDAs.
  - Australian Energy Storage Test Facility project – led by RDA Adelaide with collaboration from other RDAs nationally to engage the participation of local stakeholders.

3. Developing leadership, innovation and resilience for a changing economy

- Mobilised a group that RDA Brisbane had formed in the aftermath of the 2011 Brisbane floods: *Brisbane Business Resilience Stakeholder Group* - to respond to ex-tropical cyclone Oswald during the 2013 Australia Day Weekend: set up a web page listing assistance provided by the stakeholder group
- Digital Engagement Working Party - convened by RDA Brisbane to advise on its digital engagement strategies – comprised of: DSITIA, DSDIP, Enterprise Connect, NICTA, Rype Ideas, MSIT, The Business Success Group (DE provider), Small Business Solutions, Brisbane City Council, Brisbane Marketing. This group advised on and contributed to organisation of the CLICK! Digital Expo. The State Government, Brisbane Marketing and The Business Success Group became key partners/sponsors in the expo, which resulted in over 600 attendees from SMEs and the NFP sector 40 exhibitors of digital technologies
- *CLICK! Digital Expo working group* **–** was convened by RDA Brisbane in 2013 to provide guidance in organising its 2014 CLICK! Digital Expo, comprising: DSITIA, Brisbane Marketing, The Business Success Group, Rype Ideas, Chamber of Commerce & Industry Queensland (CCIQ)
- Partnering with *CitySmart* (Brisbane City Council's sustainability arm) to plan to co-host a Green Business Leaders Energy Saving Workshop for SMEs in September 2013
- Partnering with 4 other SEQ RDAs in the RDA Sunshine Coast-led Digital Work Hubs project (telework readiness project)

Consultations undertaken throughout 2012-13 and into 2013-14 were geared to informing current

•	Partnered with Metropolitan South Institute of TAFE (MSIT) and Small Business Solutions Queensland, along with 3 other SEQ RDAs in the delivery of Strategic Investment Fund (Queensland Government funded) training delivery for SMEs in Carbon Accounting and e-Business Health Check workshops
4.	**Strengthening service provision networks and integrated service delivery** • Led the formation of a *Bayside Transport working group*, following on from a previous Transport Forum to address connectivity issues for commuters, which comprised representatives of Australia TradeCoast Ltd, The Smith Family, Department of Transport & Main Roads, Translink, Port of Brisbane Pty Ltd. Still awaiting receipt of a report from Translink 'point of origin' survey of large employers in the precinct in order to develop a solution for connectivity. • The RDA Executive Officer was appointed Chair of the Government Industry Business Information Network (GIBIN) – a long-standing SEQ network sharing business information among representatives of agencies from the 3 levels of government, industry and education: ABS; AI Group; ASIC; AusIndustry; Austrade; Australian Competition and Consumer Commission; Australia Post; Australian Tax Office; Brisbane City Council; Business Enterprises; Business Enterprise Centres (Brisbane; Caboolture, Ipswich & Region; Redland); Chamber of Commerce & Industry Qld (CCIQ); Council of Mayors (SEQ); CSIRO; DETE; Enterprise Connect; DSDIP; DSB; DSITIA; DEEWR; Griffith University; Immigration Department; Indigenous Business Australia; IP Australia; Ipswich City Council; Justice Department; Lockyer Valley Regional Council; Logan City Council; Moreton Bay Regional Council; National Baking Industry Group; Redland City Council; Queensland Government Statistician's Office; Queensland University of Technology; Regional Development Australia Committees (Brisbane; Gold Coast; Logan/Redland, Moreton Bay & SEQ); SEQ Indigenous Chamber of Commerce; Small Business Solutions; University of Southern Queensland • RDA brokered a partnership for *My Community Directory* to partner with contracted firm *Glentworth* in conducting a survey of not-for-profit organisations on their digital engagement, which helped disseminate the survey to a broader audience • Partnering with *Business Enterprise Centre (BEC) Brisbane Metro* in setting up Business Excellence Roundtables, to broaden the engagement and success rate of Brisbane SMEs • RDA EO continues to serve as Secretary of the *Economic Development Australia (EDA) Queensland State Practitioner Network* – the national professional body for economic development practitioners.
5.	**Profiling regional competitive strengths and opportunities** • RDA partnered with *Brisbane Marketing* to undertake a Digital Audit of Brisbane SMEs, which involved a survey of 500 SMEs undertaken by Ernst & Young in conjunction with the UQ Business School. The Audit helped to inform seminar sessions at the 2012 CLICK! Digital Expo and formed the basis for the development of the Digital Brisbane strategy for which RDA served on the steering committee. The Digital Audit was launched by the Lord Mayor of Brisbane at the CLICK! Digital Expo and RDA partnered with Brisbane Marketing in launching the Digital Brisbane strategy in March 2013 • As a collaborating partner on the *2012 Brisbane Innovation Scorecard*, RDA participated on a *steering committee* which provided input to assessing and selecting Brisbane's top innovators for showcasing in the Scorecard document and launch. Other collaborating partners: Brisbane Marketing, Brisbane City Council, Enterprise Connect, State Government, University of Queensland Business School, Deloitte. • RDA partnered with *Enterprise Connect* in the Brisbane Innovation Atlas demonstration project which is being built upon to develop a key investment attraction tool by the Brisbane City Council for the city. • RDA assisted the *Climate Commission* in promoting a business breakfast, where businesses had the opportunity to meet and hear from and discuss business sustainability with four of the Climate Commissioners visiting Brisbane • RDA has liaised with Port of Brisbane Pty Ltd, Qld Transport & Logistics Council, the Queensland Smart Transport Centre and NICTA with a view to partnering to address improving freight movements in and out of the Port of Brisbane and along major network roads • As part of the SEQ Regional Development Initiative project the following stakeholder consultative forums were held which provided guidance and direction to the SEQ RDAs for future planning against the identified key priority themes across the SEQ RDAs: o Transport and Logistics o Smart Manufacturing Roundtable o Digital Thought Leaders

o SEQ in the Asian Century

and future Regional Roadmap priorities and processes. The Roadmap consultations, including some stakeholder workshops undertaken in this time period, have been relevant towards informing the 2013-2016 Regional Roadmap as we continue with working towards the RDA's six aspirational goals for Brisbane:

1. **A competitive city** that promotes economic growth and opportunity embracing change
2. **A liveable city** offering a high quality of life centred on social inclusion and community well-being
3. **A clean city** that is emissions conscious and values its environment
4. **A digital city** actively engaging opportunities offered by the digital economy for the benefit of all
5. **An enterprising city** with an innovative culture driven by a highly skilled and engaged workforce
6. **A connected city** with appropriate transport infrastructure and transit efficiency providing access to employment and markets.

