REALISING THE ‘RIPPLE EFFECT’

PRESENTED BY BRIAN HARATSIS

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BRIAN HARATSIS | EXECUTIVE CHAIRMAN

Brian Haratsis is a best-selling author, futurist, thought leader and a leading economic and strategic advisor operating in the property sector locally and internationally.

Brian has devoted the last 30 years forecasting of niche trends, successful facilitation of strategic outcomes and successful delivery of major projects / policies and specialises in forecasting demand for retirement living, aged care and is currently advising on the development of major health hubs on the Sunshine Coast and in Victoria in relation to the Sunshine Health + Wellbeing Cluster.

Brian's third book **Destructive Cities** analyses how the service sector, globalisation and technology can reshape Australia. The book builds on Australia 2050: A Big Australia (2010) and Beyond the Fringe (2012) and informs transformational rather than trend thinking.

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AUSTRALIAN HEALTH SECTOR

THE COMPLEX VALUE CHAIN

- Health Care and Social Assistance is Australia's largest industry, **employing 1,167,000** of Australia's 10 million workers nationwide **(11.6% of all workers).**
- Forecast to continue to grow at 3.1% per annum over the next 5 years, on the back of continued population growth and fast ageing.
- As a knowledge based sector, the industry continues to transform due to factors such as:
    1. Technology and Digitisation
    2. Enterprise Consolidation
    3. Globalisation & Service Exports
    4. Chronic Disease & New Models of Care
    5. Clustering

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SUNSHINE COAST HEALTH CAMPUS

MASTERPLAN - SUNSHINE COAST HEALTH CAMPUS

MASTERPLAN - SUNSHINE COAST HEALTH CAMPUS

The Sunshine Coast Health Campus has three key anchor elements:

1. The Sunshine Coast Public University Hospital,
2. The Sunshine Coast University Private Hospital and;
3. Sunshine Coast Health Institute

MASTERPLAN - SUNSHINE COAST HEALTH CAMPUS

Sunshine Coast Public University Hospital

- Tertiary teaching public hospital that will be part of the Sunshine Coast Hospital
- 164,000 square meters built over six levels plus rooftop plant rooms and a helipad
- Due to be completed March 2017 and will have **450 beds** with the potential to accommodate **738 beds** by 2021 and **900 beds** in the longer term
- 3000 jobs by April 2017
- Services include:
  - emergency services
  - comprehensive cancer centre, including radiotherapy and chemotherapy
  - specialised medical and surgical services, including neurosurgery, cardiac surgery, maxillofacial surgery, a major trauma service and paediatrics
  - maternity services, including a special care nursery for unwell newborns
  - rehabilitation service
  - mental health unit
  - renal service
  - interventional and diagnostic clinical support services, including a PET scanner for diagnosing certain types of cancer and cardiac catheterisation laboratories
  - ambulatory care (outpatient) services
  - allied health services.

MASTERPLAN - SUNSHINE COAST HEALTH CAMPUS

Sunshine Coast Private University Hospital

- The $150 million new Sunshine Coast University Private Hospital (SCUPH) owned by Ramsay Health Care (RHC) opened in 2013 and is one of the top five largest health care operators in the world
- The 200-bed hospital accommodates 6 operating theatres, a cardiac catheter laboratory, a day surgery unit, a minor procedure room, an 8-bed intensive care unit, an 8-chair day chemotherapy unit and comprehensive pathology, radiology and pharmacy services
- 110 of its beds are currently dedicated to assisting in the treatment of public patients until mid-2018 while the public hospital is built.
- Employs approximately 700 staff

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MASTERPLAN - SUNSHINE COAST HEALTH CAMPUS

Sunshine Coast Health Institute (SCHI)

- The SCHI will be delivered as a partnership between Sunshine Coast Hospital and Health Service the University of the Sunshine Coast, TAFE Queensland East Coast and a university that will deliver medical education.
- Approximately 1000 students at any week with 250 academic staff
- It will form part of the Sunshine Coast Hospital will feature space shared with these partners to deliver:
  - multiple education programs to train existing health professionals across a wide range of disciplines
  - hands-on clinical training for students studying to become health professionals, or health professionals undertaking post-graduate training
  - clinical and innovative research

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OCEANSIDE HEALTH HUB

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OCEANSIDE HEALTH HUB

Oceanside Precinct

- The Oceanside Health Hub is a 17-hectare land area owned and developed by Stockland Corporation along Eccles Boulevard up to Birtinya Boulevard.
- The total area is 32,000 square metres of land area
- 19 sub-areas ('precincts')
- The targeted land uses is for allied health, research, retail and other services.

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OCEANSIDE HEALTH HUB

Sites	Approx Area	Development Name	Committed Site Use	Developer	Estimated Completion
Precinct 1	5001m^2	TBD	Community	Sunshine Coast Council	TBD
Precinct 2	4500m^2	One Health	Commercial and Health	Minion Development	Late 2016
Precinct 3	2500m^2	Pulse	Health	Evans Long	Mid 2016
Precinct 4	3600m^2				
Precinct 5	3537m^2	TBD	Multi Deck Car Park	Excel Development Group	Mid 2016
Precinct 6	2038m^2				
Precinct 7	2054m^2				
Precinct 8a	3259m^2	Best Western Plus Oceanside Hotel	80 Room Hotel	Renard Group	Completed
Precinct 8b	2004m^2	Oceanside Early Learning Centre	Childcare Centre	Arena REIT Ltd	Completed
Precinct 9	3041m^2	TBD	Hotel & Apartments	Midson Constructions	TBD
Precinct 10	5010m^2	Reflections at Oceanside	16 Detached Residential Lots	Stockland	Completed
Precinct 11	5254m^2	Reflections at Oceanside	17 Detached Residential Lots	Stockland	Completed
Precinct 12	3045m^2	North Shore Apartments	60 Apartments	RGD Property Group	Late 2016
Precinct 13	3427m^2	Shoreline Apartments	60 Apartments	RGD Property Group	Mid 2017
Precinct 14	2898m^2	TBD	60 Apartments	RGD Property Group	Late 2017
Precinct 15	3210m^2	TBD	60 Apartments	RGD Property Group	Mid 2018
Precinct 16	3454m^2	TBD	Apartments	Gardener Vaughan Group	Late 2017
Precinct 17	5356m^2	Opal Kawana	140 Room Aged Care	Opal Specialist Aged Care	Mid 2017
Precinct 18	5652m^2	Oceanside Retirement Village	150 Apartments	Stockland	2018
Precinct 19	12510m^2	TBD	Medium Density	Stockland	2018

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OCEANSIDE HEALTH HUB

Key Projects

- $15 million Best Western Plus Oceanside Kawana (operational)
- $21 million Pulse Oceanside Medical complex – a six-level building offering 2640 square metres of medical accommodation on the top four levels with ground floor retail and on-site parking on the ground and second level (operational)
- $3 million childcare/early learning centre which will be operated by Green Leaves Early Learning Centres (completed)
- $15 million eight-level carpark offering 581 car bays and ground floor retail space developed by Excel Development Group (completed).

