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CENTRAL QUEENSLAND REGIONAL ECONOMIC DEVELOPMENT STRATEGY INCEPTION STUDY

BACKGROUND REPORT NO. 2:

FUTURE SEARCH WORKSHOP SUMMARIES: CENTRAL WEST & CENTRAL HIGHLANDS



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BACKGROUND

Between 21 March and 9 August 1992, the Department of Business, Industry and Regional Development (DBIRD), using trained facilitators, conducted Future Search Workshops in the Central Western Shires of Aramac, Barcaldine, Blackall, Ilfracombe, Longreach, Tambo and Winton, all of which are serviced by the recently formed Remote Area Planning and Development Board (RAPDB).

Within the same period, Future Search Workshops were conducted by a group of local facilitators trained by Jean McRuvie, then Development Officer, Emerald Shire, for the Shires of Bauhinia, Duaringa, Emerald, Jericho and Peak Downs, that is, the five Central Highlands' Shires which are the regional development responsibility of the recently constituted Central Highlands Promotions and Development Organisation Inc (CHPDO).

Separate Reports were prepared on each of these one-day Future Search Workshops.

Future Search Workshops were also conducted by DBIRD in mid-October 1992 - at Boulia (10 October), Birdsville (11 October) and Bedourie (11 October). Copies of the Reports on these Workshops were received in early January 1993 - too late to be incorporated into this summary.

This document summarises the findings of the Future Search Workshops for seven Shires out of the eleven that make up the Central West Sub-Region separately from those relating to the five Shires that comprise the Central Highlands Sub-Region.

The information provided by these Future Search Workshops provided very valuable input for the Central Queensland Regional Economic Development Strategy Inception Study.

The strategic direction provided through this type of participatory evaluation of options is more comprehensive and more reliable than would be obtained by using more common survey instruments such as reply-paid, posted questionnaires.

Furthermore, well-facilitated Workshops, as these were, are an excellent way of screening potential initiatives and projects and providing community-based priority rankings.

This shortlisting of economic development options assists government agencies such as DBIRD in arranging pre-feasibility studies of projects that, on the basis of the preliminary screening, show most promise. In addition, the Future Search exercise generates community involvement and fosters better community/government relations, as well as establishing constructive alliances and commitment to, as well as ownership in, the regional economic development process.

PART A

FUTURE SEARCH WORKSHOPS

CENTRAL WEST SUB-REGION

SUMMARY

INTRODUCTION

The economic bases of the Central Western Shires are very similar; all are characterised by heavy reliance on beef and wool production. It was to be expected that there would be a close similarity between how the residents of each Shire assessed the future needs and opportunities of these Shires, all of which were confronted with similar problems. Economic problems such as sensitivity to price fluctuations on international commodity markets, high transport costs due to comparative isolation, shrinking business and job opportunities and falling incomes had exacerbated sociological problems, such as general population decline and the permanent loss of a high proportion of the best educated and more highly skilled cohorts of the population.

The economic similarities and commonality of interests that drew these Shires together in attempting to find solutions to what appeared to be endemic problems created a difficult 'problem' in economic development terms when it came to identifying projects and initiatives that had the potential to provide a boost to the economies of these Shires.

An examination of Table 1 highlights the nature of this economic development dilemma in that the similarity in identified problems and limited opportunities has led to a similarity in proposed solutions. However, as economies of scale would suggest that each Shire cannot possibly support a wool scour or an abattoir, it is necessary to think in terms of what is good for the Central West, rather than in terms of the needs of individual Shires if a strong case for winning back value-adding to staple products is to be made.

The establishment and seed funding of the Remote Area Planning and Development Board (RAPDB) provides the vehicle for presenting a cohesive case that has the endorsement of the eleven Shires and, on their behalf, an acceptance of the outcomes of the application of criteria set out in DBIRD-sponsored generic studies on locational decisions as well as the sizes and locations of wool scouring and meat processing facilities, should they be deemed to be economically viable.

THE FUTURE SEARCH WORKSHOPS

The objective of the Future Search Workshops was to identify a community vision for the future development of the various Shires in the Central Western Sub-Region of Queensland. Local participants discussed issues such as the strengths and weaknesses of their respective Shires, the present state of major industries, the potential to develop new industries and the infrastructure required to facilitate the development of new and existing businesses. The roles of government, industry and the local community in the development of the economies of the Shires, and the Central Western Sub-Region as a whole, were discussed in some depth. A desire to build constructive partnerships was clearly evident.

The objective of this summary is to draw together strategic directions from the individual Workshops to provide development guidelines for the Central Western Region covered by RAPDB.

OPPORTUNITY HORIZONS

The economies of the eleven Shires that comprise the Central West Statistical Division are heavily reliant on the production of wool and beef for export markets.

Neither activity is labour-intensive, with no downline processing of either commodity taking place in the Central West. As a consequence, the economy of the sub-region is very sensitive to price fluctuations on international commodity markets as well as exchange rate fluctuations with no fallback activities to cushion these effects.