Currency checking and further dialogue has occurred in order to test applicability and the priorities which the RDA has identified across its six goals.

Stage 1 and 2 Consultations

The table below sets out how stakeholders have contributed to the 2013-2016 Regional Roadmap process and identifies ongoing consultations to inform important activities along with broader goals and priorities. (Please note that the below represents only the key engagement activities that have occurred.)

Stage 3 Broader Opportunity for Feedback and Input

The RDA has sought to keep abreast of changing circumstances, along with recently released reports and data, to inform this Roadmap. Now with the change of Government at the September 2013 Federal Election, there will likely be a review of key issues and priorities in order to align with the new Government's policy direction. In keeping with the Regional Roadmap being a living document, the RDA will provide stakeholders with the opportunity for further feedback and input – thereby ensuring that this document does not prematurely become out-dated.

Ongoing review of the Roadmap

The RDA Brisbane Regional Roadmap reflects input from stakeholders, analysis of relevant data and reports, and will be responsive to changes in policy directions that may occur from time to time – in order to articulate the RDA's overall strategic direction.

As previously stated, RDA Brisbane collaborates and forms partnerships in every strategy it implements and each activity it undertakes. Over the life of the Roadmap, it will seek to broaden its collaborative stakeholder base in addressing the identified priorities with a view to realising the 6 goals for Brisbane. Notwithstanding this, RDA Brisbane will continue to be flexible and respond to changing circumstances within the scope of its resources and influence.

Regional Indicators

RDA Brisbane has developed a set of key regional indicators designed to provide measurement of turning points or fluctuations of economic, social and environmental activity in respect of the six

<table>
<tr><th>Details of consultations and stakeholder groups informing the 2013-2016 Regional Roadmap content</th><th>Key outcomes for inclusion in the Regional Roadmap</th><th>Ongoing consultations</th></tr>
<tr><td colspan="3">Goal 1: A Competitive City</td></tr>
<tr><td>Career Hunter app (for iPhone and iPad)
Consultations with the project partners who formed a working group which met several times during the development phase of the app:
The Smith Family
DETE
DEEWR
Busy at Work
Group Apprenticeships Queensland</td><td>The app, which was launched in July 2013 as a nation-wide resource for schools and jobseekers, is a 3 year partnership with the project partners. RDA's role will be to participate in updating the app, consider sustainability strategies to fund the upkeep and expansion of the app to android platforms, promote the app both locally and through national networks.</td><td>Partners, industry and education stakeholders</td></tr>
<tr><td>SEQ RDA Regional Development Initiative project
RDA Brisbane oversees and manages the project and the RDA CEO serves as Secretary of the project Steering Committee (chaired by RDA Sunshine Coast Chair Prof Max Standage). As part of this project a number of consultative forums have informed the future direction of the SEQ regional development framework which impacts on the work of RDA Brisbane, as follows:

• Transport and Logistics Forum – Brisbane City Council; Dept of State Development, Infrastructure & Planning; QMI Solutions; Queensland Rail, TransitCare, The Smith Family, Enterprise Connect – with presentations and discussion from Port of Brisbane Pty Ltd, NICTA, Queensland Transport & Logistics Council, Australian Logistics Council (ALSO 'COMPETITIVE CITY')

• Smart Manufacturing Roundtable – Brisbane City Council, DSDIP, Brisbane Marketing, QMI, Enterprise Connect, Australian Industry Group, Chamber of Commerce & Industry Qld, Council of Mayors SEQ, Logan City Council

• Digital Thought Leaders Forum - Hub Australia, Work Club Coast, Causeway Innovation, CCIQ,</td><td>The identification of relevant SEQ project deliverables which affect and add value to the Brisbane region, to take forward as priorities and actions; segue to the review of the SEQ Regional Plan by the State Government (SEQ RDAs to be represented in planning forums)

• The forum identified the recognition of and need to address the following:
– Data sharing
– More efficient freight movement through mode share
– Impediments to coastal shipping
– Raise awareness of the need for a dedicated freight rail corridor
– Need for stronger coordination of whole of SEQ supply chains

• The forum identified the need to support and strengthen manufacturing sectors with a focus on smart specialisations. The following sectors were identified for SEQ, along with the need for further research, analysis, innovation mapping and strategies to develop the SEQ smart specialisations profile:
– Aviation, aerospace & defence
– Food and agrisciences
– Resources technologies
– Transport & logistics
– Medical technologies
– Clean technologies
– Creative industries

• The forum identified the changing business and working environment brought about by digital disruption, and</td><td>Stakeholders relevant to progressing a consortia strategy arising from the final report due in October 2013</td></tr>
</table>

CloudDC/GeoNexus, NICTA, Gravelroad (ALSO 'DIGITAL CITY')	the value of business innovation hubs to cultivate entrepreneurship. This will partly be addressed through the Digital Work Hubs project. CloudDC highlighted the significance of the GeoNexus undersea cable project, to make SEQ a world renown digital destination (see below).	
Skills Shortages in the Greater Brisbane Labour Market 2012-2021 – 2013 Update The 2012-13 Roadmap consultations identified the need – over a 2 year period – to progress implementation of recommendations arising from the original report released in 2011. A 2013 Update is to be released early in 2013-14. Input has been provided by: Brisbane City Council Department of Education, Training and Employment/Skills Queensland	Progressing the implementation of recommendations arising from the Skills Shortages in the Greater Brisbane Labour Market 2012-2021 report was identified as a 2 year process in 2012 – as was updating the report. Further consultations with BCC has identified a need to examine the Professional & Technical Services occupational grouping in more detail to pinpoint which of the occupations will most be in shortage – to explore further.	State Government (Department of Education, Training and Employment) Australian Government (Department of Education, Employment and Workplace Relations) Brisbane City Council Industry Universities
Capital City RDA collaboration: The eleven capital city RDA EOs collaborated as part of a Community of Practice (initially facilitated by the Department) to share best practice and collaborate on projects. Value proposition – RDA Brisbane has led the development of a briefing document which discusses the valuable role played by metro RDAs both within and cross-regionally or across the entire state/territory.	Continuing collaboration in the development of a value proposition briefing paper Brisbane involvement (to be facilitated by RDA Brisbane) in the Australian Energy Storage Test Facility (led by RDA Adelaide and University of Adelaide's Institute for Mineral and Energy Resources) – gaining participation from local stakeholders	Global Change Institute (UQ) http://www.gci.uq.edu.au/ Energy Users Association of Australia
Centre for Transferrable Skills The Brisbane Institute KPMG UQ Business School	Brisbane Institute Brave Ideas for Working Cities – consultations with Brisbane Institute, KPMG, UQ Business School with a view to advancing an idea for a Transferrable Skills Institute for Brisbane to meet future skill needs.	Project partners
Competitive City - general		Brisbane City Council Economic Development State Govt (DSDIP) Chamber of Commerce & Industry Qld (CCIQ) The Competitiveness Institute

