



“Discovering Diversity”
Seisia Beach, NPA

TORRES STRAIT ECONOMIC STUDY

Phase-1

*General Report on
Economic Opportunities*



SUPPLEMENTARY REPORT

**August 2007
(Revised)**

TORRES STRAIT ECONOMIC STUDY



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General Report on Economic Opportunities

SUPPLEMENTARY REPORT

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For
**INDIGENOUS BUSINESS AUSTRALIA
&
TORRES STRAIT REGIONAL AUTHORITY**

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TORRES STRAIT ECONOMIC STUDY
Supplementary Report

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1.0 INTRODUCTION

Following review of the Phase-1 report, the Steering Committee requested the following supplementary assessment be provided on the likely scale, timing and other benefits from the different opportunities identified to help prioritise further research and initiatives.

The following assessment has been drawn up in the light of feedback from the Torres Strait Regional Authority that they saw broad priority areas lying in the direction of:

- Tourism.
- Fishing Industry Development.
- Marine Services
- Infrastructure Programs.
- Retail Distribution.

The following first reviews the range of opportunities canvassed in the main report to identify such aspects as scale and timing of jobs likely to be created, flow-on and connected benefits, and how further research and initiatives in that field might be pursued and prioritised.

It should be noted that potential job numbers given in this section are very broad estimates developed from previous research for this report and are designed to provide an appreciation of likely 'orders of magnitude' only.

Drawing on the above, the next section lists the on-going initiatives that might be pursued under the following headings:

- 1) Immediate Specific Projects to be Pursued.
- 2) Priority Opportunities.
- 3) Intermediate Opportunities.
- 4) Long-Term Opportunities.

An initial draft report was prepared in August, 2007. The following report is a version revised in October, 2007.

2.0 REVIEW OF OPPORTUNITIES, PRIORITIES & HOW THEY MIGHT BE PURSUED

2.1 MARINE INDUSTRIES

2.1.1 Prawn Fishery

Potential employment of 70 licenses, is about 210 jobs. Not all licenses are operating and the potential is substantially lower than 210, and probably of the order of 150. Currently, very few employees are Islanders.

Localisation of employment would only be viable if Thursday Island can be turned into a base for the fishing industry including slipways, servicing, and possibly direct importation of fuel from overseas.

Substantial improvements in Islander capital availability would be needed. Improved management and other skills would be necessary.

The first step would need to be to attract existing boats and crew to base in Thursday Island and to achieve this, there needs to be a major improvement in marine servicing capacity on Thursday Island. (See **Priority Opportunity 2.**)

2.1.2 Tropical Rock Lobster

There are 20 commercial primary boats with about 60 tenders. Some will not be operating. Estimated employment is about 100. Islander catch would add another 40%, with a full-time employment equivalent of about 40, making a total of about 140.

There are two challenges here:

- a) The need to negotiate a greater share of licenses.
- b) The need to professionalise the local operations.

I believe TSRA has the first in hand. The second however, requires a mix of actions including:

- a) Attention to CDEP arrangements militating against professionalisation.
- b) Appropriately equipping and training indigenous licensees.

There is a need for a study into appropriate CDEP arrangements to encourage professionalisation of fisheries and in other fields. (See **Priority Opportunity 1 Fisheries Professionalisation.**)

For this fishery, there also needs to be a build up the marine servicing capacity in the area. (See **Priority Opportunity 2.**)

Recent reports of moves to establish aquaculture in this field (see Cairns Post 17-08-07) should be pursued with a view to encouraging location of aquaculture operations in the Strait area as **Immediate Specific Project 1.**

Action in this field needs to be paralleled by the development of a fisheries equipment program. (See **Priority Opportunity 1 Fisheries Professionalisation.**)

2.1.3 Spanish Mackerel & Fin Fish

Licensed commercial capacity in the mackerel fishery would indicate about 47 jobs and in the reef line fishery, about 35 jobs. The two overlap and the mackerel fishery is not year round. Islander capacity could add substantially, especially if equipped appropriately. Potential full-time employment could be of the order of 70 – 100.

The comments above about the Tropical Rock Lobster fishery also apply to these fisheries. (See **Priority Opportunity 1 Fisheries Professionalisation.**)

2.1.4 Pearl Shell

Current employment in pearl farms in the area appears to be less than 20 (only 4 were recorded in the 2001 Census). The proposal for an additional farm at Saibai would involve employment of no more than about 10.