Residents of the Central West are conscious of the need to arrest population decline by providing job-creating opportunities in both private and public sectors, but are realistically aware that the available options are somewhat limited.

There is an overwhelming conviction that the best available industrial diversification opportunities lie in value-adding to the sub-region's staple livestock products - sheep and cattle - with a viable kangaroo meat industry becoming a distinct possibility.

In particular, the establishment of local wool scouring and topping plants and beef and mutton processing industries were given top priority rankings across the sub-region.

Tourism industry development in an integrated manner, stressing outback lifestyle and historical themes, is viewed as a further diversification opportunity.

Maintaining a full range of services in country centres, including the local provision of technical education facilities, is deemed essential to the revitalisation of the economy of the Central Western Sub-Region.

A shortage of water storage capacity, coupled with poor catchment management practices, as well as high transport costs with inadequate service levels are viewed as constraints that, if not addressed within an integrated planning framework, could inhibit development progress.

There is clear evidence of a very positive attitude towards building a resilient economic base for the sub-region without detriment to the natural environment and relatively attractive lifestyle.

SOME STRATEGIC POLICY POINTERS

The policy implications arising from these Central West Future Search Workshops should be of interest to the RAPDB, as well as DBIRD and other government departments.

The more significant policy strands from which recommendations should be framed would appear to be:

1. Investigate the economic feasibility of establishing a mutton abattoir in the Central West as well as its most economic location, and clarify whether or not it should be serviced by one or more killing stations and where these should be located.
2. Investigate the economic feasibility and best location/locations for one or more wool scours in the Central West.
3. Explore the potential for a wool top making plant in association with the wool scouring operation.
4. Explore the possibility of establishing a meat abattoir and/or killing stations in the Central West and decide the most economic locations for such operations.
5. Conduct preliminary investigations of the potential viability of a kangaroo meat processing plant in the Central West (including the distribution of hide pre-treatment and carcass cold storage plants).
6. In consultation with parties who have shown an interest in a small-scale (cottage industry type) boutique wool scouring/spinning/weaving/knitting operation, explore the market potential for the product types that may be produced.
7. Should the establishment of one or more wool scouring or meat processing plant in the Central West prove to be feasible, LGAs should ensure that the sub-region's interest is placed above parochial interests by accepting what is deemed to be the best location on economic grounds.
8. In order to cope with the ubiquitous water shortage problem, what is needed appears to be a multi-purpose facility which demands a water storage and utilisation management strategy. This is well beyond the resources of the individual Shires. It requires a total government approach where industrial, commercial, tourism, recreational and domestic needs are all addressed within an integrated planning framework. It should not be a piecemeal approach.
9. Long-term water storage/utilisation management should be viewed as a permissive factor in promoting economic diversification, as well as enhancing the attractiveness of the sub-region to residents, potential residents and visitors alike.
10. Remote areas with sparse populations have always had to cope with high transport and other service costs. Considerable cross-subsidisation of these services have been justified on equity grounds, but are difficult to justify on economic grounds. Likewise, infrastructure provision being subjected to objective economic criteria is necessary if economic efficiency in public sector resource use is to be achieved.

It would appear that, rather than pushing for freight subsidisation incentives, better use of existing transport infrastructure could be achieved by adopting modern storage and freight forwarding practices, attaining better capacity utilisation and

negotiating as a block for cheaper freight rates, including backloading rates. This is another critical area that needs to be examined within a sub-regional context.

11. On the related issue of transport infrastructure provision, there would appear to be advantages in identifying, on a sub-regional basis, a shortlist of the most critical infrastructural needs and ranking them. With large projects it may be better to break them down into stages such as electrification of rail to Barcaldine first, with Longreach the next stage. This exercise should involve not only Transport Queensland regional officers, but also officers from all government departments. The benefits of a total government approach with strong community involvement should be evident. 'Wish lists', however, should be realistic if desired projects are to survive a pre-feasibility scan.
12. The packaging and promotion of the Central West as a tourist attractor needs to be systematically planned. Different packages will need to be developed and pitched at different target markets. The Birdsville Races are known internationally. This event could be promoted as part of a two-week Outback Festival that could incorporate sponsored camel treks, endurance horse rides and a car rally, as well as a series of staggered special events taking in historical themes in centres like Blackall, Barcaldine, Longreach and Winton. The promotional literature should be distributed at least a year in advance. There is a need for catchy slogans, such as 'Come Home to the Outback', 'Keep the Real Australia Alive'. The first Outback Festival would have to be carefully planned to ensure that it is an outstanding success. Media coverage will be free and make the staging of subsequent events easier.
13. Some Future Search Follow-up Workshops have already been conducted. RAPDB should conduct a review of achievements by each Shire over the twelve month period since the original Future Search Workshops were held. Successes should be publicised. Achieving a few 'wins' will help sustain community confidence and commitment.

Details of 'Opportunity Priority Rankings' and 'Potential Projects and Initiatives', by Shire in each case, are provided in Tables 4.1 and 4.2 respectively.

