

# Benchmarking South East Queensland

in a global context

Executive Summary



## About this report

This 2025 benchmark has been developed as part of wider input to inform the Smart Region Digital Plan. The Smart Region Digital Plan is one of the 29 commitments being delivered as part of the South East Queensland City Deal, a long-term partnership between the Australian Government, Queensland Government and Council of Mayors (SEQ).

## Acknowledgements

The significant time and input of stakeholders interviewed during the development of this report is acknowledged.

Report has been produced by lead authors: Dr Tim Moonen, Patrick McVeigh, Borane Gille and Ezra Rawitsch, from The Business of Cities, an urban intelligence firm providing data and advice to global cities, companies and institutions. Based principally in London, since 2008 the firm has worked with more than 150 leadership teams working for cities and regions on their future economy, governance, and built form.

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## Acknowledgement of Country

This report respectfully acknowledges the Traditional Owners of the lands across South East Queensland and their enduring connection to Country, which has been cared for by many generations of First Nations Australians. We pay our respects to Elders past and present.

## Read the full report

This Executive Summary introduces and summarises the full extended report, which can be found separately at [seqmayors.qld.gov.au](https://seqmayors.qld.gov.au) complete with data glossary, case studies and graphs.



Front page image credits: Brizzy Pix, Visit Sunshine Coast, Gary Cranitch @ Queensland Museum and BEDA

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Image Credit: Tourism Noosa,  
Manuel Freudenmann

# Foreword

Queensland is open for business and to ensure South East Queensland (SEQ) can pursue an ambitious vision and remain a globally competitive region, partnerships with local government and industry are more important than ever.

Queenslanders should have certainty in the delivery of generational infrastructure and increased connectivity across South East Queensland through stronger partnerships between all levels of government to accelerate investment and coordination.

South East Queensland is one of Australia's fastest-growing regions and we want to make sure it continues to be a great place to live. As the region continues to grow, it's important we look at other global cities to understand how they are addressing both the challenges and opportunities of growth.

This independent benchmarking offers a fresh perspective of how SEQ is performing against global peer regions such as Barcelona, Metro Vancouver, Busan, San Diego and Hamburg. It assesses a range of factors including connectivity and productivity as well as innovation and sustainability by drawing on local and global data, detailed case studies, and insights from over 150 regional leaders.

The report offers a clear narrative on the region's comparative strengths, gaps, and pathways to global competitiveness. It builds upon the groundbreaking independent analysis in 2017 that positioned South East Queensland as a global reference point for benchmarking city-regions.

The 2017 report emphasised the importance of maintaining and protecting the lifestyle and natural environment that continue to make SEQ such a unique and enviable destination.

Since then, SEQ has achieved significant outcomes, including securing Australia's largest City Deal as well as the right to host the Brisbane 2032 Olympic and Paralympic Games. With SEQ's population set to reach six million by 2046, and the need to create one million new jobs, the imperative to remain a liveable, competitive, and globally relevant region has never been greater.

This report supports our joint priorities to reset the planning partnership between state and local government, and to develop timely plans for the future of SEQ to identify what infrastructure and services are needed to accommodate our growth.

With the Brisbane 2032 Olympic and Paralympic Games on the horizon, it is imperative that we continue to work together to ensure that SEQ maximises legacy and prepares to showcase the region, Queensland and Australia on the world stage.

There is a need for ambitious policy decisions that should protect the lifestyle of our Queensland communities, while facilitating responsible growth through infrastructure provision for SEQ. The increase in population must also be supported by improved project management for our transport, health, education, and other infrastructure projects that are delivered on-time and on-budget.

The insights from this study reinforce the need for continued coordination across all levels of government, South East Queensland Council of Mayors and the private sector to progress and align strategic actions. We invite readers to use this report as a practical guide for making strategic decisions and aligning actions that will shape the future of South East Queensland in the decades ahead.

Thank you to the Business of Cities for undertaking this analysis and the considerable number of stakeholders that were interviewed to inform this report.



**Brisbane Lord Mayor  
Adrian Schrinner**

Chair, Council of  
Mayors (SEQ)



**The Hon Jarrod Bleijie MP  
Deputy Premier**

Minister for State Development,  
Infrastructure and Planning and  
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# Introduction

## Strong growth trajectory with stable foundations

South East Queensland (SEQ) is midway through a historic 40-year transition, during which it is doubling its population from 3 to 6 million people and establishing itself as one of the world's 100 largest city-region economies. This growth trajectory allied to stable foundations place Brisbane in the top 5% of cities globally for future opportunity, and propel locations across the region into stand-out prospects.

SEQ has many of the ingredients and endowments to become the world's consummate middleweight region – a place of extraordinary lifestyle, pre-eminent education, advanced technology, healthy environment, world-class clusters, abiding openness, welcome and warmth, convenience and connection, all grounded in a confidently authentic identity and communities of character. Looking to a mid-21<sup>st</sup> century of multiplied risks, few places on earth possess these combinations in the way SEQ can showcase.

As such, SEQ is becoming more popular and prominent. The city-region is reaching a new threshold both of internal scale and interconnectedness, and external reach and relationships. Hosting the world at the 2032 Olympic and Paralympic Games will profoundly shape the region's international reputation for the remainder of this century.

## Learning, leading, and succeeding on the global stage

This makes it important for leaders across SEQ and Australia to step back and observe how the city-region is evolving in a global context, who it shares common paths with, and what it can learn from and share with the world. There is a local and national stake in SEQ's success.

