



Regional
Development
Australia

L I M E S T O N E C O A S T



An Initiative of
Government
of South Australia



An Australian Government Initiative

REGIONAL *Roadmap*

2013-2016



1. MESSAGE FROM THE RDA CHAIR

I am pleased to present the Limestone Coast Regional Roadmap 2013–2016.

The RDALC Regional Roadmap provides the direction and priority for regional development in the Limestone Coast. It reflects current and emerging issues, describes the region, its attributes, industry and employment base and key advantages. Our Roadmap characterises our region in terms of its human capital, sustainable communities and population growth, access to markets, its comparative advantage and business competitiveness. It sets out the economic, environmental and social vision for the region, articulates the drivers of change, identifies strengths, challenges, needs and opportunities, and lists priorities for action.

Five (5) key areas for priority attention have been identified following an extensive consultation process that encompassed business, industry, local government, regional stakeholders and the community. A collaborative effort from all levels of Government will be required to address these areas and ensure that this region can achieve sustainable regional development.

The Roadmap is an important document for our region and can be used by stakeholders to inform practice and decision making, provide for contributions to other regional plans and act as a prospectus for those interested in investment in, or relocation to, the Limestone Coast. It is designed to be a living document that responds to opportunities and needs as and when they arise.

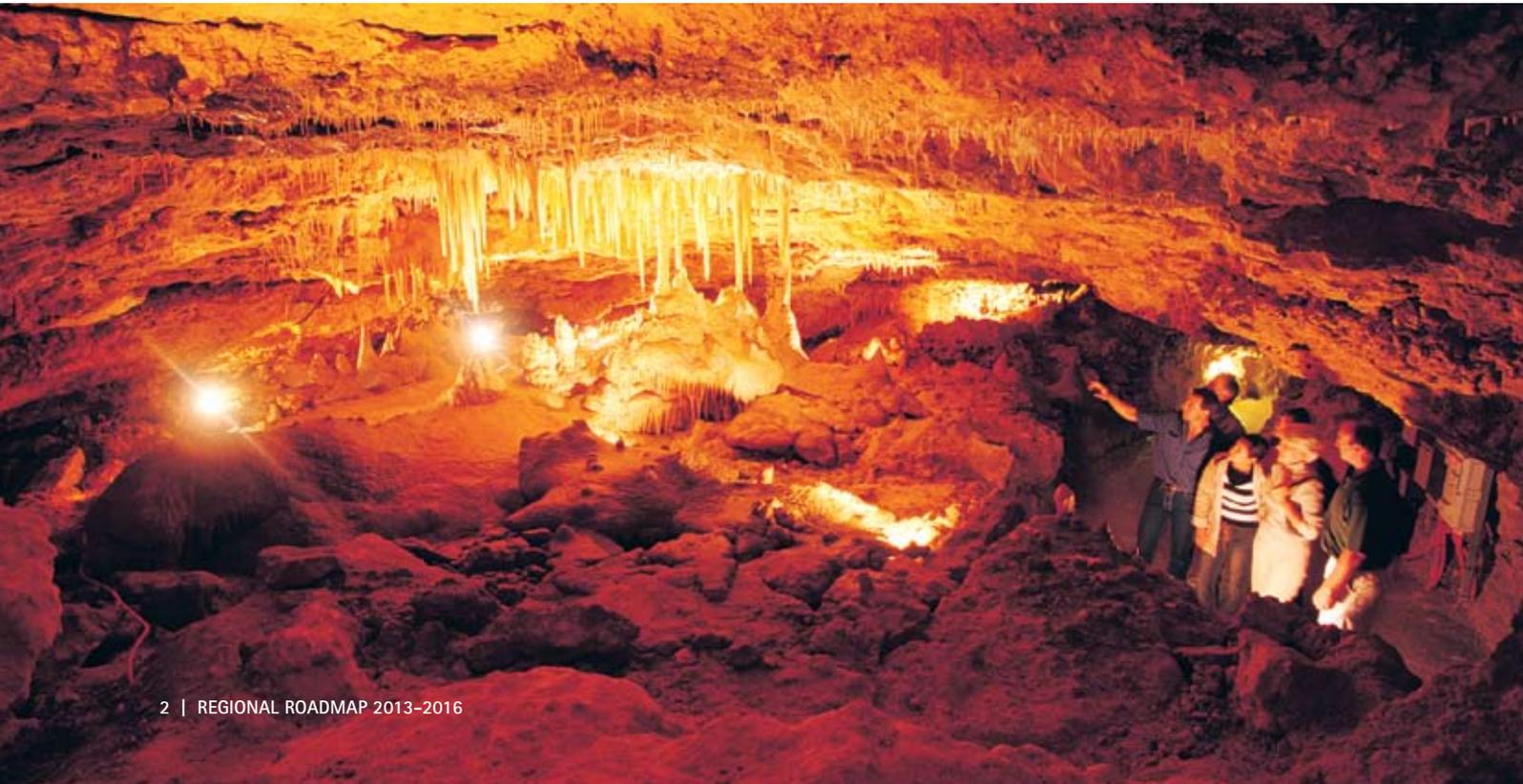
I welcome your active participation in implementing the plan on behalf of the region.