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THE FUTURE OF OCEANSIDE

THE GLOBAL STAGE

The need for competitive advantage

- In order to achieve global significance and continue to:
  - Sustain employment growth
  - Attain investment
  - Breed innovation
  - Attract SME’s

The hub needs a competitive advantage in the form of:

  - A broadly based strategy
  - Globally recognised tenants
  - A deep ‘industry structure’ facilitating the growth of SME’s
  - Anchor infrastructure
  - Points of difference i.e.
    - Biobank
    - The Thompson Institute
    - E.g. CRICK

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THE IMPORTANCE OF ANCHOR INFRASTRUCTURE

The need for competitive advantage

1. SC Private Hospital (Ramsay) – 60,000 patients admitted - 3 year into 50yr lease - 2yrs remaining on contract of treatment of public patients

2. SCUH (3000 jobs by April 2017). To be part of a concerted delivery of health care with additional 1,300 FTE to be engaged Jan/Feb 2017.

3. SCHI (1,000 students)
   - Unincorporated JV
   - Sunshine Coast Hospital & Health (SCCHS)
   - University of the Sunshine Coast (USC)
   - TAFE Qld East Coast (TQEC)
   - Second University (TBC)

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BIOBANKS

What's a Biobank?

- Maintain bio specimens (such as blood, saliva, plasma, and purified DNA)
- Libraries of the 'human organism'
- Researchers access biobanks when they are in need of specimen with similar traits for their research studies
- The Australasian Bio specimen Network – Oncology is a national network of bio-banks established to "collect, process and disseminate bio-specimens for cancer research."
- Networking of biobanks provides economies of scale – rare tumour types can be targeted through collection of bio-specimens in substantial quantities only possible with collaboration
- Provides better ease of access for researchers and enables more efficient use of under-utilised resources
- i.e. Victorian Cancer Biobank

THE THOMPSON INSTITUTE

The University of the Sunshine Coast (USC) began planning a neuroscience institute in 2011

What is it?

- Three story building with 4400m2 of floor space located at 12 Innovation Parkway, Birtinya - purpose-built facility providing a major innovative research environment
- Building purchase was generously funded by local philanthropists Roy and Nola Thompson
- Aims to address youth suicide prevention, brain ageing and dementia, as well as mood disorders, depression, autism, and PTSD, through implementation of CARE.

CARE – The Institutes integrated approach to convert research breakthroughs into clinical practice

C linics - the provision of clinical services to psychiatric and neurological patients

A dvocacy - for patients and their carers

R esearch - using "cutting-edge, translational brain imaging techniques" to investigate brain structure, function and neurochemistry in disease

E ducation -educating the next generation of brain scientists and specialist doctors

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THE FRANCIS CRICK INSTITUTE

CRICK

- Dedicated to understanding the scientific mechanisms of living things - why disease develops and to find new ways to treat, diagnose and prevent illnesses such as cancer, heart disease, stroke, infections, and neurodegenerative diseases.

- Founded by six of the UK's most successful scientific and academic organisations - the Medical Research Council, Cancer Research UK, the Welcome Trust, University College London, Imperial College London and King's College London.

- A total of around £650 million has been invested to establish the not-for-profit institute

- When it is fully operational, the Francis Crick Institute will employ 1500 staff, including 1250 scientists, and have an operating budget of approximately £130 million a year.

OCEANSIDE'S COMPETITIVE ADVANTAGES

Current Competitive Advantages

1. Greenfield / New Tertiary Teaching Hospital = relatively inexpensive land entry points
2. Education Focus = high innovation
3. Location and captive population
4. Existing network of Regional Assets (inc. Nambour Caloundra, Gympie)

Identity and competitive advantages to be fully developed by stakeholders.

OPPORTUNITIES AND SPECIALISATIONS

Future of Oceanside

1. Research Institutes & Partnerships –
    - Cancer Prevention
    - Cardio-vascular disorders
    - Patient Quality and safety
    - Mental Health
    - Biomedicine and bioengineering
    - Genetics and genomics

2. Graduates – single largest input to innovation in the workplace

3. Growth in SME's

4. Capturing Global Interest

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OPPORTUNITIES AND SPECIALISATIONS

The Sunshine Coast Hospital and Health Service (SCHHS) research themes 2016-2021

1. Aged care, cognitive impairment and stroke
2. Cardiovascular and renal disease
3. Health services research
4. Trauma, critical care and emergency care
5. Infectious disease
6. CHIIEF project - genetic basis of disease, Patient Databank, Biobank based at USC
7. Mental health
8. Chronic disease
9. Oncology
10. Maternal and child health
11. Care of the surgical patient

OPPORTUNITIES AND SPECIALISATIONS

The Electronic Medical Record (eMR) - a key component of the SCHHS research themes

- Ability to contribute effectively to research in areas such as:
  - comparative effectiveness research
  - the CHIIEF project
  - health services research
  - patient safety and;
  - epidemiology