SUMMARY OF FINDINGS BY SHIRE

The initiatives and projects identified by each facilitated group of about ten persons as the core of a realistic basis for the future economic development of the Shire were consolidated into industry/activity categories and prioritised using a weighted voting system. Table 1 shows the top five rankings for each of the seven Shires. It should be noted that considerable consolidation took place to ensure that group sizes were not too small for intensive analysis/evaluation purposes.

TABLE 1 - CENTRAL WEST: OPPORTUNITY PRIORITY RANKINGS BY SHIRE

ARAMAC	BARCALDINE	BLACKALL	ILFRACOMBE	LONGREACH	TAMBO	WINTON
Community facility development	Water supply enhancement - horticulture industry development	Manufacturing and industry development	Wool processing	Water storage/usage management	Tourism promotion/ development	Tourism promotion/ development
Infrastructure (roads, water, electricity) improvement	Manufacturing and light industry development	Wool processing	Meat processing	Establish value-adding industries	Establish value-adding industries	Road improvements
New business/industry development (meat processing)	Infrastructure improvement	Meat processing	Small business/ industry development	Develop tertiary education supply industry eg. UCO, TAFE	Small business/ industry development	Small business/ industry development
Provision of technical education and training ie. TAFE type courses	Provide transport industry services ie. freight depot	Provision of incentives (for business/industry)	Tourism promotion/ development	Wool storage and treatment	Infrastructure development	Water catchment management
Tourism promotion/ development	Generate value-adding activities	Tourism promotion/ development	Roadhouse and associated development	Tourism promotion/ development	Employment, technical education training	Community development

An examination of Table 1 demonstrates that, although the rankings between Shires vary considerably, there is a common desire to establish value-adding industries - wool and meat processing plants in particular. Tourism industry development, particularly promoting an integrated package of the unique natural and historic attractions of the sub-region, was identified by all Shires as providing an opportunity to diversify and strengthen their narrow economic bases.

In the cases of Tambo and Winton, tourism industry development received top ranking; in the case of Ilfracombe, fourth ranking; in the cases of Aramac, Blackall and Longreach, fifth ranking. In the case of Barcaldine, tourism industry development was combined with community development and further education and training.

Four of the seven Shires - Aramac, Barcaldine, Longreach and Winton - expressed a desire for water supply enhancement/management which was seen as essential for both manufacturing and tourism industry development.

There was also common concern with transport costs and levels of service and a desire for infrastructure improvements, particularly roads.

Longreach Workshop participants gave third ranking to further developing the local education/training supply industry. However, as shown by Table 2, all Shires expressed a desire for the provision of additional education/training facilities locally.

Table 2 details specific initiatives and projects identified through the various Future Search Workshops.

In terms of industrial development, wool and meat processing are identified by all Shires. Likewise, all Shires see the need to adopt an integrated approach to tourism promotion.

It is interesting to note that several of the stronger prospects have already been subjected to DBIRD-sponsored pre-feasibility studies. This fast action lends a lot of credibility to the fact that there is genuine government commitment to exploring the economic prospects of any employment-generating industries that will contribute to revitalising the economy of the hard-pressed Central West.

A number of themes emerged which were common to all seven Workshops. Generally, participants were of the opinion that local communities have tended to rely too heavily on a small number of large industries. Diversification into new industries was required to reduce the impact of an economic downturn in one particular industry on the community in general. Opportunities were identified to develop an approach to tourism which capitalises on the natural attributes of a particular town, Shire or sub-region. Potential new industries were discussed. These included value-adding to the existing raw materials produced in the sub-region, new industries which made use of native flora and fauna, and the development of by-products from existing industries.

TABLE 2 - CENTRAL WEST FUTURE SEARCH WORKSHOPS: POTENTIAL PROJECTS AND INITIATIVES

INDUSTRY	ARAMAC	BARCALDINE	BLACKALL	ILFRACOMBE	LONGREACH	TAMBO	WINTON
Industry development	Wool scour	Meat processing, concrete products	Wool processing, top making, meat meal/fertiliser plant, horticulture	Wool scour, sheep abattoir, tannery, cottage craft	Abattoir, wool processing, wool store, native fauna (kangaroo) meat processing	Wool processing, meat processing, timber industry, horticulture	Meat meal plant, tannery, opal value-adding
Small business development	Attract new retailing businesses	Develop more retail outlets, fill empty shops	Re-cycling may be an opportunity	Provide tourism related facilities (outback dunnies theme)	Identify and promote local business opportunities	Establish 3 new small businesses during next financial year	Arrest business closure trend
Tourism industry promotion/development	Promote tourist attractions	More packaged tours, exploit Labor Party heritage	Promote outback culture/heritage, promote historic wool scour	Outback tourism	Promote Hall of Fame, build on historic heritage	Develop and promote farm/station tourism, historic tourism, create a lake	Promote QANTAS birthplace, outback theme
Education/training facilities	Basic skills, business planning courses	TAFE facility, basic hospitality industry training	TAFE facility	Basic technical education	TAFE facility, UCQ campus	Establish rural and remote training centre	Pre-vocational training
Infrastructure development	Better roads needed	Integrate road and rail, set up freight depot	Improve roads	Provide railway services	Improve road link to west	Develop all-weather road to Springsure and Alpha	Road from Boulia to N.T. border
Natural resource development	Arrest land degradation	Better water resource management	Better water storage/conservation	Improve water resource management	Better water supply management	Improve water supply, better access to national parks	Need reliable fresh water supply
Community development	Indoor sporting complex	Foster community pride and encourage action	Better use of water for sport, more attractions for youth	Develop attractions for youth, recreation facilities	Community centre, promote historical awareness - community pride	Open learning centre, career guidance program	Town beautification, preserve historic buildings