Ruth Schubert CHAIR

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2. EXECUTIVE SUMMARY

The executive summary provides an overview of the Limestone Coast Region outlining its Strengths, Challenges, Needs and Opportunities as well as outlining its relationship to neighbouring regions in Victoria which share a common border. It identifies the Regional Plan Priorities identified by Regional Development Australia Limestone Coast (RDA Limestone Coast) determined by a combination of analysis of the profile of the region together with stakeholder consultation and feedback.

OVERVIEW OF THE REGION

The Limestone Coast Region (South East of South Australia) lies midway between the capital cities of Adelaide and Melbourne, covering the south-eastern section of South Australia and encompasses the Local Government areas of the City of Mount Gambier; District Councils of Grant, Kingston, Robe and Tatiara; and the Naracoorte Lucindale and Wattle Range Councils. The Limestone Coast region supports a population of 64,105 people (ABS Census 2011). The region houses many of South Australia's key resource based companies and covers an area of some 21,337 square kilometres.

Strengths of the Region

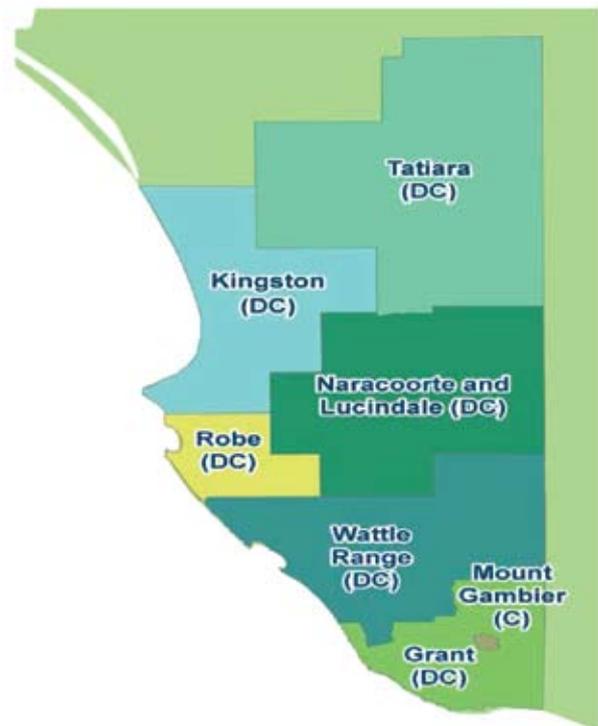
- Diverse economic base
- Reliable rainfall and significant groundwater resources
- Highly productive agricultural and horticultural land
- Epitome of clean, green environment
- Healthy marine environment and fishing resources
- A wealth of natural resource attractions
- Attractive region in which to live and work

Challenges

- An aging population
- Changes to industry structure and workforce skills needs
- Competing in a global economy
- Providing social infrastructure
- Inadequate hard infrastructure
- Perceived city centric focus of State Government

Needs

- Infrastructure upgrades and development
- Broader education and training options
- Targeted and applicable research
- Access to skills and expertise
- Development of regional leaders and entrepreneurs for the future





Greater Green Triangle Region

Opportunities

- High value manufacturing and agribusiness
- Sustainable use of natural resources to develop existing industries and build new ones
- Target high value product and service development focusing on regional strengths
- Target development of emerging industries such as alternative energy and cellulose fibre products
- Establishment of an innovation hub in the region

Together with the neighbouring Western Districts of Victoria, this wider region is often referred to as the Green Triangle Region and represents a very important political, community and industry based alliance.