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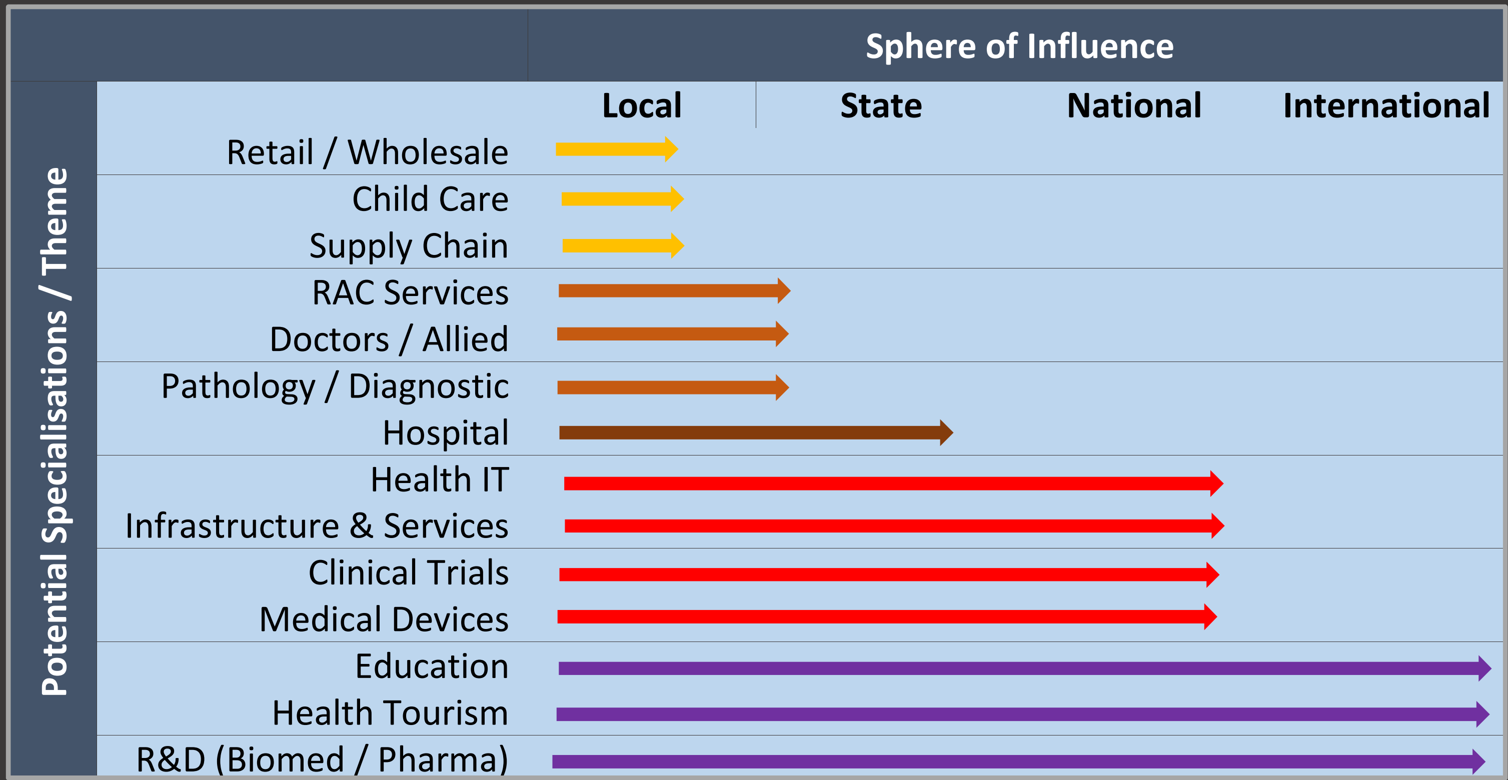
OPPORTUNITIES AND SPECIALISATIONS



HOW DO WE UNLOCK?

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UNDERSTANDING THE VALUE CHAIN AND MULTIPLIERS

THE VALUE CHAIN

Understanding the Value Chain

- 1. Extensive and complex, and
- 2. Significantly more that than just hospitals and primary health care

Purchasers	Insurers	Providers	Distributors	Suppliers
• Government	• Government	• Hospitals	• Wholesales	• Pharmaceutical
• Medicare	• Private Health Insurance	• Physicians	• Distributors	• Devices
• Individuals	• PBS	• Aged Care	• Internet / mail-order	• Health IT
		• Home Health	• Pharmacy	• Research
		• Alternative medicine	• Retail	• Human Resources

MULTI-FACETED STRUCTURE

Providers

Purchases, Insurers, Suppliers and Distributers.

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AUSTRALIA'S LARGEST SECTOR (BY EMPLOYMENT)

ANZSIC Industry	2006	2011	Change in Employment	
	no.	no.	no.	%
Hospitals (Except Psychiatric Hospitals)	300,819	358,989	58,170	19.3%
Psychiatric Hospitals	2,072	1,797	-275	-13.3%
General Practice Medical Services	65,942	72,916	6,974	10.6%
Specialist Medical Services	20,561	26,762	6,201	30.2%
Pathology and Diagnostic Imaging Services	28,744	34,030	5,286	18.4%
Dental Services	32,143	39,751	7,608	23.7%
Optometry and Optical Dispensing	10,749	13,477	2,728	25.4%
Physiotherapy Services	10,214	13,355	3,141	30.8%
Chiropractic and Osteopathic Services	6,446	7,973	1,527	23.7%
Other Allied Health Services	39,345	56,914	17,569	44.7%
Ambulance Services	11,120	14,816	3,696	33.2%
Other Health Care Services n.e.c.	6,723	9,948	3,225	48.0%
Aged Care Residential Services	128,276	165,485	37,209	29.0%
Other Residential Care Services	13,852	18,839	4,987	36.0%
Child Care Services	74,130	99,033	24,903	33.6%
Other Social Assistance Services	100,234	132,999	32,765	32.7%
Hospitals, nfd	1,041	223	-818	-78.6%
Medical and Other Health Care Services, nfd	37,583	22,497	-15,086	-40.1%
Allied Health Services, nfd	388	318	-70	-18.0%
Other Health Care Services, nfd	46	43	-3	-6.5%
Residential Care Services, nfd	588	446	-142	-24.1%
Social Assistance Services, nfd	30,719	29,740	-979	-3.2%
Health Care and Social Assistance, nfd	34,414	47,282	12,868	37.4%
TOTAL	956,149	1,167,633	211,484	22.1%