There was a general consensus that existing infrastructure was inadequate to attract new businesses to the sub-region, and that incentives were required to overcome the cost impediments associated with establishing and running a business in a remote area.

Workshop participants agreed that there is a need to develop and have access to education and training facilities. Such facilities should be relevant to the needs of local employers to ensure that the appropriate expertise is available to support new commercial initiatives.

In general, participants took the view that there were insufficient government incentives to assist new, start-up businesses. Participants generally agreed that there is a need for greater local participation in the development process. Without involvement, commitment and ownership, the desired momentum would not be achieved.

There was evidence of a genuine desire to work in partnership with government and to share the responsibility of driving the regional development process.

ISSUES OF PRIME STRATEGIC IMPORTANCE

The issues identified by Workshop participants as having prime strategic significance may be categorised under the following sub-headings:

Tourism

- . Marketing and promotion
- . Education and training
- . Infrastructure upgrading
- . Regional job creating projects

Infrastructure

- , Road, rail and air transport
- . Water
- . Energy/electricity

Education and training

- . School
- . Pre-vocational
- . Adult

Industrial development

- . Agriculture
- . Mining
- . Alternative primary industries
- . Manufacturing/value-adding
- . Recycling

Community development

- . Housing and accommodation
- . Beautification of towns
- . Improved public amenities
- . Improved public services

Business incentives

- . Roles of government
- . Local participation
- . Constraints to business development

The mechanisms and resources required to achieve these objectives need to be researched and formalised. Some necessary actions are:

Tourism

- . Conduct market research to identify opportunities, carry out feasibility studies and plan strategies.
- . Establish local working groups to assist with market research, target special interest groups and liaise with government and industry groups.
- . Improve the ascetic quality of the sub-region/town by community-driven beautification programs.
- . Improve transport, accommodation and service facilities.
- . Investigate ways of accessing finance.
- . Promote the various Shires and centres and establish information centres, arrange publication of brochures and the development of a local identity/theme.

Transport infrastructure

- . Establish local working groups to identify industry and community needs with respect to roads.
- . Develop a strategy to integrate road, rail and air transport, and perform an audit of existing infrastructure.
- . Encourage community consultation with local Shires, tourist operators, business and road working groups in other sub-regions.
- . Lobby state and federal politicians, local authorities and tourist organisations.
- . Engage market research to identify needs of existing and potential users.
- . Identify incentives required to attract business.

Possible business incentives

- . Introduction of taxation zones to lower personal income tax.
- . Direct tax incentives to existing and potential businesses.
- . Fuel price equalisation.
- . Introduction of an incentive scheme to attract professionals into the area.
- . Reduce the level of government intervention and regulation.
- . Establish local education and training facilities, especially pre-vocational training.

Community development

- . Commence town beautification program, which includes tree planting, new parks and playgrounds, and tidy town projects.
- . Improve services to the public, including health, child care and aged care.
- . Construct public amenities, such as sporting facilities and community recreation centres.
- . Improve community information by the establishment of information centres.
- . Establish local committees to research projects, determine and access funding, raise community awareness and involvement, and assist with planning.

Education

- . Research community needs. For example, education and training required to enhance future employment prospects for local persons.
- . Establish a database of education and training facilities which are available through TAFE, universities and agricultural colleges.
- . Promote existing education services.
- . Access local facilities and resources.
- . Identify availability of funding.

Industry Development

- . Identify infrastructure required, such as transport, water and energy.
- . Identify possible sources of funding to carry out feasibility studies, develop marketing strategies and build infrastructure.
- . Research existing and potential markets.
- . Determine employment, education and training needs.
- . Encourage community involvement and support.
- . Lobby local, state and federal government, industry and business.
- . Identify barriers to business investment such as costs of production and determine how these impediments might be removed.
- . Identify incentives to attract business, such as infrastructure requirements and taxation relief.

PROPOSED PROJECTS BY SHIRE

ARAMAC

- . Seal road from Aramac to Torrens Creek.
- . Compile tourism package by January 1993.

- . Improve basic education skills by end of 1st Semester 1993 utilising parental involvement.
- . Establish one new retail outlet in Muttaborra and Aramac by end December 1992.
- . Establish an indoor sporting facility in Aramac by December 1992.
- . Establish a multi-purpose sporting facility in Muttaborra by December 1993.

