GULF SAVANNAH DEVELOPMENT

LOWER GULF MARINE & RIVERINE ECONOMIC DEVELOPMENT

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EXECUTIVE SUMMARY

INTRODUCTION

The Lower Gulf Marine and Riverine Economic Development project (the Project) was designed to look for and progress a range of economic development opportunities not currently identified through the range of other economic analyses, feasibility studies and strategies currently underway in the Gulf and North West Queensland. This meant navigating around Ports North's Dredging Analysis for the Port of Karumba and around the Department of State Development, Manufacturing, Infrastructure and Planning's (DSDMIP's) interest in the region, which now comprises marine facilities in Karumba, aquaculture and the Strategic Blueprint for the North West Minerals Province. It also meant noting the enduring relevance of a number of past economic development studies conducted in the region (without re-engaging or updating them), including the establishment of crocodile farms, feedlots and abattoirs in the region.

EVOLUTION OF SCOPE AND DELIVERABLES

As indicated, the evolving scope of the State's interest in the region impacted on project scope, most notably by significantly adjusting the degree of focus on the Port of Karumba in this analysis. Stakeholder insights, gleaned through extensive phone and on-site interviews, were another key determinant of the scope of the Project. The latter led to two unanticipated developments:

1) The opportunity to assist in the progression and delivery of projects identified through the stakeholder consultation process.
2) The need to re-imagine and re-confirm the role of Gulf Savannah Development in the region: organisational focus, membership, stakeholders, deliverables.

THE STRATEGIC ROLE OF GSD

During regional visits, on site discussions, phone interviews and follow-up engagement, it became clear that stakeholders wanted more and expected more from GSD and that to do so, GSD needed to re-clarify its vision and purpose and deliver value to existing and prospective members and to the region as a whole. This document is designed to assist GSD to refine its organisational philosophy and strategic direction as well as to provide key stakeholders with a clear sense of GSD's role in the region and the value it proposes to deliver to them.

This document reaffirms the importance of GSD in:

- Advocacy;
- Investment attraction and business investment;
- Regional branding and promotion;
- Facilitating the development and delivery of key enabling infrastructure projects.

KEY FOCUS AREAS OF PROPOSED INITIATIVES

This document also retains its pragmatic focus on a range of projects and initiatives that, if pursued, have the potential to build more sustainable and viable communities and businesses.

SAFETY

Major issues of interest were communication capability in the Gulf, development/promotion of marine safety applications and the introduction of navigation/mooring aids around Sweers Island.

GOVERNANCE

Items of interest included improved regulation of camping near rivers, administration of commercial use of recreational marine facilities, enhancing the effectiveness of regional organisations, local government delivery of tourism infrastructure and the composition of GSD board, management committee and membership lists.

DIGITAL

GSD helped to develop a range of new digital initiatives (Digital Enablement Strategy, Data Sharing Agreement), progressed funding submissions for a variety of digital infrastructure and digital enablement projects (NMT-KMB Fibre Project, Gulf Savannah Digital Hub) and commenced lobbying activity for others (BKT-NMT Fibre Project).

NATURAL ATTRACTIONS

The region has not shortage of world-class natural attractions (National Parks, World Heritage sites), though few of these are driving the same kind of economic and employment outcomes as equivalent attractions closer to the coast. A number of opportunities to leverage these natural attractions to drive the tourism economy are explored throughout.

ECONOMIC DEVELOPMENT

A range of other economic development initiatives (or enabling activities) were raised by project stakeholders. These range from the need for more/larger events, regional branding, progression of Indigenous Land Use Agreements and opening new drive tourism routes.

INTRODUCTION

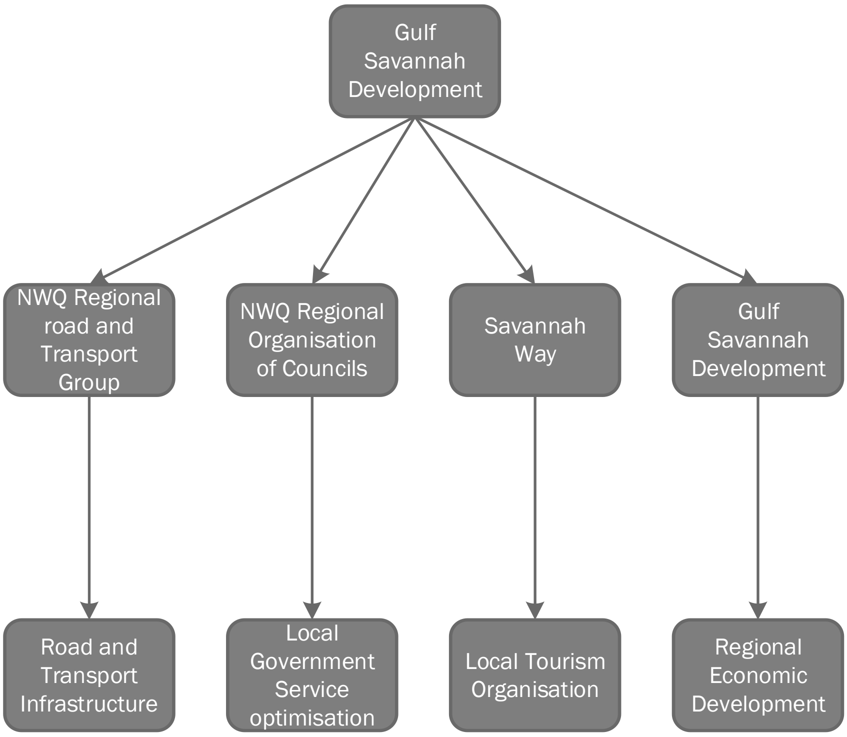
RFF Australia has been engaged to assist Gulf Savannah Development (GSD) to develop the Lower Gulf Marine and Revirine Economic Development project. to support the aspirations of the region. This project required detailed research and analysis into the local economy and community as well as consultation with a wide variety of stakeholders. This document summarises this research and consultation that has informed the strategy including:

- Gulf Savannah Development Organisational Strategy
- Overview of the Gulf Savannah region
- Strategic Context
- Competitive Advantages and Opportunities
- Economic Analysis
- Economic Development Strategy

GSD OVERVIEW

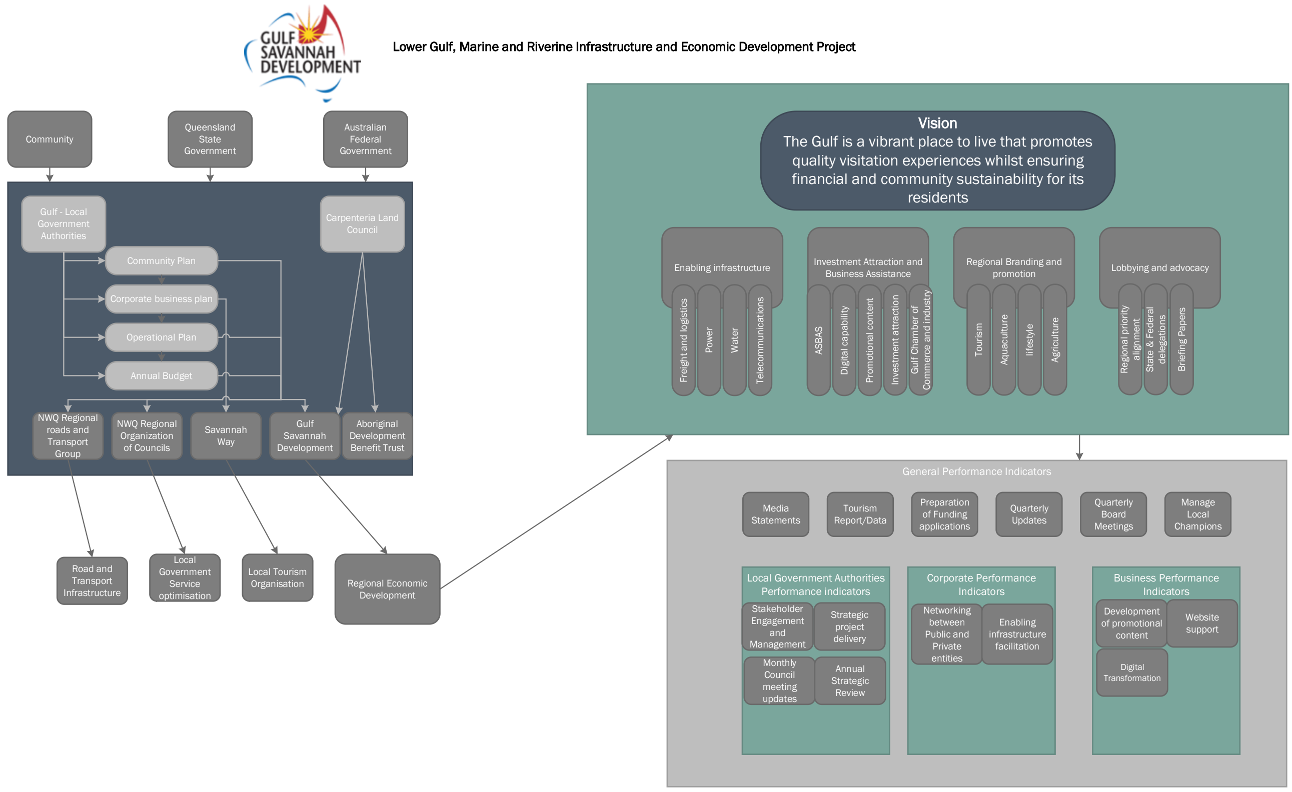
GSD is the lead Economic Development organisation for the Gulf Savannah Region and drives initiatives for the benefit of the area. As a group, GSD has historically focused on water, energy, communication, transport infrastructure, investment opportunities and small business support and development.

More recently GSD has been challenged by the proliferation of regional representative bodies resulting in ambiguity of its role and scarcity of funding considering GSD's previous focus areas.



CREATION OF THE GSD ORGANISATIONAL PHILOSOPHY

In understanding this changing environment GSD undertook some internal workshops to decide on an appropriate path forward. The image below represents the outcome of this work and the organisational philosophy moving forward. The guiding premise was to determine the most effective way that the organisation could deliver value to existing and prospective members and to the region as a whole.



To start with GSD acknowledges that it now exists in the context of Federal, State and Local Government policy and programs. Although GSD traverses all of the responsible areas of the RRTG, the ROC and Savannah Way Limited it does so in the context of Economic Development with a focus on leveraging investment.

Under its Economic Development focus GSD has 4 key pillars of activity namely:

1. ENABLING INFRASTRUCTURE;

Through the "Enabling Infrastructure" pillar, GSD will monitor the region's freight and logistics, power, water and telecommunications networks to ensure that are fit for purpose for the growing economic activity of the region. In this area it is acknowledged that Local Government, Industry and the Regional Roads Group are critical stakeholders to engage with and to align activities with.

2. INVESTMENT ATTRACTION AND BUSINESS ASSISTANCE;

"Investment Attraction and Business Assistance" is fundamentally important to support a growing regional economy. Subject to funding support ASBAS will continue to be rolled out. GSD has also begun and will continue to prioritise improved digital capacity working in line with the digital capacity work undertaken by GSD to date which includes promotional content. Specific work on attracting private and Government investment will continue but it is the formalisation of GSD's role as a regional Chamber of Commerce that presents the greatest opportunity. This move allows GSD to maintain its regional representative status but delivers more targeted outcomes for its business members who historically may not have been able to realise the potential of involvement.

3. REGIONAL BRANDING AND PROMOTION; AND

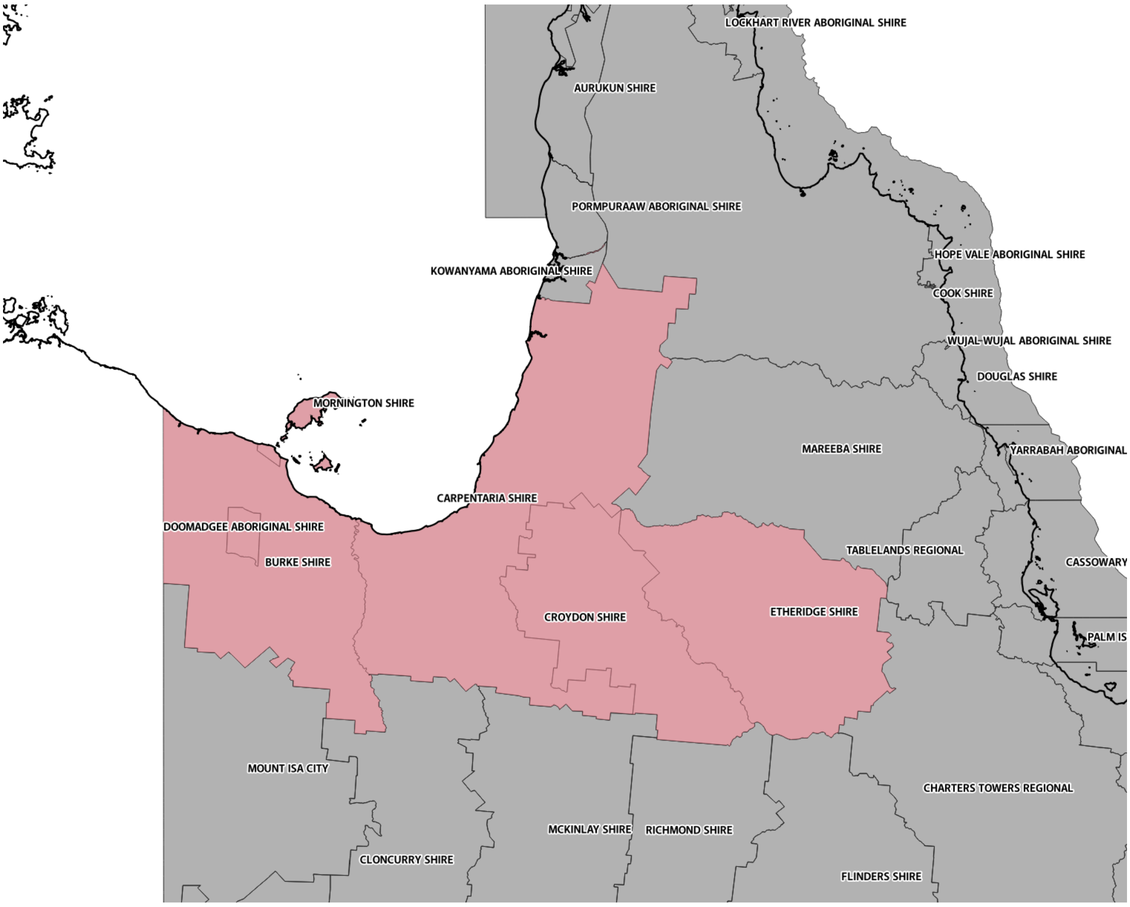
Regional Branding and Promotion will allow GSD to position the Gulf in the hearts and minds of stakeholders. Whether it is the place to develop your pastoral venture, grow your aquaculture business, have unique tourism experiences or develop your industrial offering, GSD will position the region's positive attributes to be broadly recognised by the relevant stakeholders.

4. LOBBYING AND ADVOCACY.

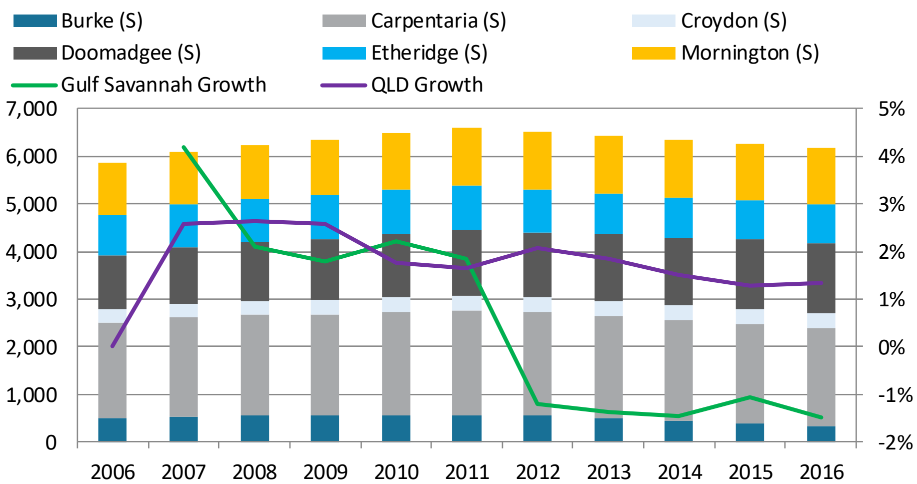
The final component of the GSD organisational Strategy is Lobbying and Advocacy. This is an important part of GSD's value proposition within the region as it is able to aggregate opportunities and impacts to map nationally competitive bids for resources to support regional priorities.

GULF SAVANNAH REGION

The Gulf Savannah region comprises of six local governments, spanning an area of 186,000 square kilometres with a population of 6,161 (2017).



The Gulf Savannah region makes up 10.8% of the State of Queensland but has just 0.13% of its population (**Error! Reference source not found.**).



The region's economy is relatively small, measuring just $797 million in 2015-16[1], contributing 0.26% to the State economy (Table 0.1).

Table 0.1 Gulf Savannah Gross Regional Product ($M)

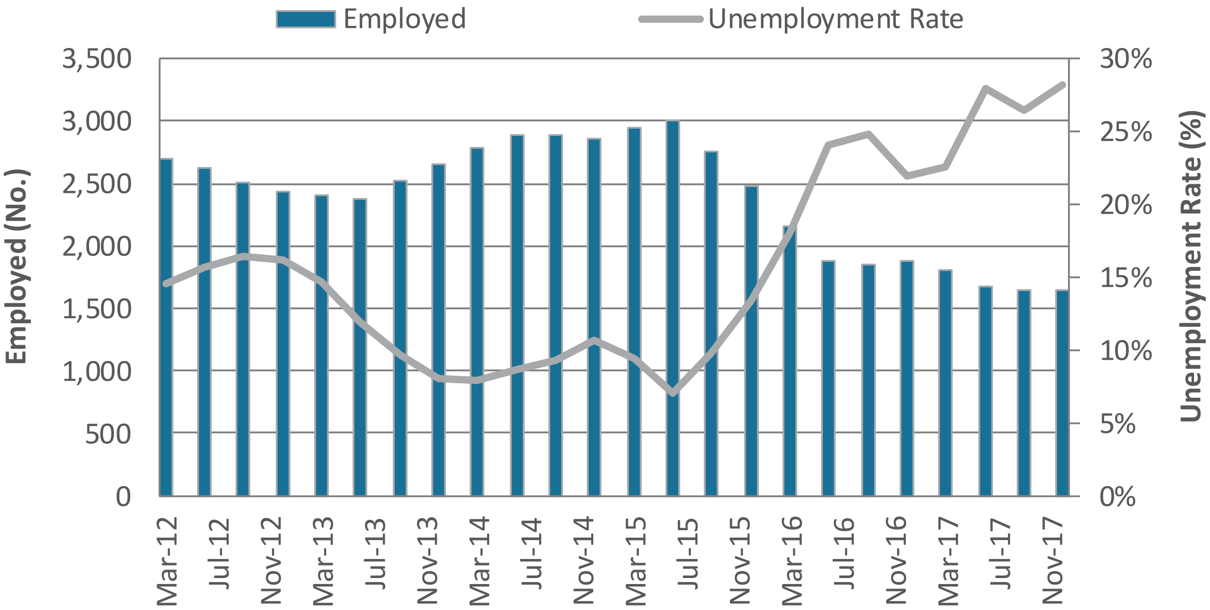
	2010-11	2015-16	Avg Ann % Change
Burke	$392	$417	1.2%
Carpentaria	$154	$166	1.5%
Croydon	$15	$13	-2.8%
Doomadgee	$32	$31	-0.6%
Etheridge	$125	$125	0.0%
Mornington	$30	$45	8.4%
Gulf of Savannah	$748	$797	1.3%
QLD	$272,741	$312,149	2.7%

Source: ID (2017)

In late 2015, production at the MMG Century mine ceased and the last shipment of ore concentrate was shipped from Port of Karumba in February 2016. The mining and export operations made a considerable contribution to the regional economy, providing over 1,000 jobs in the region (or roughly a third of all jobs) (MMG, 2016). The loss of so many jobs in such a small economy has meant that the unemployment rate has tripled over the last three years to reach 28.3% in December 2017 (Figure 0.1).