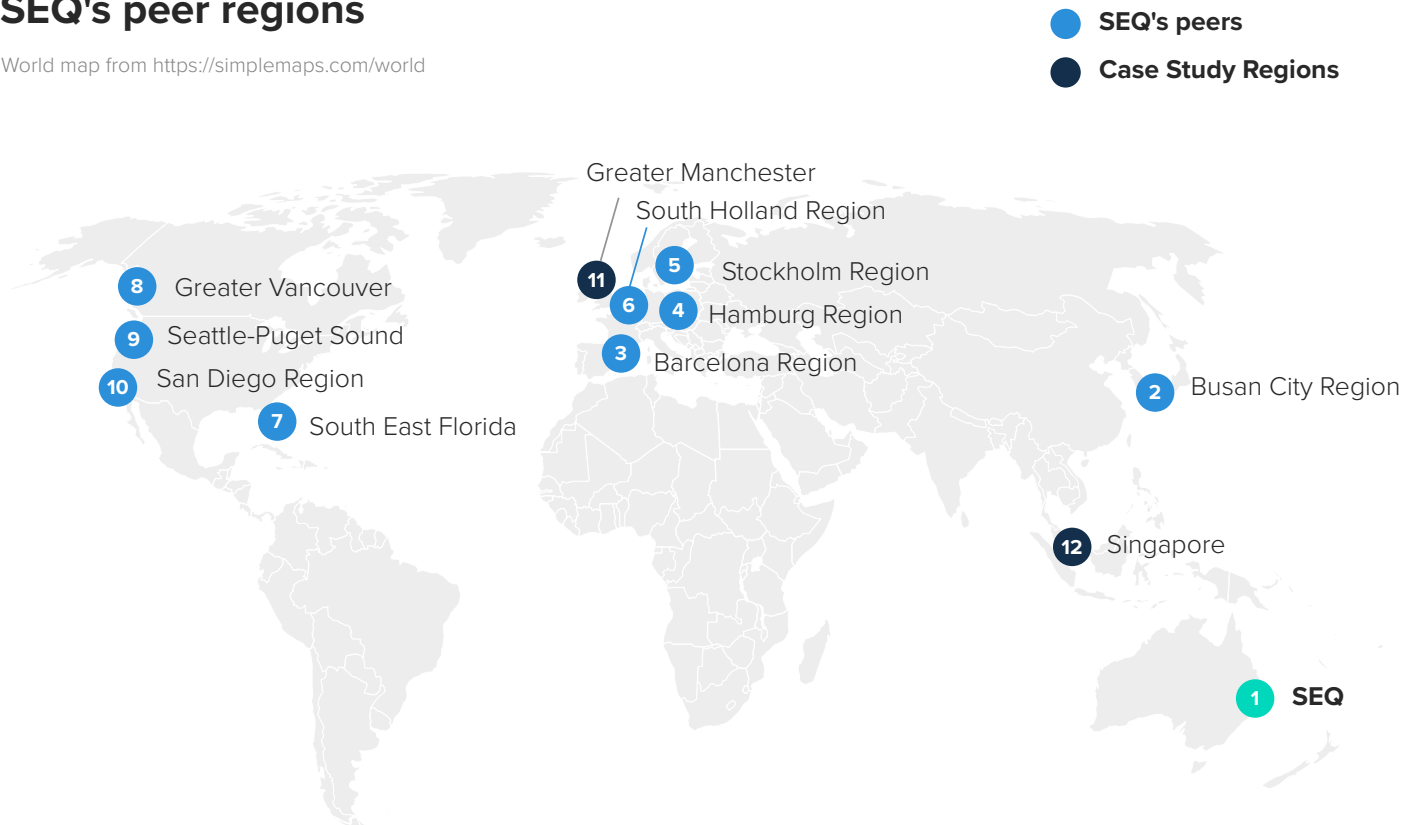
Australia's long-term aspirations as a nation of 40 million people require SEQ, as one of its 'Big 3' capital city-regions, to be competitive at a global scale for multiple cycles to come. This report follows on from the inaugural 2017 benchmarking of SEQ to assess how the region is progressing against other comparable high-quality-of-life medium-sized regions that share similar attributes and ambitions. Like SEQ these 'peers' comprise a rich economic and spatial mosaic – from high-growth cities to coastal communities, inland gateways, biodiverse rural areas, and natural icons and resources.

## Informing the region's next 5-10 years

By drawing on a combination of urban indices, regional datasets, case studies, and interviews, this research offers SEQ a fresh look at its international trajectory and new perspectives with which to review the upcoming 5-10 years of opportunities and choices.

## SEQ's peer regions

World map from <https://simplemaps.com/world>



## About the peer regions

This report compares SEQ among a group of ten carefully selected city-regions. These are 'peers', comparators and, sometimes, competitors.

### Selecting SEQ's peer regions

The selection of peer regions was based on the 2017 benchmarking report criteria of international regions of comparable population and economic size, comparative advantage in liveability, education and trade, and distinctive strategic or gateway location in their nation.

### Changes from the 2017 benchmark

Eight of the ten peers appear in both the 2017 version of this study and the current 2025 edition. Fukuoka and Cape Town have been replaced with the regions of Seattle and Stockholm in the updated study.

These new peers were selected to reflect SEQ's recent convergence toward other leading regional innovation economies with significant advanced industry capabilities, focused on precinct- and district-level development of new capacity. Seattle (known as the Puget Sound Region) and Stockholm also offer significant learnings for SEQ on how collaborative regional governance can over time yield significant agenda-setting and region-shaping power. These two new comparators also better allow for cross-cutting regional comparisons based on high-quality data.

## Key figures of SEQ's peers

City-Region	Population	Size (km <sup>2</sup> )	Regional population density (inh./km <sup>2</sup> )	Population of largest city	Core city's share of regional population
Barcelona Region	7.3m	19,900	367	1.7m	30%
Busan City Region	7.8m	6,500	1200	3.5m	45%
Hamburg Region	5.4m	28,500	189	2.0m	36%
Metro Vancouver	2.9m	2,900	1012	0.7m	22%
Miami (South East Florida)	6.3m	13,600	463	0.5m	7%
San Diego Region	3.3m	11,000	296	1.4m	42%
Seattle Region	4.0m	6,300	635	0.8m	19%
South Holland	3.8m	3,300	1151	0.7m	17%
Stockholm Region	2.9m	13,600	213	1.0m	40%
<b>SEQ</b>	<b>4.0m</b>	<b>35,331</b>	<b>114</b>	<b>1.3m</b>	<b>32.5%</b>

These ten city-regions all comprise of multiple local governments, with the largest central city surrounded by a larger regional population. They lie across a spectrum of spatial and governance contexts, outlined in 'Typology of Peer Regions' on page 25.

## Common attributes of peer regions

The city-regions selected for the 2025 report form an effective 'peer group' because they share most or all of the following attributes with SEQ:

- 1. Medium-sized** - These regions have a functional population within a factor of two of where SEQ is today or is projected to be in 20-30 years.
- 2. Strong gravitational pull of the largest core city** - The main city in each region (Brisbane in SEQ's case) typically rates among the top 150 globally as a host for global companies and investment, while the wider region possesses advantages in production, affordability and lifestyle choice.
- 3. Strategic coastal location** - These regions act as gateways or hubs for global trade, talent and investment. They are in the top 100 for port, freight or distribution functions globally. They are usually the second or third regional economy in their nation or their part of the continent.
- 4. High quality of life appeal across the region** - The peer regions are, on average, rated within the top 10 in their continent for liveability and outperform on appeal for visitors and students.
- 5. Knowledge and innovation capabilities** - All the regions possess global top 200 universities and average in the top 75 across a full range of innovation benchmarks globally.

# Key findings of 2025

## Increasingly interdependent

SEQ's growth finds itself being accommodated within the skeleton of a multi-centre region. This presents an unusually promising canvas to simultaneously meet lifestyle needs, serve urban and non-urban industries, and create the points of scale and critical mass that drive agglomeration and diversify investment. The analysis points to more areas where Brisbane's performance and prospects appear to be co-dependent with SEQ-wide factors of housing choice, connectivity, data storage, lifestyle variety, and development of the grey economy. Other local areas in turn rely on Brisbane as a magnet and gateway to the region. International experience – from Amsterdam's rise into Europe's No.3 innovation region, to Miami's shift from 'sun and fun' into an inter-continental trade and enterprise capital - suggests this complementarity is a source of medium-term advantage, if a region starts to lean in to the co-ordination task on strategy, planning, delivery and communication.

## Rising up

By relevant international standards, SEQ's population growth trajectory is remarkable and continues to drive positive economic indicators. The city-region's demography, stability, and access to resources underpin its successful servicing of commodities industries, tourism and resource-hungry sectors. It has accrued major advantages in higher education, research and healthcare that truly stand out internationally. Brisbane especially is becoming more visible and a magnet for lifestyle and investment.

## Diseconomies of bad growth are yet to fully hit home

Like other global city-regions, SEQ is experiencing the externalities that come with growth. However, its inherited strengths mean that for the time being, compared to most global peer regions more people in SEQ are in work, income inequality is more moderate, the labour market is more gender equal, fewer people complain about the inconvenience of car travel, and the region is on the whole more affordable, greener and less polluted.