BARCOLDINE

- . Develop a plan by June 1993 for an integrated road and rail transport service depot.
- . Carry out a feasibility study into water catchment management by June 1993.
- . Research education and training needs.
- . Establish a concrete works by December 1993.
- . Establish a mutton works/cannery/fertiliser plant by June 1994.
- . Encourage new business by upgrading facilities by June 1993.

BLACKALL

- . Develop a cultural heritage tourism package within eighteen months, the aim to increase visitation to Blackall to 150,000 per annum by November 1994.
- . Establish a vocational education facility in Blackall by January 1993.
- . Establish one horticultural enterprise by 1994.
- . Develop a recycling industry.
- . Establish a wool scour and top making plant by June 1997.
- . Establish a meat meal and fertiliser plant employing 100 persons by July 1993.
- . Create a water hole for water supply and recreation within four years.
- . Establish a community centre.

ILFRACOMBE

- . Develop a fully operational railway service by end December 1992.
- . Develop tourism based on outback 'dunnies' by April 1993.
- . Establish a wool scour facility by December 1993.
- . Establish a feral and CFA abattoir and tannery by 1995.
- . Develop a craft cottage industry by end 1993.

LONGREACH

- . Develop a plan by December 1992 to integrate road, rail and sea transport and upgrade airport.
- . Establish a community centre in Longreach by February 1992.
- . Finalise a report by June 1993 into alternative sources of water supply for Longreach.
- . Develop a tourism package by December 1992 to increase visitation by 25% above 1989/90/91 average by December 1995.
- . Develop a TAFE facility in Longreach.
- . Further feasibility studies by 14 August into establishment of an abattoir.
- . Determine feasibility by December 1992 of wool scour/tops factory.
- . Complete a feasibility study by end June 1993 into wool scour test and dump facility.
- . Complete a feasibility study by June 1994 into the establishment of a native fauna industry.
- . Establish a wool scour facility.
- . Establish a business promotion and development organisation with at least 60 members by September 1992.

TAMBO

- . Develop a tourism promotional plan for Tambo and district.
- . Develop a flora and fauna park within fifteen minutes' travel from Tambo.
- . Develop an all-weather road to Springsure and Alpha from Tambo and have the road to Springsure sealed within two years.
- . Conduct a feasibility study into the processing of feral and surplus stock into meat meal, blood and bone meal and tanned hides.
- . Lobby for tax incentives for manufacturing and small businesses.
- . Establish three additional small businesses in the Tambo district during the 1992-93 financial year.
- . Establish a rural and remote area training centre in Tambo with some aspects in operation by 1994.
- . By December 1993 establish a shearing contractor and team of shearers in Tambo.
- . Retain and improve the existing health services in the Tambo area, with the provision of a visiting social worker and community health training by the end of 1992.

WINTON

- . Upgrade Kennedy Development Road and Donahue Highway (from Boulia to the Northern Territory).
- . Develop plan by end September 1992 for the establishment of an adequate fresh water supply for Winton.
- . Refurbish Corfield and Fitzmaurice building for centenary in 1995.
- . Increase visitors to Winton by 500 by end of 1993.
- . Establish a working tourist display centre by September 1995.
- . Have 80% of youth in Winton complete pre-vocational training relevant to a local industry.
- . Establish a meat meal plant by the end of June 1993.

PART B

FUTURE SEARCH WORKSHOPS

CENTRAL HIGHLANDS SUB-REGION

SUMMARY

INTRODUCTION

The more diversified economic base of the Central Highlands Area, its closer proximity to the coast and its better developed infrastructure is reflected in the wider range of future development prospects emerging from the Future Search Workshops.

Unlike the Central West's reliance on two basic commodities, wool and beef, the Central Highlands has grass and lot-fed beef, coal, grain, cotton and horticulture, as well as an extensive electrified rail network for coal haulage to the coast, including an electrified passenger service to Rockhampton.

However, the heavy reliance on coal mining, at present the foremost 'engine of growth' industry in Central Queensland, presents its own unique problems in the longer term.

THE FUTURE SEARCH WORKSHOPS

Future Search Workshops were held in the Jericho, Emerald, Peak Downs, Bauhinia and Duaringa Shires. The objective was to explore, through group participation, a vision for the future developmental direction of the various Shires. Participants were required to separate into groups, and (with the aid of a facilitator) identify and then vote on projects which they would like to see developed in their particular Shire.

The consultative process provided a broad community viewpoint on what new businesses and industries are considered to be both possible and essential for the development of the various Shires. It also indirectly identified what participants consider to be the strengths and drawbacks of the respective Shires.

The initiatives which participants would like to see developed within their Shire have been grouped into the following categories:

- . Infrastructure and services
- . Tourism
- . Agriculture
- . Food and fibre processing
- . Mining
- . Mineral processing
- . Value-adding
- . Human resource development
- . Natural resource development
- . Community development
- . Energy production

OPPORTUNITY HORIZONS

Although coal is the dominant commodity in terms of value of production and export earnings, the industry is not a big employer, being capital-intensive by nature. However, the industry generates a significant amount of employment in transport and cargo handling activities. Beef production, the second ranking economic activity of the sub-region, is not labour-intensive either, as processing takes place outside the sub-region.