There is a definite enterprise proposal at Saibai 'on the table' for assessment through normal TSRA channels. (See **Immediate Specific Project 2.**)

Achieving expanded production in the long-term depends on building up wild stocks. Pearl shell needs to be included in long-term fisheries regeneration research. (See **Long-Term Opportunity 1 Fisheries Stock Replenishment.**)

2.1.5 Oysters

There is currently no employment in this fishery and potential employment is difficult to assess.

There are two questions:

- i. Potential marketability?
- ii. A need to develop aquaculture skills and techniques?

It is recommended this be included as **Long-Term Opportunity 2.**

2.1.6 Crabs

There seems to be potential employment for a number of people handling local and PNG wild caught crabs in the Top Western group and, more if a 'grow out' facility became viable as is being looked into at Boigu.

It is recommended that the PNG wild crab trade be included in **Priority Opportunity 3 PNG Trade.**

The potential for 'growing out' imported crablets needs to be researched as part of **Long-Term Opportunity 2.**

2.1.7 Trochus & Beche de Mer

It seems likely that Trochus and Beche de Mer collection will remain a non-professional fishery. Currently there are 116 and 131 licenses respectively. No suggestions were received that these species could be farmed. But they might be included in long-term fisheries regeneration research. (See **Long-Term Opportunity 1 Fisheries Stock Replenishment.**)

2.1.8 Sea Sponges

Immediate prospects for employment at Yorke I appear to be about 12, but success could lead to more.

A detailed feasibility study needs to be carried out including addressing corporate organisation issues. This has been included as an **Immediate Specific Project 3.**

2.1.9 Turtle & Dugong

Employment generation is most likely to be through eco/heritage tourism. (See **Priority Opportunity 6.**)

The species should also be included in lower priority regeneration research. (See **Long-Term Opportunity 1 Fisheries Stock Replenishment.**)

2.1.10 Marine Products Distribution

There is already some employment through the various 'factories' in the different communities - probably no more than 20 - 30 persons throughout the area. Further localised employment of the order of 10 might be created through merchandising operations on Thursday I.

This prospect has been included as **Intermediate Opportunity 1 Marine Products Distribution.**

2.2 LAND INDUSTRIES

2.2.1 Agricultural & Livestock Industries

Only a few people are currently employed in the various horticulture projects around the islands. Virtually all foodstuffs are imported. Q'ld Department of Primary Industries has in effect no research and extension services in this field available locally. Prospects of employment being generated on any scale are longer-term.

It is suggested that the pursuit of opportunities in this field be part of a Longer-Term Research initiative. (See **Long-Term Opportunity 4.**)

However, in the short-run, the outcome of the current feasibility study into reopening the farm at Bamaga might be regarded as a potential **Immediate Specific Project 4** for 'follow through'. Given the area of the farm, it is likely that employment will not be large and almost certainly below 10.

The "Wongai Plum" opportunity probably falls into the category of being an iconic project with benefits of supporting tourism and cultural industries development. Employment from collecting would only be seasonal and part-time. The important initial step is to find out more about distribution of fruiting trees and conditions under which fruit might be transferred into Thursday I for presentation to tourists, processing, and use as cooking/restaurant ingredients. It is recommended that it be part of **Intermediate Opportunity 3 Heritage Tourism – Culinary Arts.**

Policy reactions to climate change are putting an emphasis on 'bio fuels'. Prospective crops for the Torres Strait are palm oil and coconut oil. The area's marine industries and transport are likely to be highly fuel dependent and prospects should be looked into in a longer-term study into adjusting to 'climate change'. (See **Long-Term Opportunity 7.**)

2.2.2 Mining

The employment that might be generated by a wolfram mining operation at Moa will depend on the extent of the deposits. A new wolfram mine being developed in Mareeba Shire is proposed to have a workforce of 50 and the "Watershed" sheelite mine (another ore of tungsten) is planned to have a workforce of 100.

It is important that the community work with mining companies to have the exploration carried out and it has been included as **Immediate Specific Project 5.**

Mining developments south of the NPA have a potential to provide substantial drive-in/drive-out employment to the NPA and other Island communities and there is a need for a watching brief to keep informed of potential opportunities. **Priority Opportunity 9 Feasibility Research Road Construction Enterprise** is relevant.

2.2.3 Quarrying

The whole question of future long-term fill, sand and aggregate requirements for the islands in general should be looked into with a view to determining ways of supplying economically from within the area. This has been classed as **Intermediate Opportunity 2.** It is unlikely that more than about 20 jobs would be involved.