Goal 2: A Liveable City		
Liveable City - general		Office of the Not-for-Profit sector OR QCOSS (re social inclusion; capacity of NFPs) My Community Directory Property Council of Australia - Policy and Research Manager) Partners for Liveable Communities
Goal 3: A Clean City		
Green Business Leaders Energy Saving workshop CitySmart Brisbane Marketing/Australia TradeCoast CitySmart corporate partners	Stakeholders decided on the format of the workshop under the Watt Savers banner, with Brisbane Marketing to provide marketing support for promotion to Australia TradeCoast SMEs.	
Clean City – general		Global Change Institute (UQ) CitySmart Brisbane City Council Australian Govt
Goal 4: A Digital City		
CLICK! Digital Expo A working group was convened which has met three times – comprising representatives from: Brisbane Marketing Qld Dept of Science, IT, Innovation & the Arts Rype Ideas The Business Success Group Chamber of Commerce & Industry Queensland (CCIQ) See also Digital Thought Leaders Forum under SEQ project	These consultations have led to RDA Brisbane committing to holding another CLICK! Digital Expo to follow the highly successful 2012 event. The next expo will be held in Brisbane in March 2014 – an expanded 2-day event keeping the streamed seminar format of the 2012 expo, still aimed at SMEs from Brisbane and the rest of SEQ. The Expo addresses Objective 1 of the Digital Brisbane Strategy.	CLICK! Working Group Partners and sponsors
SEQ Digital Work Hubs Project Brisbane Marketing Hub Australia	RDA Brisbane is to continue its participation in an RDA Sunshine Coast led project across 5 SEQ RDAs for the development of Digital Work Hubs on the city fringe or neighbouring RDA areas, and innovation spaces across the region. A literature review has been completed and the Demand Research component of the Project has been contracted to an economic development specialist consultancy firm. This continuing project addresses Objective 3 of the Digital Brisbane strategy	Project partners and potential investors

Digital Brisbane Strategy RDA participated in a working group to advise on the development of the strategy by the Brisbane Chief Digital Officer (which was informed by the Brisbane Digital Audit in which RDA was a partner) – comprising: Brisbane's Chief Digital Officer Other Brisbane Marketing staff and board members State Government (DSITIA) Ernst and Young News Queensland River City Labs Microsoft Brisbane City Council Selected 'digital champions' identified by the Digital Audit	RDA Brisbane is identified as a key partner in implementation of the Digital Brisbane Strategy and has committed to holding a 2014 CLICK! Digital Expo to address Objective 1 of the Strategy (see CLICK! Digital Expo above). RDA Brisbane is also a partner in the SEQ Digital Work Hubs project, which is also an area identified in the Strategy (Objective 3) and being taken forward by RDA Brisbane in the Brisbane region (see below).	Brisbane Chief Digital Officer Brisbane Marketing State Government CCIQ
Geonexus Project CloudDC	Support to stakeholders for a project for the landing and termination of an International Fibre Optic Undersea Cable on the Sunshine Coast linking through to the Global Internet. This presents an opportunity to transform South East Queensland from being 'Regionally Significant to Globally Important', and put SEQ, and Queensland on the Global map for Internet Exchanges..	DSITIA
Digital City - general		DSITIA Brisbane Marketing Digital Enterprise & Digital Hubs providers
Goal 5: An Enterprising City		
Business Resilience Networks Consultations over partnering in the formation of Business Excellence Roundtables with Business Enterprise Centre (BEC) Brisbane Metro along with Brisbane City Council	RDA has partnered with BEC Brisbane Metro in the development of Business Excellence Roundtables across Brisbane aimed at nurturing business growth and resilience. Feeder groups would be the Lord Mayor's Business Forums which are funded to continue in the 2013-14 Council budget period.	Chambers of Commerce BECs
Australian Institute of Commercialisation (AIC) and Qld Govt Technical Clinics State Government (DSITIA)	RDA participated in an Australian Institute of Commercialisation (AIC) and Qld Govt Sorghum for Food Tech Clinic, which workshopped opportunities to grow the industry in SEQ. This resulted in a follow-up meeting with DSITIA with a view to RDAs providing follow-up business network facilitation following the tech clinics	State Government (DSITIA, DSDIP) QMI Solutions
Connecting research institutes with industry Smart Services CRC (QUT) UQ Centre for Clinical Research	The need for research institutes to develop closer links with industry in order to partner to further develop solutions/promote best practice innovations and technologies	Brisbane Marketing BCC Enterprise Connect CCIQ

Enterprising City - general Department of Science, Information, Technology, Innovation and the Arts (DSITIA) Dept of State Development, Infrastructure & Planning (DSDIP) Health and Community Services Workforce Council Skills Queensland Brisbane Marketing Metropolitan South Institute of TAFE (MSIT) Property Council of Australia – Qld Division	Supported: • Developing business resilience, business networks and information services • Indigenous enterprise and economic development initiatives • Innovation - innovative business creation and growth campus	CEO, SEQ Indigenous Chamber of Commerce Brisbane Marketing Enterprise Connect Brisbane City Council Economic Development
Goal 6: A Connected City		
Transport & Logistics Port of Brisbane Pty Ltd Qld Transport & Logistics Council Queensland Smart Transport Centre NICTA	• The continuing need to address more efficient freight movements in and out of the Port of Brisbane and along major network roads – this issue in a broader SEQ sense was addressed by the SEQ RDAs Transport & Logistics Forum (see above) • Support for a dedicated rail freight corridor to increase rail mode share and ease freight movements by road	NICTA QTLC Port of Brisbane TMR
Vocational Transport Connectivity – Australia TradeCoast The Smith Family Partnership Brokers Brisbane City Council Translink TransitCare NICTA Port of Brisbane Pty Ltd Dept of Transport & Main Roads	Continuing need to address connectivity issues for commuters to the Australia TradeCoast (south) area. Still awaiting receipt of a report from Translink's 'point of origin' survey of large employers in the precinct in order to develop a solution for connectivity.	Bayside-Industry Transport Working Group
Transport - general		TMR Brisbane City Council

goals for Brisbane (Attachment 3). The regional indicators – to be updated annually - will enable timely analysis of the current, short-term and longer-term regional situation in order to track progress towards realising these six goals.