Grain production, the third most important economic activity, is also capital-intensive, as value-adding industries have not yet developed in the sub-region.

Given the strength of the beef and grain industries, there are opportunities for expansion of grain-fed beef production.

Cotton production relies on irrigation from the Fairbairn Dam; there are two cotton gins in the Emerald Area. The industry has excellent growth potential.

Being export reliant, the economy of the Central Highlands sub-region is very susceptible to fluctuations in international commodity prices and exchange rates.

There is a need to diversify the economic base of the sub-region, and a logical preference for building downstream processing activities on natural resource endowment and the traditional commodity base.

Further development of the gemfields and an extension of horticulture, provided adequate water is available, are viewed as potential job-creating opportunities.

Tourism is also perceived as a valuable growth industry.

Above all else, providing job opportunities through establishing more value-adding activities within the sub-region is rated as a means of retaining population and providing a more stable and diversified economic base.

There is a belief that the Central Highlands can supply many of the victualling needs of the mines, the bulk of which are presently supplied from outside the sub-region.

Water supply is a common constraint on the economic development of the various Shires and there is a general belief that road improvements are necessary if the sub-region is to make progress with tourism industry development.

There is a strong feeling of self-reliance across the sub-region and a keen desire to assist government in identifying what are the more critical development needs of the sub-region.

SOME STRATEGIC POLICY POINTERS

There are some clear policy guidelines that have emerged from the Central Highlands Future Search Workshop exercise. These should be of interest to the CHPDO, DBIRD and other government departments. Recommendations in the Final Study Report relevant to the Central Highlands will be drawn from these 'policy pointers' and supplemented by inputs from the Consultative Committee Workshop. Due to similarities between the Central Highlands and Central West Sub-Regions, there are similarities between these 'policy pointers' which include:

1. Investigate the economic feasibility of establishing a cattle meat processing plant in the Central Highlands.
2. Explore the economic feasibility of establishing a dairying industry in the Fairbairn Dam irrigation zone near Emerald.
3. A need to consider meat processing plant location in conjunction with the expressed desire for similar value-adding activity by Central West Shires. Obviously, every Shire cannot support an abattoir. However, it may be difficult to convince remote Central West Shires that they can benefit from having their meat processed in the Central Highlands rather than on the coast. Effective networking between CHPDO and RAPDB is essential on these potentially sensitive issues where DBIRD has to be accepted as the objective judge.
4. There are clear advantages to be gained by adopting a collective approach towards the transport problems of the sub-region, in particular, exploring the scope for negotiating cheaper freight rates and low backloading rates and the provision of specialist freight storage/forwarding services. This may be particularly relevant if, say, the Central West gains a kangaroo meat processing plant and the Central Highlands one or more beef abattoirs. Better synchronisation of east/west and west/east freight movements could advantage operations in both Regions.
5. Tourism networking and market segmentation needs to be raised to a higher level and the attractions of the sub-region identified, packaged and targeted.

The Outback and historic themes identified for the Central West carry over to the Central Highlands, so there should be opportunities for establishing mutually advantageous linkages.

Gemfest and Gemfields tourism in general could benefit from marketing in the four-wheel drive magazine and promotion to backpackers. Local tourism industry operators may be able to club together to provide courtesy return minibus transport between Rockhampton and Emerald to entice backpackers to divert from the north/south, south/north itineraries and spend a couple of days 'trying their luck' on the gemfields and enjoying the recreational facilities of Fairbairn Dam.

The resources needed to design and mount an effective tourism promotion strategy are beyond the means of CHPDO, but may be achievable with collaborative backing from local tourism/gemfield operators.

6. With infrastructure improvement provision, the areas of greatest need have been identified by individual Workshops. It is now necessary to prioritise these for the Central Highlands Sub-Region as a whole and to consult closely with Transport Queensland, as well as other government departments with a stake in improving access/egress.
7. Water supply, including storage and catchment management, needs to be addressed in the larger total government forum. It is vital that an integrated water resource supply/management plan be developed and implemented to ensure that shortages of this vital resource do not retard the development effort. It is necessary not only to support accelerated industrial development and diversification and consequent population growth, but also assists in widening the range of tourist attractions and improving the recreational diversity and quality of life of the resident population.
8. Ensuring that follow-up Future Search Workshops take place and reviewing progress with initiatives that arose out of the original Workshops should be the responsibility of the CHPDO. The progress reviews will identify positive achievements to date and will sustain interest in and commitment to the idea of community-driven development and establishing proactive networks and working partnerships with government at all levels.

Details of the 'Opportunity Priority Rankings' and 'Potential Projects and Initiatives' by Shire from which these 'policy pointers' were taken are provided by Tables 4.3 and 4.4 respectively.

SUMMARY OF FINDINGS

The findings of the various groups participating in the Future Search Workshops were consolidated at Plenary Sessions and priority rankings established on the basis of participant voting. Table 1 summarises the overall outcomes for the five Shires.

