Mackay Isaac Whitsunday

30 Year Sugar Industry Strategy 2015-45

Part C: Policy & Planning Integration

Central Region Sugar Group

April, 2015

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1. Introduction

This *30 Year Sugar Industry Strategy* has been developed for the Mackay Isaac Whitsunday (MIW) sugar industry by the Central Region Sugar Group (CRSG) for the purposes of promoting and advancing the development of our commercially vibrant, sustainable and self-reliant raw sugar and sugarcane derived products industry.

This document provides policy and planning integration and alignment of the strategy with other Commonwealth, Queensland, regional and local policies, strategies and plans.

Who do we represent?

CRSG is based in the Mackay, Proserpine and Plane Creek regions in North Queensland with sugarcane growing areas situated in the Mackay, Isaac and Whitsunday Local Government Areas.

CRSG and MIW sugar industry

Farming	Manufacturing	Exporting
CANEGROWERS Mackay Area Committee	Mackay Sugar Limited Racecourse, Farleigh, Marian	Raw sugar storage and an export terminal at the Port of Mackay
CANEGROWERS Plane Creek Area Committee	Wilmar Sugar Australia Plane Creek, Proserpine	
CANEGROWERS Proserpine	Sugar refinery Racecourse Mill	
Australian Cane Farmers Association	Ethanol distillery Plane Creek	

What do we do?

At a national level, CRSG works with the Australian Sugar Industry Alliance (ASA) to drive the development and promotion of policy advancing the commercial development of the Australian sugar industry. This is achieved through engagement with government, industry, service providers, community and other stakeholders, and by providing leadership to advance the sugar industry self-reliance, sustainability and viability.

At a regional level, CRSG engages with local government, industry, service providers, community and other stakeholders on key local issues that are necessary to enable the sugar industry in the MIW region to achieve its growth potential.

Why a 30 year Strategy?

The *MIW 30 Year Sugar Industry Strategy* seeks to set out how the MIW sugar industry will improve its position as a globally competitive, economically and environmentally sustainable industry based on sugarcane.

The 30 year planning period was chosen to align with Australian and Queensland Government planning horizons, especially with regards to the long-term view required for infrastructure and service delivery planning, for example, the Commonwealth Government's Northern Australia development initiatives and Queensland Government's goal of doubling agricultural production by 2040. Integration and alignment with these longer term strategies is important so that CRSG can be ready to play its part in the sustainable development of Northern Australia and Queensland.

In addition, the *MIW 30 Year Sugar Industry Strategy* covers a number of election periods, so it caters for a level of consistency and continuity and provides insight to inform government decision-makers as they change over the period.

2. Australian Government

The Australian Government has a number of white papers and policy reviews which will affect the implementation of this sugar strategy.

2.1 Agricultural Competitiveness White Paper

https://agriculturalcompetitiveness.dpmc.gov.au/

The Agricultural Competitiveness Green Paper was released in October 2014 with submission due by 12 December 2014. This Green Paper represents the summation of the views of the Australian public on the vital issue of the health and future of Australian agriculture. The green paper summarises the issues, what the government is already doing and stakeholder ideas as per the table below.

Issue, government actions & Ideas	MIW 30 Year Sugar Industry Strategy
Infrastructure	
• Building efficient and cost-effective transport and communications infrastructure that will support the movement of farm inputs and outputs, reduce costs and open up new markets. • Facilitating new or intensified agricultural production.	DIVERSIFICATION INNOVATION ECONOMICS & INFRASTRUCTURE
Working with the States and Territories	
• Deliver improved outcomes for Australian agriculture, including by tackling deregulation through the Council of Australian Governments (COAG) agenda.	ECONOMICS & INFRASTRUCTURE
Competition and regulation	
• Giving farmers the best chance to earn a fair return on investment by ensuring fairness and transparency in the supply chain. • Making sure that unnecessary red and green tape is removed and that the necessary regulation creates the least possible costs for business and individuals.	ECONOMICS & INFRASTRUCTURE
Finance, business structures and taxation	
• Improving access to finance. • Providing access to reliable independent business information and advice. • Ensuring that the tax system appropriately encourages investment.	ECONOMICS & INFRASTRUCTURE
Foreign investment	
• Encouraging responsible foreign investment to build new production capacity. • Ensuring the foreign investment framework takes into account the needs of the agricultural sector.	ECONOMICS & INFRASTRUCTURE
Education, skills and training, and labour	
• Ensuring agriculture is well covered in our education system. • Making education more accessible for children in remote areas. • Increasing skills of new and existing workers. • Enabling access to a flexible workforce. • Attracting new entrants into agriculture.	CAPABILITY & RESILLIANCE
Drought	
• Building resilience and risk management capability. • Providing appropriate support to farm families and otherwise viable farm businesses suffering severe droughts.	CAPABILITY & RESILLIANCE
Water and natural resource management	
• Identifying and building the water infrastructure needed for Australia's future water supply needs. • Ensuring sustainable and productive use of natural resources for economic growth and development. • Improving our knowledge of sustainable resource use. • Managing weeds and pests.	COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE
Research, development and extension (RD&E)	
• Boosting productivity through strategic and coordinated research and development. • Making sure that farmers can apply the latest innovations through ensuring effective extension of new knowledge and technology.	INNOVATION

Issue, government actions & Ideas	MIW 30 Year Sugar Industry Strategy
Biosecurity	
• Protecting our favourable animal and plant health status to maintain productivity and access to export markets.	CAPABILITY & RESILLIANCE
Accessing international markets	
• Giving our exporters the best chance of capturing high-value markets through addressing technical barriers to trade and ensuring trade negotiations deliver real commercial benefits for the sector. • Contributing to global food security.	ECONOMICS & INFRASTRUCTURE

Source: Commonwealth of Australia 2014, *Agricultural Competitiveness Green Paper*, Canberra, October, p. xvii.

2.2 Review of the Renewable Energy Target

https://retreview.dpmc.gov.au/

The Review of the Renewable Energy Target (RET) scheme was jointly announced by the Hon Ian Macfarlane MP, the Minister for Industry, and the Hon Greg Hunt MP, the Minister for the Environment, on 17 February 2014.

The RET has been operating in various forms since the Mandatory Renewable Energy Target (MRET) commenced in 2001. As set down in legislation, the objectives of the RET are to:

- encourage the additional generation of electricity from renewable sources;
- reduce greenhouse gas emissions in the electricity sector; and
- ensure that renewable energy sources are ecologically sustainable.

The expanded RET scheme, which commenced in January 2010, is designed to ensure at least 20 per cent of Australia's electricity comes from renewable sources by 2020. To achieve this, the legislation contains annual targets for large-scale renewable generation, expressed in gigawatt hours (GWh) that rise each year to 41,000 GWh in 2020. It also provides upfront support for the installation of small-scale renewable energy systems.

Key points from the Renewable Energy Target (RET) are:

- *The objectives of the Renewable Energy Target (RET) are to: encourage the additional generation of electricity from renewable sources; reduce greenhouse gas emissions in the electricity sector; and ensure that renewable energy sources are ecologically sustainable.*
- *The RET has encouraged significant new renewable electricity generation, which has almost doubled as a result of the scheme. Installations of small-scale systems have exceeded expectations, with output from these systems already exceeding levels anticipated for 2020. To date, the RET has delivered a modest level of emissions reductions.*
- *With the renewables industry now established in Australia, the main rationale for the RET hinges on its capacity to contribute towards the Government's emissions reduction target in a cost effective manner. However, the RET is a high cost approach to reducing emissions because it does not directly target emissions and it only focuses on electricity generation. It promotes activity in renewable energy ahead of alternative, lower cost options for reducing emissions that exist elsewhere in the economy. In the presence of lower cost alternatives, the costs imposed by the RET are not justifiable.*
- *The economic landscape has changed significantly since the current RET was adopted in 2010. In particular, demand for electricity has been declining and forecasts for electricity demand in 2020 are now much lower. Rather than adding generation capacity to meet growth in electricity demand, the RET is contributing to a large surplus of generation capacity.*
- *The current RET would require a further $22 billion cross-subsidy to the renewables sector in net present value (NPV) terms over the remainder of the scheme (in addition to the $9.4 billion cross-subsidy provided from 2001 to 2013) and encourage more than $15 billion (in NPV terms) of additional investment in renewable generation capacity to 2020. This investment comes at the expense of investment elsewhere in the economy and the additional generation capacity is not required to meet the demand for electricity.*
- *Analyses suggest that, overall, the RET is exerting some downward pressure on wholesale electricity prices. This is not surprising given that the RET is increasing the supply of electricity when electricity demand has been falling. Artificially low wholesale electricity prices can distort investment decisions in the electricity market and are unlikely to be sustained in the long term. Over time, all other things being equal, wholesale electricity prices could be expected to rise to better reflect the cost of generating electricity.*
- *The direct costs of the RET currently increase retail electricity bills for households by around four per cent, but modelling suggests that the net impact of the RET over time is relatively small. The impact on retail electricity prices for emissions-intensive trade-*

exposed businesses and other businesses is significantly greater. The RET does not generate an increase in wealth in the economy, but leads to a transfer of wealth among participants in the electricity market.

- *The Expert Panel has recommended options to the Australian Government for both the Large-scale Renewable Energy Target* [LRET] *and the Small-scale Renewable Energy Scheme* [SRES]*. The Panel considers the Government should emphasise alternative, lower cost approaches to reducing emissions in the Australian economy. In putting forward its recommendations, the Expert Panel has been mindful of the impacts particular options will have on those who have invested in renewables on the basis of the RET as currently legislated.*

Source: Commonwealth of Australia 2014, *Renewable energy Target Scheme: Report of the Expert Panel*, Canberra, August, p.i.

Since separation of the RET into LRET and SRES, the sugar milling industry has invested an additional $300 million, specifically targeted at increasing the exported amount from mills to the National Electricity Market. The RET has been fundamental to capitalising each of these projects, through delivering an acceptable return on investment. Mackay Sugar recently invested $120 million in expanding cogeneration capacity and capability at Racecourse Mill. Part of this investment included significant bagasse storage enabling electricity generation for 50 weeks of the year. Racecourse Mill supplies the equivalent of one third of Mackay’s energy demand.

Altering the RET is likely to have impacts on any future diversification investment.

2.3 Energy White Paper

http://ewp.industry.gov.au/

The Australian Government has committed to an Energy White Paper that focuses on deregulation, competition and productivity. This will encourage efficient energy markets, holding down costs for consumers. Making the sector more globally competitive will also help it attract investment. The Energy White Paper will set the foundations for the future reliable supply of competitively-priced energy in Australia.

The release of the Green Paper is the second step in consultation on the Energy White Paper. An Issues Paper was released in late 2013, responding to the Terms of Reference (Attachment 1) and seeking comment on 28 identified issues. The Eastern Australian Domestic Gas Market Study was released for consultation at the same time.