One of the key political and marketing strengths of each part of the region is the ability to unite under the Green Triangle banner.

REGIONAL PLAN PRIORITIES

In compiling this Regional Roadmap a series of consultations were undertaken throughout the community, to gather information on the key priorities, issues and opportunities for the region. Community feedback from The Limestone Coast Economic Diversification Forum held in September 2012 provided further input into building a more prosperous future for the region and outcomes from the forum have been incorporated in the Regional Roadmap.

The main body of the document describes in detail those issues under the following considerations:-

- **Human Capital**
- **Sustainable (Economic, Environmental And Social) Communities And Population Growth**
- **Access To International, National And Regional Markets**
- **Comparative Advantage And Business Competitiveness**

The resulting **5 key areas for RDA action** are:-

1. Economic Development and Diversification

The Limestone Coast region may not reach its full economic potential without significant Government input in planning for regional growth. A concentrated effort is required to capitalise on the natural resource base of the region to increase food production outputs across the whole chain, maximise value adding opportunities, leverage greater investment in tourism development and support innovation in industry and small business growth.

It is widely acknowledged across the Limestone Coast region that our key natural assets, a diverse economy and the management structure for innovative and sustainable use of groundwater resources, provide a real opportunity for population growth and for the region to markedly increase its contribution to State and National development. Sustainable economic development will be the key driver for population growth across our region. The RDA will undertake a representative and facilitation role to encourage and support investment across the whole economic development spectrum and work closely with the NRM Board to ensure all development encompasses sustainable and innovative natural resource management.

Our priorities are:-

- Increasing value adding to agricultural, marine and horticulture production of premium food and wine.
- Increasing advanced manufacturing particularly in the forest and forest products industry.

- Increasing exports and expansion of markets for regional products.
- Maximising alternative energy production (wind, wave, biomass and geothermal).
- Developing industry clusters to maximise economic development within the region.
- Increasing Research and Development relevant to the region's industries.
- Providing support for Small Business development and sustainability.

RDA Limestone Coast plays a key role as a member of the Limestone Coast Economic Diversification Reference Group. The group formed by the South East Local Government Association (SELGA) is a partnership between SELGA, RDA Limestone Coast, State Agencies PIRSA and DMITRE and has been a model for region-led development. The group aims to be the catalyst for sustainable development in premium food and wine production and advanced manufacturing in the Limestone Coast with RDALC's Regional Roadmap being a key support document for the work plan of the Group.

2. Infrastructure

To achieve population growth and overall economic development within the Limestone Coast region, significant investment is required to maintain and construct supporting infrastructure.

The RDA will work collaboratively with all levels of Government and the private sector, to drive and secure planned investments in strategic infrastructure projects.

Our priorities are:-

- Championing the implementation of the Green Triangle Freight Action plan and road upgrades.
- Advocating for investment for the maintenance and upgrade of infrastructure associated with the South East Drainage and Watercourse network, particularly as it relates to regional transport, industry and agriculture.
- Influencing the upgrade of waste water treatment facilities.
- Promoting increased power availability and reliability.
- Promoting mobile phone coverage and high speed broadband availability.
- Supporting improved marine infrastructure.



3. Human Capital Development (Population Growth, Skills and Leadership Development)

Sustainable economic development will be the key driver for population growth across our region but will be reliant on Human Capital development within the region.

The RDA will act to facilitate population growth and to encourage and foster skills and leadership development.