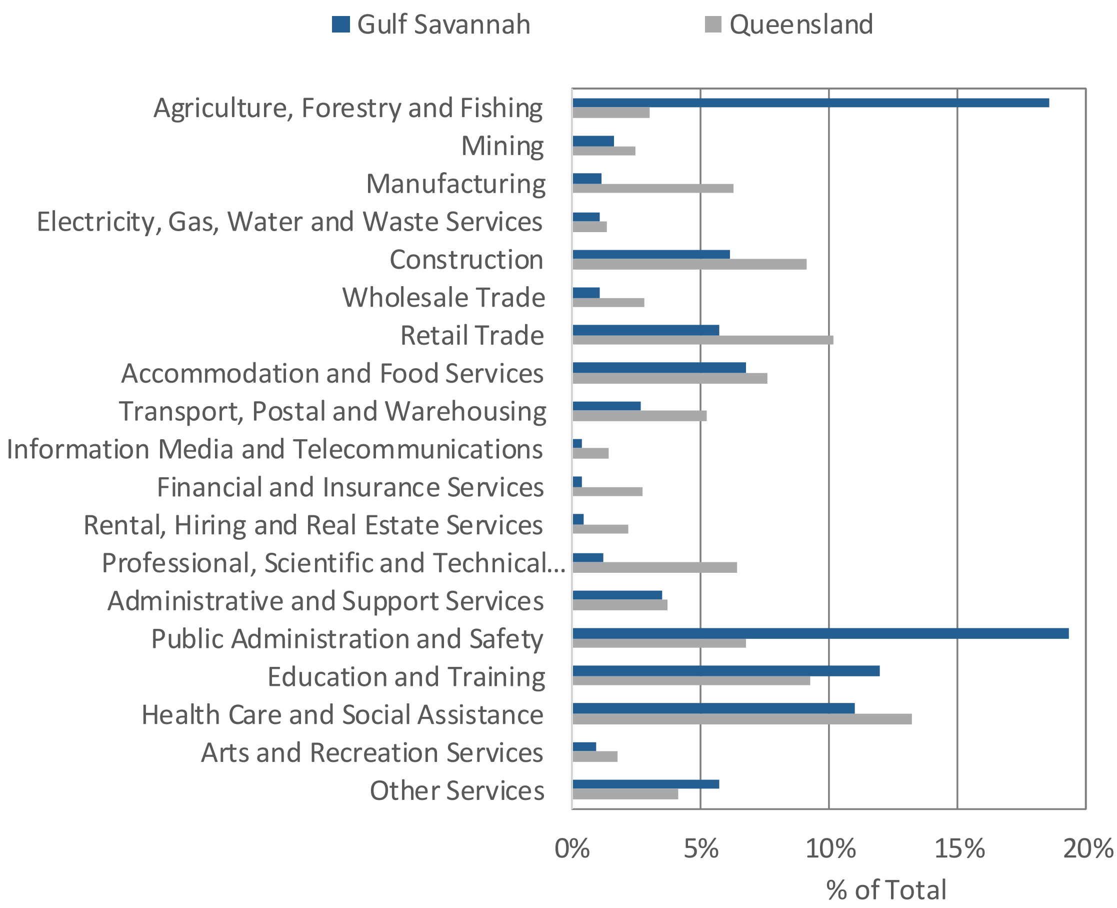
Figure 0.1 Employment and Unemployment Rate, Gulf Savannah Region

[1] In Gross Regional Product terms.



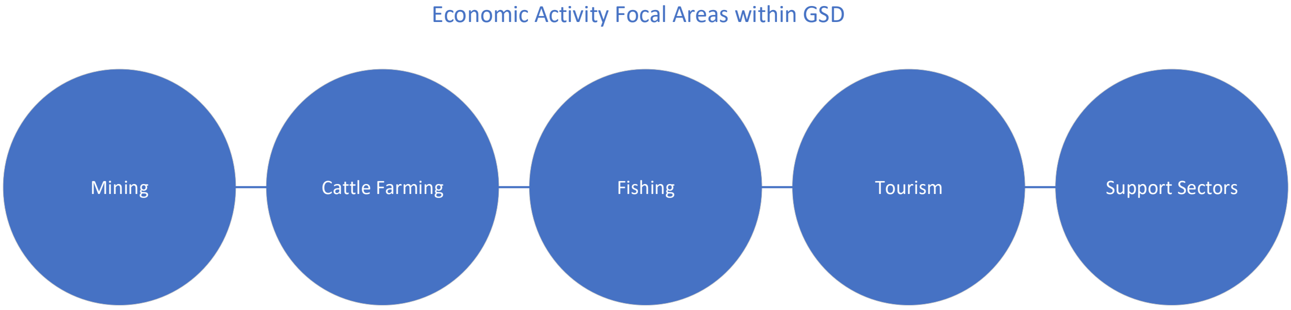
Source: Department of Employment (2018)

Figure 0.2 Employment Structure, Gulf Savannah Region (2016)



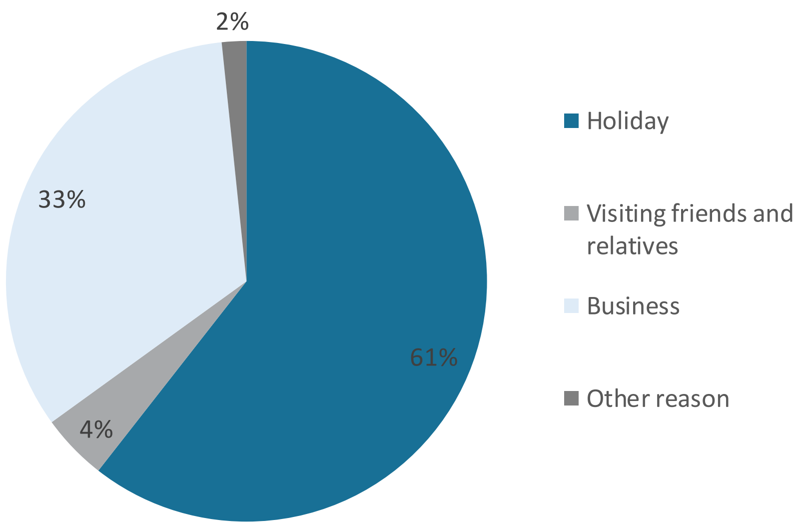
Source: ABS (2017b)

Beyond mining, the regional economy is supported by cattle farming, fishing, tourism and other support sectors such as public administration, education and health (Figure 0.2).



These activities are geographically dispersed across the region with Etheridge and Croyden Shires having considerable cattle farms while the local fishing fleet is predominantly based in Karumba. The broader Gulf region has nearly 2 million head of cattle, making it the third largest region in the country (**Error! Reference source not found.**). Fishing in the region produced almost 2,000 tonne of fish in 2016 (**Error! Reference source not found.**). Barramundi represents about a quarter of the total catch at around 500 tonne, which is two-thirds the total Barramundi catch in Queensland and one third in Australia. While tourism is a part of the entire region, it is centred in Burketown and Karumba. The region receives on average just under 100,000 visitors per year that generate 471,000 visitor nights. Tourism expenditure injects $99.2 million into the regional economy, which represents 7.5% of the total regional economy[1] (both directly and indirectly). Given the removal of the MMG Century mine, this percentage is likely much higher today than in 2015-16.

Figure 0.3 Visitors, Purpose of Visit, Gulf Savannah Region



Source: TRA (2017)

Normanton is the largest town centre in the region and functions as a hub for a variety of government services.

STRATEGIC CONTEXT

STAKEHOLDERS

There are a number of key stakeholders across the economy that will be pivotal in the future economic development of the region, including:

LOCAL GOVERNMENTS

The six local governments will play a key role in the delivery of economic development across the region.

BURKE SHIRE

The Burke Shire is the second smallest local government area in the Gulf Savannah region with a population of 342 people. The population has declined considerably since 2011, losing 215 people or 39% of its total. At the same time, the population has aged considerably. The decline in population and changing demographics would have a considerable impact on the local economy as a large proportion of the consumer base has disappeared. Household income levels have dropped between 2011 and 2016, which (combined with the age demographics) would signal that much of the decline in population was due to higher income earning families leaving the district.

The available labour force data would align with this thinking as it shows a considerable loss in employment from June 2015 of over 100 jobs (40% of the total), which is likely due to the closure of MMG's Century Mine operations. With the loss of such a significant economic driver such as the mine and a small population base, it will be difficult for the area to develop a more sustainable economy over the short-term. However, with the revival of the Century Mine through New Century Resources, solid prospects for mining production near Walford Creek and revived interest in the development of unconventional gas reserves in the Mt Isa Superbasin, Burke may be on the verge of protracted growth over the next 7-20 years.

CARPENTARIA SHIRE

The Carpentaria Shire is the largest area in the Gulf Savannah region with an estimated population of 2,051 people. While the population demonstrated solid growth from 2006 to 2011, it has since declined. The decline in population has had an impact on the local demographics, with the population aging significantly, which changes the local consumer patterns and impacts the local economy.

The Shire of Carpentaria has benefitted from the Port of Karumba and the relatively larger population as these factors have driven a variety of economic activity across a range of sectors. The closure of the MMG mine and the subsequent cessation of shipments from Port of Karumba provided a blow to the local economy and approximately 392 jobs were lost from June 2015. Subsequently, the unemployment rate of the area rose dramatically from 8% to 28% in one year. Since this time, the unemployment rate has stabilised, but many residents have left the district.

Identifying new opportunities and ways to leverage the Port of Karumba will assist in ensuring a more sustainable economy into the future. The renewal of the dredging program at the Port of Karumba in 2018 will reduce future barriers to use of the port.

CROYDON SHIRE

The Croydon Shire is the smallest of the Gulf Savannah region with an estimated population of 300 people. The population has been declining and the changing demographics would indicate that various younger families have left the district, which has resulted in the resultant population being predominantly older.

The local economy is very small and is based on local agriculture. Based on labour force data, it would appear that numerous local residents have either closed their business (or been forced to) and moved away over the last two years. While some have left, unemployment in the Croydon Shire is much lower than the Gulf Savannah region, likely stemming from the strength of the local agricultural sector.

For the Croydon Shire, like many small and remote communities, there are numerous challenges stemming from a lack of critical mass in terms of people. Unless the agricultural sector grows locally, it will be difficult to achieve a sustainable economy.

DOOMADGEE SHIRE

The Doomadgee Shire is the second largest local government in the Gulf Savannah region with an estimated population of just under 1,500.. The local population has been growing quite steadily over the last decade. The population of the Doomadgee Shire is very young compared to others in the Gulf Savannah region and the State, with a median of 21 in 2016, compared to the State average of 38.

The local economy is small and would appear to be based on servicing the local population across various service sectors such as retail, education, health and public administration. Recent labour force statistics would indicate that there have been considerable job losses in the area since 2015, losing 257 jobs (or 40%). The area also suffers from a very low participating rate (estimated at 37%), which means that only 37% of the population are employed or unemployed but looking for work. The State's participation rate by contrast is 64%. The low participation rate may likely be a function of the demographics of the area (i.e. lots of young people) as well as the lack of local economic drivers (such as agriculture or mining).

ETHERIDGE SHIRE

The Etheridge Shire has experienced a steady decline in population over the last five years, leaving an estimated population of 819 people. The decline in population has caused considerable changes to the local demographics, with a considerable aging of the population since 2006. The proportion of residents aged 45+ now make up half of the population and there has been a noticeable drop in the below 45 age groups, most commonly associated with families.

The economy of the Etheridge Shire is associated mostly with agriculture, predominately beef cattle. The area's participation rate of 60% is relatively high for the region and close to the Queensland level of 64%. In June 2015, participation was estimated at 76%, which means that much of the population decrease has been based on people leaving because they lost their job or decided to close their business. Job losses in the Shire have been considerable, losing 180 jobs (or 30% of the total) since June 2015. Even with these losses and population decline, the unemployment rate of 9% is the second lowest in the region.

MORNINGTON SHIRE

The Mornington Shire is the second largest local government area in the Gulf Savannah region with 1,200 people. It is unique because the majority of residents live on Mornington Island and are separate from the mainland of Australia. While the population had been increasing up to 2011, since this time it has been stagnant.

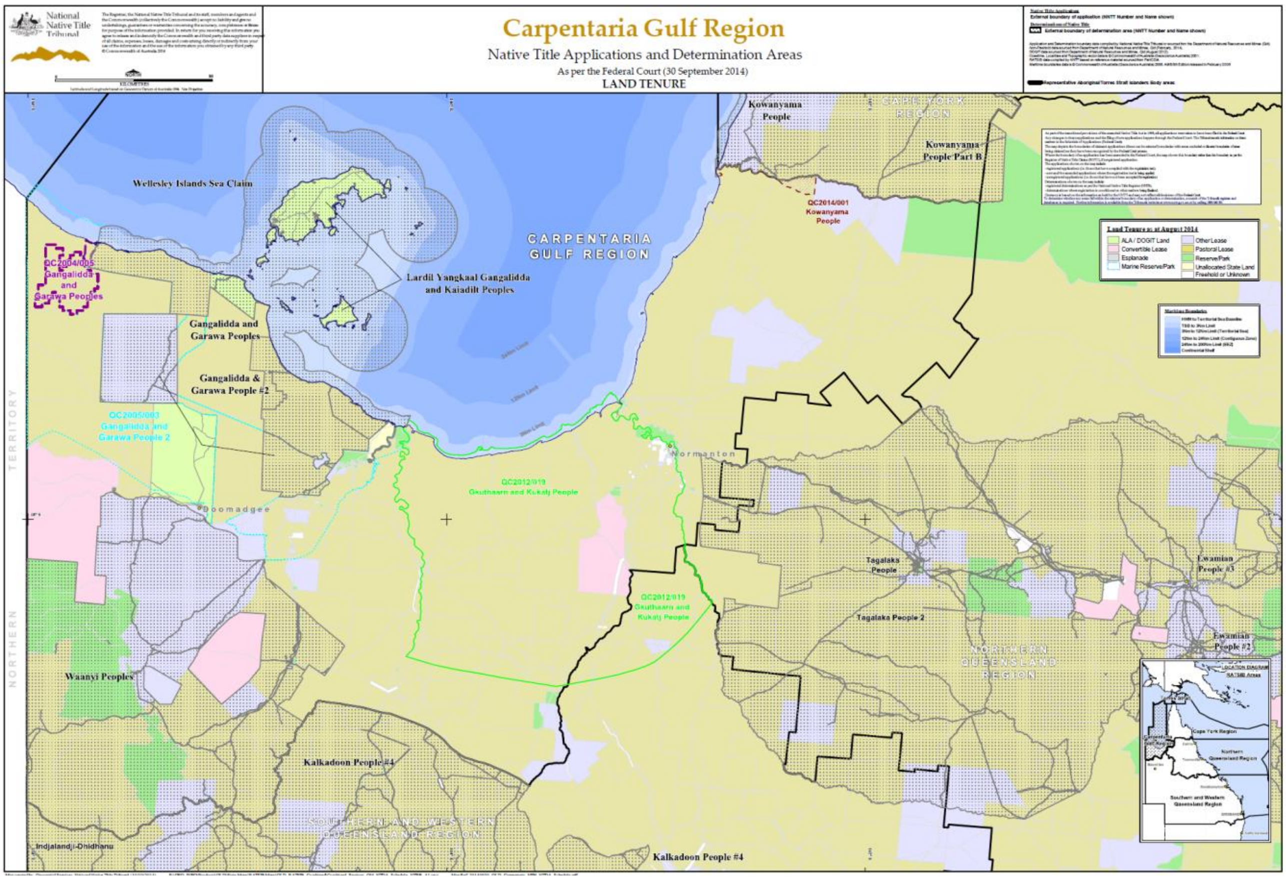
The majority of the economy is based around servicing the local population through various services such as healthcare, education and public administration. Since June 2015, the labour force and employment have fallen considerably, causing the unemployment rate to increase dramatically from 8% to 27%. Over 200 jobs were lost between June 2015 and June 2016 equating to 38% of total jobs.

Given the isolation of its island location and lack of economic drivers, the Mornington Shire will need to investigate ways in which it can build export oriented economic activities or locally deliver traditionally imported services in order to build future economic sustainability.

CARPENTARIA LAND COUNCIL

The Carpentaria Land Council Aboriginal Corporation (CLCAC) was first established in 1982 as a community-based organisation to represent, protect and secure the rights and interests of Aboriginal people in the Gulf of Carpentaria.

CLCAC is the largest and well known corporate entity representing the rights and interests of Traditional Owners in the Gulf of Carpentaria. CLCAC draws its membership from the nine Aboriginal language groups whose traditional lands and waters are located in the Gulf.



TOURISM TROPICAL NORTH QUEENSLAND (TTNQ)

TTNQ is the regional tourism organisation (RTO) for the region and reaches from Cairns to Cape York and the Gulf Savannah region. Tourism TNQ works with the state agency Tourism and Events Queensland to promote and develop the tourism industry in Queensland.

SAVANNAH WAY LIMITED

Savannah Way is a major tourism marketing organisation that promotes visitation to Northern Australia, stretching from Broome in the west to Cairns in the east (and all destinations in between). Savannah Way Limited also functions as the local tourism organisation (LTO) for the Gulf Savannah region.

FAR NORTH QUEENSLAND REGIONAL ORGANISATION OF COUNCILS (FNQROC)

FNQROC is the regional organisation of Councils for far north Queensland, including Carpentaria, Croydon and Etheridge Shires from the Gulf Savannah region. As an organisation FNQROC is focused on the optimisation of local government service delivery but presents an opportunity to engage collectively with the Local Government Authorities.

STRATEGIC DOCUMENTS

There are a broad range of documents that effect and inform GSD's position moving forward. Understanding these documents and where possible aligning to local, state and federal Government strategies will allow GSD to better leverage its position to benefit the region.

FEDERAL GOVERNMENT

NORTHERN AUSTRALIAN ENVIRONMENTAL RESEARCH PORTAL – LINKS BETWEEN GULF RIVERS AND COSTAL PRODUCTIVITY.

The Flinders, Gilbert and Mitchell Rivers flow into the southern Gulf of Carpentaria, supporting healthy ecosystems and nationally significant wetlands as well as important recreational and commercial fisheries. These rivers create an increasing interest in developing water resources in northern Australia. There is further information on the health and productivity of the floodplains and coastal areas which developments with be impacting. Specifically, this research will need to show which rivers, which are marked for developments in the future, are most important for the flora and fauna so well informed decisions on the management can be made.

INFRASTRUCTURE AUSTRALIA – NORTHERN AUSTRALIAN INFRASTRUCTURE AUDIT

In a commitment to the potential of Northern Australia, the Government has released the *2030 Vision for Developing Northern Australia* policy paper in June 2013, followed by the release of the *Green Paper on Developing Northern Australia* in June 2014. The Joint Parliamentary Select Committee on Northern Australia has also released the final report of its inquiry (tabled 4 September 2014).

To support the white paper on development, Infrastructure Australia has also been requested to conduct an infrastructure audit.

The scope of the audit was to:

- Collect and evaluate data for critical infrastructure assets and networks in the economic infrastructure (transport, energy, water and communications) sectors
- Undertake demographic and economic modelling of Northern Australia against various population growth scenarios (for the years FY16 short-term, FY21 medium-term and FY31 long-term)
- Provide a critical infrastructure gap analysis against both 'baseline' projections and the various population growth scenarios
- Generate a list of critical infrastructure requirements.

The audit focuses primarily on infrastructure connecting to larger northern population centres (3,000 persons or more), as well as to areas of significant existing or prospective economic activity.

OUR NORTH, OUR FUTURE: WHITE PAPER ON DEVELOPING NORTHERN AUSTRALIA

The White Paper sets out the priorities for driving progress and growth in the north, which are support for:

- a northern trade and investment gateway
- a diversified economy
- Indigenous entrepreneurs and businesses
- world-class infrastructure
- investment in water infrastructure

- world leading research and innovation.

Building stronger communities is another priority of the government's developing northern Australia agenda.

STATE GOVERNMENT DOCUMENTS

NORTH WEST MINERALS PROVINCE STRATEGIC BLUEPRINT

A Strategic Blueprint for Queensland's North West Minerals Province (Blueprint) contains a suite of actions to secure the long-term future of the region and its communities, including new funding of $39 million over four years as part of the 2017–2018 State Budget for a range of short and medium-term actions under three strategic priorities:

1. FACILITATING CONTINUED RESOURCES SECTOR DEVELOPMENT

Approximately $30.9 million will be dedicated to large-scale geological programs to help identify the next generation of commercial mineral deposits and support frontier gas exploration. Promoting the Gulf's potential to investors and facilitating commercial development of smaller projects, including potential common-user infrastructure, will also support resource sector development.

2. DIVERSIFYING THE REGIONAL ECONOMY AND CREATING EMPLOYMENT OPPORTUNITIES

Almost $5.5 million will help diversify the regional economy and maximise economic development and job creation opportunities. This includes targeted support for Aboriginal and Torres Strait Islander students and other young people, and a new regional team based in Mount Isa focussed on developing a long-term economic diversification strategy as well as employment and community resilience strategies.

3. WORKING WITH BUSINESSES AND THE COMMUNITY TO DELIVER INTEGRATED AND APPROPRIATE SERVICES

Approximately $2.6 million will help improve government and collaborative service delivery, maintain and build community resilience, and engage with regional stakeholders in blueprint implementation.

The Blueprint's strategic priorities and funding reflect the Queensland Government's commitment to continue to work in partnership with other levels of government, the resources sector, business, industry – and local communities to guide and secure the future of this important region.

ADVANCING NORTH QUEENSLAND

The Queensland Government is working to advance and diversify North Queensland's economy. Recognising the immense economic potential of the region and having a keen focus on delivering on the tremendous opportunities and competitive natural advantages the region presents. The government's strong commitment to North Queensland is evidenced by a range of actions to date to create jobs and grow the north's economy, including more than $2.4 billion in infrastructure improvements in North Queensland in 2016–17, supporting up to 7500 jobs. This investment will create jobs now and jobs for the future. It will also create a more resilient and diversified economy that is better able to respond to global economic transformations.