Goals	MIW 30 Year Sugar Industry Strategy
Attracting energy resources investment	

• Streamline environmental and other approvals
  ○ Outcome: More certain, timely and accessible approvals. Better regulation will lower costs to business, boost productivity and enhance Australia's international competitiveness.
• Better skills and workforce productivity, including access to skilled migration
  ○ Outcome: Industry has access to the skills it needs for timely and cost-effective projects, which will encourage future investment.
• Create supply chain opportunities and Indigenous employment
  ○ Outcome: Local small-to-medium enterprises (SMEs) more involved in supply chains, lowering project costs and growing local economies. More Indigenous Australians employed in the energy resources sector.
• Enhance pre-competitive geoscience and improve access to environmental data
  ○ Outcome: Lower costs and exploration risk. Reduced duplication and regulatory burden. Improved community engagement. Better-informed decision-making and environmental management.
• Help to identify and address infrastructure bottlenecks
  ○ Outcome: Industry has access certainty, reducing infrastructure duplication and cost.
• Promote Australia's energy products, technology and services exports
  ○ Outcome: Increase the export earnings of Australia's energy resources, products and skills.
	DIVERSIFICATION

Electricity Prices	

• Pursue tariff reform and improved consumer access (including controlled third party) to energy use data, including electricity network tariff reform to limit cross-subsidies
  ○ Outcome: Consumers are better informed, have tariff choice and know how to manage energy use and cost. Energy users pay their fair share of the costs of the poles and wires that supply electricity.
• Ensure reliability standards do not encourage unnecessary investment in electricity networks
  ○ Outcome: Consumers do not receive higher reliability standards than they would be willing to pay for if they understood the impact on electricity prices.
• Improve the efficiency of electricity use
  ○ Outcome: Electricity cost savings for consumers.
• Rationalise emissions reductions actions to reduce unnecessary costs
  ○ Outcome: Consumers do not pay more due to market distortion.
• Remove unnecessary regulatory barriers and market interventions, and encourage further privatisation
  ○ Outcome: Better prices and services for consumers through more competition, efficiency and innovation.
	ECONOMICS & INFRASTRUCTURE

Goals	MIW 30 Year Sugar Industry Strategy
Building gas supply and improving market operation	

• Bring on new gas supply as quickly as possible
  ○ Outcome: Avoid potential supply shortages so that domestic gas users do not pay higher prices than necessary.
• Improve the availability and quality of market information to improve market transparency and competition
  ○ Outcome: Gas sellers and buyers have more certainty about the availability of supply and pricing, and the market is more transparent and competitive.
• Implement other gas market development priorities to expedite gas market reform
  ○ Outcome: A development strategy for the unconventional gas industry. More flexible and transparent market arrangements.
	ECONOMICS & INFRASTRUCTURE

Security, innovation and energy productivity	

• Maintain secure, competitively-priced and reliable energy supplies
  ○ Outcome: Consumers have access to adequate and reliable energy.
• Improve energy productivity
  ○ Outcome: Cost savings to Australian households and businesses, improved domestic security and reduced greenhouse gas emissions intensity.
• Develop a better 'outlook' capacity
  ○ Outcome: Government better prepared to respond to supply issues, to global market opportunities, and to invest strategically in research. Industry will have access to better information, giving more certainty and encouraging investment.
• Keep the range of energy options technology neutral by tackling regulatory barriers and making best use of research investments
  ○ Outcome: Australia is able to choose from the broadest possible range of energy options. This will strengthen Australia's energy security.
• Look for relevant international technology engagement
  ○ Outcome: Australian industries benefit from international experience.
	DIVERSIFICATION
	INNOVATION
	ECONOMICS & INFRASTRUCTURE

Source: Commonwealth of Australia 2014, *Energy White Paper – Green Paper*, Canberra, September.

Sugar mills are a significant provider of renewable energy. The electricity generated by sugar mills is used in the regional centres around the mill, which displaces or defers investment in transmission networks (a major contributor to recent price increases). However there are a number of issues which currently limit how sugar mills can contribute to local electricity networks. These need to be addressed as part of the White Paper process, and are the focus of industry submissions into the process.

2.4 Developing Northern Australia

https://northernaustralia.dpmc.gov.au/

The Green Paper on Developing Northern Australia sets out a policy platform for realising the full economic potential of the north, and includes an implementation plan for two, five, ten and 20 years. Submissions on the Green Paper, which closed in August, and the report of the Joint Select Committee on Northern Australia's Parliamentary Inquiry will inform the development of the White Paper. The Green Paper describes the Government's role as being 'to create a regulatory and economic environment that fosters viable private sector investment.'

The sugar industry has great potential for contributing to the development of northern Australia. The industry has a long history of production in rural areas and contributes to the social and economic wealth of many regional centres in Queensland. There is also significant potential for expansion of existing technologies, such as electricity and ethanol and for a range of other biofuels and bioproducts derived from sugarcane.

There are six broad policy directions in the paper as per the table below:

Policy direction	MIW 30 Year Sugar Industry Strategy
Infrastructure	
• Productive new infrastructure • Better use of existing infrastructure • Better planning and understanding of infrastructure opportunities and benefits	ECONOMICS & INFRASTRUCTURE
Land	
• Diverse and longer pastoral leases • Flexible leases for Indigenous landholders • Efficient native title processes • More accessible information	GROWTH
Water	
• New infrastructure to support industries and communities • Comprehensive water resource assessments • Best practice planning and management • Water markets	COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE
Business, trade and investment	
• Deregulation agenda for the north • Workforce availability and skills that meet business needs • New markets and greater trade links • Innovative business-friendly policies	CAPABILITY & RESILIENCE ECONOMICS & INFRASTRUCTURE
Education, research and innovation	
• Building capabilities and skills • Partnerships with world leasing institutions • More international students • Effective engagement with international development in the region	CAPABILITY & RESILIENCE
Governance	
• Collaboration across governments • Effective engagement with, and presence in, Northern Australia • Effective service delivery • Capable and stable local institutions	COMMUNITY & ENVIRONMENT

Source: Commonwealth of Australia 2014, *Green Paper on Developing Northern Australia*, Canberra, June.

2.5 Competition Policy Review

http://competitionpolicyreview.gov.au/

Australia's competition laws and policies are currently being reviewed to 'identify competition-enhancing microeconomic reform to drive ongoing productivity growth and improvements in the living standards of all Australians.'[1] The Review seeks to build on the Hilmer Review from 1992 to protect, enhance and extend competition. It will examine laws that protect and encourage competition and remove regulations and restrictions that may impede competition. It will also reform government businesses and leverage market-based benefits in goods and services provided by government.

The sugar industry in Australia has deregulated since the 1990s and as a result, has improved its efficiency, productivity and innovation. Prior to deregulation, the production and selling of sugar was regulated. For example, legislation determined the sugarcane production area and all sugar produced by mills was acquired (vested) by a government owned corporation for selling to the domestic and international markets. Deregulation has also enabled the industry to explore diversification opportunities, such as cogeneration of electricity, ethanol and other bioproducts. There are remnants of regulation remaining, such as collective bargaining which are due for review in 2014.

The competition policy review draft report (September 2014) contains the following draft recommendations:

<table>
<tr><th>Draft Recommendations</th><th>MIW 30 Year Sugar Industry Strategy</th></tr>
<tr><td colspan="2">1. Competition principles</td></tr>
<tr><td>The Panel endorses competition policy that focuses on making markets work in the long term interests of consumers. The following principles should guide Commonwealth, state and territory and local governments in implementing competition policy:
legislative frameworks and government policies binding the public or private sectors should not restrict competition;
governments should promote consumer choice when funding or providing goods and services and enable informed choices by consumers;
the model for government provision of goods and services should separate funding, regulation and service provision, and should encourage a diversity of providers;
governments should separate remaining public monopolies from competitive service elements, and also separate contestable elements into smaller independent business activities;
government business activities that compete with private provision, whether for profit or not for profit, should comply with competitive neutrality principles to ensure they do not enjoy a net competitive advantage simply as a result of government ownership;
a right to third party access to significant bottleneck infrastructure should be granted where it would promote a material increase in competition in dependent markets and would promote the public interest; and
independent authorities should set, administer or oversee prices for natural monopoly infrastructure providers.
Applying these principles should be subject to a 'public interest' test</td><td>ECONOMICS & INFRASTRUCTURE</td></tr>
<tr><td colspan="2">2. Human services</td></tr>
<tr><td>2. Australian governments should craft an intergovernmental agreement establishing choice and competition principles in the field of human services. The guiding principles should include:
user choice should be placed at the heart of service delivery;
funding, regulation and service delivery should be separate;
a diversity of providers should be encouraged, while not crowding out community and voluntary services; and
innovation in service provision should be stimulated, while ensuring access to high quality human services.
Each jurisdiction should develop an implementation plan founded on these principles that reflects the unique characteristics of providing human services in its jurisdiction.</td><td>CAPABILITY & RESILIANCE</td></tr>
</table>

[1] Commonwealth of Australia 2014, The Australian Government Competition Policy Review Issues Paper, April, P1

Draft Recommendations	MIW 30 Year Sugar Industry Strategy
Transport	
3. Road • Governments should introduce cost reflective road pricing with the aid of new technologies, with pricing subject to independent oversight and linked to road construction, maintenance and safety. • To avoid imposing higher overall charges on road users, there should be a cross jurisdictional approach to road pricing. Indirect charges and taxes on road users should be reduced as direct pricing is introduced. Revenue implications for different levels of government should be managed by adjusting Commonwealth grants to the States and Territories. **4. Liner Shipping** • The Australian Government should repeal Part X of the CCA. • A block exemption granted by the ACCC should be available for liner shipping agreements that meet a minimum standard of pro competitive features (see Draft Recommendation 35). The minimum standard of pro competitive features to qualify for the block exemption should be determined by the ACCC in consultation with shippers and the liner shipping industry. • Other agreements should be subject to individual authorisation by the ACCC. • Repeal of Part X will mean that existing agreements are no longer exempt from the competition provisions of the CCA. Transitional arrangements are therefore warranted. • A transitional period of two years should allow for authorisations to be sought and to identify agreements that qualify for the proposed block exemption. **5. Coastal Shipping** • Noting the current Australian Government Review of Coastal Trading, the Panel considers that cabotage restrictions should be removed, unless they can be shown to be in the public interest and there is no other means by which public interest objectives can be achieved.	ECONOMICS & INFRASTRUCTURE
6. Taxis	
• States and Territories should remove regulations that restrict competition in the taxi industry, including from services that compete with taxis, except where it would not be in the public interest. • If restrictions on numbers of taxi licences are to be retained, the number to be issued should be determined by independent regulators focused on the interests of consumers.	N/A
7. Intellectual property	
• The Panel recommends that an overarching review of intellectual property be undertaken by an independent body, such as the Productivity Commission. • The review should focus on competition policy issues in intellectual property arising from new developments in technology and markets. • The review should also assess the principles and processes followed by the Australian Government when establishing negotiating mandates to incorporate intellectual property provisions in international trade agreements. • Trade negotiations should be informed by an independent and transparent analysis of the costs and benefits to Australia of any proposed IP provisions. Such an analysis should be undertaken and published before negotiations are concluded. • 8. The Panel recommends that subsection 51(3) of the CCA be repealed.	INNOVATION
9. Parallel imports	

• Remaining restrictions on parallel imports should be removed unless it can be shown that:
  ○ they are in the public interest; and
  ○ the objectives of the restrictions can only be achieved by restricting competition.
	N/A

10. Planning and zoning	

• All governments should include competition principles in the objectives of planning and zoning legislation so that they are given due weight in decision making. The principles should include:
  ○ a focus on the long term interests of consumers generally (beyond purely local concerns);
  ○ ensuring arrangements do not explicitly or implicitly favour incumbent operators;
  ○ internal review processes that can be triggered by new entrants to a local market; and
  ○ reducing the cost, complexity and time taken to challenge existing regulations.
	GROWTH

Draft Recommendations	MIW 30 Year Sugar Industry Strategy
11. Regulatory restrictions	

• All Australian governments, including local government, should review regulations in their jurisdictions to ensure that unnecessary restrictions on competition are removed.
• Regulations should be subject to a public benefit test, so that any policies or rules restricting competition must demonstrate that:
  ○ they are in the public interest; and
  ○ the objectives of the legislation or government policy can only be achieved by restricting competition.
• 12. Given the unique position of Australian Standards under paragraph 51(2)(c) of the CCA, the Australian Government's Memorandum of Understanding with Standards Australia should require that non government mandated standards be reviewed according to the same process specified in Draft Recommendation 11.
	ECONOMICS & INFRASTRUCTURE

Competitive neutrality	
• 13. All Australian governments should review their competitive neutrality policies. • 14. All Australian governments should increase the transparency and effectiveness of their competitive neutrality complaints processes. • 15. All Australian governments should require government businesses to include a statement on compliance with competitive neutrality principles in their annual reports	N/A
16. Electricity, gas and water	

Energy
• State and territory governments should finalise the energy reform agenda, including through:
  ○ application of the National Energy Retail Law with minimal derogation by all National Electricity Market jurisdictions;
  ○ deregulation of both electricity and gas retail prices; and
  ○ the transfer of responsibility for reliability standards to a national framework.
 	