Our priorities are:-

- Promoting skills and workforce development
- Championing the establishment of an innovation hub
- Promoting access to higher education
- Supporting leadership and entrepreneurial development

4. Promotion of the Region

The Limestone Coast boasts wonderful lifestyle opportunities, however, consultation undertaken by the RDA indicated that more can be done to promote those lifestyle experiences and opportunities, which will act as a catalyst for strong growth in the number of people visiting or relocating to the Limestone Coast region. The RDA will work collaboratively with all levels of Government and play a stronger role in promoting growth opportunities across the region and demonstrating that the Limestone Coast is a great place to visit and an even better place to live.

Our priorities are:-

- Promotion of the "LiveGrowAchieve" marketing material for the Limestone Coast.
- Development of an investment prospectus for the region.
- Implementation of the Destination Action Plan 2012-2015.

5. Community Well being

Access to services and facilities for the delivery of health and personal care across the Limestone Coast region, together with affordable housing, will underpin the key strategies for population growth and economic development.

The RDA will consult with, and advocate on behalf of, community and health care bodies, to assist and support regional efforts for increased health and aged care services, and assist with the coordination of a whole of region Social Inclusion Action Plan in conjunction with the work of the Limestone Coast Community Services Roundtable.

Our priorities are:-

- Development of a whole of region Social Inclusion Action Plan.
- Production of a spatial map and data set identifying existing aged care facilities, occupancy rates and demand.
- Lobbying for the retention of existing services at smaller regional hospitals.
- Lobbying for adequate mental health services to meet the growing demand in the region.

3. VISION FOR THE REGION

VISION

"The Limestone Coast is a dynamic and sustainable 'food bowl' region of Australia. Prime livestock and agricultural food production, wine, fishing and plantation forestry drive a diverse, globally competitive economy where community wellbeing and lifestyle are highly valued."

The long term vision for the Limestone Coast region is that of a vibrant thriving region making the most of its natural resources to sustainably produce premium food and wine and valued added products that are exported from the region and for which premium prices are obtained. The utilisation of state of the art manufacturing processes and production techniques together with applied research and development will be enabling factors.

Sustainable population growth in each of the Limestone Coast's regional centres as a result of region wide economic development and diversification will provide the basis of provision of services and facilities required.

The region will be viewed as an attractive place to live, providing a wonderful regional lifestyle, the availability of a comprehensive range of services and facilities with the opportunity to earn an attractive income enhanced by a reasonable cost of living and value for money housing availability.

The Limestone Coast will be home to an Innovation Hub and have a strong tertiary education presence with a Research and Development focus linked to key industries within the region such as forestry, agriculture and alternative energy.

The region's natural tourist attractions combined with its premium food and wine offerings will be developed to the point where the region is seen as one of the State's premium tourism destinations for both international and domestic tourists alike and be viewed as a natural extension of the Great Ocean Road tourist attraction in Victoria.

To achieve the long term vision that RDA Limestone Coast has for the region and to realise its potential, economic development and diversification will be vital. The region will move its production



further up the value chain, increasing the value that is added within the region and becoming less reliant on being a "price taker" of commodities.

The region is well placed to be a supplier of products to the emerging markets of Asia especially food and wine of high quality produced in the clean, green environment that the Limestone Coast provides.

The attraction of private investment capital for development and government investment in essential infrastructure will be key enablers.

All key stakeholders within the region will work collaboratively for achievement of this vision with leaders and entrepreneurs encouraged and supported to take up the challenge.

Governments will be supported to play a key role to ensure that policy settings support regional development and act as a stimulus for the growth of regions through positive planning for regional growth.

4. ROLE OF THE RDA

Regional Development Australia Limestone Coast (RDALC) is the key economic and regional development agency in the Limestone Coast region with responsibility for achieving 5 key outcomes:-

- Consultation and Engagement with the Regional Community
- Informed Regional Planning through the development of its Regional Roadmap
- Enhanced Whole-of-Government Approach
- Enhanced Awareness of Government Programs
- Improved Community and Economic Development

RDA Limestone Coast's role is to ensure the longer term growth and sustainability of the Limestone Coast Region and the wellbeing of its community, through:-

- Provision of leadership, co-ordination and expertise across all areas of regional development.
- Ongoing engagement with the community and the provision of advice, information and feedback to Governments, policy makers and stakeholders regarding issues and activities which are important to the development and wellbeing of the Limestone Coast Region.
- Promotion and support of the policies, strategic plans and priorities of the Commonwealth, the State Government and Local Government that facilitate community and economic development outcomes in the region.
- Provision of services and undertaking projects that facilitate community and economic development outcomes in the region.