In addition, RDA Brisbane has developed a separate set of competitiveness indicators (Attachment 5) grouped according to four of the five COAG Regional Australia Standing Council key determinants of regional economic growth. These indicators are largely drawn from the Regional Australia Institute's InSight Index along with data from MyRegion and the 2013 State of Australian Regions Report. The indicators rank the RDA Brisbane region with RDAs nationally and against each of the capital city RDA regions, and with annual updating, will enable tracking of competitive strengths and weaknesses.

10. Attachment 3: RDA Brisbane Regional Indicators

RDA BRISBANE REGIONAL INDICATORS

What are indicators?
Indicators are measurements that tell us how we are doing; whether we are going up or down, going forward or backward, getting better or worse, or staying the same.

Good Indicators...

- *are bellwethers that reflect fundamentals of long-term regional health.*
- *reflect the interests and concerns of the community.*
- *are statistically measurable on a frequent basis.*
- *measure outcomes, rather than inputs.*

Source: http://www.siliconvalleyindex.org/

PURPOSE AND METHODOLOGY

The RDA Brisbane set of key regional indicators was developed for inclusion in the 2013-2016 Regional Roadmap in order to provide measurement of turning points or fluctuations of economic, social and environmental activity. In 2012 RDA developed a set of six aspirational goals for Brisbane:

7. **A competitive city** that promotes economic growth and opportunity embracing change
8. **A liveable city** offering a high quality of life centred on social inclusion and community well-being
9. **A clean city** that is emissions conscious and values its environment
10. **A digital city** actively engaging opportunities offered by the digital economy for the benefit of all
11. **An enterprising city** with an innovative culture driven by a highly skilled and engaged workforce
12. **A connected city** with appropriate transport infrastructure and transit efficiency providing access to employment and markets.

The regional indicators establish a baseline that will enable timely analysis of the current, short-term and longer-term regional situation. By being periodically updated, the indicators will enable tracking of Brisbane's progress towards realising these six goals.

Selection of the indicators has been based on:

- Their ability to measure progress in respect of the RDA's six goals
- Availability of data on a relevant geographical basis
- Relevance of the indicators to the region and RDA Brisbane's goals
- Quality of data – integrity, accuracy, frequency, timeliness, accessibility and comparability with other cities/regions

INDICATOR SOURCES

Indicators have been drawn from among the following indexes or sources:

ABS – the Australian Bureau of Statistics (from which most of the data is drawn for these indicators) produces community profiles http://www.abs.gov.au/websitedbs/censushome.nsf/home/communityprofiles

BCC— the Brisbane City Council collects and collates data to inform its policies and services - these have been provided by the BCC's Economic Development Unit. The BCC also has its own Community Profile data, developed by OESR http://statistics.oesr.qld.gov.au/bccstats/profiles

GCIF – The Global City Indicators Facility provides an established set of city indicators that allows for global comparability of city performance and knowledge sharing. Brisbane (along with Sydney and Melbourne) is among 224 cities across the world reporting on 115 indicators on city services and quality of life according to a globally standardized methodology. http://cityindicators.org/ (full dataset is only available to member cities)

MyRegion – is an Australian Government website that provides regional information and data on each of the 55 RDA regions with data drawn from a variety of sources http://myregion.gov.au/regional-profile-data-metadata

NIEIR – The National Institute of Economic and Industry Research is commissioned by the Australian Local Government Association to annually (in June) produce the State of the Regions report, which includes economic data for each of the 55 RDA regions across Australia (full dataset is only available to subscribers).

OESR – Queensland Dept of Treasury's Office of Economic & Statistical Research produces datasets from a variety of sources http://www.oesr.qld.gov.au/our-office/who-we-are/index.php

RAI – the Regional Australia Institute launched its 'InSight' competitive regional indicators in June 2013, Australia's first online index and interactive map tracking the competitiveness of Australia's 560 LGAs and 55 RDA regions http://www.regionalaustralia.org.au/research-policy/insight/

SALM - Small Area Labour Markets produced quarterly by the Australian Department of Education, Employment & Workplace Relations (DEEWR) http://deewr.gov.au/small-area-labour-markets-publication

SEIFA – Socio Economic Indexes for Areas – provided every 5 years by the ABS from Census data
http://www.abs.gov.au/websitedbs/censushome.nsf/home/seifa?opendocument&navpos=260

The table below shows the selected **Regional Indicators** and the estimated cycle for their review (frequency) in respect of the RDA Brisbane Regional Roadmap.

RDA BRISBANE REGIONAL INDICATORS TO MEASURE PROGRESS AGAINST REGIONAL ROADMAP GOALS

Measure	Index/Organisation	Regional Indicator	Period	Geographical level	Frequency	Value	Data source
1. A competitive city that promotes economic growth and opportunity embracing change							
Productivity	GCIF	Gross Regional Product per capita (AUS$)	2010-11	Brisbane GCCSA	irregular	$63,600	Queensland Treasury's Experimental Estimates of Gross Regional Product March 2013 report
Productivity	BCC-Econ-Unit	City Product as a percentage of Country's GDP	2010-11	Brisbane GCCSA	irregular	9.2%	Queensland Treasury's Experimental Estimates of Gross Regional Product March 2013 report
Business size by turnover	ABS	% of Registered businesses with turnover range $2m or more	2010-2011	Brisbane	Annual	6.7%	ABS-Brisbane Community Profile
Real Economic Growth	BCC-Econ-Unit	Growth of GRP, current prices (%) over 10 years	2001-2011	Brisbane	Not specified	4.7%	Queensland Treasury's Experimental Estimates of Gross Regional Product March 2013 report
Construction Investment	NIEIR	Value of residential and non-residential new construction and renovations ($m cvm p.a.)	2013	LGA	Annual	$14,013	2013-14 State of the Regions report
Employment growth	OESR	Employment (persons) Year-on-Year growth (%)	2011-2012	Brisbane (Region)	monthly	0.83%	Queensland Treasury, OESR Regional Profiles
Jobs	ABS	Number of jobs located in Brisbane	2011	Brisbane LGA	5 years	632,015	ABS 2011 Census
Unemployment rate	SALM	Unemployed persons aged 15 years and over (%)	Mar 13 Qtr	LGA Brisbane	Quarterly	5.6%	Dept of Education, Employment & Workplace Relations