Water
• All governments should re commit to reform in the water sector, with a view to creating a national framework. An intergovernmental agreement should cover both urban and rural water and focus on:
  ○ economic regulation of the sector; and
  ○ harmonisation of state and territory regulations where appropriate.
• Where water regulation is made national, the body responsible for its implementation should be the Panel's proposed national access and pricing regulator.
	ECONOMICS & INFRASTRUCTURE

Competition law simplification	
17. Concepts • The Panel recommends that the central concepts, prohibitions and structure enshrined in the current competition law be retained because they are the appropriate basis for the current and projected needs of the Australian economy. **18. Simplification** • The competition law provisions of the CCA should be simplified, including by removing overly specified provisions, which can have the effect of limiting the application and adaptability of competition laws, and by removing redundant provisions.	ECONOMICS & INFRASTRUCTURE
19. Application of the law to government activities in trade or commerce	
• The CCA should be amended so that the competition law provisions apply to the Crown in right of the Commonwealth and the States and Territories (including local government) insofar as they undertake activity in trade or commerce.	N/A
20. Market definition	
• The current definition of 'market' in the CCA should be retained but the current definition of 'competition' should be re worded to ensure that competition in Australian markets includes competition from goods imported or capable of being imported into Australia and from services supplied or capable of being supplied by persons located outside of Australia to persons located within Australia.	ECONOMICS & INFRASTRUCTURE
21. Extra territorial reach of the law	
• Section 5 of the CCA should be amended to remove the requirement that the contravening firm has a connection with Australia in the nature of residence, incorporation or business presence and to remove the requirement for private parties to seek ministerial consent before relying on extra territorial conduct in private competition law actions.	ECONOMICS & INFRASTRUCTURE

Draft Recommendations	MIW 30 Year Sugar Industry Strategy
Cartels	
• 22. The prohibitions against cartel conduct should be simplified and the following specific changes made: ○ the provisions should apply to cartel conduct affecting goods or services supplied or acquired in Australian markets; ○ the provisions ought be confined to conduct involving firms that are actual competitors and not firms for whom competition is a mere possibility; ○ a broad exemption should be included for joint ventures and similar forms of business collaboration (whether relating to the supply or the acquisition of goods or services), recognising that such conduct will be prohibited by section 45 of the CCA if it has the purpose, effect or likely effect of substantially lessening competition; ○ an exemption should be included for trading restrictions that are imposed by one firm on another in connection with the supply or acquisition of goods or services (including IP licensing), recognising that such conduct will be prohibited by section 47 of the CCA (revised in accordance with Draft Recommendation 28) if it has the purpose, or has or is likely to have the effect or likely effect of substantially lessening competition. • 23. The CCA should be amended to remove the prohibition of exclusionary provisions in subparagraphs 45(2)(a)(i) and 45(2)(b)(i).	ECONOMICS & INFRASTRUCTURE
24. Anti competitive disclosure of information	
• The 'price signalling' provisions of Division 1A of the CCA are not fit for purpose in their current form and should be repealed. • Section 45 should be extended to cover concerted practices which have the purpose, or would have or be likely to have the effect, of substantially lessening competition.	ECONOMICS & INFRASTRUCTURE
25. Misuse of market power	
• The Panel considers that the primary prohibition in section 46 should be re framed to prohibit a corporation that has a substantial degree of power in a market from engaging in conduct if the proposed conduct has the purpose, or would have or be likely to have the effect, of substantially lessening competition in that or any other market. • However, the Panel is concerned to minimise unintended impacts from any change to the provision that would not be in the long term interests of consumers, including the possibility of inadvertently capturing pro-competitive conduct. • To mitigate concerns about over capture, the Panel proposes that a defence be introduced so that the primary prohibition would not apply if the conduct in question: ○ would be a rational business decision or strategy by a corporation that did not have a substantial degree of power in the market; and ○ the effect or likely effect of the conduct is to benefit the long term interests of consumers. • The onus of proving that the defence applies should fall on the corporation engaging in the conduct.	ECONOMICS & INFRASTRUCTURE
26. Price discrimination	
• A specific prohibition on price discrimination should not be reintroduced into the CCA. Where price discrimination has an anti-competitive impact on markets, it can be dealt with by the existing provisions of the law (including through the recommended revisions to section 46, see Draft Recommendation 25). • Attempts to prohibit international price discrimination should not be introduced into the CCA on account of significant implementation and enforcement complexities and the risk of negative unintended consequences. Instead the Panel supports moves to address international price discrimination through market solutions that empower consumers. These include the removal of restrictions on parallel imports (see Draft Recommendation 9) and ensuring that consumers are able to take legal steps to circumvent attempts to prevent their access to cheaper legitimate goods.	ECONOMICS & INFRASTRUCTURE
Vertical restrictions (other than resale price maintenance)	
• 27. The provisions on 'third line forcing' (subsections 47(6) and (7)) should be brought into line with the rest of section 47. Third line forcing should only be prohibited where it has the purpose, or has or is likely to have the effect, of substantially lessening competition. • 28. Section 47 should apply to all forms of vertical conduct rather than specified types of vertical conduct.	ECONOMICS & INFRASTRUCTURE
29. Resale Price Maintenance	
• The prohibition on resale price maintenance (RPM) should be retained in its current form as a per se prohibition, but the notification process should be extended to include resale price maintenance. • The prohibition should also be amended to include an exemption for RPM conduct between related bodies corporate, as is the case under sections 45 and 47.	ECONOMICS & INFRASTRUCTURE

Draft Recommendations	**MIW 30 Year Sugar Industry Strategy**
30. Mergers	
• There should be further consultation between the ACCC and business representatives with the objective of delivering more timely decisions in the informal review process.	ECONOMICS & INFRASTRUCTURE
Employment related matters	
Secondary boycotts enforcement • 31. The ACCC should include in its annual report the number of complaints made to it in respect of secondary boycott conduct and the number of such matters investigated and resolved each year. • 32. Jurisdiction in respect of the prohibitions in sections 45D, 45DA, 45DB, 45E and 45EA should be extended to the state and territory Supreme Courts. **33. Restricting supply or acquisition** • The present limitation in sections 45E and 45EA, such that the prohibitions only apply to restrictions affecting persons with whom an employer 'has been accustomed, or is under an obligation' to deal with, should be removed.	ECONOMICS & INFRASTRUCTURE
Exemption processes	
• 34. The authorisation and notification provisions in the CCA should be simplified: o to ensure that only a single authorisation application is required for a single business transaction or arrangement; and o to empower the ACCC to grant an exemption (including for per se prohibitions) if it is satisfied that either the proposed conduct is unlikely to substantially lessen competition or that the proposed conduct is likely to result in a net public benefit. • 35. Exemption powers based on the block exemption framework in the UK and EU should be introduced to supplement the authorisation and notification frameworks.	ECONOMICS & INFRASTRUCTURE
Enforcement and remedies	
• 36. The ACCC should review its guidelines on section 155 notices having regard to the increasing burden imposed by notices in the digital age. • 37. Section 83 should be amended so that it extends to admissions of fact made by the person against whom the proceedings are brought in addition to findings of fact made by the court.	N/A
38. National access regime	
• The declaration criteria in Part IIIA should be targeted to ensure that third party access only be mandated where it is in the public interest. To that end: o criterion (a) should require that access on reasonable terms and conditions through declaration promote a material increase in competition in a dependent market; o criterion (b) should require that it be uneconomical for anyone (other than the service provider) to develop another facility to provide the service; and o criterion (f) should require that access on reasonable terms and conditions through declaration promote the public interest. • The Competition Principles Agreement should be updated to reflect the revised declaration criteria. • The Australian Competition Tribunal should be empowered to undertake merits review of access decisions while maintaining suitable statutory time limits for the review process.	ECONOMICS & INFRASTRUCTURE

Draft Recommendations	MIW 30 Year Sugar Industry Strategy
A national competition body	

• 39. The National Competition Council should be dissolved and the Australian Council for Competition Policy established. Its mandate should be to provide leadership and drive implementation of the evolving competition policy agenda.
• The Australian Council for Competition Policy should be established under legislation by one State and then by application in all other States and the Commonwealth. It should be funded jointly by the Commonwealth, States and Territories.
• Treasurers, through the Standing Committee of Federal Financial Relations, should oversee preparation of an intergovernmental agreement and subsequent legislation, for COAG agreement, to establish the Australian Council for Competition Policy.
• The Treasurer of any jurisdiction should be empowered to nominate Members of the Australian Council for Competition Policy.
• 40. The Australian Council for Competition Policy should have a broad role encompassing:
  o advocate and educator in competition policy;
  o independently monitoring progress in implementing agreed reforms and publicly reporting on progress annually;
  o identifying potential areas of competition reform across all levels of government;
  o making recommendations to governments on specific market design and regulatory issues, including proposed privatisations; and
  o undertaking research into competition policy developments in Australia and overseas.
• 41. The proposed Australian Council for Competition Policy should have the power to undertake competition studies of markets in Australia and make recommendations to relevant governments on changes to regulation or to the ACCC for investigation of potential breaches of the CCA.
• 42. All governments, jointly or individually, should have the capacity to issue a reference to the Australian Council for Competition Policy to undertake a competition study of a particular market or competition issue.
• All market participants, including small business and regulators (such as the ACCC), should have the capacity to request market studies be undertaken by the Australian Council for Competition Policy.
• The work program of the Australian Council for Competition Policy should be overseen by the Ministerial Council on Federal Financial Relations to ensure that resourcing addresses priority issues.
• 43. The Australian Council for Competition Policy should be required to undertake an annual analysis of developments in the competition policy environment, both in Australia and internationally, and identify specific issues or markets that should receive greater attention.
	N/A

44. Competition payments	
• The Productivity Commission should be tasked to undertake a study of reforms agreed to by the Commonwealth and state and territory governments to estimate their effect on revenue in each jurisdiction. • If disproportionate effects across jurisdictions are estimated, the Panel favours competition policy payments to ensure that revenue gains flowing from reform accrue to the jurisdictions undertaking the reform. • Reform effort would be assessed by the Australian Council for Competition Policy based on actual implementation of reform measures, not on undertaking reviews.	N/A
45. Competition and consumer functions	
• Competition and consumer functions should be retained within the single agency of the ACCC.	N/A
46. Access and pricing regulator	

• The following regulatory functions should be transferred from the ACCC and the NCC and be undertaken within a single national access and pricing regulator:
  o the powers given to the NCC and the ACCC under the National Access Regime;
  o the powers given to the NCC under the National Gas Law;
  o the functions undertaken by the Australian Energy Regulator under the National Electricity Law and the National Gas Law;
  o the telecommunications access and pricing functions of the ACCC;
  o price regulation and related advisory roles under the Water Act 2007 (Cth).
• Consumer protection and competition functions should remain with the ACCC.
• The access and pricing regulator should be established with a view to it gaining further functions as other sectors are transferred to national regimes.
	N/A

ACCC governance	
• 47. The Panel believes that incorporating a wider range of business, consumer and academic viewpoints would improve the governance of the ACCC. • 48. The ACCC should also develop a Code of Conduct for its dealings with the media with the aim of strengthening the perception of its impartiality in enforcing the law.	N/A

Draft Recommendations	**MIW 30 Year Sugar Industry Strategy**
49. Small business	
• The ACCC should take a more active approach in connecting small business to alternative dispute resolution schemes where it considers complaints have merit but are not a priority for public enforcement.	ECONOMICS & INFRASTRUCTURE
50. Collective bargaining	
• The CCA should be amended to introduce greater flexibility into the notification process for collective bargaining by small business. One change would be to enable the group of businesses covered by a notification to be altered without the need for a fresh notification to be filed (although there ought to be a process by which the businesses covered by the notification from time to time are recorded on the ACCC's notification register). • The ACCC should take actions to enhance awareness of the exemption process for collective bargaining and how it might be used to improve the bargaining position of small businesses in dealings with large businesses.	ECONOMICS & INFRASTRUCTURE
51. Retail trading hours	
• The Panel notes the generally beneficial effect for consumers of deregulation of retail trading hours to date and the growth of online competition in some retail markets. The Panel recommends that remaining restrictions on retail trading hours be removed. To the extent that jurisdictions choose to retain restrictions, these should be strictly limited to Christmas Day, Good Friday and the morning of ANZAC Day.	N/A
52. Pharmacy	
• The Panel does not consider that current restrictions on ownership and location of pharmacies are necessary to ensure the quality of advice and care provided to patients. Such restrictions limit the ability of consumers to choose where to obtain pharmacy products and services, and the ability of providers to meet consumers' preferences. • The Panel considers that the pharmacy ownership and location rules should be removed in the long term interests of consumers. They should be replaced with regulations to ensure access and quality of advice on pharmaceuticals that do not unduly restrict competition. • Negotiations on the next Community Pharmacy Agreement offer an opportunity for the Australian Government to remove the location rules, with appropriate transitional arrangements.	N/A

Source: Commonwealth Government, *The Australian Government Competition Policy Review*, Canberra, September.