Regional Development Australia Limestone Coast is a partnership between three levels of Government:-

- the Australian Government through the Department of Regional Australia, Local Government, Arts and Sport;
- the State Government through a number of projects and programs that RDA Limestone Coast delivers on its behalf.
- Local Government through the South East Local Government Association (comprising the City of Mount Gambier; District Councils of Grant, Kingston, Robe and Tatiara; and the Naracoorte Lucindale and Wattle Range Councils).

RDA Limestone Coast is part of a national network of 55 RDA committees/boards across Australia and is one of a network of 8 Boards established in South Australia (one metropolitan and 7 regional bodies). These Boards have been established as incorporated associations under the *Associations Incorporations Act (1985)*.

The role of the RDA Network is to enhance growth and strengthen the regional communities of Australia and the network has a pivotal role in ensuring the long term sustainability of Australia's regions.

RDA is based on building partnerships between governments, regional development organisations, the private sector and other key regional stakeholders to provide a strategic and targeted response to issues in each region and to facilitate community leadership and resilience. RDA Limestone Coast will work with all stakeholders to develop and strengthen communities in the Limestone Coast region.

Close cooperation and interaction with Local Government in particular through the South East Local Government Association and its member councils and RDA Limestone Coast's membership of the Limestone Coast Economic Diversification Reference Group, is seen as key to maximising economic and community growth in the region.

RDA Limestone Coast plays a key service delivery role through the ongoing provision of business assistance programs. In addition to the strategic role played by the Board and Board Staff the following programs are delivered across the Limestone Coast Region:-

- Small Business Advisory Service
- Skills For Jobs in Regions
- Career Development Centre
- Partnership Broker Program
- Tourism Industry Development Project
- Apprenticeship Advisor Project
- Export (Austrade programs)

RDA Limestone Coast also plays a hosting role with Officers from SELGA, AusIndustry, Department of Employment/ Department of Education, the Department of Further Education, Employment, Science and Technology, and the Australian Sports Commission co-located within the Old Town Hall Building in Mount Gambier.

THE STRATEGIC CONTEXT FOR RDA LIMESTONE COAST

Australian Government

The Australian Government's commitment to regional Australia is strong and longstanding. A variety of Government policy and programs will impact on improving the economic viability and competitive advantage of regional communities, including (but not limited to):-

- Regional Development Australia network
- Regional Development Australia Fund
- Regional Infrastructure Fund
- National Broadband Network
- Clean Energy Future Plan
- Living Longer. Living Better. Aged Care Plan
- Remote Jobs and Communities Program
- National Health Reform Agreement
- Health & Hospitals Fund
- DEEWR Regional Education, Skills & Jobs Plan
- Building Australia's Future Workforce Package
- National Workforce Development Fund
- Regional Skilled Migration Scheme
- Regional and Enterprise Migration Agreements
- Skills for Sustainable Growth strategy
- Local Government Financial Assistance Grants
- Biosecurity Act
- Caring for our Country and Landcare
- Rural Financial Counselling Service
- National Food Plan
- Rural Industries Research & Development Corporation
- Building Better Regional Cities
- Housing Affordability Fund
- Community Investment Fund
- Export Market Development Grants Scheme
- TradeStart
- AusIndustry Programs
- Education Investment Fund

RDA Limestone Coast has an information provision and advocacy role in relation to these policies and programs.

State Government

Following on from the 6 key building blocks outlined in the South Australia Strategic Plan, the Government in early 2012 outlined seven strategic priorities that will form the foundation of their future directions and decisions:-

- Creating a vibrant City;
- Maintaining our safe communities and healthy neighbourhoods;
- Clean green food as our competitive edge;

- An affordable place to live for everyone;
- Every chance for every child;
- Growing advanced manufacturing; and
- Realising the benefits of the mining boom for all South Australians.

The Limestone Coast Region Plan (A volume of the South Australian Planning Strategy), whose key objectives are Liveability; Competitiveness and Sustainability and Climate Change Resilience, was also reviewed in the development of this document to ensure synergies across all regional planning documents.