2.3 TOURISM

2.3.1 Employment Potential

The 2001 Census indicated employment in accommodation, bars, clubs, cafes and restaurants at 107. Most of this employment would be in servicing:

- Business visitors (accommodation), and
- Local residents (bars, cafes and restaurants).

Visitors also spend on transport, retail (gifts, souvenirs, groceries), tours, recreation and cultural services and associated employment is generated in those sectors.

Most holiday visitor employment generated would be in the NPA. Employment at present in the sector, including that generated by non-holiday visitors, is probably less than 200.

Recent studies carried out by Cummings Economics into tourism employment generated in Cardwell Shire which includes Dunk, Bedarra and Hinchinbrook Island resorts and substantial tourism flows to Mission Beach and Cardwell indicated an employment of 700. For the Torres Strait to reach this level, it will take many years and the development of a major 'holiday' tourism segment.

2.3.2 Organisation

Achieving substantial employment in tourism will be a long-term project, the initial key to which will be the creation of suitable organisational arrangements to employ full-time staff in tourism marketing. This can be through a separate tourism organisation or through a body with wider aims of promotion of development as occurs commonly in many regions of Australia. This marketing needs to have the financial input and involvement of business and industry in the region.

Marketing needs to go hand-in-hand with action to stimulate investment in tourism businesses, infrastructure and training.

As tourism is still in its infancy, substantial local/regional government support will be important. Any regional organisation will need to develop links with TTNQ, Tourism Queensland and Tourism Australia.

A framework to move in this direction has been put in place in the form of the recently developed Tourism Strategy.

Much of TSRA's future actions in this field should be influenced by, and in association with, this organisation, creation of which is listed as **Immediate Specific Project 6**. Recommended action on organizing to achieve wider development is covered in the following Section 2.8 and **Priority Opportunity 11**.

2.3.3 NPA

The major prospect of increasing 4WD visitation to the NPA over a period of time would appear to be through improving the road to Weipa. Reference is made under the heading "Infrastructure Program" to the prospects of forming an enterprise that both provides substantial employment to people of the area and achieves an important objective of upgrading the road from Weipa to Bamaga for tourism, but also for access to mining jobs and markets for local product.

This could involve the direction of substantial amount of CDEP employment in the short-run to achieve a major economic benefit on say a 10-year time frame. (See **Priority Opportunity 9 Feasibility Research Road Construction Enterprise**).

2.3.4 Accommodation Thursday I

Current lack of accommodation on Thursday I and its cost, is a bottleneck to smooth development of visitation to the area.

The concept canvassed in the main report is to use business traffic demand to provide an immediate basis for construction of a type of accommodation that, over time, will provide the foundations for attracting 'fly-in' holiday sightseeing type traffic into the islands. This would need to be associated with development of a range of experiences in the Inner Group and for those who can afford it, opportunities to visit the outer islands.

The object would be to examine the possibility of attracting operators with the experience and marketing links that would progress the area into 'fly-in' holiday tourism in a substantial way. (See **Priority Opportunity 5 Thursday I Tourism Accommodation.**)

There is outer island interest in developing accommodation on Thursday I, especially aimed at catering for visitors from the outer islands. This has been listed as an immediate project for consideration (**Immediate Specific Project 7 Islander Accommodation Thursday I.**)

2.3.5 Inner Island Attractions & Transport Development

This will need to develop as part of the tourism program and the comments about walking tracks, signposting, water taxi services as an extension of taxi services, might be referred to Torres Shire Council and the proposed tourism promotion organisation.

2.3.6 Outer Islands

Best immediate prospects seem to lie in the field of 'special interest' tourism with fishing being first priority. It is believed that Tourism Queensland already has promotional activity underway. Existing facilities on Poruma (at both the resort and 'the Dongas'), and on Yorke I, and facilities being constructed on Warraber and Kubin, would appear to be suitable.

There probably needs to be some further research into the likely extent of the market, how the various islands can tap into the market, the extent to which existing guest house accommodation can be used for this purpose, and possibilities for forming a centralized marketing and booking system. (See **Priority Opportunity 6 Outer Islands Fishing Tourism Accommodation.**)

Definite interest in developing game fishing based in our outer island area needs to be pursued as an **Immediate Specific Project 8.**

Other possibilities for special interest tourism include bird watching. As an intermediate research project, contact might be made with the Bird Watching fraternity to seek opinions about wider prospects in the area including NPA and the top western group next to the Papua New Guinea coast. (See **Intermediate Opportunity 4 Special Interest Tourism Markets, eg. Birdwatching.**) This is only small ancillary tourism that will have a marginal impact.