Rural value-adding received top rating from three of the five Shires - Bauhinia, Duaringa and Jericho. It received second ranking from Emerald and third ranking from Peak Downs.

Water resource supply/management was given top ranking by Peak Downs and second highest ranking by Bauhinia. It was incorporated into the third ranking, primary industry development, by Emerald Shire.

Infrastructure improvement was ranked as important by four out of the five Shires and was also given a flag by Emerald under the tourism promotion/development category.

TABLE 1 - CENTRAL HIGHLANDS: OPPORTUNITY PRIORITY RANKINGS

BAUHINIA	DUARINGA	EMERALD	JERICHO	PEAK DOWNS
Industry development (Rural value-adding)	Industry development (Rural value-adding)	Provision of additional education facilities	Rural value-adding industry development	Water resource supply/ management
Water resource supply/ management	<ul style="list-style-type: none"> Retaining youth in area Tourism promotion/ development 	Secondary industry development	Primary industry development	Providing for needs of youth - better recreation/ entertainment facilities
Tourism promotion/ development	Road improvement	Primary industry development	Meat processing	Industrial development particularly small operations
Infrastructure development (Roads/Transport)		Community development	Government infrastructure improvement	Infrastructure improvement
Community development		Arts and cultural development	Tourism promotion/ development	Small business/ commercial development
Resource protection		Tourism promotion/ development	Provision of technical education and community development	Tourism promotion/ development

All five Shires nominated tourism promotion and development as an important area of future endeavour.

Emerald gave top rating to further development as an education/training provider. Provision of technical education locally was viewed by all Shires as important as a means of arresting population drift from the Central Highlands.

An examination of Table 2 shows particular initiatives and projects identified by each of the five Shires under the various industry/activity categories.

The number of new/alternative businesses and industries that were identified by respondents would indicate that the Central Highlands is determined to maximise the opportunities which exist for the development of the sub-region's natural resource base.

Some lack of the necessary standard of infrastructure and services to facilitate the economic development of the sub-region suggests that the various Shires have to plan carefully for the future economic expansion of their sub-region.

The identification of new industries would indicate that participants hold the view that the Central Highlands has become too reliant on a small number of major primary industries, and that diversification into new alternative industries is required so as to reduce the risk of an industry-driven regional economic recession.

Participants generally agreed that there has not been enough value-adding to crops and livestock production within the sub-region, and that downstream processing should be performed locally, in order to avoid loss of capital and employment opportunities to other sub-regions.

The emphasis on education and training suggests that participants hold the view that an improvement in technical, financial, management and business skills is required to assist and accelerate the economic development process.

The emphasis on local projects aimed at beautifying parks and playgrounds and improving community-based facilities suggests that participants would like to see the development of a sense of pride and ownership in their towns and sub-region, and that this would also enhance tourism promotion.

The strong emphasis on the need for strategic economic planning reflects the viewpoint of the participants that, in the past, the development of community, business and industry has occurred in a piecemeal fashion without much thought being given to strategic planning at a regional level.

TABLE 2 - CENTRAL HIGHLANDS FUTURE SEARCH WORKSHOPS: POTENTIAL PROJECTS AND INITIATIVES

INDUSTRY	JERICO	EMERALD	PEAK DOWNS	BAUHINIA	DUARINGA
Tourism	Finding ways for competing and improving community involvement in promoting tourism in Shire	Promotion of the region for tourism, farm holidays, the real Australia	Promote high quality restaurant, promotion of tourism, mine tours	Promotion of guided tours, promote tourism and development of region	Developing road side parks, promote the unique Blackdown Tablelands
Infrastructure & Development	Identify problems and find solutions in relation to proposed abattoir, integration of road and rail services, flood control	Identify available land and services for promotion of industry, provide for increased demands of Fairbairn Dam	Upgrade roads, construct dams in open-cut areas	Improve mail services, better roads	Improve roads to tourist attractions, upgrade Bedford Weir
Natural Resource Development	Develop native timber industry	Extend irrigation area, better use/management of water resources	Provide continuous and ample water supply, store and conserve water	Develop native timber industry	Better conservation and management of water resources
Education and Training	Arts and crafts and tourism education	Promote education facilities in Emerald region, build up service base	Increase education facilities	Training for hospitality industry	Access to basic business training
Community Development	Develop a unified theme for Shire	Establish cultural complex, establish mining museum, improve medical facilities	Development of youth centre, form a youth access centre	Restore old home as museum, beautify the area	Develop Bedford Weir, showground and aged care facilities
Mining	Stake in mining industry	Increase sapphire production and add-value	Not raised by group, present level of mining activity high	Identify possibility of investment, explore bentonite processing	A major source of income, encourage further developments
Manufacturing and Industrial Development	Inducing local investment and utilising existing human & natural resources, wood chip/paper pulp	More cotton gins, a meatworks, dairy product processing, wine production	Wood pulp industry	Identify possibility of investment in wood pulp industry, bentonite	Establishment of heavy engineering works in Blackwater, operate milling la the
Agriculture	Horticulture, native flora industry, timber	Expansion of horticulture, (citrus, grapes), dairy industry in irrigation area	Timber, improved pasture	Timber	Aquaculture, Bedford Weir
Food and Fibre	Export wood pulp, export vegetables	Process meat, cotton, grain	Establish stock feed mill, ie. stockfeed factory	Process timber	Open cafe