Primary Industries and Regions SA (PIRSA) is a government of South Australia agency, a vision of growing sustainable and competitive regions in South Australia.

PIRSA strategic priorities:-

1. To effectively influence State and national policy agendas to ensure decisions impacting water, land use, natural resource management and climate change adaptation support sustainable primary production and other regional industries;
2. Drive greater connection between government policy making to develop a whole-of-government policy framework that enables industry to innovate, adapt and compete in a rapidly changing international marketplace;
3. Build on Australia's clean and green reputation and South Australia's world class biosecurity practices to enhance the value of primary production outputs and secure access to existing and emerging markets;
4. Harness the value-adding opportunities from primary production such as food and wine tourism and food and beverage processing;
5. Involve and engage with regional communities and government agencies to integrate the implementation of plans for each region on issues such as regional development, tourism, infrastructure, resource allocation and workforce attraction, retention and skilling; and
6. Encourage and assist the development of existing, new and diversified regional business activities through a fully integrated case management approach that supports access to capital attraction, investment attraction, marketing opportunities (including export marketing), mentoring, and government grant funding.

RDA Limestone Coast has a strong working relationship with PIRSA.

Local Planning

In developing the inaugural Roadmap and the resultant updates regional plans developed by other key regional organisations across the Limestone Coast were consulted to ensure consistency of goals, including:-

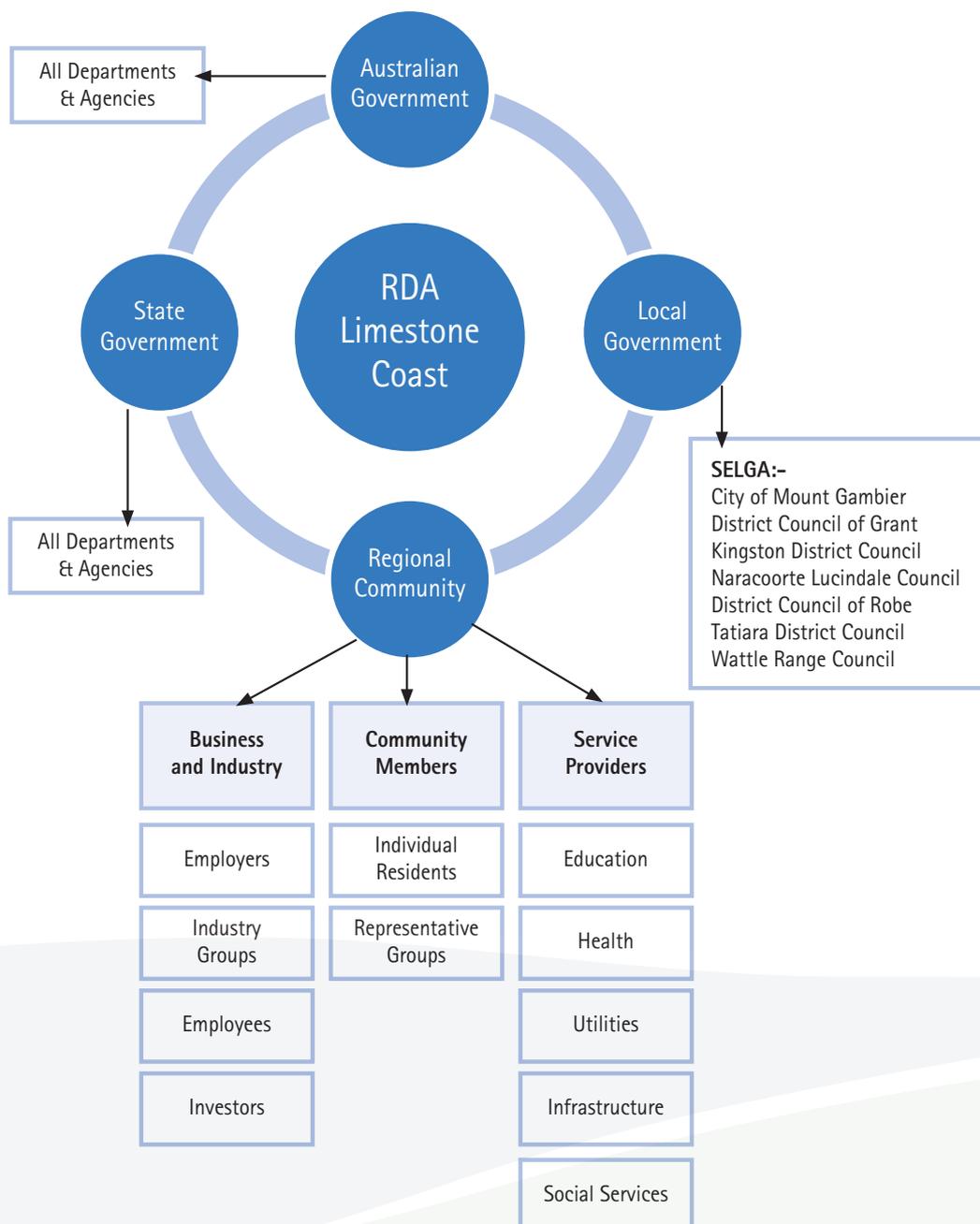
- South East Local Government Association
- Local Councils (City of Mount Gambier; District Councils of Grant, Kingston, Robe and Tatiara; and the Naracoorte Lucindale and Wattle Range Councils)
- South East Natural Resources Management Plan
- The Limestone Coast Workforce: Analysis of supply, demand,