ADVANCING TOURISM IN NORTH QUEENSLAND

Advancing Tourism in North Queensland is a supplement to Advancing Tourism 2016–20, the Queensland Government's plan to grow tourism and jobs. Key actions specific to advancing tourism in North Queensland are outlined in the Queensland Government's Advancing Tourism supplement, which seek to capitalise on the opportunity afforded by unprecedented growth in tourism to increase market share and boost tourism jobs by targeting four priority areas;

- -grow quality products, events and experiences;
- invest in infrastructure and access;
- build a skilled workforce and business capabilities;
- seize the opportunity in Asia.

NORTH WEST QUEENSLAND STRATEGIC DEVELOPMENT STUDY

The investigations undertaken as part of the North West Queensland Strategic Development Study clearly highlight that North West Queensland features some of the strongest unrealised economic potential in Australia. Australia is set to turn significant attention to the North West region as it seeks new and alternative sources of growth, and as the 'Asian century' creates broad opportunities across the resources, agricultural, tourism, education and professional services sectors. The following four strategic development priorities have been articulated for the region based on economic potential, available resources, and the major national and international economic trends set to impact the region over the coming decades:

- New Mine Exploration and Development.
- Irrigated and Intensified Agriculture.
- Energy Generation, Security, and Export.
- Supply Chain Productivity, Efficiency, and Reliability.

COMPETITIVE ADVANTAGES AND OPPORTUNITIES

COMPETITIVE ADVANTAGES

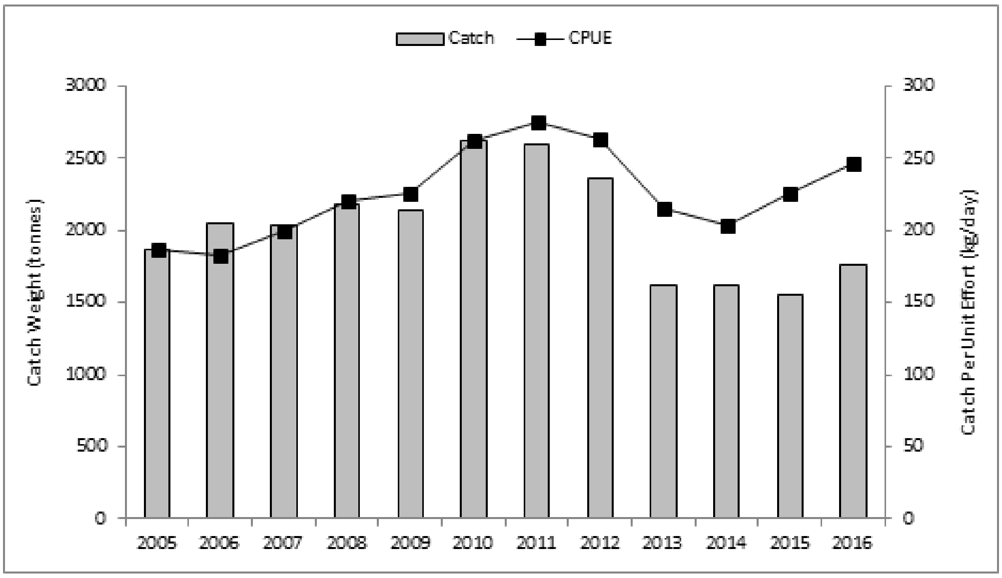
The Gulf Savannah region has distinct challenges given its small size, large geographic footprint and its relative remoteness. However, there are a number of competitive advantages in the region, including:

- **Large existing and capable agricultural industry**, including:
  - Some of the **largest cattle properties in the country** including almost 2 million head of cattle (third largest region in the country)
  - A **commercial fishing fleet of approximately 60 vessels** and a functioning port and support infrastructure in Karumba that caught almost 2,000 tonne of fish (including approximately 500 tonne of Barramundi representing one third of the wild caught Barramundi in Australia)

Species targeted	Barramundi, king and blue threadfins, tropical shark and grey mackerel
Fishing season	1 January–31 December Barramundi closures apply to all fishers from midday on 7 October to midday on 1 February every year
Commercial fishery symbols	Total number of fishery symbols issued: N3–85; N12–3; N13-1 [30]
Commercial fishery licences	Total number of licences with access to the fishery: 84 [30]

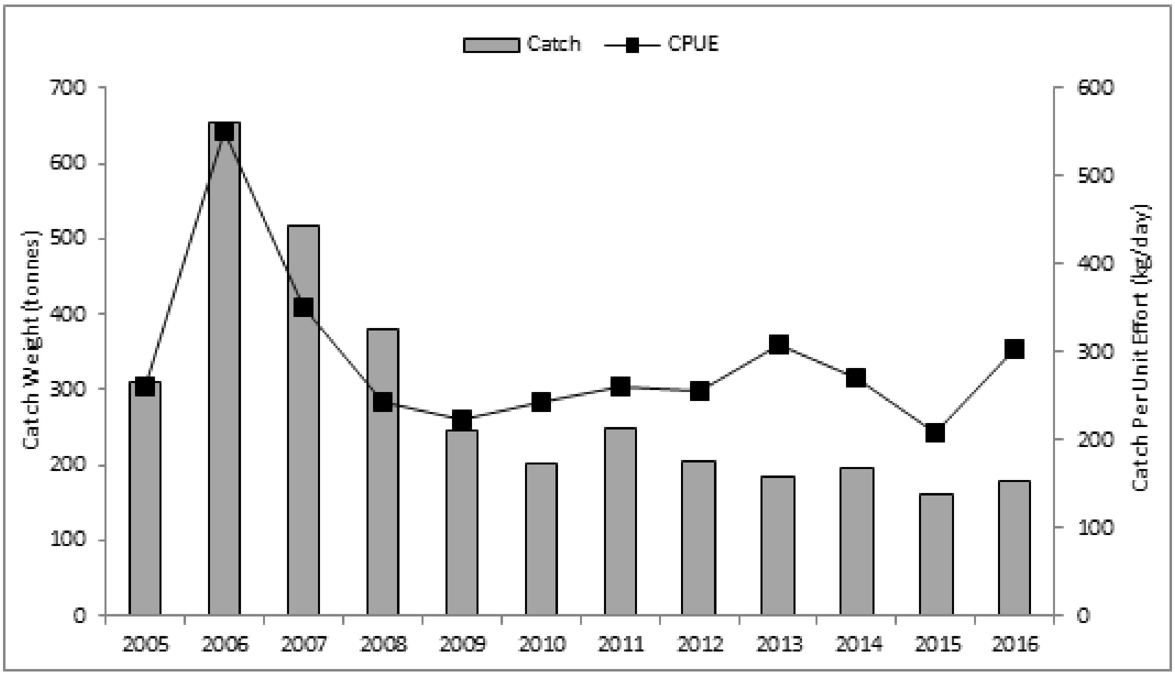
Feature	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total catch (t)	1871	2053	2037	2184	2138	2622	2601	2364	1622	1623	1560	1759
Total effort (days)	9987	11248	10168	9908	9458	9987	9443	8962	7527	7974	6901	7140
Licences (active)[30]	88	93	96	91	91	87	81	87	83	74	71	77
GVP ($A million)	10.4	12.6	12.3	13.3	13.2	15.7	16.7	15.5	9.8	9.7	9.2	10.3
Species totals												
Barramundi (t)	500	735	631	726	793	763	966	928	505	457	367	467
Blacktip shark (t)	1	76	111	176	205	216	190	133	156	123	100	210
Blue threadfin (t)	81	66	59	76	71	63	49	39	40	49	41	54
Grey mackerel (t)	394	490	640	622	482	897	853	766	486	562	718	645

King threadfin (t)	283	305	248	295	309	377	325	313	176	142	138	169



Species targeted	Spanish mackerel and demersal fin fish species
Fishing season	1 January–31 December
Commercial fishery symbols	Total number of fishery symbols issued: L4–46 [26]
Commercial fishery licences	Total number of licences with access to the fishery: 46 [26]

Feature	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**
Total catch (t)	311	654	517	381	247	203	248	204	185	195	160	177
Total effort (days)	1192	1190	1473	1562	1108	835	951	803	602	722	764	587
Licences (active) [26]	32	29	31	35	28	23	22	16	16	16	15	15
GVP ($A million)	2.1	2.9	2.7	2.4	1.5	1.4	1.7	1.4	1.3	1.4	1.1	1.2
Species totals												
Spanish mackerel (t)	229	218	228	285	189	191	240	198	185	194	156	176



- Access to **pristine natural waters in the Gulf of Carpentaria**
- Numerous national parks including:
  - **Boodjamulla National Park** (home to Lawn Hill Gorge and the Riversleigh World Heritage Area – one of the most significant fossil sites in the world)
  - **Mutton Hole Wetlands Regional Park** (one of the largest continuous estuarine wetland areas in Queensland and home to a significant number of waterbirds)
  - **Finucane Island National Park** (a pristine estuarine wetland only accessible via boat with a significant population of waterbirds)
- Internal **road networks providing access** to east coast of Australia as well as connections to the Northern Territory
- Existing tourism market that delivers an **estimated 100,000 visitors to the region every year**
- Varity of **resource deposits** including zinc, lead, copper, uranium and shale gas and port infrastructure capable of exporting resources
- Number of **functioning airports** providing access for private aircraft as well as regular public transport (RPT) services.

CHALLENGES

While the region has numerous advantage, the Gulf Savannah also has numerous challenges:

- The region is very large and remote, providing challenges of connectivity and access to markets
- The Gulf Savannah region has numerous waterways, providing a large area often providing no access to telecommunications and presenting visitors, local businesses and residents with the situation of being in a remote location without the ability to seek assistance in times of need
- With a small, dispersed population, local governments face the challenge of maintaining infrastructure from a small rates base, limiting available capital for on-going maintenance of existing infrastructure
- There is a lack of digital connectedness throughout the region, despite numerous recent upgrades in telecommunications infrastructure
- There is a lack of digital engagement from numerous local businesses

- While the region has numerous natural attractions, there is a lack of tourism products and experiences
- Parts of the local transport network are insufficient to promote the ease in movement of visitors and supplies.
- Seasonal disruptions and road closures from weather events.

Tackling these challenges will increase the region's competitiveness and unlock future economic potential.

OPPORTUNITIES FOR GROWTH

Based on the research, analysis, and competitive advantages identified above as well as consultation undertaken for this project, the following projects for economic growth have been identified.

Table 0.1 Gulf Savannah Region, Economic Development Opportunities

Project Name	Description
VHF Repeater Sweers Island	Installation of a VHF Repeater on Sweers Island to increase communications and safety
Marine Safety Applications	Promote the use of marine safety applications to increase visitor safety
Improvements to Marine Safety Applications	Lobby Government to improve marine safety applications, increase usability in the Gulf Savannah region and ultimately increase safety
Burketown to Normanton Fibre Optic Project	Delivery of a 220km fibre path between Burketown and Normanton
Data Sharing Agreement	Agreement amongst tourism operators, LGAs and others to share data regarding visitors to the region
Digital Enablement Strategy & Digital Taskforce	A plan to improve digital engagement by local businesses and LGAs
Digital Hub	Development of a central marketing, bookings/transactions hub for the Gulf Savannah region (tours, events, accommodation)
Burketown Mineral Baths	Development of a mineral baths in Burketown to feature accommodation and café
Muttonhole Wetlands	Development of eco-tourism and visitor services to access Muttonhole Wetlands
Riversleigh Fossil Fields	Lobby Government to deliver a Tourism/Visitor Strategy for the Riversleigh Fossil Field World Heritage Site (as per Management Plan)
Regional branding	Conduct a regional branding initiative to promote the region and its products
Events & Signature Events	Development of an Events Plan to develop new events and improve Destination Events

Project Name	Description
Low impact, low infrastructure RV sites	Development of tourism sites in the region for self-contained RVs
Hydrographic Survey	Conduct a hydrographic survey of the Albert River in order to improve safety and navigability
New drive tourism route: Dunbar Road	Upgrade 237km of the Burke Developmental Road between Normanton – Dunbar – Chillagoe to open a new touring route connecting to the Great Tropical Drive
Kombucha	Work with partners to secure funds to conduct an options and business case of health drink production in the region
Farm Stay	Conduct an assessment and business case to identify 3-5 farm stay sites in the region
Traditional Knowledge & Biodiscovery	Conduct initial research into the potential to develop Indigenous medicines for broader commercial use
Fishing Lodges	Proactively support the re-establishment of various fishing lodges through ASBAS program
Ports North Board	Seek a representative position on the Ports North Board for the CEO of GSD
Feedlot and Abattoir	Investigate the potential to develop feedlots in the region to further support and grow the cattle industry
Crocodile Farm	Investigate the potential for a commercial crocodile farm and park in the region
Resource Developments	Provide advocacy support for potential resource developments in the region
Local Food Production & Distribution (veg, herb, fruit)	Investigate the potential to produce vegetables locally for commercial and retail sale

Source: RFF

Opportunity Prioritisation

In order to prioritise the opportunities that GSD pursues, they were considered across a range of criteria, including:

- **Impact**: considers the future potential economic impact in general terms (5=very significant, 1=minor)
- **Capital Required**: considers the amount of capital required for the project (1=considerable, 5=very little)
- **Planning/Regulatory Requirements**: considers the effort and costs that would be required to progress through project planning as well as the necessary regulatory approvals process (1=considerable effort and costs, 5=relatively minor effort and cost)
- **Timeliness**: considers how quickly the project could be realised and delivered (1=considerable time required, 5= can be realised in a short amount of time)
- **GSD Influence**: considers how much influence GSD can have on the potential project (1=very little influence on the outcome, 5=considerable influence on the outcome)

These criteria are not meant to prioritise the opportunities into a stepwise process or 'to do' list as all of them are important and should be pursued. Rather, the prioritisation should direct resource allocation and how each of the opportunities are pursued. The following table (Table 0.2) summarise the prioritisation of opportunities.

Table 0.2 Economic Development Opportunity Prioritisation Matrix

Project/Opportunity	Impact	Capital Required	Planning / Regulatory	Timeliness	GSD Effectiveness	Score	Rank
Marine Safety Applications	1	5	5	5	5	4.2	1
Events & Signature Events	5	3	4	4	4	3.9	2
Fishing Lodges	5	4	4	4	3	3.9	3
Regional branding	5	3	4	3	4	3.7	4
VHF Repeater Sweers Island	1	5	4	4	4	3.6	5
Crocodile Farm	5	3	3	3	4	3.5	6
Low impact, low infrastructure RV sites	4	4	3	4	4	3.8	7
Ports North Board	1	5	5	3	3	3.4	8
Burketown to Normanton Fibre Optic Project	5	2	2	3	5	3.3	9
Local Vegetable Production	3	2	3	5	4	3.3	10
Burketown Mineral Baths	5	2	3	3	4	3.3	11
Farm Stay	3	3	3	4	3	3.2	12
Data Sharing Agreement	1	4	4	3	4	3.2	13
Digital Enablement Strategy & Digital Taskforce	4	3	2	3	4	3.1	14
Digital Hub	4	3	2	3	4	3.1	15
Improvements to Marine Safety Applications	1	4	4	3	3	3.0	16
Riversleigh Fossil Fields	4	3	2	2	3	2.7	17
Hydrographic Survey	2	2	2	3	4	2.6	18
Muttonhole Wetlands	3	2	2	2	3	2.4	19
Feedlot and Abattoir	4	1	1	2	3	2.2	20
New drive tourism route: Dunbar Road	4	1	2	2	2	2.1	21
Resource Developments	5	1	1	1	2	2.0	22
Kombucha	2	2	2	2	2	2.0	23
Traditional Knowledge & Biodiscovery	2	2	1	2	2	1.8	24

Source: RFF

ECONOMIC ANALYSIS TOOL

The economic analysis tool is meant to assist GSD in the future on an on-going basis by providing a tool that can assist with better understanding the economic value of different projects, or more specifically the economic value that various projects can generate for the region in the future. The tool can be used by GSD staff to identify the economic value (in terms of Gross Regional Product and employment) in both direct and in-direct (flow-on) terms.

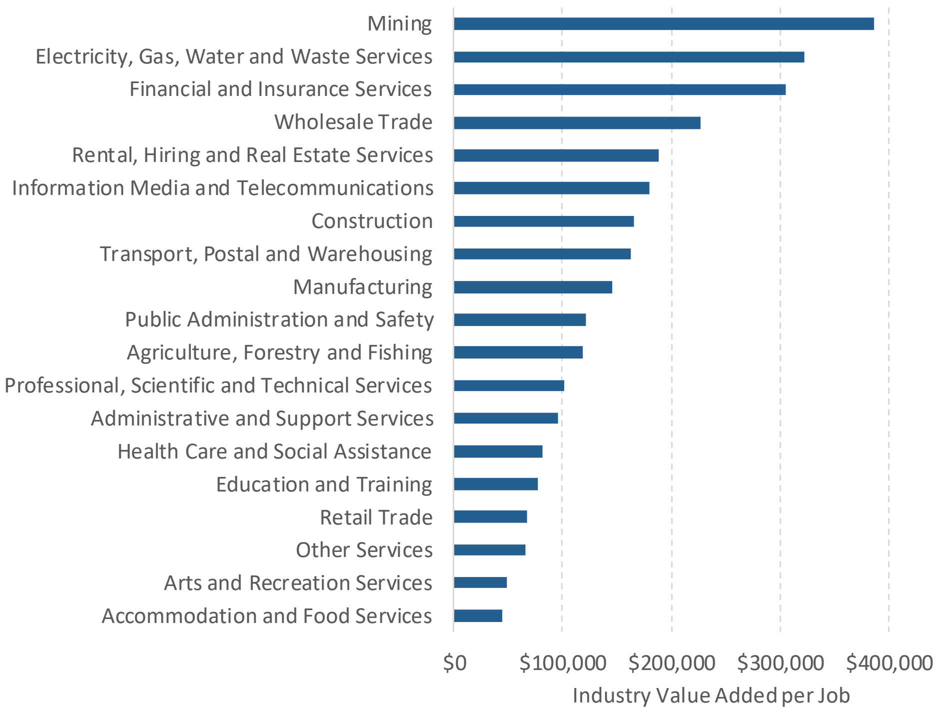
The tool uses the most recent Input-Output (IO) table provided by the ABS and has been customised to represent the Gulf Savannah region. IO analysis considers inter-industry relationships and transactions, which enables the investigation into how a single project can impact the local economy through measuring its impacts on all other industries in the region, both directly and indirectly. In this way, the economic value of a project can be better understood not only in its direct impacts but how it will impact other businesses and create value in the wider economy.

The economic analysis identifies a series of economic metrics and this tool produces outputs including:

- **Gross Regional Product**: value of the total of economic output minus the costs of goods and services used as inputs. It is the preferred measure of the economy as it focuses on the net contribution. This value is most closely associated with Gross State Product (GSP) at the State level and Gross Domestic Product (GDP) at the national level.

Employment: employment positions generated, expressed on a full-time equivalent (FTE) basis model has been constructed in a very general fashion so it can be applied to any project. The model does not recognise the different levels of value that various projects in different industries can provide. For example, agriculture is a relatively 'high value-adding' industry relative to retail. As such a project that adds jobs in agriculture will generate greater value for the economy than a project in the retail industry (Figure 0.1). This principle should be considered when evaluating projects, as the model will inherently undervalue 'higher value adding' industry projects and overvalue relatively 'lower value-adding' projects.

Figure 0.1 Industry Contribution by Industry per Job (2016-17)



Source: RFF; ABS (2017)

REGIONAL ECONOMIC DEVELOPMENT PLAN

GULF SAVANNAH DEVELOPMENT PURPOSE

The purpose of GSD will be to facilitate outcomes and drive economic development projects and initiatives for the benefits of its members and the residents of the region. It will represent economic development in the Gulf Savannah region and provides leadership and lobbying regarding economic development initiatives for the region. GSD will bring together people, ideas and resources to drive economic development and growth in the Gulf Savannah Region.

GSD has developed the following clear objectives:

- Sustain and increase economic diversity across the region
- Sustain and increase local jobs
- Attract public and private sector investment into the region

ECONOMIC DEVELOPMENT STRATEGY

The new GSD Economic Development Strategy is highlighted in the figure below and provides a strong framework for guiding future activities. The overview highlights:

- The key goals and objectives of economic diversification, jobs and investment guide all activities
- There are four key pillars of action that each have specific initiatives (which will change over time)
- These initiatives will be reported against specific KPIs and on a regular basis

Figure 0.1 Gulf Savannah Regional Economic Development Strategy

Goals & Objectives	Economic Diversity	Jobs	Investment	
	Enabling Infrastructure	**Business Development & Support**	**Advocacy**	**Regional Branding & Marketing**
Four Pillars of Action	Ensuring suitable infrastructure is available to support economic growth will allow the economy to expand and grow, avoiding barriers **Key Projects** VHR Repeater Marine Safety Apps Hydrographic Survey New drive tourism route	Assisting local businesses to be better, attracting new investments and investigating economic growth opportunities will help the economy to grow **Key Projects** Data Sharing Digital Engagement Digital Hub Burketown Mineral Bathes Muttonhole Wetlands RV Sites Kombucha Farm Stays Traditional Knowledge Fishing Lodges Feedlot and Abattoir Crocodile Farm Local Veggie Production	Lobbying the Government as one region creates a stronger and more powerful voice for the region **Key Projects** Marine Safety Fibre Optic Project Riversleigh Fossil Fields Ports North	Raising the profile of the region and building critical mass with products and services can attract visitors, investment and build value in the economy **Key Projects** Regional Branding Events
Results	Key Performance Measures		Reporting	

Source: RFF

MONITORING AND REPORTING

The action plan highlighted above will be monitored and quarterly progress reports will be sent to members as well as quarterly presentations. More frequent updates regarding activities will also be provided through monthly electronic progress reports and specific updates for various individual projects or initiatives.