POPULATION DRIVEN

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INDUSTRY STRUCTURE

- Providers are numerous and well dispersed.
- Dominated by SME's

Industry	Business Counts 2015				
	Non Employing	1-19 Employees	20-199 Employees	200+ Employees	TOTAL
	no.	no.	no.	no.	no.
Hospitals (Except Psychiatric Hospitals)	680	217	101	40	1,038
Psychiatric Hospitals	23	12	6	0	41
General Practice Medical Services	20,339	18,122	352	13	38,826
Specialist Medical Services	7,787	6,857	122	6	14,772
Pathology and Diagnostic Imaging Services	1,246	755	108	23	2,132
Dental Services	6,129	6,838	144	6	13,117
Optometry and Optical Dispensing	1,099	2,056	61	0	3,216
Physiotherapy Services	2,728	2,914	86	3	5,731
Chiropractic and Osteopathic Services	2,233	2,574	6	0	4,813
Other Allied Health Services	12,520	5,924	145	7	18,596
Ambulance Services	18	12	6	3	39
Other Health Care Services n.e.c.	429	307	22	0	758
Aged Care Residential Services	697	428	595	131	1,851
Other Residential Care Services	230	369	199	21	819
Child Care Services	5,151	3,265	1,312	36	9,764
Other Social Assistance Services	1,636	636	113	19	2,404
TOTAL	**62,945**	**51,286**	**3,378**	**308**	**117,917**

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SIGNIFICANT MULTIPLIERS

- In addition to the direct/initial employment effects created by the precinct, flow-on or indirect employment is also created.

Industry	Initial effects	First round effects	Industrial support effects	Simple multipliers	Consumption induced effects	Total multipliers
Agriculture, Forestry and Fishing	-	0.01	0.08	0.09	0.27	0.36
Mining	-	0.00	0.02	0.02	0.07	0.09
Meat and Dairy Products	-	0.03	0.01	0.04	0.10	0.14
Other Food Products	-	0.03	0.01	0.05	0.14	0.19
Beverage and Tobacco Product Manufacturing	-	0.00	0.00	0.00	0.04	0.04
Textile, Knitted and Leather Products	-	0.01	0.01	0.02	0.03	0.05
Clothing and Footwear	-	0.03	0.01	0.04	0.09	0.12
Wood and Wood Products	-	0.00	0.01	0.01	0.03	0.03
Paper Products and Printing	-	0.04	0.03	0.06	0.10	0.16
Petroleum and Coal	-	0.00	0.00	0.01	0.02	0.03
Basic Chemicals and Chemical Products	-	0.03	0.02	0.05	0.09	0.14
Polymer and Rubber Products	-	0.01	0.02	0.03	0.06	0.09
Non-Metallic Mineral Products	-	0.00	0.01	0.01	0.02	0.03
Primary Metal Products	-	0.00	0.02	0.03	0.05	0.08
Fabricated Metal Products	-	0.01	0.02	0.02	0.05	0.07
Transport Equipment	-	0.00	0.02	0.02	0.14	0.16
Machinery and Equipment	-	0.12	0.06	0.18	0.21	0.39
Furniture and Other Manufacturing	-	0.02	0.01	0.03	0.12	0.15
Electricity, Gas, Water and Waste Services	-	0.01	0.02	0.04	0.12	0.16
Construction	-	0.00	0.03	0.04	0.16	0.20
Wholesale Trade	-	0.10	0.05	0.15	0.29	0.44
Retail Trade	-	0.03	0.01	0.04	0.80	0.84
Accommodation and Food Services	-	0.01	0.03	0.04	0.47	0.51
Transport, Postal and Warehousing	-	0.06	0.10	0.16	0.41	0.57
Information Media and Telecommunications	-	0.04	0.05	0.08	0.24	0.33
Financial and Insurance Services	-	0.04	0.05	0.09	0.41	0.49
Rental, Hiring and Real Estate Services	-	0.05	0.07	0.12	0.21	0.34
Professional, Scientific and Technical Services	-	0.13	0.24	0.37	0.69	1.06
Administrative and Support Services	-	0.07	0.08	0.15	0.26	0.41
Public Administration and Safety	-	0.02	0.03	0.05	0.91	0.96
Education and Training	-	0.02	0.02	0.03	0.76	0.79
Health Care and Social Assistance	6.41	0.03	0.00	6.44	1.03	7.47
Arts and Recreation Services	-	0.01	0.01	0.02	0.16	0.18
Repair and Maintenance	-	0.06	0.09	0.14	0.35	0.50
Personal and Other Services	-	0.05	0.01	0.06	0.22	0.28
Ownership of Dwellings	-	0.00	0.00	0.00	0.00	0.00
Total Multiplier	6.41	1.06	1.23	8.69	9.15	17.84