2. A liveable city offering a high quality of life centred on social inclusion and community well-being							
Indoor and outdoor recreation	GCIF	Square metres of public recreation space per capita	2012 report data	LGA	Not specified	77.75	Gerard Mcinerny - GIS Team BCC
Community safety	GCIF	Violent crime rate per 100,000 population	2012 report data	Brisbane LGA	Annual	220	QLD Police Annual Statistics report
Prosperity - household	My Region	Average wage and salary income	2009	Brisbane LGA	Annual	$49,885	ABS (National Regional Profile 2006-2010)
Prosperity – household	NIEIR	Household Debt Service Ratio	2013	Brisbane LGA	Every 5 years	16%	2013-14 State of the Regions report
Socio economic	SEIFA	SEIFA - population in the most disadvantaged quintile (%)	2011	Brisbane LGA	Every 5 years	6.6%	ABS 2011 Census
Welfare dependency	NIEIR	% of resident population aged 16-64 receiving income support	2013	Brisbane LGA	Annual	6.8%	2013-14 State of the Regions report based on Centrelink data
Cultural diversity	BCC Community Profile	% of people speaking other language at home	2011	Brisbane LGA	every 5 years	14.6%	OESR - Census 2011
English language proficiency	BCC Community Profile	% of overseas born people that speak English not well or not at all	2011	Brisbane LGA	Every 5 years	8.1%	OESR - Census 2011
Population change	My Region	Average annual growth rate of estimated residential population (%)	2011-12	Brisbane LGA	Annual	1.3	ABS 3218.0 - Regional Population Growth 2011-12
Ageing population	My Region	% of population that that is aged 65+	2012 report data	Brisbane LGA	Annual	11.5%	ABS Estimated Regional Population
Housing density	BCC-Econ-Unit	Number of persons per household	2012 report data	Brisbane LGA	irregular	2.7	BCC-Econ
3. A clean city that is emissions conscious and values its environment							
Greenhouse gas emissions measured in tonnes per capita	GCIF	Greenhouse gas emissions measured in tonnes per capita	2012 report data	Brisbane GCCSA	irregular	19.54	BCC
Total residential electrical use per capita (kWh/year)	GCIF	Total residential electrical use per capita (kWh/year)	2012 report data	Total Brisbane Metropolitan Area	irregular	2479 kWh	BCC

Percentage of city's solid waste that is recycled	GCIF	Percentage of city's solid waste that is recycled	2012 report data	Brisbane LGA	irregular	24%	BCC
Percentage of the city's wastewater receiving tertiary treatment	GCIF	Percentage of the city's wastewater receiving tertiary treatment	2012 report data	Brisbane SA	irregular	99.7%	BCC
Green area (hectares) per 100,000 population	GCIF	Green area (hectares) per 100,000 population	2012 report data	BCC	irregular	570.1	BCC
4. A digital city actively engaging opportunities offered by the digital economy for the benefit of all							
Internet connectivity	My Region	Number of internet connections per 100,000 population	2011	Brisbane LGA	5 years	86.01%	ABS 2011 Census
Broadband connectivity	My Region	% households and businesses with broadband internet	2011	Brisbane LGA	5 years	76.6%	ABS 2011 Census
Business digital maturity	Brisbane Marketing	overall weighted average digital maturity score	2012	Brisbane LGA	Not yet determined	*3.07	Brisbane Digital Audit, November 2012
Technology readiness	RAI InSight	% of businesses in technology and related industries	2011	Brisbane LGA	5 years	12.1%	ABS 2011 Census
5. An enterprising city with an innovative culture driven by a highly skilled and engaged workforce							
School performance-secondary	RAI InSight	% of students in the top 2 bands for literacy and numeracy	2012	Brisbane LGA	Annual	31.7%	My Schools,
Higher education	RAI InSight	% of working age population with a university qualification	2011	Brisbane LGA	5 years	33.5%	ABS 2011 Census
Technical qualification	RAI InSight	% of working age population with certificate and diploma qualifications	2011	Brisbane LGA	5 years	26.8%	ABS 2011 Census
Education and occupation	SEIFA	Index of Education and Occupation (decile)	2011	Brisbane LGA	5 years	9	ABS Census 2011
Skilled labour force - employees	RAI InSight	Percentage of workforce employed as Managers and Professionals	2011	Brisbane LGA	5 years	39.4%	ABS 2011 Census
Skilled labour force - jobs	BCC	Percentage of total jobs that are in the Professional,	2012	Brisbane LGA	Quarterly	9.1%	ABS/BCC factsheets

		Scientific & Technical Services industry					
Employment Participation	BCC	Employment Participation rate (% of working age population?)	2012	Brisbane SA	Monthly	68.5%	ABS 6291.0.55.001
Level of income from own business	RAI InSight	Average own unincorporated business income	2009-10	Brisbane LGA	Annual	$27,302	ABS (estimates of personal income for small areas)
Innovation	Brisbane Marketing	Percentage of businesses that innovate	2012	Brisbane LGA	Annual	62%	2012 Brisbane Innovation Scorecard
Innovation - patents	NIEIR	Number of high tech patent applications per capita per year	2012	Brisbane LGA	Annual	6.82	State of the Regions report 2013-14 (from IP Australia)
Presence of research organisations	RAI InSight	Number of research organisations within a 90 minute drive	2013	Brisbane LGA	Annual	0.02%	RAI – GIS calculations based on business directory. [Explanation sought from RAI as to the value being a %]
6. A connected city with appropriate transport infrastructure and transit efficiency providing access to employment and markets.							
Growth in port freight	Port of Brisbane	Percentage Increase in export volumes over previous financial year	2011-12	Port of Brisbane	Annual	11.8%	Port of Brisbane Pty Ltd
Public transport mode share	ABS	Percentage of commuters that use public transport to get to work	2011	GCCSA	5 years	10.1%	ABS 2011 Census
Airport growth	Brisbane Airport Corporation	Airport passenger growth rate	2012 report data	Brisbane Airport	Annual	4.5%	BNE airport
Transport safety	GCIF	Transportation fatalities per 100,000 population	2012	BMN, BMS	Annual	1.25	TMR Qld Road toll report

* Overall weighted average digital maturity score including 17% of digital sceptics. Excluding the digital sceptics, the score is 3.58 on a scale of 1 to 5; based on a sample survey of 500 businesses

ABS – Australian Bureau of Statistics
BCC – Brisbane City Council
Cvm = chain volume measure, which is flows of constant 2010-11 value converted from current values by the ABS using their cvm methodology
GCCSA – Greater Capital City Statistical Area (ABS)
GCIF – Global City Indicators Facility
GDP – Gross Domestic Product
GRP – Gross Regional Product
NIEIR – National Institute for Economic and Industry Research