The other immediate prospect for the outer islands is eco/heritage research/study tourism such as recording of cultural sites (Monash University Badu and Moa) and turtle research like that currently being conducted at Mapoon on Cape York. Groups like Earthwatch might be contacted. It has the potential to 'turn on' a steady stream of visitors at select locations. (This has been included as **Priority Opportunity 4.**)

Larger accommodation/resorts have the potential to create substantial numbers of jobs. However, long-term markets as well as community interface questions need to be addressed. This is a long-term research need. The proposed priority research into accommodation on Thursday I involving contact with national/international tourism accommodation specialists will probably be instructive in relation to this question and is the first step. (See **Long-Term Opportunity 5.**)

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The question of marine tourism around the outer islands is an intermediate to longer-term research need.

This would include research into potential scuba diving sites of international class. Prospects of developing them would depend on where they are located in relation to airports/airstrips/accommodation. The first priority is to have someone who knows this market evaluate the area's potential.

Also in this category would be the other marine tourism possibilities mentioned of 'water coach safaris', bare boat charters, and basing cruise vessels in the area.

These have all been put together as exploratory **Intermediate Opportunity 5** involving initial contact with persons knowledgeable in the field to start sizing up the opportunities and need for further research.

2.4 CULTURAL INDUSTRIES

Substantial effort is currently underway in developing art/craft centres throughout the Torres Strait.

The prime recommendation of the report related to the establishment of a business vehicle to market output to help sustain viability of employment in this field currently heavily supported by CDEP.

Priority Opportunity 7 Cultural Industries Product Marketing/Distribution is designed to look into this further, including the marketing/distribution of Papua New Guinea artifacts from across the border, culinary products, and performing arts products (eg. CD's), and clothing.

2.5 INTERNATIONAL TRADE

Priority Opportunity 3 PNG Trade relating to Fishing Industry & Marine Services extends to other possible products.

There is a possibility marine services developed at Thursday I will cater for business from Papua New Guinea.

2.6 DEFENCE & SURVEILLANCE

Much of these activities have a maritime aspect and improvement of marine services at Thursday I could help bring down costs of these services. (See **Priority Opportunity 2**.) The question of subcontract arrangements for burning illegal vessels might be looked at in the context of this study.

2.7 SERVICE ECONOMY

2.7.1 General

The major emphasis of the report has been on achieving development of industries earning outside income rather than 'the follow on' service industry structure.

This is not to say that the service industry structure is not important and its efficiency is heavily intertwined with the development of industries earning outside income.

The following looks at how opportunities in this field might be progressed.



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2.7.2 Marine Services

According to the 2001 Census, about 50 jobs related in the area to water transport and services.

This has been covered in the previous section on Fishing Industry & Marine Services (see **Priority Opportunity 2 Marine Services**).

2.7.3 Land & Housing Shortages, Thursday I

The State Government seems to have this problem being researched and no further action is recommended from this report. Solving the problem is vital to the whole economy of the area and especially to achieving progress in the marine services area.

2.7.4 Retailing & Distribution

According to the 2001 Census data, this sector already accounts for about 200 jobs in the area, including 72 in supermarket and grocery stores and 24 in take-away food retailing. At the request of TSRA, further studies into opportunities in this field are included as **Priority Opportunity 8**.

2.7.5 Infrastructure Services & Construction

According to the 2001 Census, electricity, gas, water supply and construction activity account for over 130 jobs.

One of the opportunities identified in this study, related to formation of an enterprise to carry out important road upgrading between Bamaga and Weipa (see **Priority Opportunity 9**).

TSRA has requested that further research be carried out into infrastructure programs that might provide opportunities for local employment.

This is included as **Priority Opportunity 10**.

2.7.6 Engineering & Equipment Maintenance

The marine aspects of this are included under **Priority Opportunity 2 Marine Services**.

2.7.7 Business Services/Health & Education & Other

Comments in the main report should be noted.

No further studies are recommended as a result of this report.

2.7.8 Other

A further long-term research need relates to "Adjusting to Climate Change" which has been included as **Long-Term Opportunity 7**.