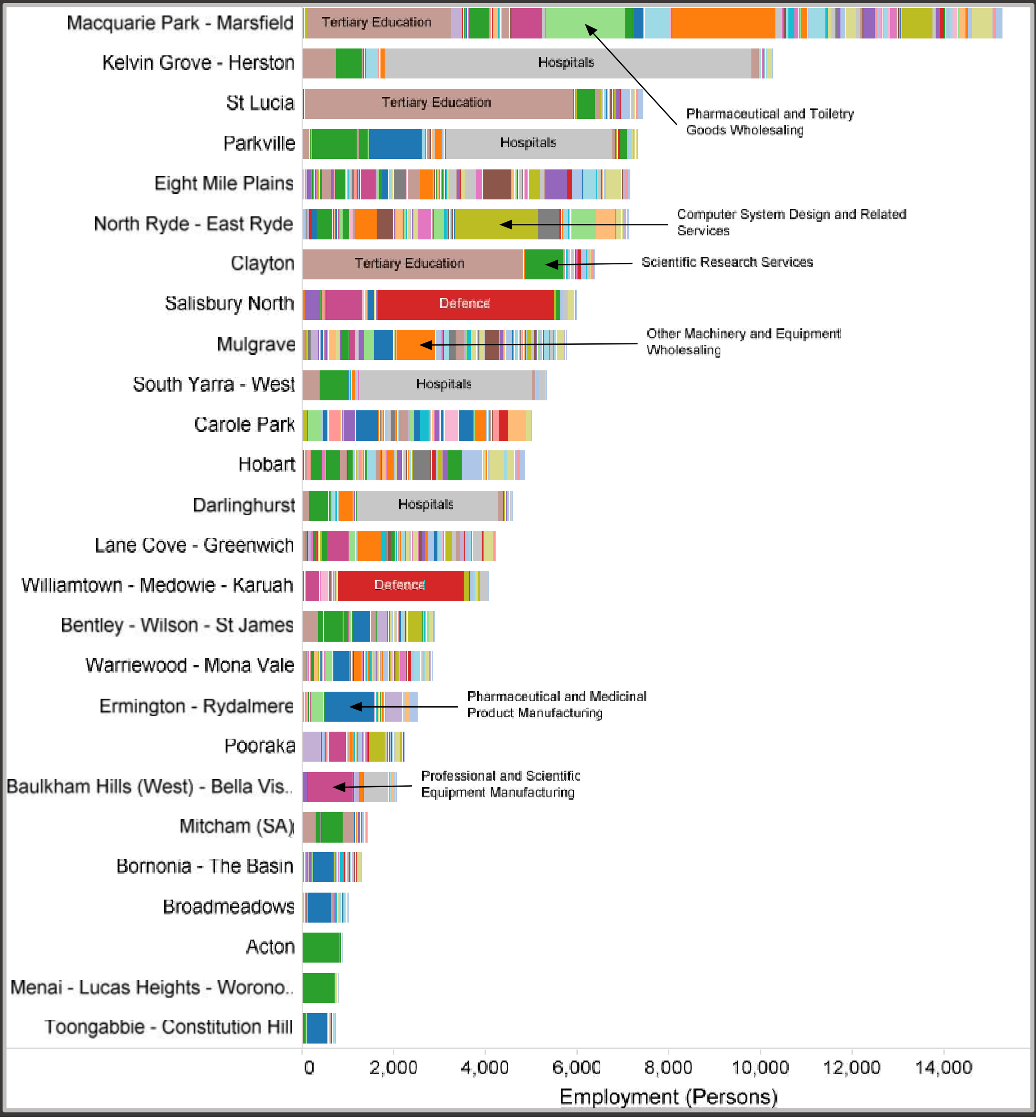
SIGNIFICANT MULTIPLIERS

Employment Multipliers

For instance, for every $1 million dollars that is spent in the health industry:

- 6.4 high valued health industry jobs are created and sustained;
- An additional 2.29 jobs are created (production induced effects); and
- A further 9.15 jobs are supported due to the wider ‘ripple’ effect.

UNIQUE COMPOSITION AT A PRECINCT LEVEL



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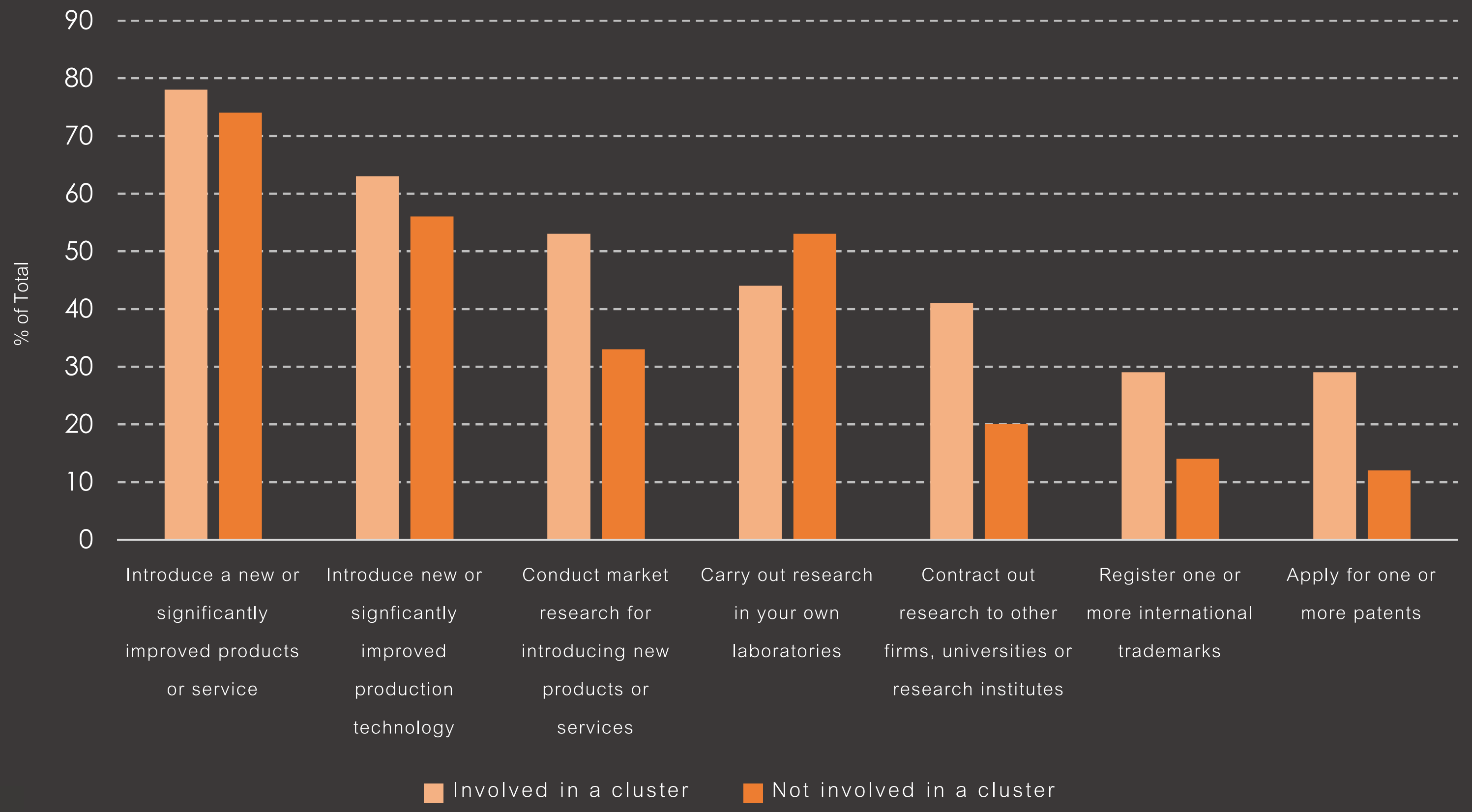
INNOVATION PERFORMANCE IN CLUSTERS