## Better placed to react to pandemic shifts

More of SEQ's unique advantages have been revealed by the altered preferences of talent and growth industries: year-round outdoor lifestyle, affordability edge over neighbouring capital city-regions, greater consistency in its high standard of living, a more generous blue and green infrastructure endowment in the immediate region and wider state, a safer bet given geo-political instabilities, and proximity to Asian markets. These attributes are also fuelling a pick-up in entrepreneurship and success in scaling up.

## The birth of a global city-region in the era of 2032

Rather like the Île-de-France is to Paris or South Florida is to Miami, SEQ is an administrative construct that has come to comprise a close fit with an expanded and urbanising city-region economy.

The 'city-region' has become a much more significant feature of global urbanisation. As is commonly the case worldwide, SEQ's own city-region system consists of a core city (Brisbane) which is the largest economic, cultural, and administrative centre, and neighbouring cities, towns, and rural areas whose own economies support and enhance the scale and functions of the whole. As with Miami/South Florida, Barcelona/Catalonia, Vancouver/Greater Vancouver and hundreds of others, SEQ's international competitiveness and reputation is shaped first and foremost by Brisbane as the primary city.








Yet these city-regions increasingly function as an interdependent economic unit where daily activities such as commuting, trade, and social interactions extend beyond the administrative boundaries of any single city. In well-established city-regions these flows are enabled by strong transport links, shared infrastructure, and communities borrowing from each other's economic advantages. The cities and communities together possess a **combined scale**, **common assets** and **complementary specialisations** that make them more attractive places to live, work and invest.

These benefits work both ways. Over time, the major hub cities (like Brisbane) in a city-region also find that their ability to continue improving their own position on the international stage depend fundamentally on the carrying capacity and efficiency of the wider region. With the right integration, planning, co-operation and communication, SEQ provides Brisbane with what economists call 'borrowed scale' - more choice, flexibility on costs, and sources of specialist capability.

As a result, more and more city-regions recognise the potential if they collaborate to compete, even if the journey to get there is often bumpy. To do so increasingly relies on new and better coordination of governance and policymaking across multiple boundaries to capitalise on opportunities of scale, ensure benefits are better distributed, and address risks of sprawl, waning sustainability, and social disparity.










## Headlines

- 
-  **2nd fastest** growth in venture capital in last 10 years
  -  **Lowest** share of income spent on mortgage payments
  -  **2x** range of globally-rated university programs
  -  **3x** faster pace of growth over next 20 years
  -  **52%** more international students
  -  **Lowest** air pollution

\* Scores and positions vs SEQ's 10 peer regions

## Emerging risks

- 
-  **38%** less frequency of public transport between region's largest centres<sup>†</sup>
  -  **23%** less productive
  -  **3rd** fastest-aging population
  -  **54%** lower population density of urban centres
  -  **9th of 10** for innovation economy
  -  **6th** highest recognition of flagship cultural institutions

<sup>†</sup>Average frequency between each peer region's 4 largest cities based on weekday frequency of rail/bus journeys.

## The region's key growing pains

SEQ's clear areas of strength and progress are important to differentiate its proposition and profile globally. Yet analysis also points to the region's growing pains around housing, transport, and access to opportunity:

**Getting around and getting on** - SEQ has witnessed a more rapid resurgence of traffic congestion, longer commute times, and distance to jobs and amenities, which affects efficiency and access to opportunity in the region. Despite investment, public transport services remain less fast and frequent than peers in Europe and Asia, and access tails off faster beyond the metropolitan core around Brisbane. Digital connections also still lag, albeit there have been recent improvements.

**Modest productivity and hindering progress in innovation** - Despite the remarkable strength and popularity of the region's education and exports, SEQ's sector mix and rate of external investment are still playing catch up to more prosperous regions. The region still has a smaller knowledge economy and is currently more reliant on healthcare and education as drivers of jobs and growth. While some of its peers are national or international capital cities, SEQ is facing tailwinds to attract R&D, capital, infrastructure, highly employable graduates, and frontier industries to invest in the region. Productivity growth is more constrained than in comparable regions due to this lagging investment.

**Rising housing costs** - Whilst SEQ's more affordable housing than the Sydney or Melbourne regions drove much of the last wave of demand, this advantage has been eroded as the cost of land and construction has driven sprawl, placing additional pressures on the transport network. Homelessness figures are also catching up to international regions. Greater housing choice and mix is needed across the region.

**More social externalities** - Growth pressures are starting to undermine key aspects of liveability and threatening social licence for the direction the city-region wants to go in. The city-region is seeing more young and middle-income people locked out of the housing market and access to job-rich locations.



## SEQ's performance

relative to  
peers across 10  
thematic pillars



**Source:** The Business of Cities Research. For each of the 10 categories, SEQ has been evaluated in multiple comparative performance benchmarks. Its aggregate score across these benchmarks among the group of 10 peer regions informs its final position. See appendix for methodology.

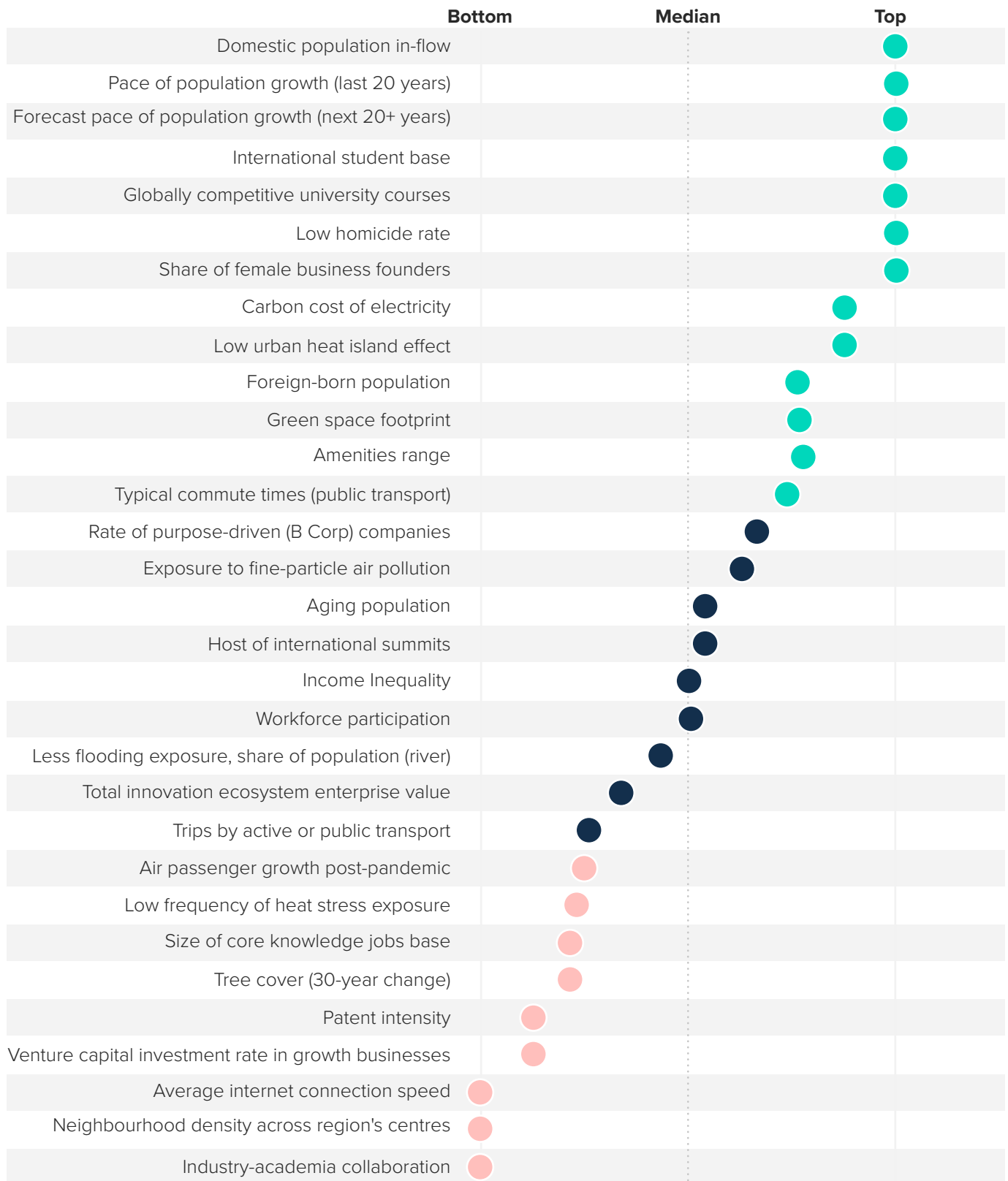
The full extended report investigates SEQ's economic growth and performance trajectory in more detail, reflecting on the city-regions' short- and long-term trends. For each, the framework observes strengths, challenges and risks, as well as a sample of relevant comparative data, examining the following five key pillars:



- 1. Growth, Opportunity & Prosperity** - Ability to provide all residents pathways to quality jobs, education, home ownership, entrepreneurship, quality housing and overall wellbeing.
- 2. Place & Connectivity** - Neighbourhood vibrancy and appeal, and the ability to reliably connect people to jobs, families and services.
- 3. Talent & Innovation** - Emerging industries, jobs in established industries, its skills pool, and partnership between research and business.
- 4. Sustainability & Resilience** - Capacity to rebound from shocks, progress on decarbonising its city systems, and responsibly harness its natural resources.
- 5. Experience & Culture** - Depth and variety of creative, social, and interactive activities that shape the unique identity and character of the city-region.

# SEQ's international performance

Against peer regions across sample of key metrics



Percentiles are used to express SEQ's performance where in some cases data is not available for all peers; e.g., where Brisbane is 1<sup>st</sup> of 10 = 100%; where Brisbane is 3<sup>rd</sup> of 8 = 71%.

## SEQ's overall trends vs. peer regions



## SEQ's observed structural challenges

These symptoms point to structural issues where SEQ is internationally an outlier:

### **Rate of infrastructure investment and delivery is not keeping pace**

- Forthcoming rail and bus rapid transit investments and improvements will make a significant difference. But at a wider picture they are insufficient to make SEQ's urban platform ready for future cycles of economic opportunity. Frequency and reliability of connections between as well as within SEQ's multiple centres will be essential to maximise the benefits of an integrating region. Rising vulnerabilities to climate risks also suggest more investment and innovation is required to adapt, mitigate, and also commercialise the region's expertise in resilience and disaster management internationally.

### **Unscrambled brand and place identities**

- SEQ as an administrative label does not command visibility as a distinct "place brand" or competitive identity in external markets. Most of the region's constituent cities and places have communicable assets but lack national and international recognition in their own right. Brisbane has been surfacing strongly as a popular and distinctive city, and gateway to the region for talent, investment and opportunities. Yet unlike most comparable city-regions, Brisbane is not yet fully accepted or utilised as the "attack brand". Localised competition risks diluting the potential to amplify the collective international reputation.

### **Fragile and fragmented governance of the region**

- Notwithstanding important instances of progress, the governance structures and coordination habits are less developed than in most peer city-regions – whether within, across, and between tiers of government, or between industry, research and education. The current result, despite much common goodwill and endeavour, is less ownership or directional consensus around SEQ's vision, path or proposition.

### **The costs of low density are accumulating**

- The result is less efficient connections than most of its peers, and less of the critical mass centres tend to rely on to develop mixed economies with gravitational pull. Less of the urban fabric is suited to the proximity and amenity needs of talent and innovators, and the 'high experience' expectations of visitors. The region is home to several very promising innovation precincts, with great potential to scale and mature in order to excel internationally. More broadly however, the indications suggest that current patterns of land use do not favour long-run competitiveness.

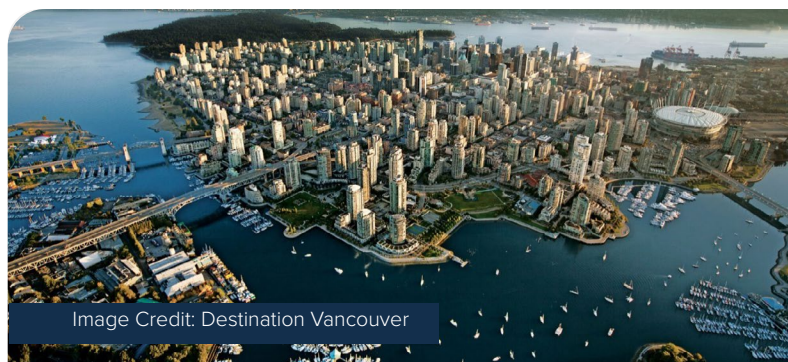


Image Credit: Destination Vancouver

## What globally competitive regions are doing to flourish

This comparative benchmarking not only reveals the rate of progress other regions are making, it also highlights the acceleration of projects, reforms, investments and collaborations that are being undertaken.

Many of these regions share with SEQ a context consisting of multiple cities and localities, whilst also being much smaller than the state government. Seattle (Puget Sound), Greater Manchester, South Holland and Singapore are showing pathways to grow the high value jobs base, sequence regional deals, and strengthen their city-regional brand.

### Common policy and strategy directions among SEQ peer regions and reference points

- 1 Intensification around transport stations and strategic hubs well beyond the region's main CBDs
- 2 A single regional innovation strategy organised around priority innovation districts, proactively convening the technology base
- 3 More mature arrangements for organising, resourcing and co-ordinating their growth effectively
- 4 Figuring out how to tell their regional story to the world in a courageous and positive-sum way
- 5 Targeted approaches to attract international talent and entrepreneurs motivated by mission
- 6 Pursuing a high calibre of visitor and cultural economy in order to drive trade and enterprise

# Learning from the globally competitive leaders

## Greater Manchester



Greater Manchester has been the UK's pioneer of an important model of city-region governance - a Combined Authority of 10 local governments.

After an initial pilot tested the benefits of devolving more powers to the level of the city-region, a total of seven deals over 15 years have subsequently expanded the toolkit for Greater Manchester to shape its own approach to skills, transport and public services. Each deal has added extra leadership and governance capabilities, as well as financial tools to allow more of the revenues associated with growth to be retained.

As Manchester has evolved into a Greater Manchester city-region, its identity has become about place making as much as place marketing. The city's core idea of "Original Modern" became the basis for a deeper identity, linking the city-region to the great urban, industrial and inventive challenges of every age, without diluting established narratives about art, design, music and sport. Manchester has a successful mixed revenues system for building identity into all interactions, which reflects its mature culture of shared leadership among politicians, business leaders and university Vice-Chancellors. These endeavours are harnessed by economic and investment agencies that astutely leverage the institutions' capacity and partnership working expertise.

Manchester's successful maturing of the region's governance, investment and identity is widely seen to be a product of:

**Strong, skilful and consistent advocacy** from civic leaders with support from industry to the central government, maintaining momentum and driving progress toward securing future deal generations and investments.