ISSUES OF PRIME STRATEGIC IMPORTANCE

Tourism

- . Develop a unified approach towards the promotion of the Central Highlands as a tourist venue in its own right.
- . Ensure that promotion brochures cover the variety of attractions that the sub-region offers.
- . In collaboration with other sub-regions, package the attractions of the sub-region.
- . Draw up a calendar of events for the Central Highlands and ensure that there are no clashes with major events planned for the CQ Region as a whole.
- . Use market segmentation techniques in promoting the sub-region and build on the 'Outback - the Real Australia' and 'Relaxed Lifestyle' themes.

Infrastructure

- . Identify and prioritise segments of road most in need of upgrading.
- . Investigate and pursue integration of road and rail services.
- . Seek transport cost reductions by adopting cooperative freight forwarding and backloading practices.

Natural resource development

- . Adopt better water resource use, storage and management practices.
- . Develop native timber industry.

Education and training

- . Seek increased provision of education facilities across the sub-region.
- . Target courses at basic business training for local government as well as business.
- . Target basic hospitality industry training.

Community development

- . Promote community pride and awareness.
- . Research and promote historical heritage.
- . Improve the attractiveness of rural centres through beautification of environs.

Mining industry

- . Work towards increased stake in supplying goods and services to the mining industry.
- . Encourage future developments within environmental constraints.

Manufacturing and industrial development

- . Go for the establishment of natural resource value-adding industries.
- . Aim at diversification of the industrial base.

Agriculture

- . Explore opportunities to expand horticulture, timber production and to develop aquaculture.

Food and fibre

- . Develop small timber processing/wood pulp industry.
- . Process meat, cotton and grain.
- . Establish stockfeed mill.

PROPOSED PROJECTS BY SHIRE

BAUHINIA

. Infrastructure and services

- improve roadhouses
- bus service to Carnarvon Gorge
- improve mail centre
- better roads

. Tourism

- manned information services centre
- run guided tours
- extra attractions and enhance existing ones
- enquire into running events
- form a Rolleston promotion and tourism association

- camper van facilities
- resource information and rural tourism

. **Agriculture**

- timber production

. **Mineral processing**

- bentonite processing

. **Value-adding**

- feed processing plant
- feedlot
- unique industries
- fertiliser production plant

. **Regional development**

- land care

. **Community development**

- restore home for museum
- community beautification program
- BBQ facilities

. **Energy production**

- gas production

DUARINGA

. **Infrastructure and services**

- motel accommodation
- improve roads to tourist attractions
- more water storage

. **Tourism**

- highway rest area development
- theme park development
- advertising and promotion

- tours
- develop Bedford Weir facilities

. **Value-adding**

- recycling
- heavy engineering works

. **Community development**

- small business - land, shops, sheds
- show and showground

. **Education**

- access to basic business training/skills

EMERALD

. **Infrastructure and services**

- increase parking facilities
- improve medical facilities
- aged care centre

. **Tourism**

- increase promotion
- arts and craft centre
- information centre

. **Agriculture**

- expand horticulture
- expand cattle production

. **Food and fibre processing**

- cotton mill/gin
- wine production
- juice extraction
- meatworks
- dairy processing
- feedlotting

. **Mining**

- sapphire production

. **Value-adding**

- develop heavy and light industries
- recycling of mung beans and chick peas

. **Human resource development**

- develop an agricultural research centre
- improve access of community to education services
- develop new education courses which compliment industries in the sub-region
- self awareness programs

. **Community development**

- performing arts and cinema complex
- multiple workshop area
- library
- museum

JERICHO

. **Infrastructure and services**

- transport
- correctional centre
- housing
- bitumen links

. **Tourism**

- Noah's ark, etc.
- safaris/bush holidays
- arts and craft centre
- steak houses

. **Agriculture**

- native flora production
- permaculture
- horticulture
- timber industry

. **Food and fibre processing**

- export pulp industry
- beef abattoir
- native animal abattoir (kangaroo, emu and deer)

. **Mining**

- formation of a lobby group to progress the interests of the mining industry

. **Value-adding**

- recycling
- cottage industries

. **Community development**

- develop a community theme

PEAK DOWNS

. **Infrastructure and services**

- piped water from existing facilities for industry and domestic use
- damming open-cut mining areas
- construct water tower
- increase housing accommodation
- upgrade roads
- chemist
- day care centre
- hospital
- crematorium
- plumber

. **Tourism**

- restaurant
- tourist marketing and information centre
- host farms tours
- accommodation
- arts and craft

. **Agriculture**

- new primary industries
- timber production

. **Value-adding**

- new heavy industries
- feedlots
- recycling
- value-adding to raw commodities

. **Community development**

- indoor and outdoor sports and recreation facilities
- increase education facilities
- new small businesses
- youth access centre
- community support centre