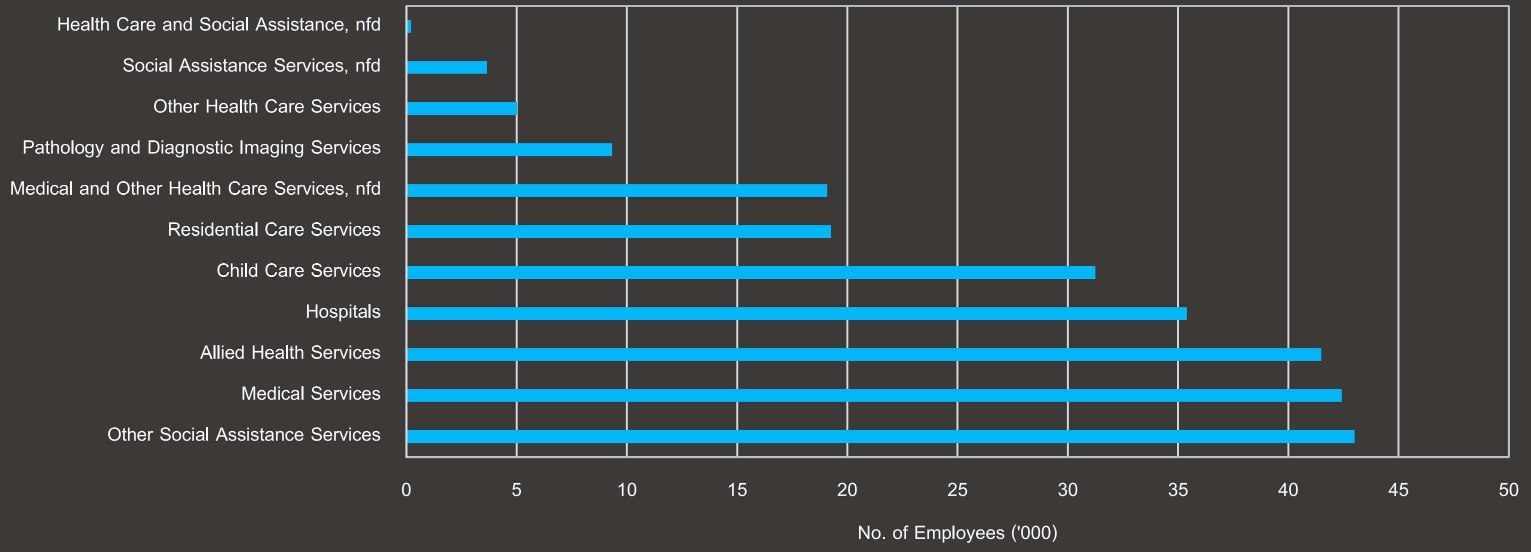
Innovation performance in clusters vs not involved in a cluster (Walker, 2014)



INDUSTRY GROWTH PROJECTIONS

Total employment growth forecast at 3.1% per annum over the next 5 years.

Largest expansion forecast across all sectors



Other emerging sub-sectors, include:

- Medical and surgical equipment and devices;
- Health IT;
- Health infrastructure and services; and
- Clinical trials

STRONG COMPETITION FOR JOBS

QLD

- Cloncurry Health Precinct (Cloncurry, QLD)
- Dolphins Health Precinct (Redcliffe, QLD)
- Gold Coast Health & Knowledge Precinct (Southport, QLD)
- Health & Food Sciences Precinct (Coopers Plains, QLD)
- Herston Health Precinct (Brisbane, QLD)
- North Lakes Health Precinct (North Lakes, QLD)
- Princess Alexandra Hospital (Brisbane, QLD)
- Robina Health Precinct (Robina, QLD)
- Southport Health Precinct (Southport, QLD)
- Springfield Health City (Springfield Central, QLD)

VIC

- Foster Health Precinct (Foster, VIC)
- Geelong Health Precinct (Geelong, VIC) (small redevelopment)
- Parkville Medical Precinct (Melbourne, VIC)
- Health Precinct City of Ballarat (Ballarat, VIC)
- Monash Health Translation Precinct (Melbourne, VIC)
- Sunshine Health Precinct (St Albans, VIC)
- The Alfred Medical Research & Education Precinct (Melbourne, VIC)
- Wantirna Health Education Precinct (Wantirna, VIC)
- Northern Health Teaching, Training and Research Precinct (Epping, VIC)

NT

- Casuarina Health Precinct (Casuarina, NT) (small)
- National Remote Health Precinct (Alice Springs, NT)
- Palmerston Health Precinct (Farrar, NT)

NSW

- Illawarra International Health Precinct (Illawarra, NSW)
- Lismore Health Precincts (Lismore, NSW) (two planned precincts)
- Liverpool Health & Education Precinct (Liverpool, NSW)
- Macquarie University Hospital Precinct (Sydney, NSW)
- St Vincent's & Mater Health Sydney: Darlinghurst campus area (Sydney, NSW)
- Sydney TAFE Health Precinct at Randwick College (Sydney, NSW) (small)
- Westmead Health Precinct (Westmead, NSW)

TAS

- Launceston Health Precinct (Launceston, TAS)
- Sheffield Multi-Purpose Health Precinct (Sheffield, TAS)
- Virtual Tasmanian Academic Health Sciences Precinct (TAS)

ACT

- Health Innovation Precinct – University of Canberra (St Lawson, ACT)

SA

- Lyell McEwin Health Precinct (Playford, SA)
- Noarlunga Health Precinct (Noarlunga Centre, SA)
- South Australian Health and Biomedical Precinct (SAHBP) (Adelaide, SA)
- South Coast Primary Health Care Precinct (Victor Harbour, SA)
- UniSA NHMRC Cancer Research Health Precinct (Adelaide, SA)

WA

- Geraldton Health, Education & Training Precinct (Geraldton, WA)
- The Fiona Stanley Health Precinct (Murdoch, WA)

GOLD COAST VS. SUNSHINE COAST

Gold Coast Health and Knowledge Precinct VS. Oceanside Precinct

- Similar because of scale and currency
- Different because GC:
  - Government-owned and operated facility adjacent though not integrated with the hospital
  - Isolated site, serviced by public transport but little opportunity to grow
  - Replaces and existing hospital but level of transference of all services unsure
  - GC is separate from any other business precinct