**Willingness of local government leaders** to work with neighbours, develop credible proposals, shape policy rooted in evidence, and enhance collaboration between levels of government.

**Pace of regional arrangements** specified in the region constitution that requires a high level of agreement and frequency of priority-setting among members. This leads to coordinated policies and initiatives and a more mature cross-party approach to decision making.

**Place-based economic strategy** that has crystallised the task of diversifying the economy around key locations and districts across the city-region, connected by public transport, helping to foster a whole-ecosystem mindset.

## Singapore



Image Credit: Unsplash

In more recent chapters of Singapore's remarkable 60-year transformation, one challenge has been to learn how to compete in the most advanced global marketplaces for technology, venture capital, and corporate investment. Its Economic Development Board (EDB) possesses many advantages over other regions' typical investment promotion and 'one-stop shop' services, including:

- **Autonomy to be strategy-first and outcome-focused** - EDB is given licence to be chief coordinator and facilitator among other agencies in government for how to attract the capabilities Singapore needs in priority sectors. This gives it the opportunity to drive 10-year-long overarching strategies, create roadmaps for specific sectors, and play the roles of project manager and fund disperser to execute specific priorities.
- **Industrial land** - EDB prepares "plug-and-play" infrastructure and serviced land sites to enable companies to kick off faster with labs and data centres, working closely with the public developer JTC laboratories.

- **Latitude** - Scope to introduce customised fiscal and tax incentives to investors, as well as specific talent visa schemes.
- **Investment capacity** - An active global venture investor and a risk taker since setting up its corporate venture investment arm. It has made over 200 investments together with other government-linked companies (such as Temasek) in targeted tech sectors (digital, engineering, urban solutions, advanced manufacturing) via a number of its sub-funds, and advises central government on new technology trends.

This means that EDB is not just focused on individual foreign investment 'wins' to grow priority sectors. It is continuously engaged in designing an ecosystem capable of delivering and sustaining the growth it attracts.

This beneficial model taps into and builds upon Singapore's wider acknowledged advantages of clear medium-term policy goals, effective signals in the digital sector, access to specialist finance at each business life cycle stage, and connections into other global markets.

## Stockholm

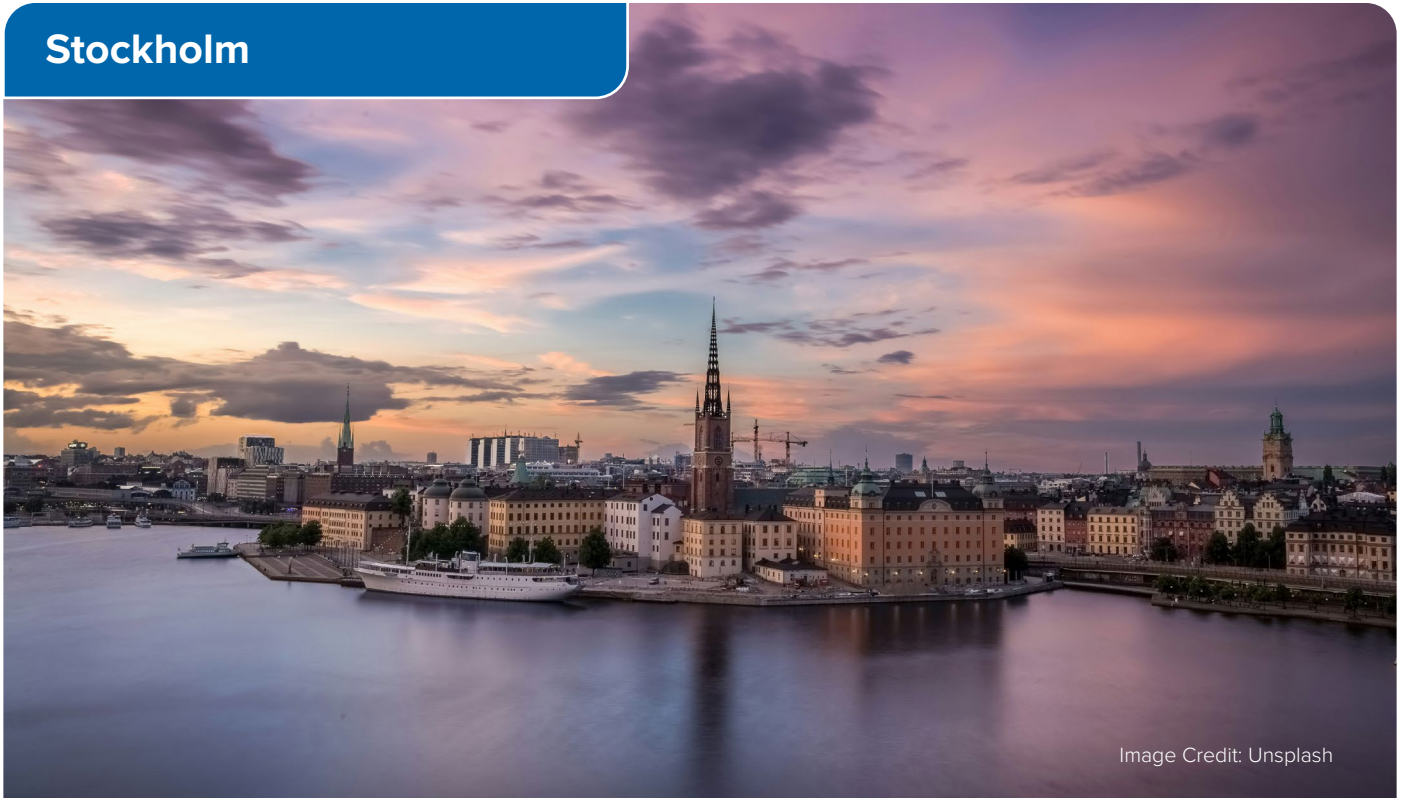


Image Credit: Unsplash

Coordinated digital infrastructure focused on the commercial portion of the economy has been the cornerstone of Stockholm's transition into one of the most innovative regions in Europe.

30 years ago, Stockholm created competition-neutral IT infrastructure designed to meet future communication needs as well as spur choice and competition. The network called 'Stokab' – built with very little public subsidy - quickly established hundreds of corporate and institutional customers, including eventually more than 25 local governments.

The network served each premise with point to point 'dark fibre' access lines, with cross-connecting nodes supporting redundancy. Point to point is viewed as key to be secure in a digital environment that is increasingly shaped by quantum. This network supported rapid 5G deployment – with Stockholm possessing the fastest 5G download speeds in 2022 in Northern Europe and encouraging alternative operators to compete with major players.

The fibre network dramatically improved the quality and reliability of communications within and between businesses in the Stockholm Region. Alongside the rise of Spotify, Klarna, and Skype among others, many other effects have been noted. These include a big rise in R&D centres setting up in the region, better connections between labs across the region to improve scientific collaboration, Stockholm's reputation for excellent connectivity during major sports events, and earlier rollout of 5G solutions in healthcare and traffic management.

Stockholm's success has paved the way for many more European regions to see rapid digital connections as the platform to grow the innovation ecosystem. Its successful implementation reflects the importance of an initial consensus on the need for better connections, and subsequently a patient approach both to deployment and returns.