Outside of reporting on activities, GSD will also provide an annual economic update to track and understand changes across the economy. This annual economic update would likely take place at one of the quarterly presentations and the event could be elevated to include a regional forum to discuss key issues, developments, opportunities, etc. External stakeholders from state and federal government as well as local businesses would be encouraged to attend.

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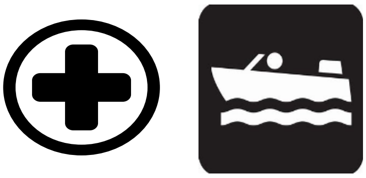
1. SAFETY - VHF REPEATER ON INSPECTION HILL – SWEERS ISLAND

INTRODUCTION

Increased maritime traffic in the lower Gulf has led to an increasing number of maritime issues, incidents and concerns. Whatever the cause – poor luck, poor weather, poor preparation – the consequences are exacerbated by the lack of an effective communication network in the lower Gulf.

ISSUE



Ineffective communication networks in the lower Gulf create and exacerbate the impact of maritime issues and incidents in the area.

OPPORTUNITIES

In discussions with key stakeholders in the area, the most effective and efficient means of addressing communication issues and improving maritime safety was determined to be the establishment of a VHF repeater system on Inspection Hill on Sweers Island. This is the highest point within 70nm.

- Lat: -17.134377°
- Long: 139.614250°

CONSULTATION

Consultation for this project has taken place with Sweers Island Fishing Resort, Volunteer Marine Queensland (Burketown, Karumba, Mornington Island) and Kaiadilt Aboriginal Corporation.

PROJECT STATUS

Commission and Install: following initial stakeholder engagement with Sweers Island, GSD initiated discussions with Volunteer Marine Rescue (Burketown Inc.). Subsequent engagement between the Kaiadilt Aboriginal Corporation (traditional Owners), VMR Burketown Inc., VMR Mornington Island Inc., VMR Karumba Inc., VMR Association Queensland (Gulf Zone) has secured funding, the equipment and permission to install the VHF Repeater.

Installation: will be completed by VMR Burketown, Karumba and Mornington Island in the first half of 2018.

COST

The cost to procure the VHF Repeated system is **~$17,000** plus labour.

This includes 3m marine grade aluminium guyed mast, waterproof repeated enclosure, solar system, 100Amp hr solar batter, VHR Marine Repeater Licence and a suite of miscellaneous build items.

BENEFITS

Key benefits include:

- Improved marine safety
- Improved operational capability of Emergency Services, including the Gulf Volunteer Marine Rescue operations, SES and Queensland Police.

RECOMMENDATION

1. Key stakeholders (VMR, Visitor Information Centres, accommodation providers, tour operators) and member Councils (particularly Burke, Carpentaria and Mornington Island) to advertise/promote relevant VHF channels.

2. SAFETY – MARINE AND BOATING APPS

INTRODUCTION

Stakeholders have identified a number of safety concerns in relation to recreational fishing/boating in the lower Gulf. Chief among these is the concern that increasing numbers of vessels are attempting to access the Wellesley Island Group from Burketown, Normanton and Karumba **and** that increasing numbers of vessels are attempting to do so without adequate preparation.

GSD contacted the Department of Transport and Main Roads and Maritime Safety Queensland to learn more about current activities and costs in relation to the development of digital/mobile applications capable of addressing various concerns related to a) effective preparation; b) registering trip details with local authorities; c) the rules and regulations applicable to fishing/marine activities/land access in the Gulf of Carpentaria.

ISSUE

Safety of mariners accessing the lower Gulf and Wellesley Island group, particularly those who have not adequately planned or prepared for their trip and who have not registered their trip with local authorities.

CONSULTATION

GSD held consultation sessions with Sweers Island Fishing Resort, Volunteer Marine Rescue, Maritime Safety Queensland and the Department of Transport and Main Roads to discuss this issue. Further discussions need to take place as detailed in "3 – Safety – Improvement to Marine Safety Applications."

OPPORTUNITIES

There are multiple agencies with multiple budgets responsible for developing multiple applications related to marine safety, marine navigation and fishing. These include:

SAFE TRX (Coast Guard / Volunteer Marine Rescue Queensland): application functionality includes the ability to upload a "Sail Plan" trip. This allows the user to specify an ETA and to have the trip monitored by the Australian Volunteer Coast Guard 24x7 every day of the year. Should you not return by your ETA then Coast Guard will initiate formal Search and Rescue procedures.

These procedures start with checking your location and giving you a phone call. However if it becomes apparent that you may be in danger then escalation procedures kick in to ensure help gets to you quickly.

Note that when a vessel becomes overdue the SafeTrx team follow the protocols set out in the Australian Search and Rescue manual and management of the operation is immediately passed to the SAR authority responsible for search and rescue in the area in which you are operating.

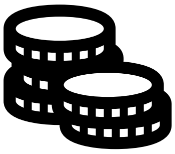
BoatWise (DTMR and MSQ): provides users with comprehensive coverage of marine and weather information for NSW and Tasmanian waterways. Coverage is extending to Queensland courtesy of funding through the Department of Transport and Main Roads (Maritime Safety Queensland).

The app allows users to view boat ramp locations and their facilities, restricted speed areas, marine reserves, paddle areas and other notable points of interest. Importantly, Boatwise provides users with access to real-time weather forecasts, tides, wind and swell information, ensuring users can make informed and safe decisions. A dedicated monitoring feature allows users to select a location of interest and receive notifications on weather conditions and warnings.
The following points of interest (POI's) are included within the app:

- Bar cams
- Jetty's
- Barways
- Marinas
- Paddle zones
- Anchorage areas
- Marine reserves
- No tow zones
- No wash zones
- Naval waters
- Speed limits

QLD Fishing (Department of Agriculture & Fisheries): this application provides access to Queensland's fishing rules "anytime and anywhere." The Queensland Recreational Fishing App provides up-to-date information on recreational fishing rules and regulations in Queensland, including size and possession limits, species identification, closed seasons, closed water and stocked impoundment maps, angler diary, and access to tide and weather information.

COST



~$8,000

There will be marginal administrative/signage costs associated with advertising the existence of the above applications at relevant boat ramps, Visitor Information Centres and with accommodation and tour providers.

BENEFIT

Safety: active use of the SAFE TRX (Coast Guard) application will contribute to safer recreational boating and fishing in the lower Gulf and Wellesley Island group.

Compliance: additional use of these applications should also encourage compliance with marine safety and fisheries regulations.

RECOMMENDATION

1) GSD partners with key stakeholders to promote the use of the SAFE TRX, Boatwise and Queensland Fishing applications, including through the installation of new signage at key boat ramps and distribution of informational material at Visitor Information Centres and with tour and accommodation providers.

3. SAFETY – MARINE AND BOATING APPS - IMPROVEMENTS

INTRODUCTION

As outlined in "2 – Safety – Marine and Boating Applications", GSD will partner with key stakeholders to promote greater uptake and use of marine safety and fisheries applications. However, it will be important to progressively address key functionality gaps in these applications.

SAFE TRX **BOATWISE** **QLD FISHING**

CONSULTATION

GSD held consultation sessions with Maritime Safety Queensland and the Department of Transport and Main Roads on the above applications with a focus on current and proposed functionality.

ISSUES

Functionality gaps include the following:

Reliance on internet connectivity: the Queensland Recreational Fishing application redirects to the Bureau of Meteorology for all information related to weather and tides. This functionality will not be available for recreational fishers/mariners in the Lower Gulf due to restricted internet connectivity.

Geographical coverage: the Boatwise application does not yet have sufficient coverage over Queensland waters to be useful to recreational fishers/mariners in the Gulf. In the absence of this coverage (e.g. weather information), this application is not currently suitable for the Lower Gulf.

Native Title: none of the applications currently identify areas of exclusive Native Title. This is an item of concern to Traditional Owners.

Geo-caching of boat ramps/launching points: while noting that this functionality costs money, the ability to geocache ramps and launching facilities so that "Notifications" about weather, equipment, fuel supplies, lodging of trip planning details are sent when users are near boat launching facilities.

COST

Native Title areas: this functionality would be relatively easy to incorporate and cost effective to introduce.

Geo-caching: this functionality will require a significant ongoing investment to pick-up all sites of relevance. Costs to be determined.

Functionality without internet connection: this functionality should not be difficult to enable, though will require more content to be stored on the App.

RECOMMENDATION

1) GSD partners with the NWQROC to lobby for improved functionality/capability of government-sponsored marine safety applications.

4. GOVERNANCE - NON-TIDAL WATERCOURSE LAND – RESERVES AND LOCAL LAWS

INTRODUCTION

Locals and tourists love Gulf rivers for providing unparalleled fishing opportunities and fantastic camping experiences. Regarding the latter, many riverbeds become popular free-camping destinations during the tourism season (those far enough away from saltwater crocodiles, in any event). These include the Gregory River (various locations, but predominantly near the township of Gregory), the Leichhardt River (at the Leichhardt River Crossing) and the Albert and the Nicholson Rivers to lesser degrees.

Source: campers flocking to the Gregory River near the township of Gregory.

ISSUE

Key concerns with current camping practices in river beds are environmental and economic:

Environmental

Unregulated camping *is* contributing to and has the potential to cause further damage to pristine rivers in the Gulf Savannah region. This is typically through a combination of camping extremely close to watercourses, not burying waste sufficiently far from a watercourse or sufficiently deep, not using available waste facilities and through the impact of run-off of grey/black water into watercourses.

Economic

Councils allocate resources toward the servicing and maintenance of these sites but receive no revenue from those who make use of these sites. In addition, anecdotal evidence suggests that local businesses receive little benefit from those utilising these sites. The extent to which this assertion is true is the subject of much current debate and analysis.

OPPORTUNITIES

There are two different approaches that may be taken to exercise greater control over river beds.

Recent Changes to the Land Act

The Land Act (QLD) 1994 was amended in July 2017 to enable Councils to apply to have non-tidal watercourse land dedicated as Reserve pursuant to s13AA, 13AC and 31C of the *Land Act (QLD) 1944*. Once dedicated as a Reserve, the local government authority (as trustee) would be in a position to manage the reserve (s52), make local laws for the reserve land (including levying fees-for-use pursuant to the local law power, s56), issue trustee leases (s57) or trustee permits (s60) over the reserve land and collect rent for these leases/permits (s63).

Key requirements:

- Address Native Title: this may be done through an Indigenous Land Use Agreement (ILUA) process (GSD has commissioned relevant clauses for inclusion in an ILUA. Available upon request).
- Receive consent of adjacent landowners: all adjacent landowners must be consulted and provide consent to the dedication of the non-tidal watercourse land as reserve.
- Preparation and adoption of relevant local laws and subordinate local laws (GSD has commissioned the drafting of LLs and SLLs. Available upon request).

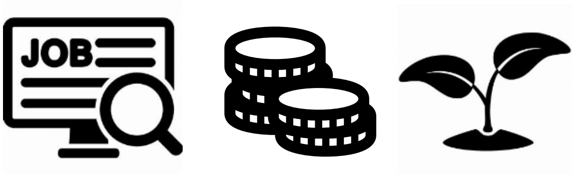
Local Laws & Subordinate Local Laws

Councils may also seek to implement a new local law or to amend an existing local law to capture camping in non-tidal water courses through application to the Minister for Natural Resources, Mines and the Environment. The application is required to enable Council to exercise regulatory control over an area <u>not</u> under Council control (e.g. as freehold, as lease, as reserve etc.).

Key requirements:

- Application to the Minister of the Department of Natural Resources, Mines and Energy.
- Preparation and adoption of relevant local laws and subordinate local laws (GSD has commissioned and received draft Local Laws and Subordinate Local Laws. These are available upon request).

BENEFITS



Location	Employment	Revenue	Environment
Gregory River	1-2	$68k - $137k per 6 months	↗
Leichhardt River	0.25	$15K-$20K per 6 months	↗

Location	Employment	Revenue	Environment
Nicholson River	0.25	$15K-$20K per 6 months	↗

RECOMMENDATION

1) Gulf Savannah Councils implement local laws and subordinate local laws providing the power to manage and maintain non-tidal watercourse land used for camping.
2) Burke Shire Council seeks to have part of the Gregory River (near the township of Gregory) dedicated as a Reserve for Recreational Purposes.

5. GOVERNANCE - COMMERCIAL USE OF LOCAL GOVERNMENT MARINE FACILITIES

INTRODUCTION

There are a number of marine facilities either owned or managed by local governments in the Gulf Savannah region that are used for both recreational and commercial purposes. Under current local laws and under current fees and charges, commercial and recreational uses are not differentiated.

Image: Burketown Wharf Pontoon at high tide. Local member for Traeger, Mr Rob Katter MP on deck.

ISSUES

While it is assumed that Councils will foster and incentivise economic activity by building the enabling infrastructure or off-setting the costs of establishment or operation of businesses, it is also fair that commercial operators contribute to the upkeep of the infrastructure upon which their businesses depend.

Asset Management – Whole of Life Costs

Councils, particularly Burke, Carpentaria and Mornington Island may seek to off-set long-term operational, maintenance and replacement costs of key marine infrastructure through the regulation of commercial use of marine facilities owned or operated by local governments.

Data

In order to better understand asset usage, local governments should implement data capture practices for both recreational and commercial usage of local government owned/operated marine facilities.

OPPORTUNITIES

Local governments should consider the following:

Amendment of Subordinate Local Law 4 (Local Government-controlled areas, facilities and roads)

Currently, local laws in the Gulf Savannah Region do not distinguish between recreational and commercial operations when it comes to the use of local government controlled marine facilities such as pontoons and boat/barge ramps.

This would require inclusion of a version of the following into "Schedule 2 Restricted Activities for Local Government Controlled Areas or Roads"

The following landings, ramps, pontoons and jetties: [INSERT NAME e.g. Burketown Wharf Pontoon; Burketown Wharf Boat/Barge Ramp; Gilbert Street Boat Ramp etc.	(1) Berth or more a vessel in excess of 10m to pontoon	- Permitted in an emergency situation only
	(2) Berth or moor a commercial vessel under 10m at or on a landing, jetty, pontoon or ramp	- Permitted if authorised under an approval or the conditions of an approval or a prescribed activity; or - Permitted with the written authorisation of the Chief Executive Officer.

Adoption of "Berthing Permit" Applications

To create certainty and to enable the Chief Executive Officer of a local government to "permit" the berthing or mooring of a commercial vessel under 10m at or on a landing, jetty, pontoon or ramp, Councils would also need to adopt a "Berthing Permit" application document (see Attached).

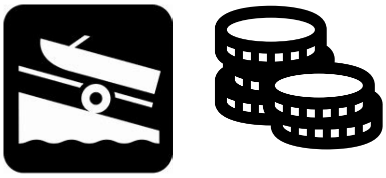
Introduction of Relevant Fees in Fees & Charges

Councils will also need to incorporate new line items into their schedules of rates and charges to validate any fees prescribed in the Berthing Permit application.

Fee and Charge Description	Cost recovery / service / commercial fee	Authorising Legislation or Local Law Provision	2018-19 Proposed Fee	GST
Berthing Permit Application Fee	Cost recovery	Subordinate Local Law 4, Schedule 2	$0.00-$50.00	Y

Fee and Charge Description	Cost recovery / service / commercial fee	Authorising Legislation or Local Law Provision	2018-19 Proposed Fee	GST
Annual berthing permit (fishing)	Commercial fee	Subordinate Local Law 4, Schedule 2	$0.00-$1,500	Y
Annual berth permit (tourism operations)	Commercial fee	Subordinate Local Law 4, Schedule 2	$0.00-$1,500	Y
Annual berth permit (freight operations)	Commercial fee	Subordinate Local Law 4, Schedule 2	$0.00-$5,000	Y

BENEFITS



While the revenue obtained from the introduction of fees for annual berthing permits at relevant marine facilities in Burketown, Karumba, Mornington Island and Normanton would not be substantive, additional revenue would have the potential to off-set some or all of the annual operation and maintenance costs associated with these facilities. This would ensure continue quality of use for recreational and commercial users alike.

COSTS

GSD anticipates management of the Local Law and Subordinate Local Law amendment process across the Gulf Savannah Councils will be in the order of $10,000.

RECOMMENDATION

1) Gulf Savannah Councils consider amending relevant Local Laws and Subordinate Local Laws to more effectively manage commercial use of marine facilities owned or managed by Councils.

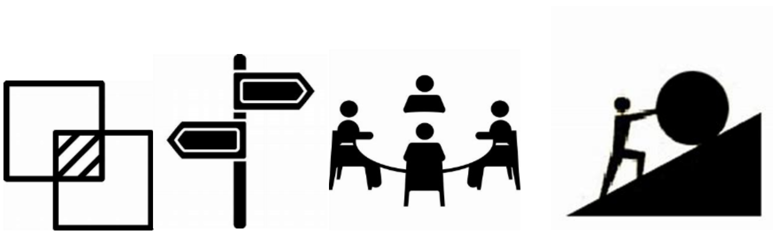
6. GOVERNANCE - MERGER OF GSD AND SAVANNAH WAY LIMITED

INTRODUCTION

In tourism terms, the Gulf Savannah Region is a geographic sub-region of the Tropical Tourism North Queensland tourism region and is represented by Savannah Way Limited, the local tourism organisation (LTO) for the region. Others include Port Douglas & the Daintree, Cape York & Cooktown, Tablelands Tourism and the Tropical Coast. Savannah Way Limited's geographical jurisdiction overlaps directly with Gulf Savannah Development's area of operations.[2]

Not surprisingly, the stakeholders and membership of both organisations are very similar, particularly as this relates to the local governments which function as the Platinum members of both organisations. In addition, the function of each organisation overlaps to a significant extent, with Savannah Way Limited's focus on tourism resonating closely with GSDs focus on economic development. At times, both organisations deliver value and at times, both organisations struggle for relevance.

ISSUES



Overlapping Operations: the focus of GSD and Savannah Way Limited inevitably overlap. Accordingly, there is a high risk of double-handling or of expending limited resources on similar items: policy submissions, development of strategy and plans, administration, travel etc.

Working at Cross Purposes: with imperfect information sharing, there is also an opportunity that the organisations might be working at cross purposes.

Management Effectiveness: the GSD Management Committee would be well served by additional expertise from the tourism/business industry. Savannah Way Limited would benefit from the influence of Mayoral representation at the board level.

Under-resourced: both organisations can make a valid claim to being under-resourced in relation to the deliverables expected of them by members and stakeholders.

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[2] However, GSD's administrative reach extends further by virtue of its administration of the Australian Small Business Advisory Service (ASBAS), which also incorporates the Tablelands and Mareeba local government areas.

OPPORTUNITIES

1) Organisational Merger

GSD and Savannah Way Limited to merge and form one entity.

Degree of Difficulty: 7/10

2) Management Committee & Board Representation

Savannah Way Limited Executive Officer to be a part of GSD Management Committee to ensure improved coordination of operations and more effective allocation of resources.

Degree of Difficulty: 2/10

COSTS

No anticipated increase in costs. Standard operational expenditure would be allocated toward modification of websites, alignment of systems and so forth.

GSD anticipates $5,000 in legal costs associated with advice/assistance in relation to development of MOUs or progression of an organisational merger.

BENEFITS

Improved stakeholder representation: an organisational merger has the potential to deliver more services and more effective services to existing stakeholders.

Leveraged funding: an organisational merger will provide an opportunity to pool financial resources to leverage larger sums of co-contribution funding toward key organisational deliverables: advocacy, tourism product development, small business advisory services, marketing etc.

Increased influence of organisation: an organisational merger would create a stronger regional voice for economic development and tourism initiatives at the regional, State and Commonwealth level.

Organisational capability: an organisational merger would combine existing skills, competencies and expertise, enhancing organisational capability to that extent and promoting greater organisational resiliency in the event of staff turnover.

RECOMMENDATION

1) Appoint Executive Officer of Savannah Way Limited to the Management Committee of Gulf Savannah Development.
2) Arrange key stakeholder consultation session to discuss the merger/union of Savannah Limited and Gulf Savannah Development Inc.
3) Initiate the merger of Savannah Way Limited and Gulf Savannah Development.