2.8 ORGANISING TO ACHIEVE DEVELOPMENT

Most regional areas of Australia find it necessary to establish special organisational arrangements to promote development.

By and large, the driving force for these organisations comes out of the regional communities and combine in the first place involvement of:

- Local business/industry support.
- Local government organisations.

This then tends to attract a degree of State Government support and project support from the Commonwealth Government.

There is substantial variety of approach. Tourism promotion is often a sub responsibility of these organizations, sometimes a separate organisation is developed. These organisational arrangements can change over time to adapt to changing circumstances and opportunities.

The most powerful and successful of these organisations tend to be those that are set up at a regional level and successfully combine local/regional government input and funding with business/industry input and funding.

The variety of organisational arrangements that can be found highlight the fact that each needs to be structured to accommodate local/regional realities.

There is already a proposal 'on the table' to establish a tourism promotion body in the area.

It is suggested that a priority study is needed into possible on-going arrangements to coordinate promotion of development of the Torres Strait, including tourism promotion (see **Priority Opportunity 11**).

3.0 PRIORITISATION OF FURTHER ACTION

3.1 GENERAL

The following groups further action as follows.

1. Immediate Specific Projects to be Pursued

By and large, these opportunities have already progressed to a point where there are specific proponents and feasibility studies existing or underway. It is suggested that these can be evaluated and progressed through normal TSRA/IBA channels.

2. Priority Opportunities

It is suggested that further work might be carried out on some of these as Phase 2 of this study to further define the opportunities in these areas to a point where potential proponents can be identified/approached to progress the opportunities.

3. Intermediate Opportunities

These are areas that might be further looked into in a preliminary way with a view to defining if further detailed research is needed to further define possible opportunities.

4. Long-Term Opportunities

These are areas that should be looked into in due course with a long-term view of the economic development of the Torres Strait region in mind.

3.2 IMMEDIATE SPECIFIC PROJECTS TO BE PURSUED

Fishing Industry & Marine Services

- 1) Tropical Rock Lobster Aquaculture Project - Reports Cairns Post 17-08-07 indicate prospects for a tropical rock lobster aquaculture project. These need to be pursued to make sure that the project or projects are located in the Torres Strait.
- 2) Pearl Farm - The proposed development of an additional pearl farm at Saibai needs to be pursued.
- 3) Sea Sponge Project - This seems to have reached a stage where it can be pursued as a specific project including development of appropriate corporate arrangements.

Land Industries

- 4) Bamaga Farm - The outcome of the current study into reopening the farm might be regarded as an immediate project to be pursued.
- 5) Wolfram Mine Prospect Moa.

Tourism

- 6) Creation of a Tourism Marketing & Development Organisation. A proposal has recently been put forward.
- 7) Islander Accommodation Thursday I – Outer Island communities have proposals they wish to pursue.
- 8) Outer Island Game Fishing Project – There is a prospective proposal.
- 9) Discussions with Seaswift re on-board accommodation for visitors to outer islands.

3.3 PRIORITY OPPORTUNITIES

Fishing Industry & Marine Services

- 1) Fishing Industry Professionalisation – This has four parts to it:
 - a) Negotiating extra licenses.
 - b) Looking at rearranging CDEP arrangements to encourage professionalisation.
 - c) Training programs.
 - d) Equipment programs.

It is envisaged that this would specially relate to the tropical rock lobster fishery, the fin and mackerel fisheries.

It probably represents the most achievable short-run prospect for substantial employment generation.

- 2) Marine Services Study – There is a need to look into the prospects of expanding the marine service capability in the area, including possible marina development for various vessels (including local vessels, tourist vessels, ferries, visiting yachts, fishing vessels), backup facilities of slipways, dry storage and repair facilities (including traveling overhead slings to lift boats out of the water), and supporting engineering activity, electrics and electronics, ship chandlery, etc. Apart from possible major support facilities in the Inner Group, sub facilities on outer islands especially for smaller craft could be looked at.

Associated with this would be examination of the prospect of achieving direct importation of fuels at a lower cost than out of Cairns, from sources such as the new refinery at Port Moresby, Indonesia or Singapore.

Most employment is likely to be in the Horn I/Thursday I area and of skilled trade persons. Advances in this field would be of importance to the continuing development of, and localisation of, employment in the fishing industry and marine tourism.

Arrangements for burning illegal vessels might be looked at in the context of this investigation.