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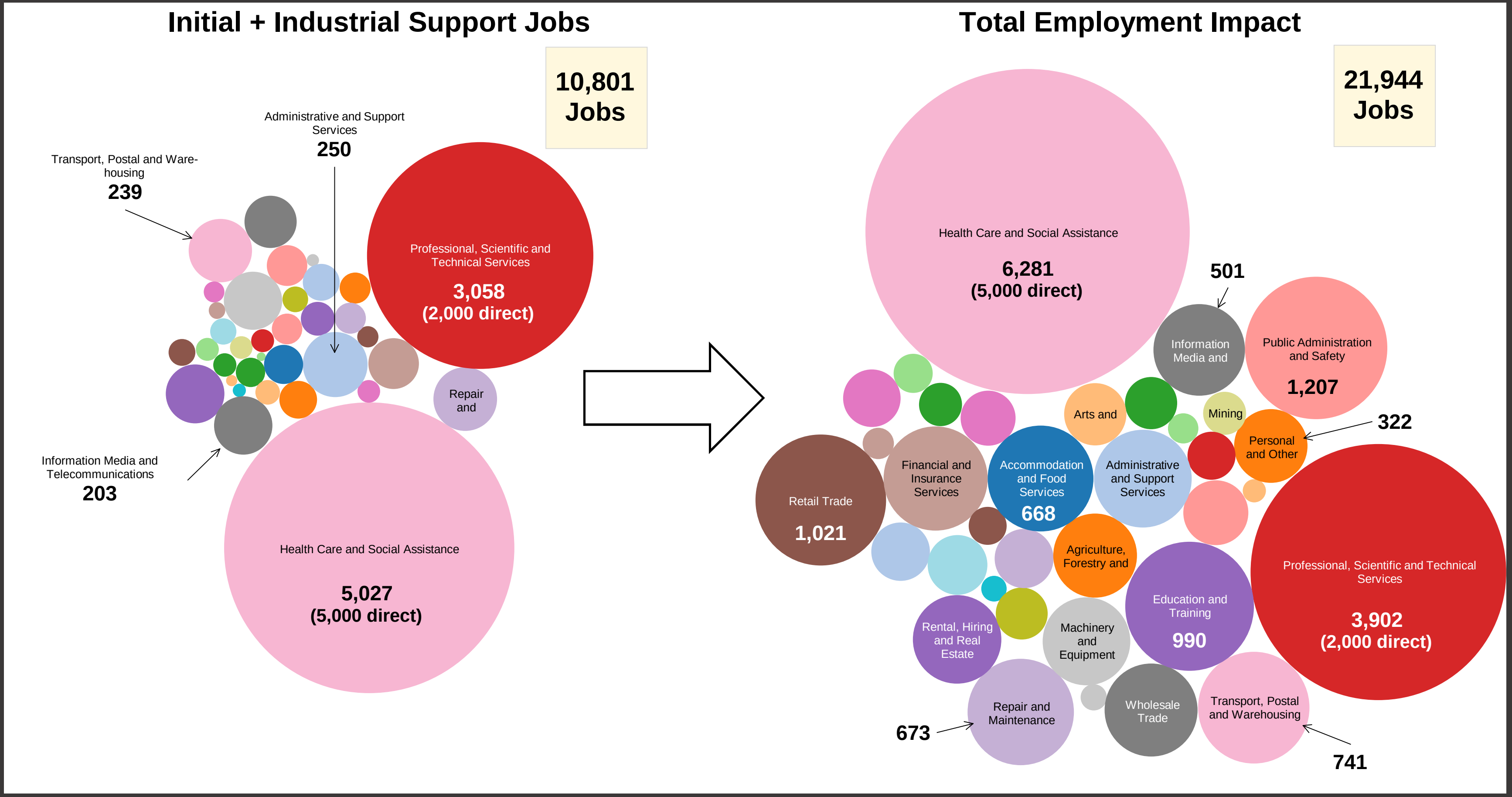
OPPORTUNITIES FOR SUNSHINE COAST HEALTH PRECINCT



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TWO PHASED APPROACH TO JOBS CAPTURE

1. Minimise job leakage (population based services);

2. Transformational

Ensuring Health and Wellbeing is central to the future planning of the Sunshine Coast

Underpin global significance

Utilising anchor infrastructure to differentiate regional brand

LEARNINGS AND NEXT STEPS

KEY LEARNINGS FROM RESEARCH

Key learnings from the MacroPlan research indicate that while each precinct will be unique in some manner, there are a range of consistent principles which define the DNA of successful health precincts nationally and internationally. They include:

1. To realise the 'ripple effect' a clearly articulated and understood mission, with designated short-term, medium-term and long-term goals is essential. This will enable an industry structure which creates opportunities for SME's .
2. The mission must be supported by fit-for-purpose governance arrangements – not a "one size fits all" approach.
3. Strong and effective leadership with "fit-for-purpose" management and facilitation skills.
4. Clear terms of engagement around resources and roles.
5. An engagement strategy for stakeholders and the community.
6. Brand recognition / pulling power through embracing size and scale – brand, marketing and communications must elevate to provide global reach.
7. High concentration of specialisation / expertise and standing.
8. Capacity to navigate complexity / accommodate diversity of contributions from stakeholders.

(CONT'D)

KEY LEARNINGS FROM MACROPLAN RESEARCH

9. Industry connections, connectivity and relevance – active engagement of business and industry.
10. A market organiser is needed who functions to broker and facilitate relationships.
11. Porous / permeable boundaries which promote a clear focus on market and outcome domains over institutional domains – essential to ensure commercial participation.
12. Incentives geared towards outcomes – reward for effort and application, not just participation.
13. "3D" approach to use of land and space – more than one use per space; vertical spaces and focus on integration / collaboration.
14. Shared and creative "playspaces" / "innovation spaces".

ACTION PLAN- THE NEXT STEPS

For the next evolutionary phase of the Precinct to occur, there is a choice. To either assume that in the long run, the opportunities will organically come. Or to accept that because of the considerable competition in the health hub space – regionally, nationally, globally, that there is a compelling reason to create an Action Plan.

The objective of this Action Plan is to create a set of key actions which will promote the Precinct's future success, predicated on embracing transformational opportunities.