3. Queensland Government

The Queensland Government has commenced an ambitious series of 30 year strategies to ensure government policy reflects the expectations of the people of Queensland, and critically, enables the State to develop with clear priorities and strategic direction. Many of the central elements of these plans have a strategic fit with the sugar industry and in particular the MIW sugar region.

3.1 Queensland Plan

http://queenslandplan.qld.gov.au/

3.1.1 Vision

*In 30 years Queensland will be home to **vibrant** and **prosperous** communities.*

*Our state will be **well planned** with the right infrastructure in the right places, to support a population that has grown across every region.*

*We will **value education** as a lifelong pursuit where we gain practical skills, enrich our lives, find secure jobs and improve the competitiveness of our economy.*

*Our **brightest minds** will take on the world and we will work collaboratively to achieve the best results for Queensland.*

*We will be the **greatest state** in which to live, work and play, and guardian of a sustainable **natural environment** that inspires an active lifestyle and supports healthy communities.*

*We will have a **community spirit** that embraces our diversity and unique culture and gives everyone the opportunity to shine. We will not leave anybody behind.*

*Government can't do this alone but as a community **working together** we can achieve everything we want for our state's future.*

3.1.2 Foundation Areas

The Queensland Plan contains nine foundations:

Foundation Area	MIW 30 Year Sugar Industry Strategy
Education - Building life skills and inspiring bright minds *Education is for life.* A quality education system is the launch pad for a rewarding life, a meaningful career and an innovative knowledge economy. Our system will be accessible and affordable for everyone at every age. It will be built on a practical learning model with educators drawn from our best and brightest to inspire and shape our future generations.	
• **G1** Our curriculum is flexible and future-focused. • **G2** We have practical-based learning. • **G3** We have the most highly valued educators in Australia. • **G4** Education is valued as a lifelong experience.	CAPABILITY & RESILIANCE
Community - Making connections *Communities are our heartland.* Our vibrant communities shape Queensland's unique character. They are places where we demonstrate our diversity and community spirit and provide vital hubs for the services and activities that connect us. We will encourage individual and community responsibility, foster acceptance and reduce disadvantage—bringing our communities closer together.	
• **G5** In Queensland nobody gets left behind. • **G6** We celebrate, embrace and respect diversity. • **G7** We applaud community achievers.	COMMUNITY & ENVIRONMENT
Regions - Building thriving communities *Regions are the engine rooms of our state.* Our regional centres are the strongest in the nation and critical hubs for our growing industries. We recognise the challenge population growth brings and will find ways to manage it. We will build on what already makes our regions exceptional—people, local enterprise, and natural resources—developing our strategic and competitive advantage.	
• **G8** Our regions are strong and prosperous. • **G9** We capitalise on unique regional opportunities and assets. • **G10** Working together we will achieve more. • **G11** We value and invest in local businesses and workers.	GROWTH DIVERSIFICATION ECONOMICS & INFRASTRUCTURE

Foundation Area	MIW 30 Year Sugar Industry Strategy
Economy - Forging diversity and prosperity *Economic prosperity creates opportunity.* Our strong economy fuels growth across our regions and is responsive to global shifts and opportunities, particularly in the Asian market. We will work to diversify our portfolio of industries and take full advantage of the resources available to us—our people and natural assets—to remain globally competitive. Our bright minds will drive innovation and help seize future opportunities.	
• **G12** We are the number one performing economy in Australia. • **G13** We are focused on industry development and diversification. • **G14** Queensland has the best job opportunities in Australia. • **G15** Our centres of excellence drive innovation.	GROWTH DIVERSIFICATION INNOVATION ECONOMICS & INFRASTRUCTURE
Health & Wellbeing - Being healthy and active *Active, healthy lifestyles drive our success.* Health and wellbeing are building blocks for fulfilling lives. We will make smart lifestyle decisions to reduce the toll of preventable disease and increase our life spans. We will understand the importance of open green spaces for recreation and social cohesion and enjoy a work-life balance to remain connected with our family and community.	
• **G16** We are physically and mentally healthy. • **G17** We are connected to our communities. • **G18** We enjoy a work-life balance. • **G19** We have the opportunity to reach our full potential.	COMMUNITY & ENVIRONMENT
Environment - Achieving balance *We are the guardians of our environment.* Queensland is home to diverse, pristine environments, including five World Heritage sites. We have a duty of care to preserve and protect our environment so it continues to underpin our lifestyle and economy. We will encourage sustainable practices including green energy solutions and the responsible management of our growing communities.	
• **G20** Our natural resources are managed effectively. • **G21** We protect the environment. • **G22** We invest in and adopt sustainable and renewable solutions. • **G23** Urban sprawl is managed efficiently.	COMMUNITY & ENVIRONMENT
People - Creating opportunities for everyone *People are our greatest asset.* Unleashing individual potential maximises personal, community and economic outcomes. We will build an inclusive society that nurtures our children, supports the least advantaged including Aboriginal and Torres Strait Islander Queenslanders, encourages diversity, fosters bright minds and uses the talents of all generations. We believe that nobody should be left behind.	
• **G24** Impacts of population growth are managed. • **G25** Older Queenslanders are respected and valued. • **G26** We support the least advantaged. • **G27** We attract bright minds to Queensland.	ALL STRATEGIES
Infrastructure - Being connected *Infrastructure creates building blocks for our future.* Our access to clean water, reliable energy supplies, communication technology and public infrastructure provides an enviable standard of living. We will keep pace with demand by planning for the future. We will create green spaces and social infrastructure, manage urban expansion and provide essential services. Our worldclass infrastructure will connect us globally.	
• **G28** Our infrastructure fits our changing population and demographics. • **G29** Our regions, businesses and communities reach their full potential. • **G30** Infrastructure is funded in a variety of ways. • **G31** Infrastructure is designed and built with longevity in mind. • **G32** Infrastructure provides connectivity and accessibility across the state.	ECONOMICS & INFRASTRUCTURE
Governance - Balancing all our interests *Governance is the people's voice.* The decisions made by governments and community organisations change our lives. We want a greater say in the process and in the allocation of resources, especially in our local communities. We will reframe our governance model to involve a broader cross-section of stakeholders, including everyday Queenslanders. We'll reduce red tape and have effective regulation to positively change behaviours.	
• **G33** We have localised and more flexible decision-making. • **G34** Regulation is outcome-based. • **G35** Government is more effective and efficient.	COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE

Source: Queensland Government

3.2 Queensland's Agriculture Strategy

https://www.daff.qld.gov.au/business-trade/development/queenslands-agriculture-strategy

3.2.1 Vision

Our 2040 vision for Queensland's agriculture, fisheries and forestry industries is for an efficient, innovative, resilient and profitable sector that thrives in the long term.

This means creating a sector that:

- *Achieves maximum productivity with optimised inputs and minimised waste.*
- *Embraces solutions that value-add and meet new requirements and market demands.*
- *Withstands and recovers quickly from difficult conditions.*
- *Yields profits and financial rewards for its producers and the economy.*

In support of this vision, the Queensland Government has set a clear, ambitious target to double Queensland's agricultural production by 2040.

3.2.2 Strategic Themes

The Agriculture Strategy contains four pathways.

Pathway	MIW 30 Year Sugar Industry Strategy
Resource Availability Securing and increasing resource availability.	
Growth of agricultural production will require additional and optimised use of critical resources including land, water, labour and capital investment. Strategies include: • Improve access to, and the reliability of, water supplies. • Ensuring coexistence of industries through planning frameworks while providing certainty for producers in strategic agricultural areas. • Improving agriculture skills and career pathways. Key initiatives include: • Releasing the *Queensland Agricultural Land Audit*. • Ensuring agriculture is represented as a state interest in statutory regional plans. • Delivering secure and defined water entitlements for agriculture.	GROWTH CAPABILITY & RESILIENCE ECONOMICS & INFRASTRUCTURE
Productivity Driving productivity growth across the supply chain.	

To double Queensland's agricultural production, productivity growth must lift above the 30-year long-term average.
 	
Strategies include:
• The development and adoption of innovation across the supply chain, including:
  ○ Implementing preparedness and response mechanisms
  ○ Continuing the Queensland Alliance for Agriculture and Food Innovation
  ○ Investing in key growth commodities such as tropical pulses, beef, grains and sugar.
 	
Initiatives include:
• A research, development and extension plan that sets clear targets for transformation through:
  ○ Research
  ○ Improved workforce capability
  ○ Increases the uptake of best practice
• Preparedness to respond to threats such as foot-and-mouth disease.
	GROWTH
	INNOVATION

Pathway	MIW 30 Year Sugar Industry Strategy
Markets Securing and increasing market access.	
Market access and demand will be key determinants of future growth. Strategies include: • Securing current markets. • Accessing new export markets. Initiatives include: • Streamline regulation while protecting our biosecurity status and food safety standards. • Realigning the Global Markets Initiative to enhance trade development services for food and agribusiness clients. • Promote Queensland agribusiness as an attractive proposition to foreign and private investors.	COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE
Production Costs Minimising the costs of production.	
Profitability and viability have been affected by the cost of inputs, regulatory compliance and logistics of supplying markets. Strategies include: • Minimise the cost of production. • Ensuring reliable access to inputs. Initiatives include: • Develop electricity and water strategies that help ensure reliable and cost-effective systems. • Address supply-chain inefficiencies by preserving rail access and developing suitable transport infrastructure and logistics pathways such as ports and roads.	GROWTH ECONOMICS & INFRASTRUCTURE

Source: Queensland Government, CRSG

3.3 WaterQ: A 30 year Strategy for Queensland's Water Sector

https://www.dews.qld.gov.au/policies-initiatives/water-sector-reform/30-year-strategy

3.3.1 Vision

A water sector that supports increased productivity, economic growth, strong and healthy communities, and a natural environment that is valued.

WaterQ presents a number of specific vision statements around various elements.