- 3) PNG Trade – There are distinct opportunities for handling/packing facilities in the Top Western islands for crabs and barramundi from adjacent coastal areas of PNG. Other possible areas include artifacts and timber.
- 4) The sea and air transport system to Cairns and Australian markets and possible cheap backloading rates offer an opportunity to develop a significant trade. However, quarantine, customs, immigration arrangements need attention under the Treaty arrangements with PNG. Developmental proposals in Western Province of PNG including proposals to develop a deep water port at Daru need to be taken into account. A study is needed to look into this whole question.

Land Industries

Nil

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Tourism

- 4) Eco/Heritage Research/Study Tourism – This should include consideration of turtles at Darnley I, and heritage sites at Moa, Badu, and contact with groups like Earthwatch..
- 5) Thursday I Accommodation – This should examine the feasibility of attracting experienced tourism accommodation operators to Thursday I as part of a program of developing the Inner Group for ‘fly-in’ tourism as well as meeting an immediate need for more accommodation for business traffic.
- 6) Outer Island Fishing Tourism Accommodation – Action is needed to identify the extent of likely markets in different parts of the Strait, locations, standards, and prices.

Cultural Industries

- 7) Cultural Industries Product Marketing/Distribution – This is to look into the potential organisation and viability of a business that would market to tourist and other outlets, within and outside the Torres Strait area, the growing output of cultural based output including art/craft, PNG artifacts, culinary products, performing art products (eg. CD’s), clothing and the like.

Retailing & Distribution

- 8) Opportunities for Retail & Distribution Development – This should include development and improvement of the sector including indigenous businesses. It should include potential support for development of local cultural industries and local foodstuffs production.

Infrastructure

- 9) Feasibility Research Road Construction Enterprise – Especially aimed at upgrading the road from Weipa to Bamaga using full-time CDEP funded labour from Torres Strait and NPA communities.
- 10) Infrastructure Program Opportunities Study – This would involve looking into further infrastructure needs in the Torres Strait area and the prospects for local businesses to be organised to participate in their delivery.

Other

- 11) Organisational Arrangements to Promote Development – This needs to be carried out in conjunction with addressing Immediate Specific Project 6 Creation of a Tourism Marketing & Development Organisation.

3.4 INTERMEDIATE OPPORTUNITIES

Fishing Industry & Marine Services

- 1) Marine Products Distribution – This would look into the marine products distribution system out of the Torres Strait to examine prospects of greater Islander involvement along the chain.

Land Industries

- 2) Quarrying – Longer-term needs and local sources of fill, sand and other quarry products needs to be looked into.

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- 3) Heritage Tourism – Culinary Arts – This would look into the possible role of Islan Kai in tourism and dietary improvement. It would include examining the possible role of the Wongai Plum.
- 4) Special Interest Tourism Markets, eg. Birdwatching – Initial contact with birdwatching specialists in Cairns area and other special interest groups to ascertain potential of the Torres Strait area.
- 5) Marine Tourism Opportunities – This would examine the potential of developing tourism based on scuba diving, water coach safaris, bare boat charters, and cruise vessels based in the area.

3.5 LONG-TERM OPPORTUNITIES

Fishing Industry & Marine Services

- 1) Fisheries Stocks Replenishment – This includes tropical rock lobster, pearl shell, trochus and beche de mer, turtle and dugong.
- 2) Black Lip Oyster Marketability and Aquaculture Skills Project.
- 3) Crab Aquaculture based on Imported ‘Crablets’.

Land Industries

- 4) Agricultural, Horticultural & Livestock Industries – A longer-term initiative in this field needs to be to liaise with Q’ld Department of Primary Industry to establish a research program and presence in the area, possibly in the NPA, to look into potential for crops, livestock production.

A parallel activity would be to invite Flecker Botanic Gardens to look into developing garden varieties and styles suitable for the area.

Tourism

- 5) Larger Accommodation Opportunities – Outer Islands – This would look into if and how larger tourism operations/resorts can be established in the area. It would initially be informed by Priority Opportunity 5 Thursday I Accommodation.
- 6) Tourism Ferry/Transfer Operations to Outer Islands – This would parallel the above study and Intermediate Opportunity 5 Marine Tourism Opportunities to look at economical ways of transfers of visitors and locals between islands.

Other

- 7) Adjusting to Climate Change – This needs to include seeking advice about:
 - Physical impacts - likely higher temperatures and rainfall in the area, and sea level rises.
 - Economic impacts – higher cost of fossil fuels and replacement by biofuels and other fuels.