7. GOVERNANCE - PROJECT FRAMEWORK – INFRASTRUCTURE VS. TOURISM PRODUCT

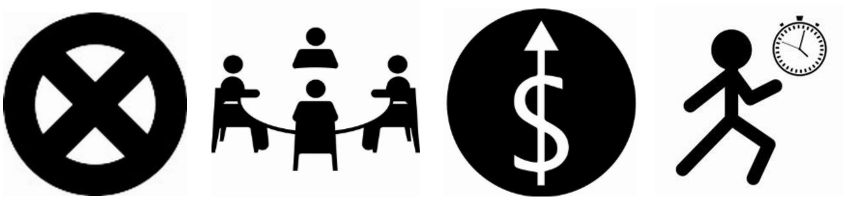
INTRODUCTION

Local governments play a crucial role in delivering key infrastructure projects. This includes project delivery within traditional spheres of operation – roads, water, sewer, waste – as well as in new and emerging areas of operation such as tourism.

While the fundamentals of good project management will apply regardless of the project, one key difference must be recognised during the project development stage to ensure that tourism infrastructure projects are delivered sensibly:

1) Water/sewer/transport infrastructure will deliver a monopoly service to a more-or-less known quantity of consumers.
2) Tourism infrastructure will exist to enable the sale of a tourism product, which will need to compete for attention and sales in a competitive marketplace.

ISSUE



A failure to approach these types of projects differently creates the following issues:

- Project does not deliver required outcomes;
- Inability to correctly identify all project stakeholders;
- Inability to correctly identify a project budget;
- Extended project delivery timeframes.

OPPORTUNITIES

Recent emphasis on improved project decision-making has led to the creation of funding buckets that allocate resources to better planning: options analyses, business cases etc. These include:

- Commonwealth: Building Better Regions Fund, Community Investment Stream;
- State: Maturing the Infrastructure Pipeline

COST

There is no additional cost associated with adopting this approach. However, it is the case that additional work at the Options Analysis and Business Case stage will increase the resource requirements at this stage of the project.

BENEFITS

- **Project Management**: through a clearer understanding of project objectives, Councils will ensure improved project development and improved project management.
- **Revenue**: by delivering product to market sooner, Council and/or business will be in a position to commence revenue generation earlier.

RECOMMENDATION

1) Incorporate separate category for “Tourism Projects” into Council’s project decision-making framework for major projects OR amend the QTC project decision-making framework to clearly delineate additional considerations for delivering Tourism Projects (concept approval, options analysis, business case, risk assessment tool).
2) Councils, Gulf Savannah Development and Savannah Way Limited keep and maintain a register of service providers in the Tourism Product development space.

8. DIGITAL - BKT TO NMT FIBRE OPTIC PROJECT

INTRODUCTION

With the recent completion of the Doomadgee to Burketown Fibre Optic Project and funding secured for the Normanton to Karumba Fibre Optic Project, there remains only one major fibre route to deliver in the Gulf: 220km fibre path between Burketown and Normanton. Gulf Savannah Development has partnered with Telstra, the State of Queensland, Burke Shire Council and the Carpentaria Shire Council to complete the Feasibility Study and Detailed Design for this project. GSD is now seeking to have this project incorporated into the State of Queensland's Digital Infrastructure Plan.

ISSUES

REDUNDANCY IN THE FIBRE NETWORK

At presence, fibre optic cable runs west from Cairns, picking up Georgetown, Croydon and Normanton. Similarly, there is a fibre optic cable that runs west from Townsville that picks up Charters Towers, Hughenden, Richmond, Julia Creek, Cloncurry, Mount Isa, Doomadgee and Burketown. While the Burketown to Normanton route remains incomplete, there is no redundancy in the fibre network.

PROJECT SCALE & BENEFITS

The scale of recent fibre projects ($2m-$4m) has enabled Councils to seek combinations of State (Building Our Regions) and Federal (Building Better Regions) funding to deliver these projects. This focus was also appropriate given the town-specific benefits these projects delivered (4G mobile, GWIP services for school, hospital, police, local government; broadband for business and residents; installation of public Wi-Fi). However, as the cost of delivering the BKT-NMT Fibre Project is high and the benefits widely distributed, other avenues of funding will be required to deliver this project.

KEY STAKEHOLDERS

Commonwealth and State Governments, 44 local government authorities, 6 x Regional Organisation of Councils, 8 x District Disaster Management Groups, ~780,000 Queenslanders.

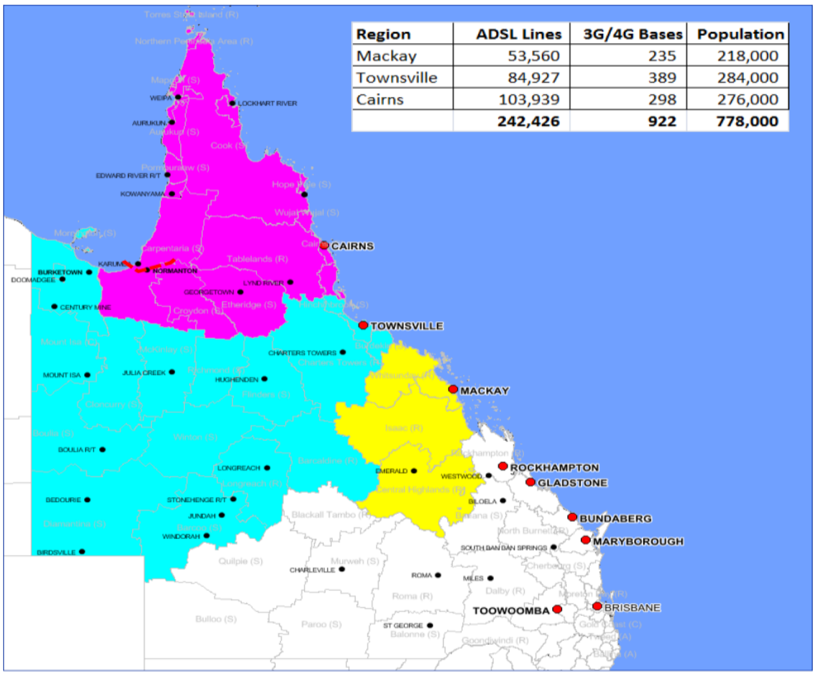
PROJECT DETAILS

Project details are as follows:

Name	Description	Cost	Jobs
BKT-NMT Fibre Optic Project	1) Installation of 109.5km fibre path between Burketown & Inverleigh West, install new regenerator at Inverleigh West; 2) Install 113.6km fibre path between Inverleigh West and Normanton. 3) Conversion of 2 x NG-SDH Chains into a NG-SDH Ring System to provide network resilience to the local area (no increase in capacity).	$15.19m	30-50 construction jobs
BKT-NMT Fibre Optic Project	4) Installation of next generation transmission technology along the above route (new 10G Ethernet Ciena C5142/6500 Packet Ring).	Telstra funded	Figure not provided

PROJECT BENEFITS

Elements 1-3 of this Project (fibre installation, new regenerator, conversion to Ring System) will deliver upwards of 30 and as many as 50 jobs during construction pending final determination of CH Monitoring requirements.



Region	ADSL Lines	3G/4G Bases	Population
Mackay	53,560	235	218,000
Townsville	84,927	389	284,000
Cairns	103,939	298	276,000
	242,426	**922**	**778,000**

Facts and Figures	
Cost	~$9.5m
Feasibility	$45K
Ongoing costs	$0.00
$resilience: $recovery	1:4
LG Areas	44
ROCs	6
DDMGs	8
RTOs	6
Chambers of Commerce	20+
3g/4g bases	922
ADSL	242,426
Downtime	<0.9 min
Availability	99.9998

The completion of Elements 1-3 of this Project will deliver 100% additional resilience to the digital network servicing towns from Mount Isa to Lund River including Doomadgee, Burketown, Normanton, Croydon and Georgetown. Additional resiliency benefits will also be delivered to Mornington Island and to Karumba. These benefits will be delivered to:

- 7 Local Government Authorities with a population of 5,400
- Area of 171,000km2
- 10 DSLAMS
- 9 3G/4G bases

Following the completion of Element 4, the project will deliver benefits more broadly:

- 44 Local Government Authorities
- Population of 778,000
- 6 Regional Organisations of Councils
- 922 3G/4G bases
- 242,426 ADSL ports

RECOMMENDATION

1) GSD advocates for the inclusion of the BKT-NMT Fibre Optic Project in the State of Queensland's Digital Infrastructure Plan.

9. DIGITAL – DATA SHARING AGREEMENT

INTRODUCTION

The ability to figure out what has happened, to determine current trends and patterns and to capably predict emerging trends and patterns is crucial to business and local government operations.

Digital platforms and practices enable this data to be accumulated and analysed very quickly, providing an opportunity for those accessing the data to make better informed decisions and to test the quality of decisions to a greater extent than previously.

ISSUE

While a great deal of data is generated in the region by a wide variety of stakeholders (Councils, businesses, Visitor Information Centres), there are very few formal mechanisms for coordinating the way this data is collected, the format it is collected in, the processes for consolidating and analysing this data and for determining what reporting should be generated and in what forums it should be shared.

Current practices in the data gathering/data analysis domain:

- Inhibit evidence-based and performance-based decision making;
- Generate difficulties when it comes to producing evidence to bolster funding applications;
- Inhibit regional benchmarking;
- Inhibit determination of bad/good/better/best practice.

KEY STAKEHOLDERS

Key stakeholders include:

Entity	Data
Local Government Authorities	Road traffic count data, water and wastewater operation data, Wi-Fi analytics, website analytics, event attendance, event donations and sponsorships.
Visitor Information Centres	Visitor numbers and demographics, number of tours sold etc.
Tour & Accommodation providers	Site/room occupancy, visitor demographics, tours sold, tour demographics, food and beverage sales.
Community Groups & Event Committees	Volunteer numbers, event numbers, event revenue (tickets, food and beverage, merchandise)

OPPORTUNITIES

Entry into a Data Sharing Agreement

Entry into a Data Sharing Agreement for the purpose of aggregating and analysing data has the potential to deliver numerous benefits to the region and to those stakeholders directly involved in generating and contribution data. This includes:



Improved stakeholder representation: meaninful data has the potenital to enable representative bodies (Council, GSD, Savannah Way Limited, ADBT, AgForce etc.) to make better decisions on behalf of members. It also has the ability to empower stakeholders to make better decisions for their businesses through identifying benchmarks, best practice, trends and patterns in consumer behaviour etc.

Attract and leverage more funding: meaningful data is key to lobbying activity and to submitting successful grant funding applications. Better data means better lobbying/applications means greater success in accessing funding co-contributions.

Increased influence of organisation: having access to more meaningful data will empower organisations to tell more accurate and more effective narratives about needs and opportunities and to make more effective demands on scarce resources than those who seek assistance without justification.

RISKS

Key concerns around any digital-related data initiative that a Data Sharing Agreement and associated Data Management practices must manage include:

- Privacy: what safeguards are placed around access and use of personal and/or commercial data?
- Security: what safeguards are placed around the storage, access and maintenance of data provided?
- Use and benefit/detriment: concerns around how data is subsequently used and who benefits/suffers as a result?

COSTS

$2,500 for a Data Sharing Agreement. Additional resourcing to complete stakeholder education and engagement sessions. The ongoing maintenance of this arrangement would be captured within existing organisational and business operations and through creation of a central coordinating hub (refer “8 – Digital – Digital Hub”).

PROJECT STATUS

GSD has commissioned and received a Data Sharing Agreement that will provide the legal framework upon which to ground stakeholder engagement/education sessions around the merits of key stakeholders signing up to this Agreement.

RECOMMENDATION

1) Gulf Savannah Development develops a Data Sharing Agreement; and
2) Gulf Savannah Development arranges stakeholder engagement sessions to outline the benefits of a regional data-sharing arrangement.

10. DIGITAL - DIGITAL ENABLEMENT STRATEGY & DIGITAL TASKFORCE

INTRODUCTION

The digital enablement of cities, towns and regions is a high priority for all tiers of government. The Smart Cities and Suburbs Fund (Cth), the National Stronger Regions Fund (Cth), the Mobile Blackspot Program (Cth/QLD), the Building Better Regions Fund (Cth) and the Building our Regions program (QLD) have all been used to build digital capabilities in metro and regional areas.

The Gulf Savannah Region has been successful in receiving funding under a number of these programs for core digital infrastructure and has commissioned a range of other studies and strategies to encourage further investment.

DIGITAL INFRASTRUCTURE PROJECTS:

Project	Status (completed, funded, detailed design, funding application)
Doomadgee to Burketown Fibre Optic Project: delivering fibre connectivity to Burke + 4G + Wi-Fi	Completed
Normanton to Karumba Fibre Optic Project: delivering fibre connectivity to Burke + 4G + Wi-Fi	Funded
Gregory 4G Mobile Black Spot Project: installation of 4G mobile phone base station	Completed
Boodjamulla National Park Mobile Black Spot Project: installation of small cell mobile	Completed
Burke & Wills (4 Ways) Mobile Black Spot Project: installation of 4GX mobile phone base station at Burke & Wills Roadhouse	Completed
Gulf Development Road Mobile Black Spot Project: 4GX between Croydon and Georgetown	Funded
Forsayth 4GX Mobile Black Spot Project: installation of 4GX mobile phone base station in Forsayth	Completed
Gulf Savannah Digital Transformation Strategy: strategy to improve digital capabilities of Gulf businesses, particularly those in the tourism sector	Completed

Project	Status (completed, funded, detailed design, funding application)
Small Business Digital Grants Program: develop a central marketing, bookings/transactions hub for the Gulf Savannah region (tours, events, accommodation).	Application submitted
Gulf Savannah Digital Enablement Strategy: investment and implementation strategy to make Gulf townships, key tourism sites and other identified areas “smarter.”	Application submitted

ISSUES

While great progress has been made in funding the delivery of core digital infrastructure, the next evolution of the Gulf’s digital enablement requires attention: maximising the value of digital upgrades and continued investment in smart technologies.

Without continue attention and emphasis on optimising and improving digital capabilities, the region will struggle to benefit from:

- Improved data acquisition capabilities
- More efficient delivery of local government services
- More effective delivery of local government services
- Improved safety of townships and communities
- Improved communication capabilities for tourism providers

KEY STAKEHOLDERS

Local government authorities, tourism and accommodation providers.

OPPORTUNITIES

In response to stakeholder submissions, GSD is now progressing the Gulf Savannah Digital Enablement Strategy. The Digital Enablement Strategy is designed to ensure that member Councils adopt a regionally focused and integrated approach to progressing their digital agendas. The first step is to complete a Digital Audit of participating towns and Councils to determine where each sits relative to the other. Following this, Councils and other stakeholders will work with ICT experts to determine an appropriate strategy for investing in digital infrastructure, tools and platforms with the aim of securing a range of economic and social benefits for the Gulf Savannah region.

Improved efficiency: optimised use of existing capabilities and uptake of new digital functionality will enable local governments and businesses to deliver similar and/or improved services with greater cost efficiency.

Customer satisfaction: improve customer levels of satisfaction with the delivery of local government services online. Improve tourist/visitor satisfaction with tourism service providers by improving access to digital communication networks at key tourism sites.

Increased employment: the Strategy will generate employment for 2-5 consultants over the period of the Strategy's development and submission.

Regional Collaboration: the Digital Enablement Strategy will increase collaboration between Councils and other key stakeholders in the region.

PROJECT OUTPUTS & COSTS

Project outputs and costs will be as follows.

DIGITAL ENABLEMENT STRATEGY

Costs are intended to be covered by GSD (25%) and by the Building Better Regions Fund (75%).

Item	Description	Cost
1. Capability audit	Identify existing digital capabilities and digital capability gaps.	$20,000
2. Digital Strategy	Strategy will look at opportunities and best practice implementation strategies for Councils – coordinated regionally – to deliver a range of services, including: ▪ Cloud computing and regional/rural constraints – costs, bandwidth, market benefits ▪ Client/server architecture and migration approaches – security/resilience and transition strategies. Case studies ▪ Cost management and opportunities for Councils as they engage with digital technologies ▪ Service enhancement for Council residents – smart parking, lighting, wifi, maintenance, IOT outcomes and so forth	$20,000
3. Costed Blueprint	This component will provide Councils with a potential procurement pathway for digital enablement, providing information on potential product ranges, product capabilities, operational costs associated with purchases and so forth.	$20,000
4. Action Plan & Recommendations	This component of the project will detail the lists of actions/recommendations to be taken by GSD, member	$20,000

Item	Description	Cost
	Councils and so on. This may include suggestions around budgetary planning, policy direction (regional integration), future funding applications, regional approaches to procurement and servicing of digital infrastructure and so forth.	
	TOTAL	$80,000

DIGITAL TASKFORCE

Item	Description	Cost
Establish and convene Digital Taskforce	GSD to coordinate Digital Taskforce to tally and coordinate digital solutions to digital issues/opportunities across the region.	$20,000

PROJECT STATUS

The Gulf Savannah Digital Enablement Strategy was submitted to Round 2 of the Building Better Regions Fund (Community Investment Stream). GSD has a preferred supplier arranged to deliver the project if successful in attracting funding under this Australian Government programme.

RECOMMENDATION

1) GSD applies and secures funding for the development and implementation of the Gulf Savannah Digital Enablement Strategy.
2) GSD, Savannah Way Limited, member Councils, Telstra and other partners form a Digital Problem-Solving taskforce to fast-track solutions to digital/communication issues identified in the Gulf Savannah Digital Enablement Strategy.

11. DIGITAL - DIGITAL HUB

INTRODUCTION

The Gulf Savannah region is not overly well represented when it comes to marketing within its tourism region (Tropical Tourism North Queensland). The Gulf Savannah region is also lacking a Marketing & Promotion Strategy. In addition, there is a significant gap between the digital capabilities of businesses and the digital expectations of today's consumers of tourism products, services and experiences as indicated in a GSD Digital Capability Audit conducted in 2017 (see findings below).

GSD Digital Capability Audit - findings	
▪ 75% of websites not updated for 2+ years; ▪ 70% do not cater for online bookings; ▪ 60% of websites not mobile ready; ▪ 50% plus do not have any analytics in place – this is your measure of how to adjust to success ▪ Many business websites not featured in top 5 Google search returns ▪ Some business websites not featured on first page of Google search returns;	▪ Questions marks over security of all websites; ▪ No evidence of (functioning) Blogs; ▪ Little to no search engine optimisation (SEO); ▪ Little evidence of User Generated Content; ▪ No evidence of inbound digital marketing campaigns.

ISSUES

The gap between the region's digital capabilities and the expectations of consumers needs to be bridged. Research indicates, for example, that online bookings systems lead to more bookings[3] and that an increasing number of bookings are taking place on mobile devices.[4] Given the paucity of online booking/transaction capability across the region and the low percentage of mobile-friendly webpages, it follows that improved digital capabilities will increase bookings, visitor numbers and revenue derived from the visitor economy.

KEY STAKEHOLDERS

Local government authorities, Savannah Way Limited, Tropical Tourism North Queensland, Visitor Information Centres, tourism and accommodation providers.

OPPORTUNITIES

Opportunities include:

Increased revenue: the ability to book and transact online will likely increase the percentage conversion of online searches to online purchases, whether in relation to tours, events or accommodation.

[3] Tour and activity providers tend to get 30-40% more bookings after implementing an online booking system (TrekkSoft, 2016).

[4] Mobile bookings in travel have grown by 1700% between 2011 and 2015, moving from 1% to 18% of online revenues (Frederic Gonzalo, 2016).

Regional Collaboration/Clustering: a Digital Hub capable of promoting tours/events/accommodation across the region will help to create tourism clusters within the region.

Improved data: the Digital Hub will generate considerable data and important metrics on patterns of consumer behaviour, empowering decision makers to test concepts and make better decisions.

PROJECT STATUS

GSD has progressed an application to develop and implement the Gulf Savannah Digital Hub.

Project	Description	Cost
Gulf Savannah Digital Hub	Small Business Digital Grants Program: develop a central marketing, bookings/transactions hub for the Gulf Savannah region (tours, events, accommodation).	$18,000 (@ 50%)

RECOMMENDATION

1) GSD applies and secures funding for the development and implementation of a Gulf Savannah Digital Hub.

12. ED – THERMAL SPRINGS DEVELOPMENTS

INTRODUCTION

'Destination-delivered experiences' are the order of the day in the tourism and events space. In a recent GSD report, establishing mineral baths/hot springs facilities attracted the second highest level of endorsements following the introduction of more farm-stay/cattle station experiences.[5]

ISSUE

In order to create more a more sustainable and more profitable tourism sector in the Gulf Savannah region, it is important to do a number of things:

Encourage first time and return visitations

In order to generate new interest and return visitations, the region must be able to offer new and/or improved tourism products. This requires the development of quality new product (delivering quality experiences) and the effective marketing of this product. The effectiveness will be influenced by the region's ability to develop unique experiences or to cluster a range of experiences capable of mobilising visitors to travel to the region.

Increase overnight expenditure

It is unsurprising that overnight visitors contribute more to a local tourism economy than those who visit during the day before moving on to another location to eat and sleep. For this reason, it is important that the development of new tourism product looks at opportunities to increase the number of overnight visitors and the quantum of overnight visitor expenditure. This can be done either by increasing the occupancy rates of existing accommodation or through incorporating additional accommodation into the development of the tourism product.

OPPORTUNITIES

There is an opportunity for the region to build additional hot spring/thermal bath/mineral bath facilities at Burketown and to augment existing facilities at Tallaroo (in Etheridge Shire).