10 Years	20 Years	30 Years
TECHNOLOGY	**INNOVATION**	**PURPOSE BUILT PRECINCTS**
Water-efficient, water-less and other technologies will be part of our homes and industries. Interactive meters and sensors will be integrated into water and energy systems, providing real-time, accurate information about water consumption. This means customers will be able to make better decisions about how and when they use this valuable resource. Sewage treatment plants will be used to generate energy instead of just using it.	Cities will install smart systems that not only prevent run-off pollution in rivers and lakes but treat water to provide reuse opportunities. Advanced water technologies will help cities recycle and reuse water locally, and reduce the energy used to transport water.	Our communities and cities will be lifestyle precincts. We will live, work and play in these well-planned precincts with low cost, modular water and sewerage services allowing us to use more than one source of water, including rainwater, reuse water and stormwater.
BALANCE	**FIT-FOR-PURPOSE WATER**	**SUSTAINABLE SECTOR**
We will balance the effects of supply and demand better between agriculture, mining, urban development and our catchments. In response, we'll see advances in water quality offsets, a maturing water market and greater reuse opportunities.	Fit-for-purpose water will provide the bulk of our agriculture and mining water. Our industries will be co-located so the waste of one becomes a resource for another. Agriculture and mining waste by-products will generate new business opportunities.	Our catchments will be sustainable and productive. Water markets, water trading and reuse will be the norm. Our infrastructure and service delivery approach will reflect our diversity, our needs and our changing climate.
SMARTER THINKING	**ADAPTIVE INFRASTRUCTURE**	**WORLD LEADER**
As the sector matures, our service providers will share their skills, knowledge and investments to deliver better value for money for all. Developers, water professionals, service providers, governments and customers will all work together.	Modular, mobile, low-cost water supply and sewage management infrastructure will be used to meet changes in our economy and population. We will export our skills and knowledge to help our neighbours develop more sustainable solutions.	Our water sector will be resilient, innovative and lead global thinking. Queensland will have world-class innovation with services designed and delivered in collaboration by public and private sector partners As Queenslanders, we will only use and pay for what we need.

Source: Queensland Government

3.3.2 Strategic Themes

WaterQ contains seven strategic priorities.

Strategic Priority	MIW 30 Year Sugar Industry Strategy
#1 Customer empowerment and community education Customers will know more about their water services and choose how these services are delivered.	
Five year actions include: • Encourage flexible pricing, including new tariff structures, to meet customer and service provider needs. • Provide greater product choices to customers by championing customer water plans. • Improve customer awareness of services through engagement and information.	ECONOMICS & INFRASTRUCTURE
#2 Equity and affordability Water services will be affordable, have more transparent pricing and provide customers with specialised dispute resolution.	
Five year actions include: • Promote user-pays approach to services. • Work with community on service standards. • Create a more efficient and transparent concessions program across water utilities. • Provide consistent state-wide dispute resolution service for customers.	ECONOMICS & INFRASTRUCTURE

Strategic Priority	MIW 30 Year Sugar Industry Strategy
#3 Efficient and productive use of water Service providers will promote products and services that use less water and energy to help customers embrace efficiency.	
Five year actions include: • Continue to encourage rural water use efficiency. • Advise on appropriate technologies and solutions, via an industry-led water innovation panel. • Increase uptake for fit-for-purpose recycled water by industry, mining and agriculture. • Investigate greater opportunities for decentralised systems including micro-utilities to deliver energy and water services.	INNOVATION ECONOMICS & INFRASTRUCTURE
#4 Responsible and productive water management Sufficient water will be available where and when it is needed, at the right quality for customers. Innovative approaches will be used to manage water use and environmental health, and generate regional economic opportunities.	
Five year actions include: • Provide opportunities for economic growth and development through greater access to water. • Increase understanding of water supply and demand needs. • Improve waterway health through innovative management.	INNOVATION ECONOMICS & INFRASTRUCTURE
#5 Skilled and sustainable water sector Service providers will have the skills and resources to respond to the challenges of the future, deliver services and secure opportunities for economies of scale.	
Five year actions include: • Improve the strength of service delivery through collaboration. • Create a culture of region-wide capital planning. • Support the needs of water sector professionals. • Establish a multi-disciplinary workforce to deal with climate variability, population growth and ageing infrastructure.	CAPABILITY & RESILIANCE ECONOMICS & INFRASTRUCTURE
#6 Smart regulation and attracting private sector investment Performance-based regulation will provide a level playing field for service providers, transparent information and consumer protection for the community, mobilise the private sector and reward innovation.	
Five year actions include: • Reduce red tape and promote transparency and accountability. • Encourage greater use of recycled water through risk-based regulation. • Use a coordinated approach to support catchment mining and resources based, total water cycle solutions.	ECONOMICS & INFRASTRUCTURE
#7 Innovative technology and infrastructure We will develop our knowledge and skills, and exploit these through innovation and technology to improve the environment and support community-led solutions.	
Five year actions include: • Create an environment that fosters innovation, encourages Queensland-specific solutions and showcases best practice. • Remove barriers to innovation.	INNOVATION ECONOMICS & INFRASTRUCTURE

Source: Queensland Government

3.4 PowerQ: A 30 year Strategy for Queensland's Electricity Sector

https://www.dews.qld.gov.au/policies-initiatives/electricity-sector-reform/30-year-electricity-strategy

3.4.1 Vision

An electricity supply system that is resilient, cost-effective and consumer-focused to support the economic and lifestyle aspirations of all Queenslanders.

Visions are presented for stakeholder groups over different time horizons:

2014-2016	2016-2026	2026-2044
CONSUMERS **GOAL:** IMPROVE CONSUMER VALUE Queensland will have the most competitive electricity prices in Australia. Empowered and informed, consumers will continually challenge the market to deliver innovative products and services that meet their needs.		
Consumers begin this timeframe with limited choice and understanding of their options in the electricity market. Thanks to timely information that is easy to understand and compare, they will become increasingly aware they can make informed decisions about their electricity needs. As electricity sector reforms in Queensland begin to take effect, consumers will start saving money. Meanwhile, more large industrial consumers will pursue increasingly energy-efficient methods as well as new options to manage their supply and better control their operating costs.	Prices will stabilise as reforms take effect and electricity sector productivity is improved. This will deliver lifestyle benefits to Queenslanders and contribute to strong economic growth. In the medium term, consumers will become adept at picking the right electricity products and services for them. In addition, the market will offer consumers the ability to creatively tailor products and services and achieve greater control and flexibility. Changes in the way consumers use electricity will be evident everywhere. Consumers will no longer see electricity as 'one size fits all'. They will expect electricity services to match their individual business and lifestyle needs. This growing interest will, in turn, force the market to work harder and become more consumer-focused. This will be a significant shift in power, with great benefits for the consumer.	In this shared energy future, consumers will wield significant power and influence as users, generators and traders of electricity. A new generation of service providers will make it easy for consumers to do as little or as much as they want in the electricity sector, and demand will drive the development of new and innovative products and services. Through new technology, some consumers will generate more power than they can use. In response, the market will offer even more ways to share electricity, which should lead to more options for consumers to control their use and costs. Queensland will have a strong and diversified economy.
MARKET **GOAL:** IMPROVE MARKET EFFICIENCY Queensland's thriving, competitive and efficient electricity market will promote timely investment, be open to new entrants and meet the changing needs of consumers across the state.		
The market is in a state of flux. Contributing factors include consumers' changing demand and usage patterns, driven by the popularity of energy-efficient products and rooftop solar systems. In response, new pricing structures will begin to show the true cost of supply and encourage consumers to use electricity in ways and at times that do not add to cost pressures and give them greater control over their bills. The retail market in South East Queensland will soon strengthen as the benefits of competition and supporting reforms take effect.	In the medium term, most consumers will feel the benefits of true retail competition for the first time. Across the state, new forms of generation and storage will become commercially viable, creating challenges and opportunities for existing infrastructure. Advanced metering and the roll-out of new tariffs will drive new efficiencies, and consumers will feel the benefits. As communications and data technology improve, matching supply and demand will be easier. Smarter grids will incorporate advanced metering, communications and control. New, smarter technologies will mean less costly infrastructure is needed. More homes and businesses may be powered independently, perhaps by cheap, organic photovoltaic cells, batteries or fuel cells. These premises will have the technology to know when power is needed, and will be able to	Innovation will be the byword for the long-term future of Queensland's electricity market. Technologies considered advanced today will be the norm tomorrow, with new products and services yet to be invented. New, non-traditional service providers will enter the market in competition with the existing participants. The lines between sellers and consumers of electricity will blur as consumers simultaneously produce, use, store and trade electricity. Technological advances in data communication will affect every aspect of the electricity market, from alternative supply and demand response through to self-healing smart grids that will detect and isolate network faults and dynamically reconfigure the system in response. At the heart of the market changes will be the consumer, whose diverse needs

2014-2016	2016-2026	2026-2044
	monitor appliances and identify those that aren't running effectively. A changed regulatory model will recognise market shifts and that network businesses are competing with new technologies to provide greater service to consumers. Consumers will also change: they will now produce and store electricity and supply the surplus back into the market. For Queensland's big energy users, new sources of energy could power operations, including solar thermal, geothermal or wind supported by gas. Technologies such as carbon capture and storage could see coal-fired generators maintaining their market share.	and demands will be met to increasingly higher standards.
GOVERNMENT **GOAL:** IMPROVE GOVERNANCE EFFECTIVENESS The Queensland Government will provide an operating environment for the electricity sector that promotes efficient markets, helps protect consumers and addresses market failures.		
Short-term reforms to stabilise the Queensland electricity market will have a positive effect felt by consumers and the market for years to come. By removing the distorted market and regulatory frameworks that contributed to recent unsustainable price rises, the Queensland Government will pave the way for a better electricity future.	The medium-term years will be a period of transition as new technologies and business models transform the sector. Taking a system-wide view, governments at all levels will work together to guide the electricity sector through this transformation.	By this time, the Queensland Government's role will have changed to watchful facilitator. It will respond quickly to the evolving and dynamic marketplace to ensure consumers and all of Queensland benefit in the new market.

Source: Queensland Government

3.4.2 Strategic Priorities

PowerQ contains eight strategies.

Strategic Priority	MIW 30 Year Sugar Industry Strategy
1. Ensure the Queensland electricity market is cost-competitive nationally.	
Actions to achieve this strategy: <u>2014–2016</u> 1.1 Implement immediate reform program. 1.2 Identify opportunities for productivity improvements. 1.3 Support consumer advocacy. <u>2016–2026</u> 1.4 Implement productivity improvements. 1.5 Make sure the tariff settings are right. 1.6 Encourage low-cost solutions in remote and isolated communities. <u>2026–2044</u> 1.7 Monitor market changes.	INNOVATION ECONOMICS & INFRASTRUCTURE
2. Champion informed decision-making so consumer behavior creates a responsive electricity market.	
Actions to achieve this strategy: <u>2014–2016</u> 2.1 Adopt national consumer protections and retail standards. 2.2 Increase consumer engagement in the electricity market. 2.3 Support higher voluntary standards for product comparison services. <u>2016–2026</u> 2.4 Adjust engagement strategies as market conditions change. 2.5 Set new goals for improved consumer experience. <u>2026–2044</u> 2.6 Address emerging impediments to ongoing consumer engagement. 2.7 Champion continued improvements in consumer service levels.	INNOVATION ECONOMICS & INFRASTRUCTURE