RAI – Regional Australia Institute
SALM – Small Area Labour Markets
SEIFA – Socio Economic Indexes for Areas

11. Attachment 4: RDA Brisbane Achievements and Momentum

2012-13 ROADMAP PRIORITIES	ACHIEVEMENTS 2012-13	CONTINUING/CARRYOVER WORK
1. DEVELOP READINESS FOR FUTURE LABOUR FORCE SKILLS CHALLENGES	• A draft **Update to the *Skills Shortages in the Greater Brisbane Labour Market 2012-2021*** report has been completed. The Update provides refreshed data and analysis which, based on current economic circumstances, predicts a softening in the previously forecast level of skilled jobs growth in the next 8 years • A **Supplementary Report** was prepared in conjunction with the Report Update which analysed Services to the Mining Industry, tertiary education patterns and structural changes, people not engaged in the labour market and gender segregation. • A nation-wide careers navigation resource has been developed in which RDA Brisbane is a partner: **Career Hunter** is a free downloadable app from the App Store and provides careers navigation across the 19 key industry groups and also identifies occupations with skill shortages • RDA supported the Queensland employer seminar of the **Work Inspiration** work experience model (following success of pilot programs), encouraging businesses to take up this model of school work experience as providing a more meaningful experience of the world of	• The 2013 Update and Supplementary Reports to be finalised and released • Review and implement recommendations arising from the Skills Shortages reports • Continue to be a part of the partnership with The Smith Family, DETE, DEEWR, Busy at Work and Group Training Queensland to launch and promote the Career Hunter app, participate in media and social network promotion and consider sustainability strategies • Support and promote Work Inspirations to Brisbane employers

	work and leading to better transition and career choice outcomes. Since assisting with introducing this UK based model to SEQ in November 2011, The Smith Family and Foundation for Young Australians undertook a national pilot to roll out the model across Australia, culminating in the above seminar (one in each State), and it has now received funding from National Australia Bank and the Australian Government to roll out the program Australia wide.	
2. REPRESENT REGIONAL STRATEGIC INTERESTS	• A set of **Regional Indicators** has been developed drawn from a variety of indexes which address RDA Brisbane's six goals; these will be used in the new Roadmap process as a framework to monitor progress towards realising the goals • In addition, a set of indicators utilising the full set of indicators from the Regional Australia Institute's InSight competitive index, MyRegion data and some indicators from the State of the Regions report has been developed ranking Brisbane's performance against the capital city region RDAs o These have been shared with the other RDAs concerned • A comprehensive **Regional Profile** has been developed, mainly based on 2011 Census data, which is an attachment to the new Regional Roadmap and serves as a stand-alone resource • **SEQ Regional Development Initiative Project** – A joint initiative across the seven RDAs, managed by RDA Brisbane, covering South East Queensland designed to	• Regional Indicators to be reviewed annually and values updated depending on frequency of data, as part of Roadmap review process • Regional Profile to be highlighted as a stand-alone resource on the RDA Brisbane website and shared with MyRegion • With the State Government's regional vision for South East Queensland being that urban and rural areas are

	address issues that span across the broader region. The initiative is intended to present a united voice on shared issues affecting South East Queensland and Northern NSW. The project focuses 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.*	mutually supportive and collaborative in creating wealth for the community, RDA Brisbane – being in the heart and capital city of the region - shares a commitment to carrying forward cross-regional initiatives and elements arising from this project. - See 5. below - See 5. below - Contribute towards positioning SEQ as the most digitally capable region in Australia – support efforts to connect an undersea fibre optic cable to SEQ which would make SEQ a sought-after destination for digital investment. - See 3 below. The CLICK! Digital Expo will be targeting attendees from throughout SEQ (one-third of the 2012 attendees were from SEQ areas outside Brisbane).

	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 SEQ region to seize the new opportunities emerging in the Asian Century as outlined in the Australia in the Asian Century White Paper. A final report will be presented in August 2013. • There was extensive collaboration with the other capital city RDAs, both through the Department-facilitated Communities of Practice and independently – sharing best practice, project intelligence, shared purpose and collaboration on potential national projects. Regional Indicators – RDA Brisbane has researched and developed a set of Regional Indicators benchmarking the capital city RDA regions – these have been shared for use by other capital city RDAs (as mentioned in the second point, above).	o The Skills Shortages in the Greater Brisbane Region (2011 report and 2013 Update) covered the Brisbane Statistical Division which takes in surrounding RDA regions • Collaboration will continue with the capital city RDAs in sharing best practice and involvement in joint activities. o including involvement in a nation-wide energy storage project led by RDA Adelaide (see 3 below) • Respond to **social, recreational and cultural infrastructure** needs o facilitate regional program funding rounds

		host workshops for NFP organisations on community asset building using community finance • Provide input **to SEQ regional planning** processes including review of the South East Queensland Regional Plan.
3. DEVELOP LEADERSHIP, INNOVATION AND RESILIENCE	• The **Business Resilience Stakeholder Network** (a network of government and other business assistance agencies) was reactivated during a severe weather event in January, where various sources of business recovery and resilience assistance was coordinated and posted on the RDA website and communicated through RDA's extensive business networks • RDA has partnered with Business Enterprise Centre (BEC) Brisbane Metro and Brisbane City Council to establish **Business Excellence Roundtables**, in order to achieve a higher degree of business engagement and therefore resilience and success, contributing to a more vibrant business ecosystem. • Partnership arrangements were set up with CitySmart (the Brisbane City Council's sustainability arm) to host a **Green Energy Savers workshop** for SMEs in the Australia TradeCoast precinct, with a focus on the transport & logistics industry – under the Watt Savers initiative set up by CitySmart. • **SEQ Digital Work Hubs** Program - RDA Brisbane is participating in an RDA Sunshine Coast led project across	• Reactivate the **Business Resilience Stakeholder Network** if severe weather events or economic shocks occur which threaten business operations and profitability • RDA will help establish the Business Excellence Roundtable structure, assist with marketing and promotion through our networks and database, and with establishing key connections. • The Energy Savers workshop will be held in October 2013 for up to 50 businesses, with sessions run by Energex and Low Carbon Australia.