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[5] GSD, '2018 Gulf Savannah Tourism Report'.

Burketown Mineral Baths

Following GSD engagement with Burke Shire Council, the scope of this project has changed from a bare-bones set of three mineral baths to be recharged by Burketown's artesian bore to a larger development that will feature ecotourism accommodation, car-park renewal to take advantage of additional coach tours, additional information signage and so on. Options Analysis available upon request.

Tallaroo Hot Springs

The Tallaroo Hot Springs redevelopment project is being progressed by Plan C on behalf of the Ewamian People. Details of this project have not been captured in this report.

PROJECT STATUS

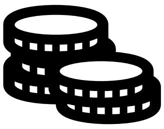
- Burke Shire Council has submitted a funding application under the Maturing the Infrastructure Pipeline fund to progress this project to the Detailed Design stage. GSD assisted with this application.

COSTS

Preliminary

- Site Audit (including soil, vegetation, water quality): $5,000
- Concept Plan/Detailed Design: $60,000
- Construction costs are likely to be highly variable depending on the scope of the facility (ablutions, changerooms, accommodation, car-park standard etc.): $100,000 - $2,000,000

BENEFITS



Facility	Employment	Revenue	Other
Burketown Mineral Baths: construction	6-12	Cost item	
Burketown Mineral Baths: post-construction	2	$112,500- $168,750 per annum	10 x new ecotourism accommodation units

RECOMMENDATION

1) GSD assists Burke Shire Council in securing co-investment for the Burketown Mineral Baths project.

13. ED – DEVELOPMENT OF MUTTONHOLE WETLANDS

INTRODUCTION

Mutton Hole Wetlands holds Regional Park status and is part of the largest continuous estuarine wetland aggregation of its type in northern Queensland. It offers significant wildlife observation opportunities, featuring diverse and complex habitats from fresh to hypersaline while also being a crocodile breeding habitat. This varied and complicated system of estuarine and freshwater wetlands supports an outstanding number of waterbirds. It is a significant breeding, feeding, resting, and moulting waterbird site while also being an important dry season refuge for waterbirds and water fowl.[6]

As with the development of other National Parks and World Heritage sites in the region, the development of the Muttonhole Wetlands presents an opportunity to deliver an exciting eco-tourism product to the region with a particular focus on avitourism products.

ISSUES

Understandably, any development in an environmentally and culturally significant location will need to satisfy a variety of stakeholder groups and regulatory thresholds. In this sense, the development must be able to function effectively as a Cultural Site, a Conservation Site and an Ecotourism site.

Provided that key stakeholder groups – Traditional Owners, National Parks and Wildlife Services, Carpentaria Shire Council, Carpentaria Land Council Aboriginal Corporation – are engaged in the process, all obstacles will be surmountable.

[6] Carpentaria Shire Council is the trustee of the Park and holds a number of responsibilities as outlined in the *Nature Conservation Act 1992*. Any development will also be subject to the *Cultural Heritage Act 1993* and the *Environment Protection and Biodiversity Conservation Act 1999*.

It will also be necessary to engage specialists in avitourism to assist in the development of the products and experiences associated with the Muttonhole Wetlands.

OPPORTUNITIES

The development of the Muttonhole Wetlands offers the Gulf another exciting opportunity to deliver a range of new tourism products and experiences (avitourism, accommodation, tours, conservation, educational, cultural) to the region.

Notwithstanding the remoteness of the wetland, the site is an important habitat for a range of internationally significant species. Coupled with the variety of birdlife on offer, there is an opportunity to develop and deliver a range of tourism experiences and products for avitourists.

Ecotourism:

- The Muttonhole wetlands present an opportunity to deliver new ecotourism-style accommodation that can be removed during the wet season.

Birdwatching:

- Given the variety of species of bird life in the wetlands, the Muttonhole wetlands has the capacity to develop a range of specialty products for avitourists.

Camp site accommodation:

- There is an opportunity to develop a range of unpowered caravan and camp sites with the Muttonhole Wetlands, adding to the overall stock of camp sites in the region, generating additional employment in the process.

PROJECT STATUS

The Business Case for this project is under development (funded). At this stage, there is no estimate for the opening of tourism services in the Muttonhole Wetlands.

BENEFITS

The development of tourism products/experiences related to the Muttonhole Wetlands has the potential to deliver a range of sustainable benefits to tourism in the region.

	2-10 jobs in relation to camp site management, bird watching tours, upkeep of tourism areas within the Wetlands and so on.
	Insights into revenue generation forthcoming.

PROJECT NEXT STEPS

- Completion of Business Case for the development of the Muttonhole Wetlands.

RECOMMENDATION

1) GSD assists Carpentaria Shire Council in securing co-investment for the development of tourism products and experiences related to the Muttonhole Wetlands.

14. ED – RIVERSLEIGH FOSSIL FIELDS

INTRODUCTION

The Australian Fossil Mammal Sites at Riversleigh and Naracoorte were inscribed in the World Heritage List in 1994 for their outstanding representation of the evolution of Australian mammals and the quality of their fossils, which are preserved in limestone. The Riversleigh section, which covers 10,000 hectares, is located in the southern section of Boodjamulla National Park in north-west Queensland. The Riversleigh fossil deposits are among the richest and most extensive in the world. The site provides exceptional examples of mammalian assemblages in a continent whose mammal evolutionary history has been the most isolated and most distinctive in the world. It includes the first records of many groups of living mammals, such as marsupial moles and feather-tailed possums, as well as other unique and extinct species such as the 'marsupial lion'.

The Riversleigh site is one of five World Heritage Sites in Queensland. Others include (anti-clockwise from left) the Great Barrier Reef, the Wet Tropics, Fraser Island and the Gondwana Rainforests. Of the five, only the Riversleigh Fossil Fields has no active Tourism Plan. Of the five, Riversleigh delivers the fewest options for tourist operators to deliver experiences to the tens of thousands of visitors to the region each year.

Stakeholders routinely identified the development of the Riversleigh Fossil Fields and associated infrastructure as the region’s best opportunity to drive growth in tourism-related jobs and revenue.

ISSUES

No Planning, No progress

The major issue relates to a perceived lack of will and resourcing to progress tourism opportunities associated with this World Heritage site.

The Riversleigh Management Strategy identifies Management Outcome 7 as “Meeting World Heritage Obligations through Tourism and Research Planning.”

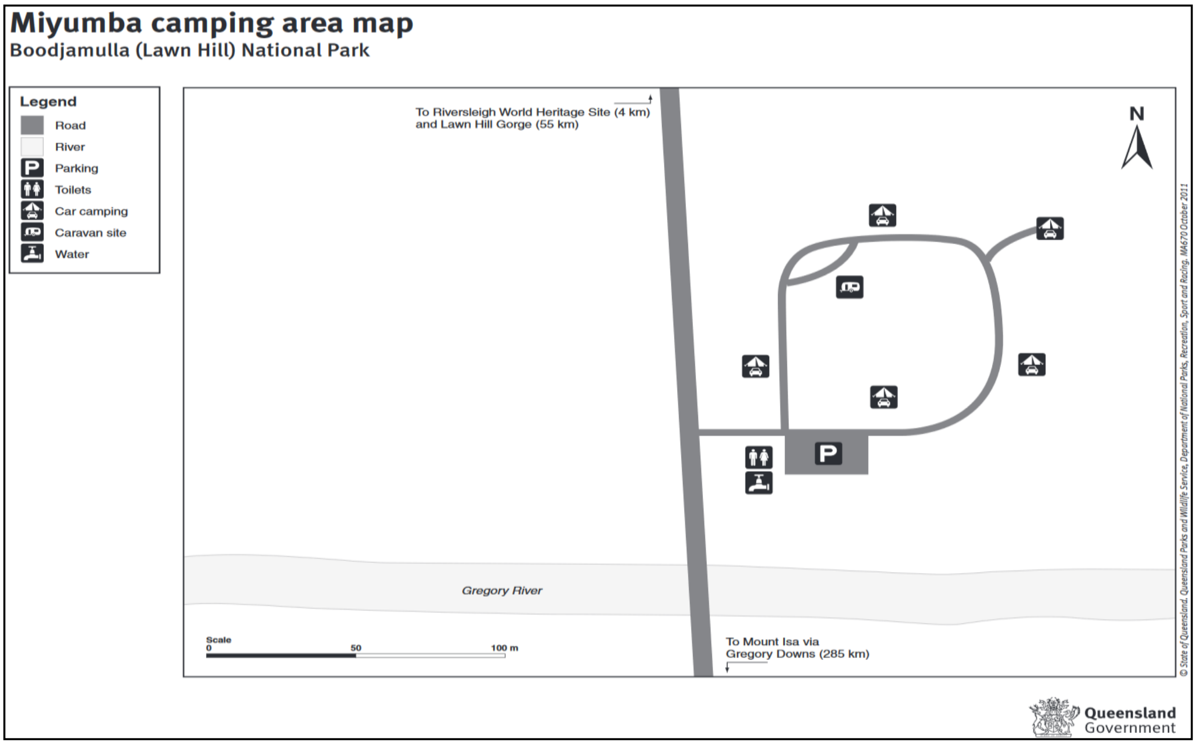
The Management Strategy also identifies that tourism will be conducted in accordance with a Tourism/Visitor Strategy. This Strategy is supposed to capture the following:

- **Develop tourism /visitor strategies and objectives** to take into account the overall goals of management of the World Heritage property and other relevant obligations.
- Work with other relevant agencies to **develop and implement a coordinated regional tourism/visitor strategy** without compromising World Heritage management objectives.
- Develop and implement a Tourism/Visitor Strategy which will, among other things:
  - Establish ongoing programs to record and monitor levels of visitor use, satisfaction, compliance and impact on the area;
  - Provide for medium and long-term planning for **visitor activities and infrastructure**;
  - Provide for medium and long-term planning for **commercial tourism operations**; and
  - Set up links with local communities, tourism operators and government agencies to **foster community involvement and support.**

In spite of the above, there has been little movement in progressing a Tourism/Visitor Strategy for the site.

Status of Existing Planning and Documentation

Boodjamulla National Park and Adels Grove provide a range of camping and other accommodation types ~50km from the Riversleigh Site. The Miyumba camp site is approximately 4km from the Riversleigh Site. The sum total of information for this feeder site to a World Heritage listed area is shown below:



Source: https://www.npsr.qld.gov.au/parks/boodjamulla-riversleigh/pdf/miyumba-map.pdf

KEY STAKEHOLDERS

Key stakeholders include: Australian Government, State Government Departments, Mount Isa City Council, Burke Shire Council, Waanyi Traditional Owners, Savannah Way Limited, Tropical Tourism North Queensland, Tourism & Events Queensland, Adels Grove, Riversleigh Community and Scientific Advisory Committee, tour operators.

OPPORTUNITIES

Master-planning & Eco-Tourism

The opportunity exists for the State of Queensland to initiate a Tourism/Visitor Master Plan for the Riversleigh World Heritage Site that progresses the outcomes elaborated in the Riversleigh Management Strategy.

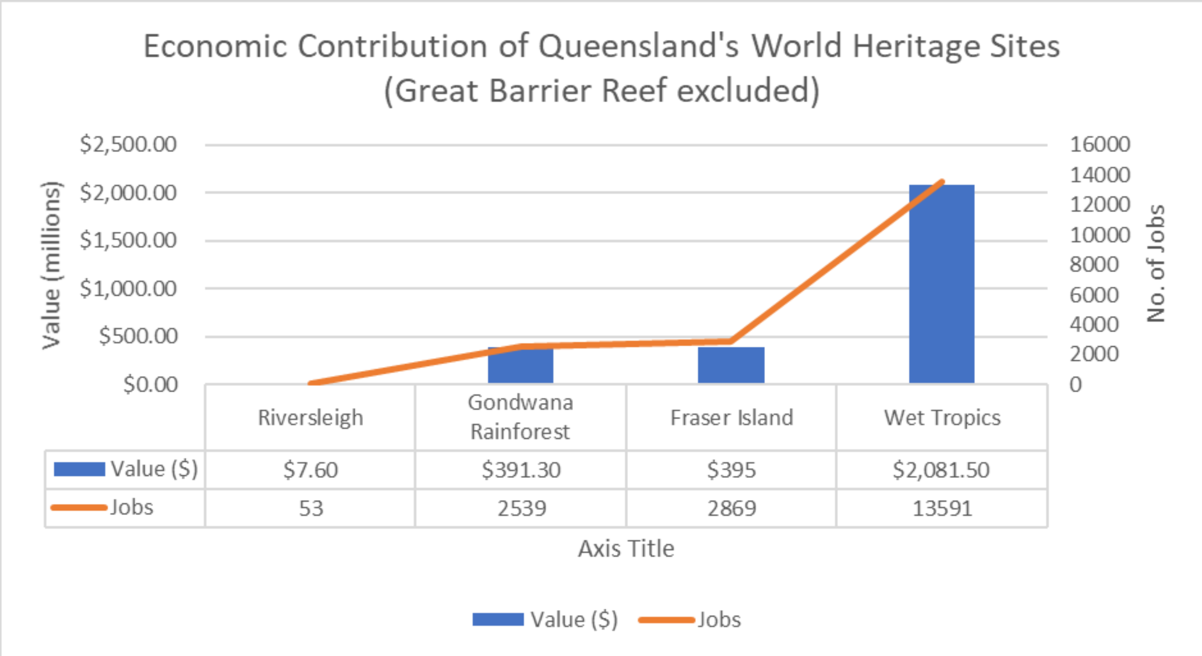
This focus would align well with the State's focus on the development of eco-tourism initiatives as part of the Queensland Ecotourism Plan 2016-2020.

Legislation and Regulation

As TEQ Chair Brett Godfrey has indicated, Queensland has a fantastic opportunity to allow (where suitable and appropriate) commercial operations in National Parks and World Heritage Sites. Doing so in Tasmania and New Zealand has had a significant impact on the economic contribution of tourism to their respective economies. Doing so in Queensland would deliver similar benefits.

BENEFITS

Queensland's World Heritage Sites deliver significant economic dividends to their regions, with the exception of the Riversleigh site. Figures in the below table, with the exception of the GBR, are taken from a 2008 report, which compares the economic value of all World Heritage listed sites in Australia.[7]



While the remote location of Riversleigh may preclude the site from ever delivering the same degree of economic contribution to the Queensland economy as the other Queensland Heritage sites, the above figures suggest there is nothing but upside in relation to the development of tourism products and experiences centred on Riversleigh Fossil Fields.

RECOMMENDATION

2) Gulf Savannah Development advocates for progression of Management Outcome 7 of the Riversleigh Management Strategy: the delivery of a Tourism/Visitor Strategy for the Riversleigh Fossil Field World Heritage Site.

[7] 'Report to the Department of the Environment, Water, Heritage and the Arts – Economic Activity of Australia's World Heritage Areas: final report', Gillespie Economics, July 2008.

15. ED – REGIONAL BRANDING & MARKETING INITIATIVE

INTRODUCTION

Beef, seafood and tourism are important contributors to the Gulf Savannah economy, accounting for 20% of total employment across the region. This figure incorporates locations with little to no agricultural (Mornington Island), seafood (Doomadgee, Croydon, Etheridge) or tourism (Doomadgee, Mornington Island) sectors. While this is the case, there is very little in the way of regional branding for the various products coming out of the Gulf.

Gulf Savannah Region, 2016, Employment by Industry

Industry	Gulf Savannah Region		Queensland		Specialisation ratio
	number	%	number	%	number
Agriculture, forestry and fishing	391	19.3	60,608	2.8	6.80
Mining	8	0.4	49,997	2.3	0.17
Manufacturing	9	0.4	128,787	6.0	0.07
Electricity, gas, water and waste services	17	0.8	23,883	1.1	0.75
Construction	108	5.3	191,338	9.0	0.60
Wholesale trade	14	0.7	56,370	2.6	0.26
Retail trade	125	6.2	211,778	9.9	0.62
Accommodation and food services	125	6.2	156,670	7.3	0.84
Transport, postal and warehousing	68	3.4	108,083	5.1	0.66
Information media and telecommunications	3	0.1	25,265	1.2	0.13
Financial and insurance services	3	0.1	54,286	2.5	0.06
Rental, hiring and real estate services	4	0.2	42,500	2.0	0.10
Professional, scientific and technical services	29	1.4	133,652	6.3	0.23
Administrative and support services	84	4.1	75,336	3.5	1.18
Public administration and safety	388	19.2	140,164	6.6	2.92
Education and training	248	12.2	192,143	9.0	1.36
Health care and social assistance	188	9.3	276,945	13.0	0.72
Arts and recreation services	11	0.5	33,667	1.6	0.34
Other services	109	5.4	83,470	3.9	1.38
Total[(a)]	**2,026**	**100.0**	**2,136,455**	**100.0**	**1.00**

Refer to explanatory notes for additional information.

(a) Includes inadequately described and not stated responses.

Source: ABS, *Census of Population and Housing, 2016, General Community Profile - G51* and unpublished data

ISSUES

In a competitive climate of regional branding of food produce and tourism, a failure to explore and exploit branding opportunities in the Gulf Savannah region is likely to lead to a number of outcomes. These include:

- Regional product loses relevance in a competitive market, particularly as this relates to tourism. Prospective tourists go elsewhere.
- Regional product (agriculture, seafood) less likely to attract a premium based on quality/demand. Product sold on the basis of price to suppliers.

KEY STAKEHOLDERS

Key stakeholders include tourism providers, the beef-cattle industry, the seafood industry and representative bodies in these domains.

OPPORTUNITIES

In response to stakeholder submissions, GSD is now progressing the Gulf Savannah Regional Branding Strategy. This Strategy recognises two things. The first is the absence of any regional, product, or sectoral branding in the Gulf Savannah region. The second is the opportunity to utilise the Gulf's unique characteristics and pristine environment to develop a compelling brand capable of driving a range of positive economic and social outcomes in the Gulf Savannah region. Research shows that this is achievable, and it is the aim of this project to leverage GSD and BBRF funding to develop a branding strategy capable of realising these benefits.

Branding & Marketing: the brand will need to be understood across a range of key markets. For this, a multi-channel communications strategy will be required to drive this initiative. This will involve partnering and utilising the marketing/distribution networks of local and regional tourism organisations and representative bodies in the agricultural and seafood sectors.

Value Adding/Revenue: the brand, as with all branding, will identify key points of differentiation for the Gulf Savannah region and market those differences. Whether this relates to the ability to taste the highest quality seafood and agricultural products from pristine environments or the ability to access unique tourism experiences delivered by Indigenous tourism operators,

Employment: a stronger regional brand is designed to create more sustainable and more profitable operations in the tourism, agriculture and seafood industries by sustaining and driving additional demand for regional products. If successful, this demand will sustain existing employment levels and create opportunities for employment growth associated with regional products: seafood, agriculture, tourism, supply chain logistics etc.

Regional Collaboration: the Gulf Savannah branding process will increase collaboration between Councils and other key stakeholders in the region.

PROJECT OUTPUTS & COSTS

Project outputs and costs will be as follows. Costs are intended to be covered by GSD (25%) and by the Building Better Regions Fund (75%).

Item	Description	Cost
5. Preliminaries	a. Survey of existing brands/collaborations; b. Regional branding literature review: models/approaches/costs	$20,000
6. Regional Audit	a. Mapping of regional stakeholders and existing/potential product for incorporation into the regional branding strategy; b. Mapping existing supply chains and collaborations	$20,000
7. Marketing & Commercial	a. Determination of branding value proposition for the region's produce; b. Brand concepts developed and finalised	$20,000

8. Legal and financial	a. Develop a corporate/membership structure for the Gulf Savannah brand; b. Develop financial plan for Gulf Savannah brand.	$20,000
9. Strategic Plan	a. Developed strategy for development, promotion and roll-out of the regional brand, including multi-channel marketing strategy.	$20,000
	TOTAL	$100,000

PROJECT STATUS

The Gulf Savannah Branding Strategy was submitted to Round 2 of the Building Better Regions Fund. GSD has a preferred supplier arranged to deliver the project if successful in attracting funding under this Australian Government programme.

RECOMMENDATION

1) GSD applies and secures funding for the development and implementation of the Gulf Savannah Regional Branding Strategy.
2) GSD to assist in the delivery of brand-based events in the Gulf Savannah region or to incorporate brand-based components into existing events.

16. ED – EVENTS

INTRODUCTION

The Gulf Savannah region hosts a wide-range of events throughout the year, with the majority taking place between Easter and late September/early October. As well as being a lot of fun, events are a key component of the region's social fabric and the local and regional tourism economy. While there are plenty of events to choose from in the Gulf, TTNQ's Destination Tourism Plan identifies the objective of developing additional events "to fill troughs and extend shoulder seasons" as a key objective for driving increased revenue from events-based tourism. TEQ has also identified the development of Destination Events as a key priority for attracting more tourists to Queensland.