# ✓ The big opportunities for SEQ

- **Use economic transition to deepen economic specialisation** - The region has some observed strengths, but these do not yet reveal themselves as globally distinctive or compelling. There is a clear opportunity to harness the current wave of technology and artificial intelligence (AI) to make overdue manufacturing upgrades viable and scalable. Demographic trends, and the attractiveness of the region to retirees, point to a need to excel in the grey economy - tourism, wealth management, and advisory know-how.
- **Use the emerging 'city-region consciousness' and appetite for cooperation to take collaboration to the next level** - This includes an enhanced city and regional identity. The DNA of SEQ with its history, diversity and personality can lend it a more distinctive cultural resonance and global reach.
- **Quality and resilience of place** - The region is starting to benefit from an improved business, social, digital and cultural environment. This is underpinned by modern facilities and amenities, a higher calibre of precincts and 'urban villages', and instances of very high-quality built environment and public realm. There is an opportunity to speed up the transition from 'big box' to 'whole place' and embed more social and environmental resilience into SEQ's growth model.
- **Become a stronger magnet for mobile prime-age talent as the diseconomies of other cities multiply** - This requires proactive positioning as well as accidental benefiting from dynamics in other cities and nations.
- **Adopt a decisively strategic position within the Asia-Pacific region** - Taking strategic advantage of the port in Brisbane and closer proximity to large and rapidly growing trading partners in Asia, in the way regions like Vancouver has done. Servicing of bilateral Asia-Pacific corridors of technology, trade and innovation has the potential to attract many more high-value jobs into the local ecosystem.
- **The 2032 platform** - Hosting the 2032 Games offers unique potential as a platform to place the region on a new growth trajectory, drive new infrastructure investment, attract additional private sector investment, and capture the interest and attention of a global audience. If harnessed correctly, the legacy benefits of the Games can extend into the following decade and beyond.
- **Sensitively support and spotlight First Nations cultures** - Supporting reconciliation and fostering opportunities for First Nations peoples to achieve their aspirations will ensure First Nations peoples and cultures become an integral part of SEQ's global standing and outward-facing identity. As the region matures, this genuine partnership will enhance both the region's brand and its visitor experience, demonstrating its commitment to diversity and inclusion on the world stage through celebration of unique Indigenous cultures and assets.



# ! The high risks of status quo for SEQ

Equally the direction of travel in many of the indices, and the wider competitive environment, point to several strategic risks if SEQ's trajectory does not benefit from intentional and strategic inputs over the next decade.

## Short-term risks

- Games leveraging is not ambitious and lacks sophistication, with limited perceived dividend for residents and limited global reputational enhancement or proposition.
- A growth management system that is lethargic and produces chronic shortages.
- Fail to meet demand for alternative housing and lifestyle choices. Mid-size corporates can't grow due to talent and affordability constraints.
- The momentum created by the foundation SEQ City Deal evaporates as changes in national policy direction becomes clearer.
- Growth is perceived by the community as uninspiring, costly and low amenity.
- Lack of strategic courage, know-how or/and collective will to succeed in future industries and foster the workforce and ecosystems they require.

## Mid-term risks

- Does not become a host for new industry sectors and high-value-added activities, or a major trade and innovation entrepôt. The region remains a third division player in the global innovation economy.
- SEQ becomes a microcosm of Los Angeles – locked in to traffic congestion, compromised liveability, corroded services, and unbridgeable social divides.
- Projection to the world of SEQ as a global city-region remains locked into a lower value leisure formula, with a focus on 'fun' rather than enrichment, innovation, and inspiration.
- Communities lose their authentic sense of place, do not build strongly localised interests and direction, and their stories and shared narrative become indistinct.
- Unremitting perceptions of housing 'emergency' and pressures for housing policy response consume policy debate and militate against the prospects for collaborative governance.
- SEQ's benefits to Queensland and Australia are reduced. Australia never accrues from the financial and soft power benefits of the nation's 'Big 3' global calibre economies.



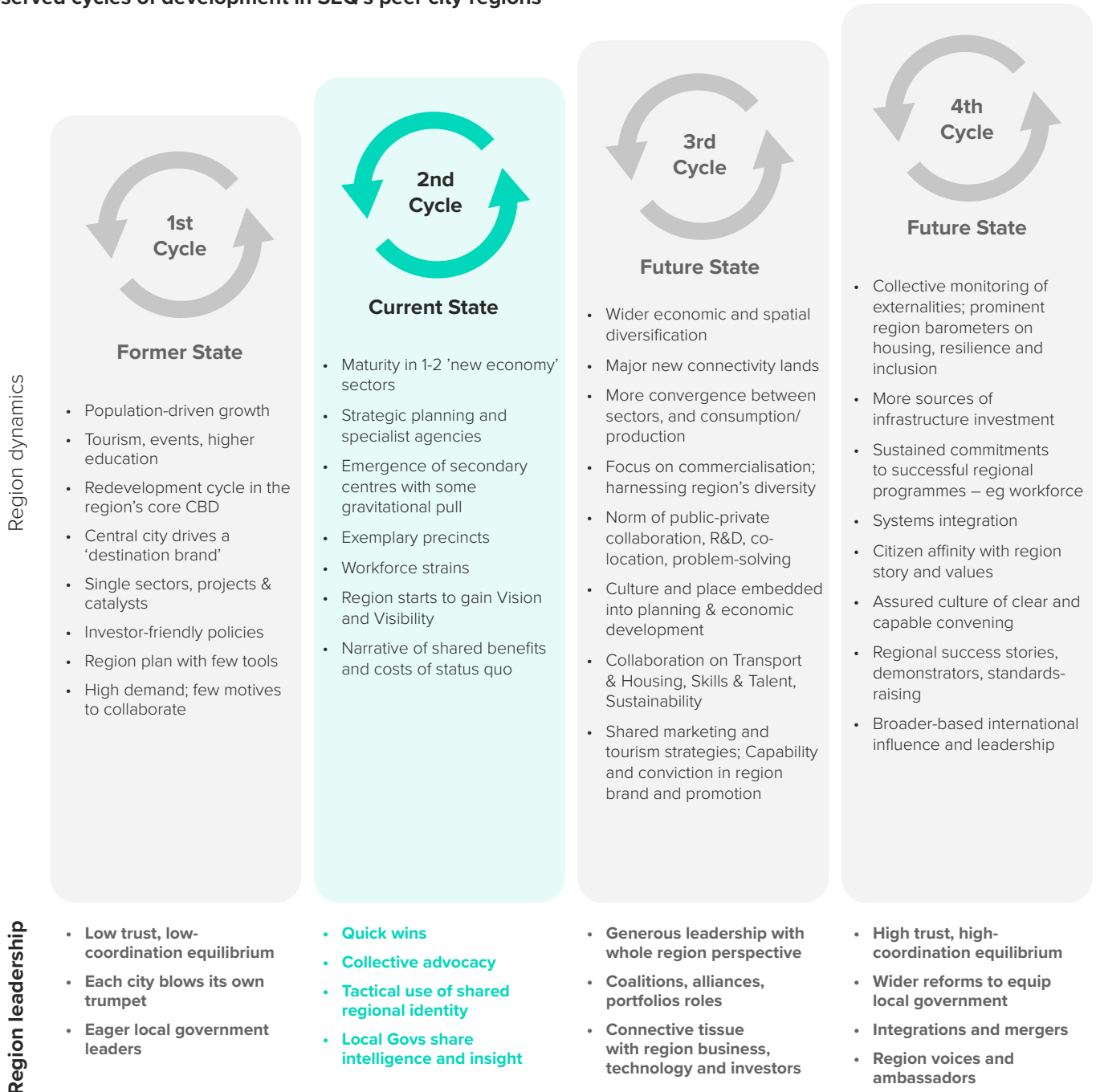
# Next steps: Imperatives for SEQ

As city-regions develop the scale and reach to become intentional players on the global stage, they tend to progress through distinct cycles of metropolitan and regional development (see Chart).