Strategic Priority	MIW 30 Year Sugar Industry Strategy
3. Encourage a competitive and diverse market that attracts more innovation and investment.	
Actions to achieve this strategy: 2014–2016 3.1 Stimulate the retail electricity market by: • Removing price regulation in South East Queensland, subject to meeting certain preconditions. • Investigating options to provide increased competition in regional areas. 3.2 Review the potential impacts of, and opportunities from, new technologies. 2016–2026 3.3 Review retail competition across Queensland. 3.4 Implement actions from the review of new technologies (action 3.2). 2026–2044 3.5 Review the policy framework in light of changes to the supply chain.	GROWTH DIVERSIFICATION INNOVATION ECONOMICS & INFRASTRUCTURE
4. Maximise opportunities from Queensland's natural resources to create cost-effective, sustainable electricity.	
Actions to achieve this strategy: 2014–2016 4.1 Ensure policy settings support efficient investment choices. 2016–2026 4.2 Remove barriers to new generation sources and technologies. 4.3 Assess Queensland's ability to contribute to emissions reductions. 2026–2044 4.4 Facilitate the development of clean and energy-efficient technologies. 4.5 Monitor the market's ability to provide a generation fuel mix that meets consumer needs.	GROWTH DIVERSIFICATION INNOVATION ECONOMICS & INFRASTRUCTURE
5. Use open data to drive market development, competition and innovation.	
Actions to achieve this strategy: 2014–2016 5.1 Develop an advanced metering framework. 5.2 Establish an electricity data hub. 2016–2026 5.3 Work with knowledge partners to share data analysis and information. 2026–2044 5.4 Identify new opportunities for open data.	INNOVATION ECONOMICS & INFRASTRUCTURE
6. Provide policy certainty to encourage strong competition and benefit consumers.	
Actions to achieve this strategy: 2014–2016 6.1 Clarify the Queensland Government's role in the electricity market. 6.2 Review the *Electricity Act 1994*. 2016–2026 6.3 Implement outcomes of the Electricity Act 1994 review. 2026–2044 6.4 Maintain the Queensland Government's role as a proponent of effective, outcomes-based regulation.	ECONOMICS & INFRASTRUCTURE
7. Position Queensland as a leader in innovative, consumer-driven reform.	
Actions to achieve this strategy: 2014–2016 7.1 Drive national consideration of supply chain disruptions. 7.2 Advocate for a more strategic approach to national reforms. 7.3 Emphasise whole-of-system electricity productivity as a policy objective. 7.4 Work with the Australian Government on the Renewable Energy Target review and the Direct Action Plan 2016–2026 7.5 Monitor the effectiveness of the wholesale market design. 2026–2044 7.6 Review the scope and operation of the national reform agenda.	INNOVATION ECONOMICS & INFRASTRUCTURE

Strategic Priority	MIW 30 Year Sugar Industry Strategy
8. Enable equitable access to electricity.	
Actions to achieve this strategy: 2014–2016 8.1 Review the hardship and concession framework. 2016–2026 8.2 Review the arrangements for the Uniform Tariff Policy. 8.3 Review the impact of the changing market on consumers. 8.4 Assess whether existing consumer protections remain relevant. 8.5 Align Queensland and Australian Government assistance measures. 2026–2044 8.6 Assess support mechanisms as the market evolves.	ECONOMICS & INFRASTRUCTURE

Source: Queensland Government

3.5 Moving Freight: A 10 year Strategy

http://www.tmr.qld.gov.au/business-industry/Transport-sectors/Freight/Moving-Freight.aspx

3.5.1 Vision

To ensure the freight system is continually receptive and responsive to customers' needs, changing industry requirements and growing economic activity.

3.5.2 Strategic Priorities

Moving Freight contains six priorities.

Priority	MIW 30 Year Sugar Industry Strategy
1. Expand the use of rail freight.	
Summary of key actions: • Develop the North Coast Line, Western and South Western rail systems and Mount Isa to Townsville rail corridor. • Provide appropriate priority for rail freight. • Improve regional rail for agricultural and general freight.	ECONOMICS & INFRASTRUCTURE
2. Increase road freight network access.	
Summary of key actions: • Deliver improved heavy vehicle access for industry. • Promote strategic road freight routes for higher productivity vehicle access. • Provide an oversize overmass (OSOM) network. • Expand heavy vehicle access for the agricultural sector.	ECONOMICS & INFRASTRUCTURE
3. Facilitate greater freight infrastructure investment.	
Summary of key actions: • Enable greater industry investment in the freight network. • Promote multi-modal investment needs. • Release upgrade strategies for the Flinders and Barkly, Peak Downs and Capricorn highways. • Deliver a heavy vehicle action plan to improve access.	ECONOMICS & INFRASTRUCTURE
4. Support future freight growth.	
Summary of key actions: • Support an inland rail freight strategy. • Enable better industry coastal shipping services. • Map freight network flood immunity.	GROWTH ECONOMICS & INFRASTRUCTURE
5. Better freight policy and information.	
Summary of key actions: • Support National Land Freight Strategy. • Support National Heavy Vehicle Regulator and national law. • Develop better freight data and information systems. • Employ technology to manage heavy vehicles.	ECONOMICS & INFRASTRUCTURE
6. Engage industry for better and safer freight outcomes	
Summary of key actions: • Support freight research and development. • Deliver heavy vehicle rest areas with industry. • Work with freight industry councils.	INNOVATION ECONOMICS & INFRASTRUCTURE

Source: Queensland Government

3.6 Governing for Growth: Economic Strategy & Action Plan

http://www.dsdip.qld.gov.au/governing-for-growth/economic-development/governing-for-growth.html

3.6.1 Strategic Economic Direction

Policy Setting and Programs: Set the foundations for growth in the four pillars and across the economy: Agriculture Strategy, DestinationQ, ResourcesQ and Property and Construction Strategy.

Catalytic Infrastructure: Better planning, prioritisation, delivery and operation of infrastructure to unlock economic potential.

Growth and strengthen regions: Capitalise on economic drivers and unique assets.

3.6.2 Strategic Objectives

The plan contains six priority areas for government action.

Strategic Objective	MIW 30 Year Sugar Industry Strategy
Policy settings and programs that drive growth	
• The Queensland Government will set the foundations for growth in the economy to ensure: ○ the most competitive business environment in Australia. ○ policy settings and programs actively drive growth and investment.	ECONOMICS & INFRASTRUCTURE
Whole of economy	
• Modernising and reforming the state's planning and development, and property and land systems. • Facilitating major projects as key growth drivers. • Reforming science and innovation as a key enabler for productivity growth. • Helping business meet challenges and capitalise on growth opportunities. • Reforming the vocational education and training sector to increase workforce participation and boost productivity.	CAPABILITY & RESILIANCE ECONOMICS & INFRASTRUCTURE
Resources	
• Providing a competitive environment for resource sector investment and growth by cutting red tape and streamlining approvals. • Enhancing and promoting Queensland's global reputation as a preferred supplier of minerals and energy resources. • Facilitating development of new resource regions and reinvigorating exploration to unlock the next wave of resources growth.	N/A
Construction	
• Achieve a vibrant, dynamic and sustainable property and construction industry in Queensland. • Ensure Queensland's built environment needs can be met and create job opportunities in the property and construction industry.	N/A
Agriculture	
• To double agricultural production by 2040 to achieve an efficient, innovative, resilient and profitable sector.	ALL STRATEGIES
Tourism	
• To double overnight visitor expenditure by 2020.	N/A
Catalytic infrastructure—delivering for Queensland's economy	
• Implement better planning, prioritisation, delivery and operation of infrastructure to enable productivity growth. • Make smarter use of existing infrastructure as well as better allocation of new investment in infrastructure to ensure value for money. • Increase private sector involvement to ensure the most efficient delivery and operation of infrastructure for Queenslanders.	ECONOMICS & INFRASTRUCTURE
Grow and strengthen regions—capitalising on regional drivers	
• The Queensland Government's strategy will capitalise on economic drivers and unique assets to grow and strengthen regional economies. • To unlock regional economic potential by enabling major project investment and exports. • Build productive and resilient supply chains.	GROWTH DIVERSIFIACTION ECONOMICS & INFRASTRUCTURE

3.7 Other Queensland Strategies

A number of other long-term strategic plans have been developed including:

- DestinationQ, a 20-year plan for tourism.
- ResourcesQ, a 30-year plan for the resources sector.
- Science and innovation action plan.

4. Regional Plans

4.1 Mackay, Isaac & Whitsunday Regional Plan 2009-2031

http://www.dsdip.qld.gov.au/resources/plan/miw/miw-regional-plan.pdf

4.1.1 Regional Vision

The Mackay, Isaac and Whitsunday region (the region) is a vibrant, progressive region where the values of the community and industry are respected and in balance with the natural environment. The region's natural assets and abundant resources will be responsibly managed for the benefit of residents, visitors and future generations. It achieves its potential with a range of industries, employment and learning opportunities for everyone. The region has a resilient and inclusive community that respects and offers diversity and choice, and where residents and visitors enjoy a healthy, active and safe lifestyle.

4.1.2 Desired Regional Outcomes

Desired Regional Outcomes (Principles)	MIW 30 Year Sugar Industry Strategy
Sustainability, climate change and natural hazards	
• *Sustainability*: Decision-making supports ecologically sustainable development. • *Climate Change*: The generation of greenhouse gases is reduced through land-use planning and development design, and long-term climate change impacts are considered in planning decisions. • *Natural Hazards*: The resilience of communities, development, essential infrastructure, natural environments and economic sectors to recognised hazards, including the anticipated effects of climate change, is increased.	CAPABILITY & RESILIANCE
Regional Landscapes	
• *Values*: Manage and enhance the values of the regional landscape to optimise their ability to contribute to the region's liveability, lifestyle, health and economy. • *Areas*: Optimise multiple community benefits through coordinated planning, management and investment in regional landscape areas. • *Green Space Network*: An integrated green space network caters for a range of community and environmental needs.	COMMUNITY & ENVIRONMENT
Environment	
• *Biodiversity*: The region's natural assets, biodiversity values and ecological services are protected, managed and enhanced to improve their resilience to the anticipated effects of climate change and other threats. • *Water Quality, Waterway Health and Wetlands*: The ecological health, environmental values and water quality of coastal, surface, ground waters and wetlands are protected. • *Coastal Environment*: Coastal resources are managed while protecting human life and property from the hazards of natural fluctuations in coastal processes. • *Air Quality and Noise*: The environment is protected to maintain the health and wellbeing of the community and the natural environment through effective management of air quality and noise.	COMMUNITY & ENVIRONMENT
Natural Resource Management	
• *Natural Resource Management*: The management and use of natural resources enhance community, economic and landscape values. • *Ecosystem-Dependent Economic Resources*: Ecosystems are sustainably managed, ensuring their cultural, social, economic and environmental services and values are protected. • *Mineral and Extractive Industries*: Mineral, petroleum and extractive resources are managed for current and future use, and their extraction, processing, transport and downstream value-adding continue to contribute to the economy. • *Planning and managing agricultural land*: The region's agricultural production areas are protected and sustainably managed to ensure their continuing contribution to the economy, and to mitigate the anticipated effects of climate change. • *Regional Water Supply Planning*: Water, as a valuable and finite regional resource, is planned and managed on a total water cycle basis. • *Total Water Cycle Management*: Water is recognised as a valuable and finite resource which is managed on a total water cycle basis.	GROWTH COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE

Desired Regional Outcomes (Principles)	**MIW 30 Year Sugar Industry Strategy**
Strong Communities	
• *Social Planning*: Social planning is incorporated into planning processes to manage and respond to changing communities, and support community wellbeing and quality of life. • *Addressing Social and Locational Disadvantage*: Social and locational disadvantage in communities is recognised and addressed. • *Healthy and Safe Communities*: Quality of life is enhanced by offering healthy and safe environments that promote active living and healthy lifestyles, and provide accessible health services. • *Community Engagement, Capacity Building and Identity*: Strong, connected and functional communities exist as a result of grassroots community development, engagement and participation, and maintaining and improving a community's sense of shared identity. • *Strengthening Resource Communities*: The long-term viability of resource communities is sustained by enhancing liveability, providing diverse housing and employment options and accommodating the needs of the resource sector. • *Engaging Aboriginal and Torres Strait Islander People*: Traditional Owners and Elders are actively engaged in planning and development processes, and their connectivity with Country is understood, considered and respected. • *Aboriginal and Torres Strait Islander Social and Economic Equity*: Aboriginal and Torres Strait Islander people have equitable access to opportunities that promote a high standard of living, good economic prospects and general wellbeing.	COMMUNITY & ENVIRONMENT
Strong Economy	
• *Economic Leadership and Coordination*: Strong economic leadership attracts, coordinates and drives regional economic development, innovation and investment. • *Integrated Economic, Land-Use and Infrastructure Planning*: Suitable land, infrastructure and facilities are available and managed to enable sustainable economic and employment growth in the region. • *Resilient and Sustainable Economy*: The economy grows through increasing levels of human-capital, knowledge-capital and natural-capital and is resilient to external factors through multiple strong industry sectors that provide diverse employment opportunities. • *Primary Industries*: Maintain existing and expand sustainable and economically viable primary industries, and diversify opportunities in the region. • *Resource Sector*: Manage mining and extractive resources to maximise economic opportunities and other community benefits, while minimising negative environmental and social impacts for present and future generations. • *Tourism*: Continue to develop the region's distinctive and sustainable tourist destinations, which offer a diverse range of activities and unique experiences to attract domestic and international visitors.	GROWTH ECONOMICS & INFRASTRUCTURE
Managing Growth	
• *Efficient Use of Land*: Land and infrastructure are used efficiently, taking into account costs of servicing, projected demand on/from existing urban infrastructure and employment. • *Planning for Growth*: DAs and Identified Growth Areas are secured for delivering medium and long-term growth opportunities, and catering for projected demand requires comprehensive planning and infrastructure delivery. • *Rural Residential Development*: Rural residential development is planned to ensure efficient delivery of services and infrastructure, preventing further fragmentation of agricultural land, and avoiding loss of areas with biodiversity and landscape values. • *Housing Choice and Affordability*: Housing meets the needs of the community, considering all lifecycle stages, varying demands, and economic circumstances.	GROWTH
Urban Form	
• *Urban Form*: The form of the region's cities and towns responds to local climate, character and identity, and supports compact, accessible, active and healthy communities. • *Heritage, Arts and Cultural Development*: The region's unique heritage places and experiences are identified, protected and valued, with further opportunities for arts and cultural development provided. • *Centres*: Regional centres and towns are the focal point for the provision of retail, commercial and community services, economic growth and diversity. • *Rural Communities*: Rural communities benefit from growth and are serviced by appropriate levels of infrastructure and support services.	N/A

Desired Regional Outcomes (Principles)	**MIW 30 Year Sugar Industry Strategy**
Infrastructure	
• *Infrastructure Planning*: Efficient, well-planned infrastructure supports population growth, economic opportunities and service provision in a sustainable manner. • *Protecting Key Sites and Corridors*: Current and future infrastructure sites and corridors are identified, protected and managed. • *Energy*: Energy is reliably provided to support growth in an economically and ecologically sustainable manner. • *Information and Communication Technology*: All communities in the region are provided with modern, reliable, accessible and affordable information and communication services. • *Waste and Recycling*: The region's waste is minimised, re-used or recycled, and promotes energy recovery. • *Sewerage*: The provision and management of sewage treatment infrastructure is planned, timed and managed, and is protected from encroachment by incompatible development. • *Social Infrastructure*: Social infrastructure is planned and located, accessible, adaptable and responsive to demographic change.	DIVERSIFICATION ECONOMICS & INFRASTRUCTURE
Transport	
• *Integrated Transport and Land Use*: Provide highly connected transport networks to facilitate strong links within and between communities and activity centres to enable high levels of accessibility, route and mode choice. • *Efficient, Accessible and Safe Transport*: An efficient, sustainable and integrated transport system exists for the region that is safe and accessible. • *Freight*: The efficient and effective movement of freight supports regional growth.	GROWTH ECONOMICS & INFRASTRUCTURE

New generation regional plans are progressively being prepared for regions across Queensland. These plans have an increased focus on economic development and are shaped by the government's policy and planning reform agenda.

5. Local Government

Local government needs to become a key industry partner as many of their policies and planning directly affect the MIW region sugar industry.

5.1 Mackay Regional Council Community Plan 2011-2031

http://www.mackay.qld.gov.au/about_council/news_and_media/publications/community_plan

5.1.1 Vision

A vibrant prosperous lifestyle today - held in trust for tomorrow's generations

As a tropical haven, our region is family-friendly, catering for all age groups and cultures. It is a desirable place to live and visit. We have appropriate infrastructure, including playgrounds, libraries, aquatic facilities and community and social centres. Our region is an economic powerhouse focused on mining, engineering, agriculture and tourism, and we enjoy living in a secure, safe and comfortable environment.

We are guardians of the region, encouraging ongoing economic growth, investment and strategic planning that creates employment and supports community diversity. We manage valuable natural assets including habitat and ecosystems.

5.1.2 Planning Themes & Strategies

Planning Theme & Strategies	MIW 30 Year Sugar Industry Strategy
Strong Communities	
• We develop infrastructure, programs and policies that support healthy lifestyles for all sectors of the community • We collect, preserve and display historical data, heritage places and cultural heritage • Everyone needs to have the knowledge and skills to participate fully in society • People need access to appropriate community services, programs and services • People need to feel safe and secure • People need to feel connected to others and have a strong sense of belonging • Provide social facilities and services to serve the lifestyle needs of our communities • Building stronger communities with all projects	COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE
Natural Environment & Landscapes	
• We must protect and improve the natural qualities of lakes, streams, waterways, wetlands and coastlines through integrated catchment management planning and processes • We need to recognise, protect and enhance significant natural and cultural heritage sites • We need to develop compact urban settlement patterns (avoiding urban sprawl) that are sensitive to the need to promote environmental wellbeing • We need services and infrastructure that support our region's environmental goals • We need to develop and maintain an environment that is attractive, sustainable and healthy • We must preserve and improve the natural environment • We need to ensure public green spaces are easily accessible and well maintained • We need to identify landscape character areas, including waterfronts, river precincts (wetland, streams and estuaries), scenic corridors and native bush that should be protected	COMMUNITY & ENVIRONMENT
Natural Resources	
• We need to manage the views and scenic values in areas that showcase the region's landscape character • We must protect and manage agricultural soils, timber resources and construction materials • We plan and act appropriately to manage our resources sustainably • We must protect and manage our marine environment • Preserve/enhance natural corridors within the urban framework	GROWTH COMMUNITY & ENVIRONMENT

Planning Theme & Strategies	MIW 30 Year Sugar Industry Strategy
Economic Development	
• Mackay needs to be the best location in regional Queensland for economic activity, and for businesses to invest and grow • We need increased innovation • Employment opportunities must increase to support our population • We need sufficient talented labour to meet business demand • Our business, industry and recreational visitors continue to grow • We need to diversify our economic base to ensure economic sustainability • We support industry clusters, businesses and groups with management expertise that also offer opportunities for careers, and the chance to collaborate with other business • We identify the economic implications and trade-offs of oil shortages and climate change	GROWTH DIVERSIFICATION INNOVATION CAPABILITY & RESILIANCE ECONOMICS & INFRASTRUCTURE
Settlement Patterns	
• We need to contain our urban growth and create compact urban areas with increased densities and a mix of housing choices • People need to have access to affordable and appropriate housing that meets a diverse range of needs • We need to establish a network of centres offering a range of employment opportunities, services and facilities, close to residents and accessible by public transport • We need to ensure our towns and buildings are located and designed with our tropical climate in mind • Sufficient land for residential, industrial and commercial growth must be provided • The planning scheme needs to ensure we have sufficient land for growth, safeguards in place to manage our heritage sites, development in flood prone areas, building designs that reflect our tropical climate and location, a network of green and open spaces with improved access to recreational activities	GROWTH
Infrastructure	

• Priority infrastructure investment must be delivered efficiently, sustainably and on time, to support the region's wellbeing. This includes:
  ○ delivery of water and then treatment of, and where possible reuse of, waste water
  ○ construction of the necessary roads, bike ways and footpaths
  ○ provision of appropriate public transport networks, rail, port and airport
  ○ drainage networks to maximise the use of urban land
• Develop and continually update an infrastructure priorities document to keep all stakeholders appraised of the needs
• We must identify and protect the corridors and areas required for future strategic infrastructure for the region's future
• We need to make sure infrastructure lasts and delivers affordable service and security for future generations
• We need to support research and development and continue investment in green, renewable energy sources and sustainable practices
	GROWTH
	ECONOMICS & INFRASTRUCTURE

Transport & Mobility	
• We need road, sea, air and rail transport networks that allow people to move easily and safely in and out of, as well as, around the region • We must establish transport and movement corridors • We need to ensure goods and freight can be moved safely to, from and through our region • We need safe accessible and user-friendly public transport that connects destinations in the region	ECONOMICS & INFRASTRUCTURE
Sustainability & Climate Change	
• We need to minimise impacts of development in higher risk areas, particularly those vulnerable to fire, flooding and storm surge, erosion, landslip, salinity and acid sulfate soils • We need to protect existing development and infrastructure susceptible to fire, flooding and storm surge, erosion and landslip • We need an integrated approach between council and the State and Federal Government to manage and monitor potential climate change challenges • Our community needs to know more about issues relating to sustainability, climate change and peak oil • We need to reduce dependency on non-renewable sources across the region through innovative measures • Our infrastructure is efficient and sustainable	COMMUNITY & ENVIRONMENT

Planning Theme & Strategies	MIW 30 Year Sugar Industry Strategy
Regional Leadership	
• Wherever possible our leaders work towards speaking with one voice on matters important to us • Our governance agencies work together on cross organisation regional projects • Council takes a leadership role in coordinating action on the Community Plan • Council is proactive when advocating on behalf of the region • The community is engaged and empowered to contribute to decision making processes	COMMUNITY & ENVIRONMENT

Source: MRC

5.2 The Isaac Region 2020 Vision 2009-2019

http://www.isaac.qld.gov.au/community-plan

5.2.1 Vision

The region of first choice

5.2.2 Vision Themes & Goals

Vision Themes & Goals	MIW 30 Year Sugar Industry Strategy
Our Diverse Lifestyle	
• FOSTER HEALTHY LIFESTYLE ENVIRONMENTS ○ Continue to develop walkways, pathways and equity of access to public space ○ Support youth initiatives and activities ○ Develop and maintain a regional Service Provider Directory • RECOGNITION FOR OUR DIVERSE CULTURES, ARTS AND HERITAGE ○ Develop a regional Public Art Strategy and continue to support and promote our cultural diversity, arts groups and rich history • PROVIDE WELL-MAINTAINED COMMUNITY FACILITIES AND INFRASTRUCTURE ○ Investigate opportunities to develop and upgrade existing community facilities including halls and child services infrastructure • SUPPORT ACTIVELY ENGAGED AND PARTICIPATING COMMUNITIES ○ Continue to foster open communication channels between Council and the community about their needs and aspirations	COMMUNITY & ENVIRONMENT ECONOMICS & INFRASTRUCTURE
Out Natural Environment	
• IMPLEMENTATION OF REGION WIDE RECYCLING SERVICES ○ Provide Isaac residents with a waste management education and dual bin recycling service • IMPROVED MONITORING AND MANAGEMENT OF CUMULATIVE MINING RELATED IMPACTS ○ Continue to lobby the EPA, governments and other industry groups to take action an minimize the cumulative impacts of mining on the environment • SUPPORT A 'CLEAN GREEN SUSTAINABLE REGION' ○ Foster well-informed, educated residents/industry about sustainable interaction with the natural environment • IMPLEMENTATION OF PEST MANAGEMENT STRATEGY ○ Conduct audit of existing pest management plans and develop aver-arching strategy to more efficiently monitor and control pest species in the region • SUPPORT A 'CLEAN GREEN' REGION ○ Develop community awareness programs to support and promote water saving initiatives, energy efficiency, recycling, waste reduction schemes and other clean green initiatives	GROWTH COMMUNITY & ENVIRONMENT
Our Economy	
• AFFORDABLE HOUSING ○ Develop and maintain a range of affordable and alternative housing options to cater for current and potential community needs • ECONOMIC DEVELOPMENT ○ Collaborate with regional agencies/networks to maximize promotion of and economic development opportunities within the region ○ Engaging the broader community in the development, management and implementation of community-economic development initiatives • TOURISM ○ Implement and review strategies to maximize sustainable eco/heritage/industrial tourism around the region ○ Continue to brand Isaac as 'The Region of First Choice' ○ Brand and promote significant facilities which are completed • BUSINESS ATTRACTION, INVESTMENT AND RETENTION ECONOMIC DIVERSIFICATION ○ Develop strategies to attract investors, provide competitive retail options and encourage business diversification ○ Encourage a diverse range of economic contributors into the region to enhance the sustainability of towns when the mining industry changes	GROWTH DIVERSIFICATION INNOVATION CAPABILITY & RESILIANCE ECONOMICS & INFRASTRUCTURE