Research and stakeholder interviews conducted by GSD and RFF generated plenty of commentary in relation to the region's events. Some of the more important feedback included:

- The lack of a regional and coordinated Events Strategy;
- A lack of data in relation to the return on investment when hosting/sponsoring events;
- Previous efforts (Morning Glory Festival) and current efforts (Gulf Country Frontiers Day Festival) to establish Destination Events for the region;

ISSUES

TIMING OF EVENTS

Weather: the cancellation of Easter-based events for weather-related reasons (e.g. lack of road connectivity) has occurred on a number of occasions in recent years. The Burketown Barramundi Fishing Competition, for example, was cancelled in 2016 and 2018, depriving the town of the fun and the revenue associated with this event. Uncertainty as to whether an event is going to take place is also likely to have an impact on decision-making to attend the event.

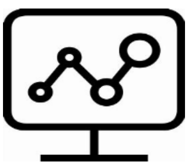
Coordination: there is no coordinated events timetable or strategy for the region. This lack of coordination may contribute to less effective marketing of the region and potential loss of revenue where events are inadvertently held on the same day (notwithstanding the inevitability that events will be held on public holidays and during school holidays).

RESOURCING LARGE-SCALE EVENTS (DESTINATION EVENTS)

<u>Time</u>, <u>money</u> and appropriate <u>skills</u> are required to host Destination Events. Councils in the region are not sufficiently resourced across these three areas to reliably host such events over an extended period and are better suited to a facilitation/sponsorship role.

ACCOMMODATION

In the Gulf, the tourism season coincides with Councils' busiest time of year for delivering civil works contracts. The scale of these projects often requires external sourced labour, generating competition for accommodation in some (but not all) towns.



DATA

While Councils retain good records on grants/donations/sponsorships provided to events (and the clubs/associations that host them), there is very little data available on the

OPPORTUNITIES

DESTINATION EVENT (MORNING GLORY FESTIVAL, GULF COUNTRY FRONTIER DAYS FESTIVAL)

In 2014, Burketown hosted the inaugural Morning Glory Festival with support from Festivals Australia and Tourism and Events Queensland. This was the region's first attempt at delivering a Destination Event (as defined by TEQ). The event was successful, but the continued resourcing of the event at the Destination Event scale was not deemed viable. The MGF continues to be held, though on a biennial basis and at a reduced scale.

The Gulf Country Frontier Days Festival

In 2017, Burketown hosted the inaugural Gulf Country Frontier Days Festival, an event promoted, organised and delivered by Goodidja Productions. The second annual event will take place in Gregory in August in 2018.

This event has the capacity to reach Destination Event status and to benefit from the additional marketing and advertising that comes from this status. GSD recommends continued regional support for this event.

SHOULDER SEASON EVENTS

GSD and Savannah Way to seek funding to host or enable others to host shoulder-season or post-shoulder season events in the region. In late 2017, Burketown hosted the Savannah Guides School, which ensured restaurants and accommodation providers enjoyed a late revenue spike. The BeefUp event in Karumba on 13-14 October 2018 provided a similar spike to accommodation providers in Karumba. Scheduling of these types of events must continue.

REGIONAL EVENTS SUPPLY BUSINESS

All Shires (and groups/clubs/associations within Shires) fund the purchase or hire of events-related equipment year on year. An Options Analysis, including regional stocktake of event supplies, is required to determine the feasibility of a regional Events Hire business.

COSTS

REGIONAL EVENTS STRATEGY

$25,000: development and implementation of strategy incorporating investment, data collation and analysis, annual reporting, performance measurement, strategy recalibration etc.

DATA SHARING AGREEMENT (COMPLETED)

$3,500: to coordinate the collation and analysis of events-related data.

EVENTS HIRE BUSINESS

$15,000: Options Analysis and Business Case for the development of an Events Hire business for regional events.

DESTINATION EVENT AND EVENT SPONSORSHIP

To be determined and informed by Regional Events Strategy.

RECOMMENDATION

1) GSD, partnering with Savannah Way, assists in the development and delivery of a Regional Events Strategy;
2) GSD, through the mechanism of a Data Sharing Agreement, facilitates the development of Return on Investment Data for all events in the Gulf Savannah region;

3) GSD seeks opportunities to assist in the marketing and promotion of Destination Events in the Gulf Savannah region.

4) GSD and Savannah Way complete an Options Analysis and Business Case to determine the feasibility of establishing an Events Hire business in the Gulf.

17. ED – INDIGENOUS LAND USE AGREEMENTS

INTRODUCTION

The Burketown Indigenous Land Use Agreement (Burketown ILUA) has proven to be an effective mechanism for addressing a number of long-standing local government issues (regularisation of tenure over core infrastructure: water, sewer, waste, marine infrastructure) and for enabling a swathe of new economic development opportunities. With regard to the latter, ILUA negotiations have led to:

…the following land tenure outcomes

- The creation of an additional 23 camp/trailer/caravan sites in/around Burketown;
- 140ha of light industrial land;
- 170ha of rural residential lots;
- Expansion of Burketown Wharf area.
- Regularisation of tenure over water, waste, sewer infrastructure.

…the following post-ILUA benefits

- Partnering with Economic Development Queensland to facilitate post-ILUA developments (light industrial, rural residential etc.).
- Licence Agreement for Yagurli Tours to operate the Burketown Visitor Information Centre.
- Development of Yagurli Tours, an Indigenous business offering a wide-range of new tours and experiences in Burketown.

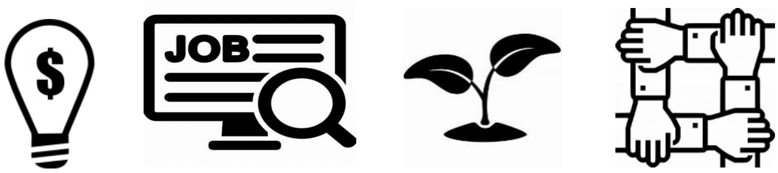
ISSUES

Negotiating Indigenous Land Use Agreements require the ongoing commitment of multiple parties to negotiate in good faith and to arrive at mutually beneficial outcomes. To learn more about negotiating ILUAs, the State of Queensland's Guidelines for Negotiation ILUAs provides a comprehensive introduction.[8]

KEY STAKEHOLDERS

The Department of Natural Resources, Mines and Energy (DNRME), Department of Aboriginal &Torres Strait Islander Partnerships (DATSIP), member Councils, the Carpentaria Land Council Aboriginal Corporation, Registered Native Title Aboriginal Corporations throughout the Gulf Savannah region.

OPPORTUNITIES



[8] See https://www.dnrm.qld.gov.au/__data/assets/pdf_file/0008/109277/negotiating-ilua-guidelines.pdf <accessed 20.02.2018?

Key opportunities have been identified to negotiate ILUAs in the Wellesley Island Group to facilitate the development of tourism/recreational fishing operations and in the township of Gregory, to facilitate a range of economic development initiatives in this remote locale. Only the latter is discussed here:

GREGORY ECONOMIC DEVELOPMENT ILUA

New economic opportunities:

- 3 x new businesses: fuel dispensary/roadhouse, cultural centre.
- 2 x new facilities: roadhouse, cultural centre

New employment opportunities:

- 10 FTE construction jobs for new facilities;
- 2-5 FTE (tourist season) post-construction jobs in roadhouse, cultural centre, road house.

Improved environmental outcomes:

- Permanent home for the Bidunggu Land & Sea Rangers

Collaboration:

- The successful ILUA negotiations likely to lead to further collaboration between Council and Waanyi Traditional Owners.

COSTS

Costs associated with ILUAs include: legal, GIS (geographic information system) mapping, community consultation, survey and compensation costs. Costs will be determined by the complexity of the ILUA.

RECOMMENDATION

1) GSD supports Burke Shire Council's application for a reduction in acquisition costs associated with the Gregory Economic Development ILUA.
2) GSD facilitates and supports, wherever possible and appropriate, ILUAs that support economic development in the Gulf Savannah region.

18. ED – LOW IMPACT RV SITES

INTRODUCTION

As identified in the Caravan Industry Association of Australia's 2017 report *State of Industry: Caravan and Camping*, 'the majority (57%) of towable units manufactured in 2016 were over 6 metres in length, with 11,605 units constructed last year. This represents a 5% increase on the previous year's results and signifies the continued consumer demand for longer towable recreational vehicles to accommodate the increased need for living space and for onboard whitegoods and equipment."

This finding aligns with contributions from stakeholder interviews, where a number of providers of sites for caravans noted the following:

- Increased size of vehicles;
- Reduced demand for powered sites based on increased use of solar PVs;

ISSUE

This shift toward the production of increasingly self-sufficient vehicles coupled with the demand for these vehicles has led to the following developments:

Reluctance to pay for facilities

Coinciding with the increased size and self-sufficiency of caravans (on board toilets, fridge, washing machine, power generation capability) has been the posing of the following question: "why should we have to pay for facilities that we don't need or use?"

Balance of powered to unpowered Sites

The current balance of powered to unpowered sites in the Gulf Savannah region is tipped in favour of powered sites. This balance reflects the infrastructure demands placed on facilities by the needs of recreational campers/caravanners decades ago when many of these caravan parks/sites were initially set up.

Increased demand for low-infrastructure, low-cost RV sites

Tied to the above items is the demand from increasingly self-sufficient RV owners to have access to more low impact, low infrastructure sites. While not necessarily a tension in itself, given caravan purchases continue to climb, local governments will need to balance the provision of more of these sites (directly or indirectly) with the needs of existing providers.

OPPORTUNITIES

There are a number of opportunities to develop low-impact, low-infrastructure RV sites in the Gulf Savannah region.

Doomadgee Aboriginal Shire Council

There are very few camping/caravanning options in the 140+km section that separates Tirranna Springs Roadhouse (Doomadgee East Road / Savannah Way) and Hells Gate Roadhouse (Doomadgee West Road / Savannah Way). The availability of a site half-way between would offer a convenient stopover point for those travelling all or part of the Savannah Way. Given the likely proximity of the site to the Doomadgee township, there would also be an opportunity to service the site with food/coffee vans and other services.

Gumbamunda Bridge (Albert River), Burketown

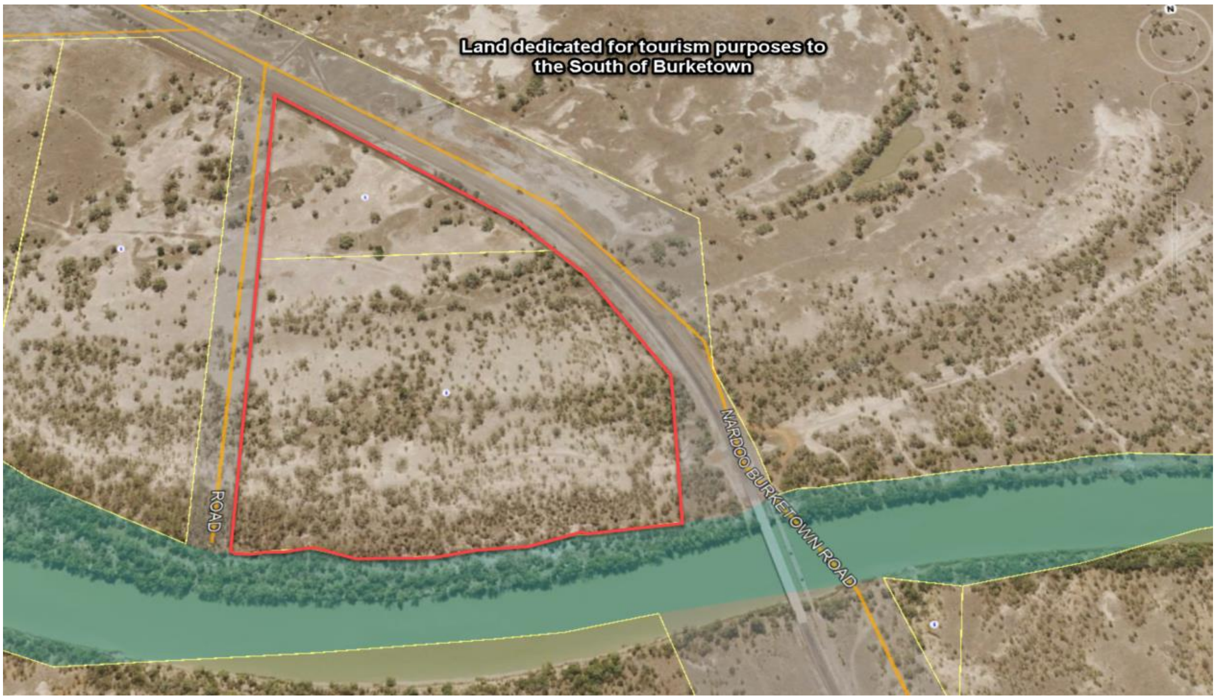
The Burketown Indigenous Land Use Agreement (ILUA) and Burke Shire Council's Draft Planning Scheme make provision for commercial tourism activity on16ha of land to the south of Burketown and near the Albert River. Current Council plans indicate that this area will receive access to treated water as part of upcoming capital works (2018-19, 2019-20). This would be an ideal site for a caravan park with opportunities to offer visitors a range of different service levels.

COST

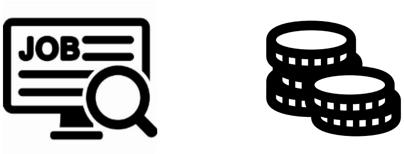
All costs will be site-dependent and will be determined with reference to the extent of vegetation clearing required (and satisfaction of planning requirements), the extent of any earthworks requirements and whether or not water will be provided and proximity to effluent disposal facilities.

Completion of a region-wide Options Analysis and Business Case is expected to cost ~$40,000.

Image: ~16ha of lan



BENEFITS



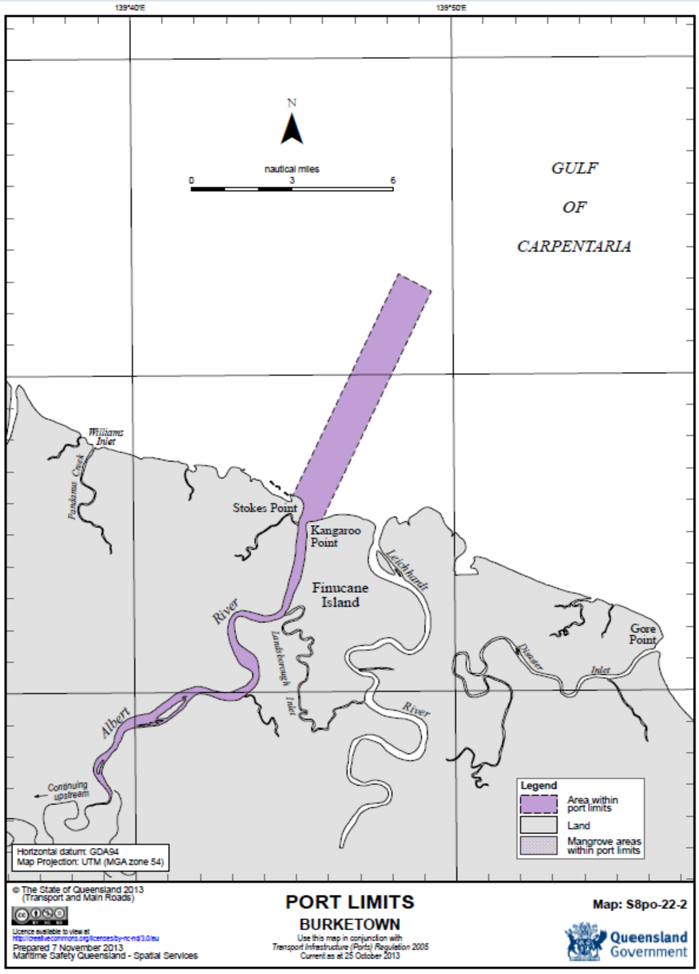
Site	Employment	Revenue
Doomadgee Aboriginal Shire Site: dump-ezy, no ablutions, no washing, no kitchen, no power, no water.	1	\$22,500 - \$45,000
Doomadgee Aboriginal Shire Site: as above with access to treated water	1	\$33,750 - \$67,500
Albert River Bridge Site: no ablutions, no washing, no kitchen, no power, no water	1	\$22,500 - \$45,000
Albert River Bridge Site: as above with access to treated water	1	\$33,750 - \$67,500
Food/coffee vans	2-4	\$11,250-\$90,000

RECOMMENDATION

1) GSD to conduct an Options Analysis and Business Case for the development of low impact RV sites in the Gulf Savannah region.

INTRODUCTION

The Port of Burketown extends 40km downstream from the Burketown Wharf on the Albert River (approximately 6.5km by road to the west of Burketown) to the Albert River mouth and out into the Gulf of Carpentaria (see image below). The Burketown Wharf and Port are most commonly used by recreational fishers and mariners, although commercial fishing and commercial tourism operators also use the Port and Wharf facilities.



With a new barge capable boat ramp being installed at the Burketown Wharf, it is timely to assess a range of commercial opportunities for this facility and the navigational requirements of those operators in a position to deliver freight, transport or tourism services from the Port of Burketown.

ISSUE

Environmental

The Albert River is a pristine river system. Traditional Owners and other local stakeholders are committed to maintaining this status, which means there is little interest or likelihood of dredging operations ever taking place in the Albert River. Given the river can be tricky to navigate, especially during low-tide, margins for error in barge operations will be low. To mitigate operational risks, it will be crucial to have a thorough knowledge of the waterway, particularly as this relates to establishing the minimum depth of navigable channels at different tidal levels.

OPPORTUNITIES

Regional Roadworks

A Class A hydrographic survey may enable Burketown to be used as a point of departure for regional civil contractors to access Mornington Island to assist in the delivery of road contracts, including Flood Damage, Roads to Recovery and ATSI TIDS projects.

As Mornington Island CEO Frank Mills noted in relation to the completion of the $13m 2013-14 NDRRA reconstruction program, "the managing contractor Koppens barged all equipment from Cairns, around Cape York to Mornington Island rather than trucking it across Queensland." That this approach was able to deliver "the best value for money solution…in delivering a reconstruction program on a remote, Indigenous Island" indicates the importance of improving regional infrastructure to ensure the revenue and profits from lucrative road construction contracts stay within the region.[9]

Finucane Island National Park Infrastructure and Tours

The completion of a Class A hydrographic survey around the Finucane Island National Park would provide the kind of certainty required to underwrite investment in tour operations and infrastructure on the National Park site.

Freight Services between Burketown and Mornington Island

Completion of a Class A hydrographic survey would be a precondition for commercial freight operations between Burketown and the Wellesley Island Group.

PROJECT STATUS

- Discussions held with Regional Harbour Master (Cairns)
- RFQ documentation completed for Class A Hydrographic Survey

COST

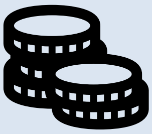
A hydrographic survey of the Albert River, Finucane Island National Park and part of the Leichhardt River is estimated at **~$200,000.**

This project is unlikely to be eligible under traditional funding streams available to GSD and Councils.

[9] Queensland Reconstruction Authority, 'QRA Case Studies, North Queensland: Reconstruction works provide morale boost'. Available at: http://qldreconstruction.org.au/news-media/reconstruction-works-provide-morale-boost <accessed 20.02.2018>

BENEFITS

Benefits would include:

	Area	Employment	Revenue
 	Mornington Island Road Works (R2R, NDRRA, ATSI-TIDS)	6-12	\$5-\$15m revenue retained in NW Queensland
	Finucane Island National Park Tours	1-2	+\$96,000 on existing tour operations
	Barge and freight operations	2-4	TBD
	Hydrographic Survey	4	Cost item

RECOMMENDATION

1) Gulf Savannah Development, Burke Shire Council and Ports North to identify an appropriate funding stream to complete a Class A hydrographic survey of the Albert River, Finucane Island National Park and part of the Leichhardt River.

DEFINITIONS

For further information on Hydrographic Surveys, please refer to Maritime Safety Queensland's 'Standards for Hydrographic Surveys within Queensland Waters', 2009. See excerpt below (p. 26).[10]

Classification Table for "Standards for Hydrographic Surveys within Queensland Waters"

Survey Class[1]	*Depth tolerance* for Reduced Depths (2 standard deviation level)	Minimum Seabed Coverage (line spacing) [2, 3]	Minimum Qualification of Personnel Undertaking or Supervising a Hydrographic Survey
A	In the case of a declared port depth the *depth tolerance* is dependant on UKC[4]. In all other cases the *depth tolerance* is to be ±0.15m.	The method used shall ensure the minimum depth in the navigable waterway has been determined. (Refer to clause 5.1.2 on page 7 of these standards)	Certified Practitioner (Hydrography 1)
B[5]	In the case of a declared port depth the *depth tolerance* is dependant on UKC[4]. In all other cases the *depth tolerance* is to be ±0.15m.	20% (Refer to clause 5.2.2 on page 8 of these standards)	Certified Practitioner (Hydrography 1)
C	±0.2m	20% (Refer to clause 5.3.2 on page 8,of these standards)	Certified Practitioner (Hydrography 2)
D	±0.3m in depths less than 25 m	3 x average water depth or 25 metres whichever is greater. (Refer to clause 5.4.2 on page 9 of these standards)	Certified Practitioner (Hydrography 2)

[10] MSQ, ''Standards for Hydrographic Surveys within Queensland Waters', 2009. Available at: https://www.msq.qld.gov.au/-/media/MSQInternet/MSQFiles/Home/boatingmaps/Hydrographic-survey-standards/Pdf_standards_hydro_surveys.pdf?la=en <accessed 20.02.2018>

20. ED – NEW DRIVE TOURISM ROUTE – NORMANTON TO DUNBAR

INTRODUCTION

The Gulf Savannah region is a popular destination for drive tourists and it this demographic that contributes the most to the regional tourism economy. The region also benefits from a high rate of re-visitation.[11] Current drive tourism routes in the region include part of the Savannah Way, which extends from Cairns through Mount Surprise, Georgetown, Croydon, Normanton, Karumba and Burketown before heading west through Katherine, Kununurra and Broome.