SEQ has been enjoying the fruits of a long first cycle of population growth and central business district (CBD)-driven investment. It is now experiencing some features of a second cycle (current state) shaped by new industries, agency coordination and long-term collaborative partnerships with higher tiers of government.

**SEQ's strategic agenda relates to how to shift decisively into the second cycle and then eventually adopt third cycle (future state) approaches**, when regions build serious corridor relationships internationally, tell their story with real confidence, and diversify the locations and leadership that drive the region.

## Observed cycles of development in SEQ's peer city-regions



# Recommended actions

A roadmap for SEQ's collective success relies on three core principles:

## Recognise the need to intentionally compete globally as one region

01



Image Credit: BEDA

SEQ is a region whose huge potential relies on a shared conviction in good growth, a competitive mindset, and a regional storytelling ambition. SEQ must build up, define and project a cohesive identity as a globally competitive city-region if it chooses to maximise the 2032 Olympic and Paralympic Games. This is more than a single message or strapline. It is about multiple voices – public, civic and business – sharing the vision and confidence to communicate a story about the region to internal and external audiences and build the experience, places and policy to match.

### The need to compete

#### Near-term (18 months)

**Identify calendar and catalysts** for region's international positioning, influence-building and diplomacy.

**Make SEQ real** - A sense of the SEQ experience and advantage needs places, examples, and people that embody it. Raising popular visibility is key. Widen the evidence base to include stories of companies and opportunities that rely on SEQ as a whole region.

#### Mid-term & pre-Games (2027-2030)

**First concrete and complementary city-region positioning**, distilling primary assets and joint messaging.

**Shared promotion of success stories** to build cohesion and confidence in region-place communications and marketing.

**Identify organisational capacity** and partnerships capable of adopting a recruitment and invitational mindset.

**Seek external validation** and challenge to any regional narrative activity.

**Careful step-up of visibility**  
– test approaches with particular internationally market-facing sectors - e.g. Real Estate.

#### Long-term (into 2032 & beyond)

**Partnerships with government agencies.**

**Recruit more** of the ambivalent larger corporates.

**Champions, exposure, alumni, events, and endorsements** from third parties.

**Build and test a narrative matrix** that speaks to different sectors.



SEQ will never become a highly productive economy without stronger connections of all kinds – especially transport and digital. Achieving these requires deeper dialogue and consensus building about the right growth model for the region, and the specific projects and investments that can shift SEQ towards that desired future. A rigorous spatial and economic strategy to collectively drive focus, vision and prioritisation for the region, can help anticipate what new economies need and identify which infrastructure items can deliver the most returns in the form of a higher productivity economy. SEQ's network of innovation hubs and places are opportunities but need scale, specialisation, and connectivity, with the link to research excellence particularly important.

## Connectivity & economy

### Near-term (18 months)

**Expedite a Regional Economic & Employment Strategy** - Ensure it goes beyond naming industry sectors and clusters, with a focus on productivity, location needs (e.g. Districts, Zones & Corridors), economic identity, and a platform for investor friendliness. Use this to develop an emerging regional growth narrative.

**City Deal** development should then align with and reinforce this economic direction.

**Invite more scenario-testing, studies and dialogue** about trade-offs of the SEQ growth model. Reveal a stronger case for why more coordinated regional growth planning is needed and what management mechanisms are required.

**Identify specifically where and how new infrastructure can best** address SEQ's competitive risks & opportunities.

**Identify industry-specific** activities that have a whole of SEQ agenda and that are easy to get momentum on.

### Mid-term & pre-Games (2027-2030)

**More attention to policy integration** between:

1. Land use, housing and transport;
2. Fiscal and political; and,
3. Economic, social and environmental.

**Use large catalysts** likely linked to the Games (e.g. major transport projects, upgraded airports, housing investments, anchor institutions) to drive more strategic integration.

**Assess what kind of multi-centre strategy** can work in SEQ.

**Identify a small number of serious agenda-setting KPIs** capable of acting as a touchstone for the city-region (inc. social), with a monitoring framework attached.

**Identify and support the demonstrators** of more intensive and effective land use that can provide a template for alternative growth models.

**Engage with SEQ Group of Universities**, build up fresh collective approaches to skills programmes, pathways, and innovation incentives.

### Long-term (into 2032 & beyond)

Framework for a long-term economic delivery system.

**The next City Deals**, including opportunities to integrate infrastructure investment systems, and better utilise assets to support growth management.

Explore alternative revenue models and business models.

Promotion and diffusion of development and place management tools.

**Begin to consider the wider 'macro region'** (North/South) and how that will integrate as connections improve.

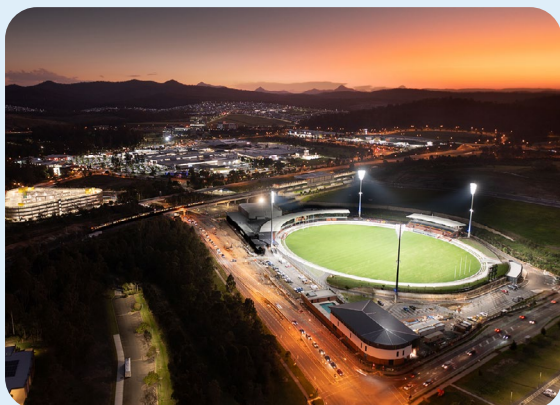


Image Credit: Ipswich City Council

SEQ must avoid falling into a low-coordination equilibrium. Achieving this demands stronger channels for collaboration across government and the private sector to align on desired outcomes and ensure swift, sustainable execution. Shared strategies need to be backed by faster decision-making, synchronised budget cycles, and long-term financial commitments that create fertile ground for effective partnerships. While large-scale governance reforms may take time, SEQ can make progress by innovating procurement processes, exploring new partnership models, and encouraging universities to take more active roles in anchoring the region’s innovation economy.

### Continuous coordination and collaboration across the region

<i>Near-term (18 months)</i>	<i>Mid-term &amp; pre-Games (2027-2030)</i>	<i>Long-term (into 2032 &amp; beyond)</i>
<p><b>Maximise ‘whole-of-SEQ’ conferences and gatherings</b> to reach into the ecosystem.</p> <p><b>Identify small but broad cohorts from across Local Government Areas</b> to ensure they are briefed and made to feel part of a forward-looking SEQ agenda.</p> <p><b>Crib sheets/playbooks of good practice for Local Government Areas</b> around development, innovation &amp; identity.</p> <p><b>Audit awareness, affinity and ambition for SEQ</b> - Identify partners with the appetite, motivation, energy &amp; persuasive power.</p> <p><b>Look to enable strong SEQ-related working relationships</b> and collaborative partnerships between different departments of Queensland Government.</p>	<p><b>Build up regional coordination and convening power</b> - To include the business community. Insource collaborative tasks wherever possible.</p> <p><b>Increase pace and/or depth</b> of interaction with leaders beyond government – inc. ED, civics, sport, tourism, local governments, and major businesses.</p> <p><b>National engagement</b> - Pursue stronger dialogue and knowledge-sharing with national peer regions (Sydney/6 cities, Greater Melbourne) for learning and combined advocacy.</p>	<p><b>Use the post-Olympic/ Paralympic international relationships dividend</b> to connect ‘Team SEQ’ up to more peer regions and global corridors.</p>

“

*These agendas are not one organisation or stakeholder's responsibilities. They point to a collectively owned and shared impetus, as well as coalitions, potential future reforms and capacity-building so that the consciousness and the 'guiding mind' for the region becomes better established.*

”



# In brief: about city-region benchmarking



## Why city-regions do it

**50+ cities and regions over the last 10 years** have chosen to develop and utilise 'outside in' benchmarking for strategic purposes at regular intervals. At the wider metropolitan and regional scale this includes Amsterdam, Bilbao, Birmingham, Manchester, Melbourne, New York, Oslo and Vancouver.