	5 SEQ RDAs (for which they received NBN funding) for the development of Digital Work Hubs on the city fringe or neighbouring RDA areas. A literature review has been completed and the Demand Research component of the Project and economic analysis are in the process of being reviewed and calibrated for release and circulation. • Metropolitan South Institute of TAFE **Strategic Investment Fund** partnership with 4 SEQ RDAs – delivered Carbon Accounting and e-business health check training to a number SMEs and NFP organisations in Brisbane (contract is current until December 2013) • **CLICK! Digital Expo** - In 2012 RDA Brisbane organised this free, one-day event – the first of its kind in Brisbane - aimed at helping businesses and not-for-profit organisations "survive and thrive" in the digital economy and leverage the benefits of high speed broadband. The event – supported by the 3 levels of government - attracted over 600 attendees from Brisbane and the wider SEQ region, and featured keynote presentations, 42 exhibitors and 40 seminars by digital and industry experts.	• RDA Brisbane's involvement in the project will involve participating in a communication and engagement campaign, and a forum with experts in the field with regard to setting up Digital Work Hubs: securing investment, operating and management systems – with a view to establishing models of digital work hubs in SEQ. • RDA Brisbane has committed to holding another CLICK! Digital Expo to follow the highly successful 2012 event. The next expo will be held in Brisbane in March 2014 – an expanded 2-day event keeping the streamed seminar format of the 2012 expo. CLICK is one of two key events named in the Digital Brisbane strategy to educate SMEs and NFP organisations on doing business in a digital marketplace. • Support to RDA Adelaide and University of Adelaide to establish an **Australian Energy Storage Test Facility** (enviro chamber and mobile unit) – connection to Brisbane stakeholders and support their bid for funding.

4. STRENGTHEN INTEGRATED SERVICE DELIVERY AND NETWORKS	• **Vocational transport connectivity** in the Australia TradeCoast southern area – RDA convened a stakeholder meeting following an earlier Bayside Industry Transport Forum held at the Port of Brisbane, and awaits details of a point-of-origin survey by Translink in order to proceed with developing solutions. • **NFP Digital Survey** - RDA commissioned a not-for-profit (NFP) digital engagement survey to provide insight into the digital capacity and preparedness of the region's NFP sector. The results suggested that NFP organisations needed more guidance and education to bring them to a higher level of digital maturity and preparedness. The findings were used towards informing the Digital Brisbane Strategy, and to tailor sessions targeted at NFP organisations at the 2012 CLICK! Digital Expo.	• Vocational transport connectivity is still an issue in this area, with further information to be obtained in order to move forward with developing solutions. • The not-for-profit sector will continue to be targeted for attendance at the 2014 CLICK! Digital Expo. • RDA is to build organisational capacity by reporting against the **Global Reporting Initiative** (sustainability reporting) and forging stronger links with the Indigenous community through development of a **Reconciliation Action Plan**.
5. PROFILE COMPETITIVE STRENGTHS AND OPPORTUNITIES	• **Port of Brisbane Freight Movements** – the RDA has investigated the situation with freight movements in and out of the Port of Brisbane: the Committee engaged with Port of Brisbane Pty Ltd on future infrastructure plans to increase the share of rail freight movements to and from the Port (and lessen the reliance on road movements) and about an import/export freight movement study. This, along with input from an SEQ Transport and	• RDA will consult with the relevant stakeholders with a view to contributing towards solutions around infrastructure and options for optimisation of freight movements.

	Logistics workshop and further consultations, will enable RDA to help address the issue. • RDA Brisbane partnered with Brisbane Marketing to undertake a **Digital Audit** of Brisbane SMEs. This involved a survey of 500 SMEs undertaken by Ernst & Young in conjunction with the UQ Business School. The Audit helped to inform seminar sessions at the 2012 CLICK! Digital Expo and formed the basis for the development of the **Digital Brisbane strategy** for which RDA served on the steering committee. The Digital Audit was launched by the Lord Mayor of Brisbane at the CLICK! Digital Expo and RDA partnered with Brisbane Marketing in launching the Digital Brisbane strategy in March 2013 • **2012 Brisbane Innovation Scorecard** - RDA was a collaborating partner with the three levels of government, University of Queensland and Deloitte in producing the 2012 Brisbane Innovation Scorecard. RDA Brisbane supported additional investigative research into Brisbane's high growth sectors, with a particular focus on the innovation processes in businesses trading globally. A survey of 300 Brisbane businesses was undertaken to benchmark the export sector and assess the relationship between innovation performance and productivity. The Scorecard showcases innovative practices and encourages Brisbane's growth to be driven by innovation. RDA officiated at the launch of the Scorecard by the Lord Mayor.	• RDA is named as a partner in the 5-year Digital Brisbane strategy and will assist with its implementation. • The Innovation Atlas led the Brisbane City Council to build upon the data in order to showcase the city's

	• **Brisbane Innovation Atlas** pilot was developed in association with Enterprise Connect as a demonstration product, and is being built into a key investment attraction tool for the city. By identifying and mapping the various elements of the Brisbane 'innovation ecosystem', the Atlas will lead to a better understanding of the city's global competitive strengths and capabilities and therefore its investment opportunities.	strengths and **advanced specialisations** locally and globally. It will focus on 4 key specialisations: food manufacturing, medical research, mining & resource technologies and creative industries. There is an opportunity for RDA to work with Council in identifying and mapping these smart specialisations. • Monitor and promote various **measures and benchmarks** of Brisbane's performance.

12. Attachment 5: RDA Brisbane Capital City Indicator Rankings

INTRODUCTION

The Council of Australian Governments (COAG) set a framework for regional economic development based on the determinants of long-term regional growth. These are: **human capital, sustainability, access to international, national and regional markets and comparative advantages and business competitiveness**. This framework is meant to provide a common lens through which jurisdictions can consider regional development, thus we have grouped several competitiveness indicators accordingly to create a regional overview in this regard. With this, we have ranked the RDAs from the capital cities, with the intention of locating areas in which a specific region may not performing as desired and work towards improving it. A summary table with the national and capitals' ranking has been done under each indicator, to help in the analysis of strengths and weaknesses of each region, nationally and regionally; and also a database with the values and notes for each indicator is available.

METHODOLOGY NOTES

- The indicators' values and national rankings have been taken from the Regional Australia Institute's Competitiveness report, MyRegion website and State of the Regions report 2013 and are respectively pointed out throughout the database.

- The national ranking used by the RAI takes into account 55 regions, matching the 55 RDAs in Australia, and the capitals' ranking takes into account the 11 RDAs in Australia that have capital cities as part of their regions.

- When corresponding, the capitals' ranking has been made using the guidelines that RAI have published in their complementary report on Results Guide. For the MyRegion and State of the Regions indicators, the ranking is based on a positive analysis, that is, a higher ranking will mean a better situation in spite of if the indicator is stated in a negative way. Or in the case of neutral indicators (population), higher ranking indicates bigger values.