Vision Themes & Goals	**MIW 30 Year Sugar Industry Strategy**
Our Essential Services	

• IMPROVED WASTE MANAGEMENT FACILITIES AND SERVICES
  ○ Implement a region-wide waste management strategy to deliver an efficient and reliable refuse collection and disposable service including landfills, transfer stations and recycling initiatives
• PROVISION OF IMPROVED IT, ICT AND POWER INFRASTRUCTURE ACROSS THE REGION
  ○ Continue to support identified communities to lobby for improved services/infrastructure to support a reliable power supply and ICT access
• SUSTAINABLY MANAGE WATER SUPPLIES AND WASTEWATER FACILITIES
  ○ continuously improve water and sewerage management to enhance sustainable healthy lifestyles
  ○ Ensure a sustainable high quality source of drinking water is available to our communities
• ROADS AND PUBLIC TRANSPORT
  ○ Actively pursue grants and funding opportunities to improve and deliver road infrastructure in rural areas
  ○ Improve connectivity within the region by upgrading arterial road networks
	ECONOMICS & INFRASTRUCTURE

Source: IRC

5.3 Whitsunday Regional Council Community Plan 2011-2021

http://www.whitsunday.qld.gov.au/council-s-plans-reports-budget

5.3.1 Vision

Our shared vision is for a region that:

- is well governed and financially sustainable;
- promotes sustainability and long term sustainable development;
- has the infrastructure that we need to meet our ever changing needs both now and in the future;
- promotes and preserves our culture and our history;
- protects our past, but promotes our future;
- is vibrant, safe and inviting;
- protects our precious natural resources and environment;
- is proactive, healthy and encourages participation in physical activity;
- has the infrastructure and facilities which promote and encourage a healthy and active lifestyle;
- is accessible by all and promotes inclusivity;
- has access to government services and opportunities;
- is proud of its identity and its people; and
- is built around sustainable planning principles and outcomes.

5.3.2 Vision themes & What Council will do

<table>
<tr><th>Vision Themes & Goals</th><th>MIW 30 Year Sugar Industry Strategy</th></tr>
<tr><td colspan="2">Our Economy</td></tr>
<tr><td>

Growth & diversification - Our vision is to pursue the promotion, creation and enhancement of new and existing economic, social and cultural opportunities for all residents and visitors in the Whitsunday region

Advocating for the development of an Investment Attraction Strategy for the region in conjunction with relevant key stakeholders and Council's collaborative partners
Advocating the Whitsundays as the region to live, work, play and invest
Advocating for a range of affordable housing options in the region
Preparing a strategic plan for the Whitsunday Coast Airport
Preparing a master plan for the Whitsunday Coast Airport
Reviewing the function of economic development in the region
Promoting economic growth and stimulus in the region by both the private sector and all spheres of government
Pursuing funding and investment attraction opportunities
Supporting the enhancement and promotion of the Made in the Whitsundays brand
Continuing to develop and enhance already existing collaborative working relationships with both the State and Federal government
Advocating and promoting mining and industrial developments to house permanent workforces in the Whitsunday region
Advocating for renewable and sustainable energy options in the region
Developing a consultation and engagement strategy that outlines a best practice approach to both statutory and non-statutory consultation undertaken by Whitsunday Regional Council

Tourism - Our vision is to pursue in conjunction with tourism agencies and bodies the promotion and enhancement of existing tourism operations and the creation of new tourism opportunities.

Advocating for the development of a regional Destination Marketing Strategy in collaboration with our key industry partners and stakeholders
Advocating for increased accessibility to the region;
Promoting and advocating for inclusive tourist planning including tourist infrastructure;
Upgrading critical regional infrastructure such as water and sewerage treatment plants;
Managing both off street and on street parking to ensure the availability of car parking for residents and tourists;
Undertaking a review of regional information facilities including the dissemination of tourist information within and outside the region;
Undertaking a review of the structure and funding arrangements of the various tourism bodies in the region;
Promoting, encouraging and advocating for new tourism opportunities and ventures in the region;
Reviewing interpretative and visitor signage in the region;
Undertaking in collaboration with our key industry partners and stakeholders a review of regional convention and entertainment facilities;
Upgrading critical regional infrastructure such as water and sewerage treatment plants.

Agriculture - Our vision is to enhance and support existing and create new agricultural industries and opportunities in the region.

Completing the Rural Lands Use Study;
Supporting, encouraging and advocating for the diversification of the agricultural industry;
Ensuring consistent planning outcomes that protect good quality agricultural and strategic cropping land from land uses and infrastructure which limit or restrict these lands for legitimate agricultural purposes;
Promoting and encouraging value-adding technologies and facilities to establish in the region;
Supporting and advocating for alternative water source projects for the region;
Monitoring, managing and mitigating the impacts associated with industrial development on the agricultural industry;
Promoting and encouraging the supply of locally grown fruit and vegetables in the region.

</td><td>ALL STRATEGIES</td></tr>
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<tr><th>Vision Themes & Goals</th><th>MIW 30 Year Sugar Industry Strategy</th></tr>
<tr><td colspan="2">Our Infrastructure</td></tr>
<tr><td>

Water - Our vision is to provide environmentally acceptable, cost effective and quality water and sewerage infrastructure in the region

Delivering water treatment plants in the region by 2013 in Bowen and Proserpine
Undertaking major upgrades to the Bowen, Proserpine and Cannonvale sewerage treatment plants
Investigating the feasibility of a regional storm water management plan

Roads - Our vision is to plan for, provide and maintain cost effective road and transport infrastructure in the region

Developing a regional car parking strategy
Investigating and undertaking a regional accessibility strategy
Explore opportunities to integrate Active Healthy Communities principles into the Whitsunday Regional Council Planning Scheme
Ensuring cycle and footpaths are integrated into new and existing residential areas that link to existing facilities and social infrastructure
Reviewing Council's Disaster Management Plan
Advocating for flood proofing of the Bruce Highway
Developing a regional cycle and foot path strategy
Advocating and planning for increased public transport use
Developing a regional storm water management plan
Advocating for alternative modes of transport for freight and logistics other than the Bruce Highway
Encouraging and advocating for road safety initiatives

Parks & Gardens - Our vision is to plan for, provide and maintain accessible and inclusive parks and gardens in the region

Preparing a long term beautification strategy for the region (including the integration of Healthy Active Communities planning principles)
Developing a coastal hazard adaption plan for the region
Preparing an open space and recreation strategy
Developing a regional cycle and foot path strategy
Explore opportunities for the development of infrastructure and programs to enhance park usage, with a specific focus on the needs of special population groups
Completing the Whitsunday Regional Council Planning Scheme

Social and Community Infrastructure - Our vision is to plan for, provide and maintain acceptable levels of infrastructure for the region to help meet the diverse and ever-changing needs of our community

Advocating for State and Federal governments to invest in the provision of essential services and infrastructure and ensure royalties are spent in our region
Developing a Regional Infrastructure Plan and a Social Infrastructure Fund
Completing an open space and recreation plan
Completing a coastal hazard adaption plan
Completing a storm water management plan for the region
Planning and advocating for infrastructure to be provided in a timely manner in order to cater for growth
Implement recommendations from the Healthy Active Plan
Pursuing future opportunities to obtain funds and grants and other economic stimulus

</td><td>ECONOMICS & INFRASTRUCTURE</td></tr>
<tr><td colspan="2">Planning our Community</td></tr>
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Strategic Planning - Our vision is to plan for and develop a region that is sustainable whilst maintaining and providing appropriate development opportunities in the region

Completing the Whitsunday Regional Council Planning Scheme
Providing the timely supply and delivery of critical social and community infrastructure
Advocating for a range of affordable housing options in the region
Promoting and further developing the Whitsunday region as a healthy and active community
Further developing and enhancing existing and establishing new relationships with key stakeholders (private enterprise, industry and state and federal governments) to ensure that the approach to planning supports and develops strong, resilient and sustainable communities
Appropriately planning for future developments so as to mitigate the impacts of climate change and weather events
Completing the Storm Tide Study

Built Environment - Our vision is to plan for and develop a strong, resilient and sustainable region

Completing of the Whitsunday Regional Council Planning Scheme
Ensuring that our planning decisions are reflective of a best practice approach to planning by ensuring that they are comprehensive, efficient, inclusive, informative, integrated, logical and transparent
Explore opportunities to incorporate active healthy community principles into Council planning

</td><td>GROWTH
ECONOMICS & INFRASTRUCTURE</td></tr>
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Vision Themes & Goals	**MIW 30 Year Sugar Industry Strategy**
Our Natural Environment	
• **Environmental sustainability** - Our vision is to plan for, develop, protect and enhance the lifestyle and wellbeing of our residents and our environment ○ Completing the Whitsunday Regional Council Planning Scheme ○ Reviewing waste management practices, including recycling, to ensure that they are cost effective and sustainable ○ Promoting and encouraging the Whitsunday region as the place to invest in renewable and sustainable technologies • **Protection and Conservation** ○ Developing, implementing and reviewing conservation and environmental strategies that promote the protection and enhancement of the natural environment ○ Supporting programs developed to maintain and enhance our natural resources of soil, water, vegetation and fauna ○ Promoting greenhouse gas reduction initiatives and opportunities within the community ○ Pursuing opportunities to protect areas of high ecological significance ○ Developing, implementing and reviewing conservation and environmental strategies ○ Promoting environmental education programs and initiatives	GROWTH COMMUNITY & ENVIRONMENT
Our Community	
• **People, Culture and Lifestyle** - Our vision is for a region where people want to live, work, play and invest ○ Advocating for a range of affordable housing options in the region ○ Developing and implementing an arts and cultural policy ○ Investigate the opportunities for the development of art related facilities in the region ○ Development and implementation of policies to protect our natural environment and landscape character ○ promote economic and employment opportunities whilst at the same time promoting our quality of life ○ Advocate and develop measures to be put in place to minimise the cumulative impacts associated with industrial development and population growth ○ Ensuring that planning and development is effectively managed; ○ Effectively managing growth and ensuring adequate infrastructure is provided; ○ Implementing recommendations from the Whitsunday Regional Council Healthy Active Plan; ○ Continuing to support, engage and facilitate opportunities for all sectors of the community with particular reference to youth, Aboriginal and Torres Strait Islander peoples, the elderly, people with a disability and people who speak English as their second language; ○ Pursuing future opportunities to obtain funds and grants. • **Sport and Recreation** - Our vision is for a healthy and active community that actively promotes, participates and encourages participation in sport and recreation activities in the region ○ Pursuing future opportunities to obtain funds and grants ○ Developing a sport and recreation plan ○ Ensuring the open space and recreation study considers sporting needs for today and the future, and rationalises the existing open space areas for sporting activities ○ Increasing skill capacity, educating and training opportunities for sport and recreation groups ○ Completing a consultation and engagement strategy ○ Implementing recommendations from the Whitsunday Regional Council Healthy Active Plan; ○ Exploring opportunities for the development of infrastructure and programs to enhance park usage, with a specific focus on the needs of special population groups ○ Supporting the development of sport and recreation groups to ensure increased access and participation through the sharing of resources	CAPABILITY & RESILIANCE COMMUNITY & ENVIRONMENT

Source: WRC