### They DO use this work to:

- Look to the whole global context.
- Understand medium-term patterns.
- Reveal and refresh the strengths and opportunities to become more durably competitive.
- Build a clearer story of the whole region's capability.
- Reach more consensus about the region's big picture priorities.

### They do NOT use this work to:

- Substitute for local data and government analysis.
- Pass judgement on current city, region or state government leadership.
- Focus on their immediate neighbours and competitors.
- Assess the merits of immediate policy choices.



## Where does the data come from?

**Draws on respected databases** of indicators, national statistics, census data, and data platform aggregations, complemented by specific sources on cities and urban areas.

**Includes an improved range of data** now available to compare whole regions – including across mobility, innovation and land use.

**Also uses 'best fit' data** - where this is the most insightful data available. Metropolitan, 'functional area', or multi-city scale data is used where this accurately reflects the overall state of play among all peer regions.



## What input changes have occurred between 2017 and 2025 benchmarking?

**2 new city-regions** - Seattle (Puget Sound) and Stockholm Region reflect SEQ's current international trajectory.

**Wider range of data** at the metropolitan and regional level captures SEQ's scale and reach.

**Adjusted framework** based on 10 pillars to reflect breadth of themes such as innovation and resilience.

**More visual insights** of SEQ's key trends in contrast to peers.



## What principles apply?

**It's all relative** - A city-region's improvements on the ground may not get picked up if others are improving even faster. The reverse is also true.

**Perception also matters** - Some measures reflect the subjective views of local and global audiences.

**Time lags** - Real improvements to infrastructure, services or demand can take 1-2 years to register.

**Results are not 'down to government'** - City-regions' performance is strongly shaped by macro and audience factors beyond government control. Benchmarks do not assign blame or responsibility.



# Typology of Peer Regions

## Dispersed, multi-centre, nascent coordination

**South East Queensland** A fast-growing and fusing region consisting of multiple distinct centres, characterised by riverside Brisbane, several coastal centres, along with inland cities and towns.

**South East Florida** Elongated coastal region of 150 kilometres of waterfront urbanisation and inland suburbs. At least four successful economic centres north of Miami, benefiting from recent infrastructure and coordination catalysts.

## Connected, single-centre, coordinated

**Barcelona Region** A dense, mid-rise, and monocentric city, surrounded by a light industrial and agricultural region highly specialised in tourism, agriculture, and food production.

**Hamburg Region** Classic single-centre city-region. A large well-resourced city government surrounded by mainly rural regions specialising in logistics, wind power and clean tech.

**Stockholm Region** Hub-and-spoke harbour city surrounded by well-connected regional towns and cities. Mid-rise, medium densities, compact and a long established regional planning framework.

## Suburbanising, mid-coordination

**Metro Vancouver** Geographically constrained region with a compact, high-density CBD serving as the main hub for jobs, culture and visitation. Radial transit system to a small number of very rapidly growing sub-centres, especially Burnaby and Surrey. Some metropolitan growth planning and co-ordination focusing on resilience, sprawl and economically sustainable land-use.

**San Diego Region** Largely suburban and coastal region that spills over the border with Mexico. Specialised in transborder trade, manufacturing, defence and life science industries. World-class knowledge institutions with centre of gravity shifting back towards main CBD and mixed use environments. Capable regional governance and economy agencies leading major new effort to sustainably connect up the region and deliver inclusive growth.

## Multi-centre, coordinated, contested

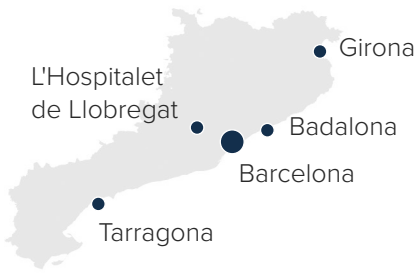
**South East Korea** Highly urbanised, dense and technology-rich trading region pivoting around Busan City Region, complemented by large neighbouring industrial city of Ulsan 50 kilometres north, and neighbouring rural Gyeongsang inland. Benefits from efforts to reform citywide governance and improve joint working among the largest cities.

**Seattle/Puget Sound Region** One of North America's more compact core cities, that has specialised in tech and aerospace. Prosperous inner-ring suburbs shaped by relationship with water. Second city has major port roles. Regional planning focuses on addressing high-cost pressures, housing affordability and transport equity.

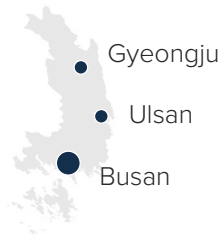
**South Holland** Compact medium-density region comprising two main cities (Rotterdam and The Hague), two large university towns (Leiden and Delft) and well connected over a green belt to the wider region of Amsterdam and Utrecht. Multiple overlapping scales of metropolitan and regional governance aim to accelerate housing supply and circular economic transition.

# SEQ's Peer Regions

## Barcelona Region



## Busan City Region



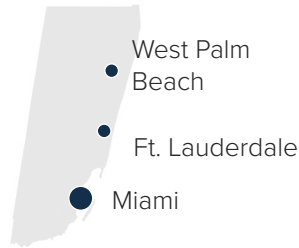
## Hamburg Region



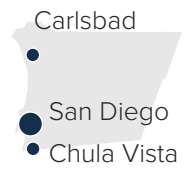
## Metro Vancouver



## South East Florida



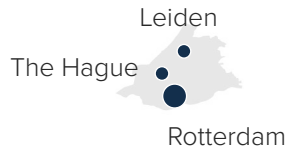
## San Diego Region



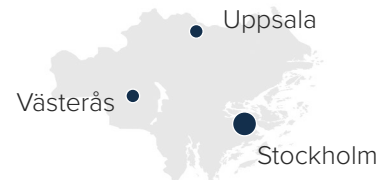
## Seattle-Puget Sound



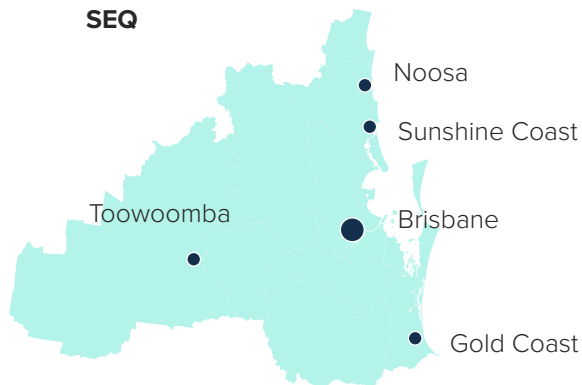
## South Holland



## Stockholm Region



## SEQ



Regional maps are to relative scale



### **Read the full report**

This Executive Summary introduces and summarises the full extended report, which can be found separately at [seqmayors.qld.gov.au](http://seqmayors.qld.gov.au) complete with data glossary, case studies and graphs.