Example:

Indicator	Brisbane			Melbourne East		
	Value	National Ranking	Capital's Ranking	Value	National Ranking	Capital's Ranking
Early school leavers (% adult population did not complete year 12)	31.60%	2	2	37.90%	4	4

Ranking: **higer** positioning is given to those regions with **lower** percentages of people that did not complete until year 12

Indicator	Australian Capital Territory			Perth		
	Value	National Ranking	Capital's Ranking	Value	National Ranking	Capital's Ranking
Health (adults with at least one of four of the risk factors)	45.80%	2	1	50.10%	4	3

Ranking: **higer** positioning is given to those regions with **lower** percentages of adults with at least one health risk factor

Indicator	Sydney			Adelaide Metropolitan		
	Value	National Ranking	Capital's Ranking	Value	National Ranking	Capital's Ranking
Population*	4,284,228	n.a.	1	1,160,492	n.a.	4

Ranking: **higer** positioning is given to those regions with **higher** population levels

- For the indicators of the State of the Regions report, the national ranking takes into account 67 regions, since they have split some RDAs into more than one, which is the case of the RDAs from Sydney, Melbourne, Tasmania, Adelaide, Northern Territory and Perth. To get the total value, a simple average was used, however this procedure is not consistent for obtaining the national ranking positions, thus this information is not available for these regions.

The Table below presents the indicators for Brisbane.

Indicator	Brisbane	
	National Ranking	Capitals Ranking
HUMAN CAPITAL (EDUCATION AND SKILLS)		
Human Capital	4	
University qualification (% of working age population)	2	2
Technical qualification (% of working age population with certificate and diploma)	51	8
Lifelong learning (% of working age population participating in education and training)	39	8
Early school leavers (% adult population did not complete year 12)	2	2
Health (adults with at least one of four of the risk factors)	11	7
English proficiency (% population)	44	5
Early childhood performance (% children developmentally vulnerable)	38	10
School performance - Primary (% students in top 2 bands)	5	6
School performance - Secondary (% students in top 2 bands)	4	3
Population over 15 with post high school qualification*	n.a.	3
SUSTAINABILITY (SOCIAL, ECONOMIC, ENVIRONMENTAL)		
Population*	n.a.	5
Population growth*	n.a.	5
Population age 0-14*	n.a.	9
Population age 15-65*	n.a.	4
Population age 65+*	n.a.	8
Net internal migration**	46	8

Economic Fundamentals	**2**	
Building approvals per capita (value in AUD '000)	2	1
Wage/labour costs (average wage and salary income)	10	4
Business confidence (higher points higher confidence)	4	5
Salary income growth rate*	n.a.	2
GRP (market prices $m)**	n.a.	4
GRP growth rate (2001-2011)**	n.a.	3
Essential Services		
Access to tertiary education services (% of working age population attending higher education institution)	2	2
Access to technical or further education (% of working age population attending)	38	10
Access to hospital services (Number of people employed in hospitals in a region per resident population)	1	1
Access to allied health services (% of workforce employed in other health services)	15	2
Access to GP services (Number of GP services per capita)	17	7
Police services (Number of people employed in police per resident population)	3	3
Access to primary education services (KM to nearest primary school)	3	2
Access to secondary education services (KM to nearest secondary school)	7	6
Institutions	**5**	
Public service (% of workforce employed in the public service)	12	4
Local government expenditure (Expenditure per capita)	16	2
Development applications (Median processing time (days))	n.a.	n.a.

Regional government influence at state/national level (Business perspectives, higher value for higher influence)	1	1
Transparency of local government policy (Business perspectives, higher value for higher transparency)	4	7
Clear roles and responsibilities in regional governance (Business perspectives, higher value for greater clarity)	4	5
Financial burden of local government (Business perspectives, higher value for bigger burden)	n.a.	n.a.
Local government assistance for businesses (Business perspectives, higher value for higher assistance)	1	2
Natural Resources	**29**	
Mineral resources (% local workforce employed in mining)	27	3
Timber resources (% local workforce employed in logging)	39	8
Commercial fishing and aquaculture (% local workforce employed in aquaculture and fishing)	41	4
Coastal access (KM to and from region's population centre to nearest coast)	6	4
National Park (KM to and from region's population centre)	14	2
Net primary productivity	39	7
ACCESS TO INTERNATIONAL, NATIONAL AND REGIONAL MARKETS		
Market Size	**4**	
Size of economy (Value of business turnover (with SA4))	4	4
Population (Number of working age residents (within SA4))	5	5
Infrastructure		

Aviation infrastructure (KM to and from region's business centre to nearest airport)	1	1
Port infrastructure (KM to and from region's business centre to nearest port)	1	1
Road infrastructure (KM from region's business centre to nearest major highway)	8	6
Rail infrastructure (KM to nearest railway station/service)	13	8
Labour Market Efficiency	**10**	
Unemployment rate (% persons in the labour force looking for work)	26	5
Young unemployment (% persons in the labour force aged 15-24 looking for work)	29	5
Participation rate (% working age population in the labour force)	5	1
Skilled labour (% of workforce employed as managers and professionals)	2	2
Welfare dependence (% of population using Government support main source income)	45	10
COMPARATIVE ADVANTAGE AND BUSINESS COMPETITIVENESS		
Technological Readiness	**4**	
Internet connection (% of households with internet connection)	2	2
Broadband connections (% Households and businesses with broadband internet)	2	2
Businesses in technology and related industries (% of workforce employed by technology related businesses)	2	2
Workers in ICT and electronics (% employed as ICT and electronics specialists)	5	5

Business Sophistication	**3**	
Economic diversification (Index where national industry structure = 0, lower values gives higher ranking)	4	2
Dominance of large employers (% of employment by businesses with 20-199 and 200+ employees)	54	11
Exporters, importers, wholesalers (% employed as importers, exporters or wholesalers)	7	4
Income source - Own business (Average own unincorporated business income)	2	2
Access to local finance (Number of banks/lending institutions within 50km as a share of total businesses)	3	2
Exports (Average value of exports per business)	2	11
Innovation	**6**	
Human resources in science and technology (Average value of exports per business)	5	5
Research and development managers (% employed as research and development managers)	2	2
Presence of research organisations (% of research organisations out of all businesses)	5	4
Expenditure on research and development (Average expenditure on R&D per business (AUD$ ‘000))	10	11
Patent applications per capita (per 100,00 per year)**	8	3
Hi tech patent applications per capita (per 100,00 per year)**	6	3
Info tech patent applications per capita (per 100,00 per year)**	9	5