The Action Plan will address the need to mitigate the risks of failure which are likely to emerge if there is no effort to leverage against the multi-billion dollar infrastructure spend.

ACTION PLAN- THE NEXT STEPS

Key components and actions include:

1. Definition of a Vision – to be reflective of the aspirations for, and commitment to the Precinct by each stakeholder. A multi-layered statement which provides clarity and direction for all engaged with the Precinct.

2. Creations of the Brand and Identity – to clearly articulate the Precincts competitive advantage which speaks to health care industry specialisation opportunities supported by the Sunshine Coasts high amenity levels. Good branding would be essential to promote opportunities to firms specialising in big data and biobanking and/or to attract institutes such as the Crick or Thompson Institutes.

3. The establishment of a system of Governance - to provide a more formal apparatus charged with the responsibility of ensuring the overall success of the Precinct, consistent with the Vision. This may feature a board structure with representation from the each major stakeholder.

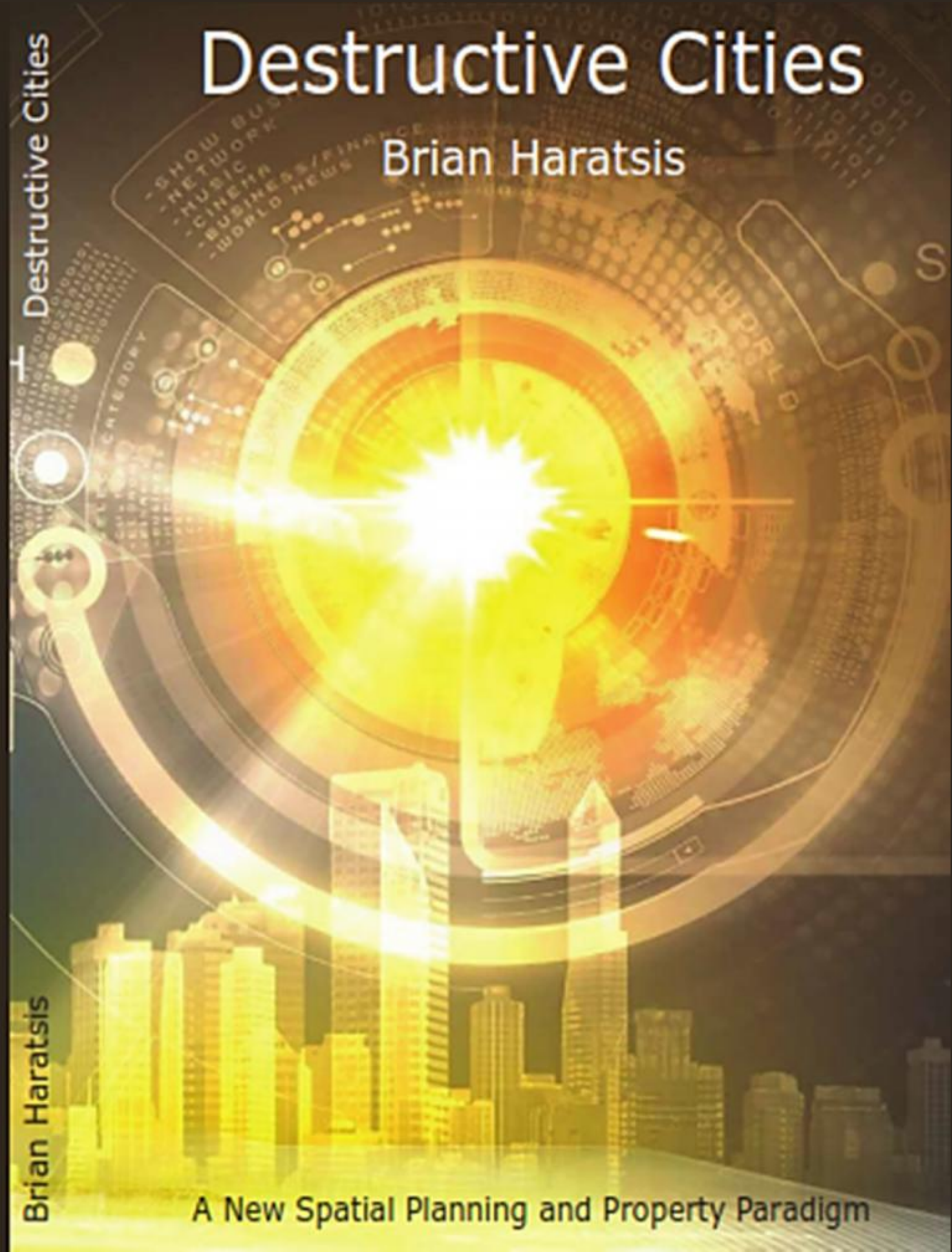
4. A Sophisticated Approach to Industry Development – to build and promote health care industry awareness and interest in the Precinct. From the collaboration with Stockland as part of the market engagement process it was found that there is a clear lack of profile. There exists an obvious need for more work to be done in a coordinated manner with sharpened messaging about the Vision, Brand and Governance.

How and why will Australian cities grow from 2015 to 2025? This book is essential reading for property analysts, developers, urban planners and students.

Brian Haratsis argues that techno-globalization turbocharged by Asian economic growth is driving economic and employment growth in the emerging tradable services sector (tourism, education, health, professional and scientific services, media and IT) which in turn will determine which Australian cities will grow and how cities will grow given current regulatory frameworks – and how cities could grow to maximise the tradable services sector. The Garden City planning philosophy which has resulted in Australia hosting three of the world's most liveable cities (Melbourne, Sydney, Adelaide) has also resulted in Australia hosting the worlds least affordable housing among the world's highest business cost cities and an infrastructure deficit including significant traffic congestion, crowded public transport, congested airports on both land and airsides.

Destructive Cities leverages Joseph Schumpeter's concept of creative destruction and argues techno-globalisation is causing destruction of the Garden Cities planning philosophy and in doing so creating new spatial (city structure) and development (residential, commercial, retail, tourism, education) paradigms which can be created and harnessed to grow Australia's tradable service sector.

This book argues that Australia's unique regional environment with city planning, design and development is a new international currency which can attract the world's best talent and tradable services and generate a virtuous cycle for Australian city and region building.



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