Running parallel to the south and also feeding into the Savannah Way route is the Overlander's Way. This route commences in Townsville and passes through Charters Towers, Hughenden, Richmond, Julia Creek, Cloncurry, Mt Isa, Cammooweal and finishes in Tenant Creek.

Carpentaria Shire Council has indicated interest in the development of a new drive tourism route between Normanton – Dunbar – Chillagoe, which would offer a range of new drive options to those travelling on the Savannah Way, the Overlander's Way, the Great Tropical Drive and further north to Cape York.

OPPORTUNITIES

New Drive Tourism Route to Encourage Return Visitation

Upgrading of ~237km of the Burke Developmental Road between Normanton – Dunbar – Chillagoe. An upgrade to this road would generate a new suite of drive tourism routes in North West and Far North Queensland, adding to an augmenting the Savannah Way, the Overlander's Way and the Cape York route.

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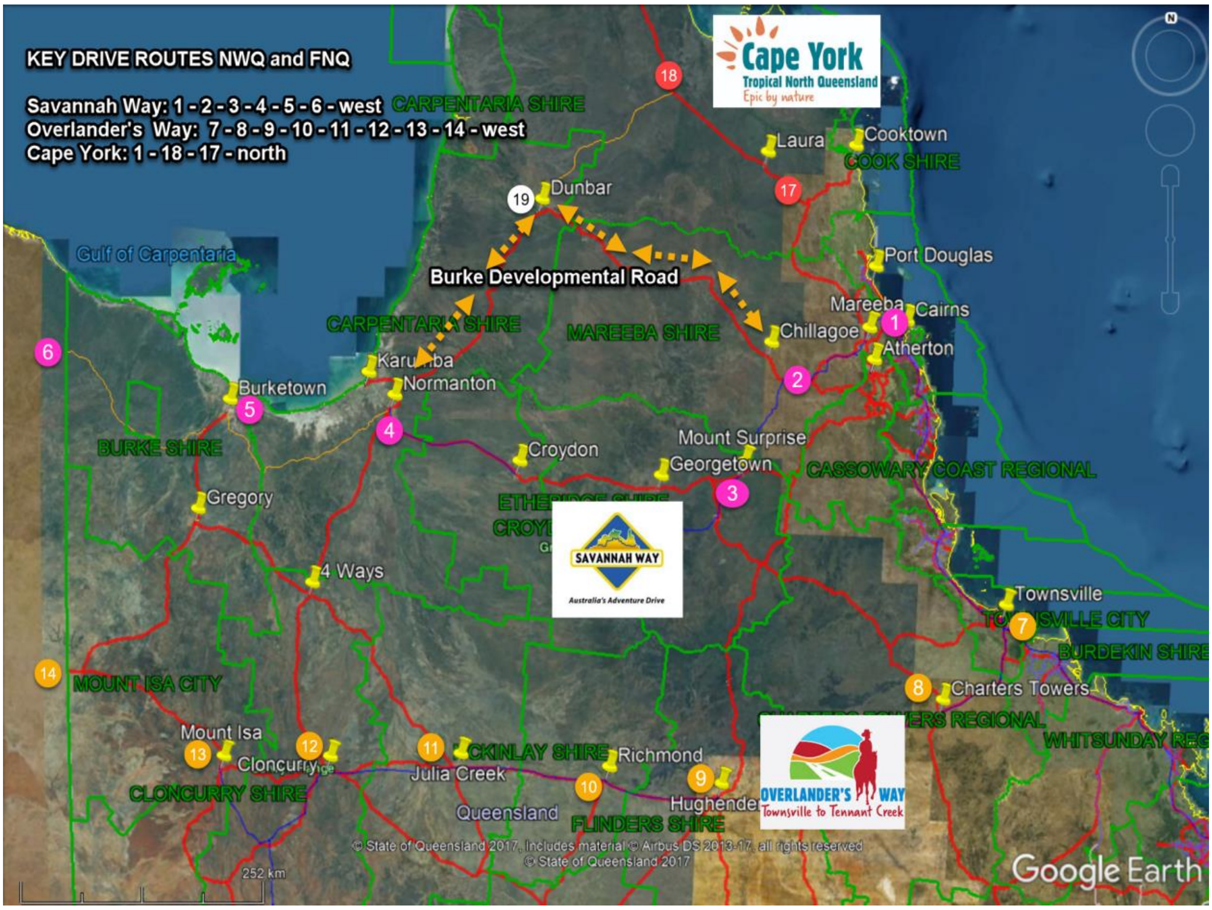
[11] In the survey informing the '2017 GSD Tourism Report', 56% of respondents identified as return visitors to the Gulf, p. 9 (Key Findings).

Creating this additional loop would offer drive tourists shorter, longer and more varied routes around the Gulf Savannah region, which is likely to increase the appeal to first time visitors and to offer variety to those who have visited the region previously.



Increased Opportunity for Farm Stay Tourism & Low Impact RV Sites

Subject to further investigation, there would be increased options for farm stay tourism across two Shires (Carpentaria and Mareeba) between Normanton – Dunbar - Chillagoe. Delta Downs Station is already operating to the north of Normanton

BENEFITS

The majority of jobs associated with this project would be delivered through road construction and ongoing road maintenance.

Item	Employment	Duration
Detailed Design for upgrade to the Burke Developmental Road	4	3 weeks
Upgrade to the Burke Developmental Road	TBD	TBD
Maintenance of the Burke Developmental Road	6	3 weeks p.a.
Farm Stay opportunities	2-8	6 months p.a.

PROJECT NEXT STEPS

- Completion of Detailed Design for the upgrade of the Burke Developmental Road. This element of the project is currently the subject of a Maturing the Infrastructure Pipeline grant.
- Incorporate upgrade of Burke Developmental Road into priority upgrade projects for the NWQ Regional Roads and Transport Group.

RECOMMENDATION

1) GSD, in parallel with Carpentaria Shire Council and the Regional Road & Transport Group, advocates for the upgrading of the Burke Developmental Road between Normanton – Dunbar – Chillagoe in order to bolster the drive tourism economy in the region.

21. ED – KOMBUCHA

INTRODUCTION

Kombucha is an ancient drink, brewed for thousands of years, which is now being sold by an increasing number of commercial operators in nations where healthfulness and mindfulness have become commodities capable of delivering solid revenue streams. Growing incidences of chronic diseases such as cancer, diabetes, high blood pressure, and osteoporosis are driving the growth of the kombucha market.[12]

The drink is traditionally made by fermenting sweetened tea with a SCOBY (symbiotic culture of bacteria and yeast). During the fermentation process, the yeast converts the sugar in tea to alcohol and the bacteria converts that alcohol to organic acids (such as ascetic acid).

The appeal of the drink is based on a variety of factors, including:

- The combination of low sugar content with effervescence and thus, the ability to replace soft drinks with an alternative;
- The positive impact on health;
- The simplicity of production;
- The ability to use an additional fermentation step to generate a brew with a mid-strength alcohol content.

ISSUES

HEALTH

Sugar-sweetened or artificially sweetened drinks are frequently sold more cheaply than alternatives. The consumption of these kinds of drinks is proportionately higher in certain demographics and localities, including in Indigenous townships and communities. As indicated in the 2016 Closing the Gap report, the worst health outcomes in terms of diabetes, heart disease and other chronic illnesses were found in remote communities and these outcomes have been linked to poor diets, including high levels of consumption of sugar and sugary drinks.

COST OF HEALTHFULNESS PRODUCTS

[12] Markets & Markets, **"Kombucha Market by Types (Bacteria, Yeast, Mold, Others), Flavors (Herbs & Spices, Citrus, Berries, Apple, Coconut & Mangoes, Flowers, Others),& by Region - Forecasts to 2020", 20**

Kombucha is a boutique product and priced as such. Unless produced and sold locally, it is unlikely that Kombucha at $5.00 would be purchased in preference to a range of other drinks sold for a fraction of the cost.

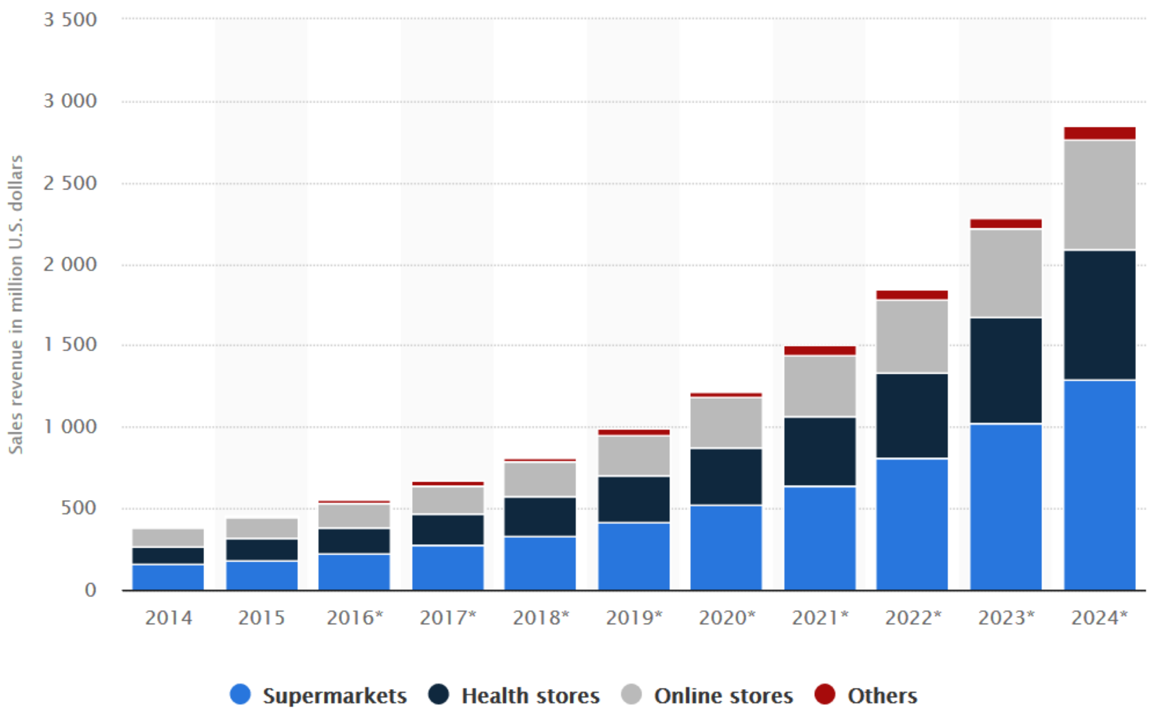
MONEY IN, MONEY OUT

Retaining income in rural, remote and Indigenous townships and communities is always a challenge. Many goods and services are freighted in and sold over the counter, with revenue flowing back toward regional hubs and major cities. While not a news headline in and of itself, it is a cause for concern when income is spent on products that contribute to poor health outcomes. If a locally produced, healthy alternative could be substituted in for an unhealthy product produced elsewhere, it stands to reason that such a product should be considered.

ALCOHOL MANAGEMENT PLANS

AMPs currently operate in 19 discrete Aboriginal and Torres Strait Islander communities across 15 Local Government Areas. As indicated by DATSIP, AMPs "were introduced to reduce alcohol related violence, particularly against women and children."[13] Stakeholder engagement, statements issued by community leaders, recent reports in the news media and the current review of AMPs indicates that there are a number of issues with the continued implementation of these plans in their current format.

Chart: Kombucha sales revenue in the United States from 2014- to 2024 ($USD)[14]



[13] https://www.datsip.qld.gov.au/publications-governance-resources/policy-governance/alcohol-management-plan

[14] https://www.statista.com/statistics/693723/kombucha-sales-revenue-us-by-sales-channel/

OPPORTUNITIES

GSD has completed preliminary research into the Kombucha and health drink market. Further research, including the development of an Options Analysis and Business Case will be required to determine the input costs, prospective employment and revenue streams for a local market.

HEALTH

As indicated, the opportunity to replace sugar-sweetened drinks with non-sugar options has the potential to improve health outcomes, by reducing the risks factors for developing a range of diet-related chronic diseases, including diabetes. The financial implications of such a result would best be determined by health experts with access to more detailed data.

JOBS

Localised Kombucha production would generate between 3-6 local production and distribution jobs.

REVENUE STREAM

A locally-owned, locally operated business would deliver a new revenue stream to the host township or region. Given capital costs are relatively cheap for Kombucha production and given the likelihood of being able to secure business start-up investment, the potential for a rapid return on investment exists.

RECOMMENDATION

2) GSD partners with relevant stakeholders to progress the localised production of health drinks, such as Kombucha, through securing funding for an options analysis and business case.

22. ED – FARM STAYS & CATTLE STATION TOURS

INTRODUCTION

Gulf Savannah Development completed a Tourism Survey & Report in 2017. Among the various questions asked of visitors to the region was one that asked respondents to select that kinds of tours/activities they would most like to be able to experience while in the Gulf region. The most popular activity/experience identified was “Cattle Station Tour”. “Farm Stay” was not far behind in fourth place. On the basis of this research, there is clear potential for the Gulf Savannah region to deliver more of these tours and farm stay opportunities.

Activity	I/We Did It!	Very Interested (if offered)	A bit interested (depends on price)	Not interested
Cattle Station Tours	15.38%	53.85%	23.08%	7.69%
Mineral Bath experience	24.39%	53.66%	12.20%	9.76%
Bush Tucker Tours	19.51%	48.78%	14.63%	17.07%
Farm Stays	10.81%	45.95%	24.32%	18.92%
Bands/Music on the Salt Pans	5.13%	43.59%	20.51%	30.77%
Podcasts about the Region	13.89%	38.89%	16.67%	30.56%
Bird Watching Tours	10.26%	38.46%	30.77%	20.51%

ISSUES

There are likely to be a number of barriers to entry to adding a tourism business to an existing pastoral property. The inclusion of the below items is based on limited stakeholder feedback.

READY, WILLING AND ABLE

Undertaking any business venture introduces a variety of stresses and anxieties. Where existing operations are stressful or successful enough, it is unlikely that graziers will look at an entirely new business venture. Agriculture and tourism both come with significant time demands and both require a wide-range of skills if they are to be done successfully. This combination of time and skill is not likely to be found easily.

AWARENESS OF ASSISTANCE/RESOURCES AVAILABLE

Graziers with an eye to developing a tourism business on site may not be aware of all the resources available to assist in setting up a tourism business. These include assistance with developing business cases, assistance in navigating planning and development requirements, assistance with generating promotional content and assistance with digital marketing and access to small business advisory services.

AWARENESS OF PLANNING REQUIREMENTS

Graziers may not be aware of Planning Scheme requirements and Development Approval processes for starting tourism businesses on pastoral properties. As it stands, all Shire Planning Schemes in the region envisage the establishment of tourism business on pastoral leases.

OPPORTUNITIES

PROOF OF CONCEPT

Gulf Savannah Development has facilitated assistance through the Australian Small Business Advisory Service (ASBAS) to Delta Downs Station in setting up their Farm Stay operation. As this operation grows, a proof of concept will exist for others in the region to follow, reducing barriers to entry.

Source: Delta Downs Farm Stays (http://www.deltadownsstation.com.au/)

REGIONAL PROMOTION + OPTIONS ANALYSIS + BUSINESS CASE DEVELOPMENT

A region-wide information campaign is required to generate interest in Farm Stay tourism ventures and to lower the barriers to entry to establishing this type of tourism venture on pastoral properties throughout the region. This campaign should outline the wide-range of skills-based assistance and financial assistance available to those seeking to establish new tourism ventures in the region.

The focus should then progressively narrow to the Options Analysis and Business Case development stage for those operators ready, willing and able to progress farm stay initiatives on their properties.

COSTS

$150,000 for a Regional Options Analysis and select Business Case development for 3-5 preferred sites.

50% the Australian Small Business Advisory Service (ASBAS), which is administered by GSD, is able to provide a wide-range of key business items (promotional material, digital platforms) at a reduced rate to the business operator.

Establishment costs for individual operations will vary depending on the scale of the operation and the services offered.

BENEFITS

Increased visitations: establishing more farm stay opportunities will increase the number of first-time and return visitations to the region.

Increased accommodation: the creation of more farm stay operations will contribute to the total stock of camp sites and ecotourism style accommodation in the region

Increased overnight visitor expenditure: the development of farm stay operations will increase the region's overnight visitor expenditure.

Provide more stops on drive tourism routes: the development farm stay operations will increase the number of stops on drive tourism routes and potentially open up new drive tourism routes.

Increased employment: farm stay tourism will generate additional seasonal employment in the region. Numbers will be dependent on the scale of the operation and the range of services made available.

RECOMMENDATION

1) Gulf Savannah Development to seek a financial co-contribution to progress an Information Campaign + Options Analysis for farm stay tourism in the Gulf Savannah region and to progress select Business Case Development for preferred sites.

23. ED – TRADITIONAL KNOWLEDGE AND BIODISCOVERY

INTRODUCTION

Legal frameworks in Australia that recognise the rights of Indigenous peoples to protect their traditional knowledge are derived from the *Convention on Biological Diversity 1992* and from the *Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilisation* ('the Nagoya Protocol'). The Convention and the Protocol recognise the importance of ecological biodiversity and the importance of traditional knowledge systems to the maintenance of this biodiversity.

In Australia, the *Environment Protection and Biodiversity Conservation Act 1999* (Cth) provides for an access regime to biological resources in Commonwealth areas and for equitable sharing of benefits arising from the use of these resources. The Queensland *Biodiscovery Act 2004* does similar work on State land requiring those engaged in biodiscovery to obtain a 'collection authority' and to enter into reasonable benefit sharing agreements, including with traditional owners.

STAKEHOLDER CONSULTATION

GSD was asked to complete some initial research into the lay of the land in relation to traditional knowledge and biodiscovery by traditional owners.

OPPORTUNITIES

Given that traditional medicines are relied upon by up to 80% of the world's population for primary health care and that approximately three quarters of the plants used in prescription medicine were originally used in traditional medicine, it is clear that opportunities exist to derive material benefits from traditional knowledge in the pharmaceutical/health care space.

In order to determine if these opportunities are worth progressing, notwithstanding competing spiritual or cultural concerns, it will be crucial that traditional owner representatives or their delegates make contact with appropriate Commonwealth and Queensland Biotechnology Organisations (research centres, government agencies, laboratories etc.). This information and relevant contacts have been passed on to the Carpentaria Land Council Aboriginal Corporation.

RECOMMENDATION

1) GSD provides details of initial research and contacts to the Carpentaria Land Council Aboriginal Corporation for progressing.

24. ED – OPPORTUNITIES LOST

INTRODUCTION

A number of once successful tourism operations in the Gulf are no longer operating. These include the Birri Fishing Resort on Mornington Island, the Escott Fishing Lodge outside of Burketown and, to a lesser extent, the Kingfisher Camp on Bowthorn Station. The popularity of these locations over a long-period of time was site- and experience-dependent: remote fishing charters in the Gulf of Carpentaria (Birri Lodge), on the Nicholson River where the freshwater meets salt water (Escott Fishing Lodge), and access to a beautiful camp site, river and gorge at Kingfisher Camp (on Bowthorn Station).

GSD raised the possibility of the resurrection of a number of these sites (or similar) with a range of long-term tour/accommodation providers from the region and local residents.

Sentiments were generally positive, provided land-owner support and land tenure arrangements were in place and provided that prospective operators received Council support rather than bureaucratic resistance.

(POTENTIAL) ISSUES

PLANNING AND DEVELOPMENT

Local government planning instruments govern the types of development that can take place within particular zones and set the levels of assessment for different types of development. All of the Councils in the Gulf Savannah region with Planning Schemes anticipate small-scale tourism operations that augment existing rural uses. Larger scale tourism developments require a greater level of scrutiny.

LAND TENURE

Kingfisher Camp	**No issue. Camp sited on Graziers Homestead Perpetual Lease.**
Escott Fishing Lodge	No issue. Current lease.
Mornington Island-based Fishing Lodge	**New site required. Native Title to be addressed.**

OPPORTUNITIES

These tour/accommodation operators attracted tourists to the region, with the two fishing lodges sufficient in themselves for mobilising visitors to the region.

Operation	Closure	Employment	Accommodation
Birri Fishing Lodge	2016	6	Maximum of 8
Escott Fishing Lodge	2005	11	30 beds, 12 powered sites, 6 bush camps
Kingfisher Camp	2015	2	20 unpowered sites

RECOMMENDATION

1) Councils to ensure Planning Schemes are conducive to the development of tourism businesses in Rural Zone Codes, particularly for those Shires currently in the process of updating their Planning Schemes (Carpentaria, Croydon, Etheridge Shire Councils).
2) GSD supports prospective operators to re-establish tourism operations through the ASBAS program and other services.