emerging trends and opportunities and strategies for regional workforce development

- Partnership Broker, Limestone Coast Environmental Scan
- Country Health SA through the local Health Advisory Councils' 10 Year Health Services Plans
- Green Triangle Freight Action Plan
- DFEEST "A Strategic Plan to guide resource allocation for participation and equity programs" 2011-2013 Limestone Coast, South Australian Government Region

These documents provide a research base for analysis and the development of RDA priorities.

STAKEHOLDERS



5. ANALYSIS OF THE REGION

The following analysis of the Limestone Coast region assesses the region in terms of four of the five key determinants of long-term regional economic growth as agreed by the COAG Regional Australia Standing Council in 2012, these being:-

- HUMAN CAPITAL
- SUSTAINABLE (ECONOMIC, ENVIRONMENTAL AND SOCIAL) COMMUNITIES AND POPULATION GROWTH
- ACCESS TO INTERNATIONAL, NATIONAL AND REGIONAL MARKETS
- COMPARATIVE ADVANTAGE AND BUSINESS COMPETITIVENESS

The analysis also identifies and discusses the region's strengths, challenges, needs and opportunities and identifies key issues as the basis for determining regional priorities.

HUMAN CAPITAL (EDUCATION AND SKILLS)

Key issues from research and consultation that support identified regional priorities are:

- **Investment in research facilities and capacity which is focused toward** innovation is vital for ongoing growth and improvement in the productivity, profitability, competitiveness and sustainability of the region's industries.
- **The region has seen significant increases in the numbers of people with post school qualifications** over time, but there is a gap when compared with state and national data. This gap is also evident in school completion data.
- **The retention rate to year 12 has improved over the last five years**, but remains below the state average. The Year 8 to 12 retention rate in Government schools in the Limestone Coast in 2008 was 76.4%, approximately 8% lower than the State average.
- **Access to tertiary education is available through TAFE SA Regional**, the largest provider of vocational education and training in SA. There is also a trend towards external and online study for a number of courses that have previously been offered face to face at the Mount Gambier Campus.
- **There are a number of other Registered Training Organisations situated within the region** as well as other training providers that work within the Limestone Coast on a needs basis.
- **Higher education is available both locally and through external delivery mode.** The University of South Australia, through their Mount Gambier Regional Centre has offered undergraduate on campus studies across four disciplines since 2006 and is offering an Education degree from February 2013. The Flinders University operate their highly successful Rural Clinical School and Southern Cross University offers forestry studies and Environmental Science.
- Significantly for the region, the University of South Australia has procured Federal Funding to connect their campus with the Australian Research and Education Network (AREN) which will provide extremely high speed communications connectivity via this link with universities and research institutions in other parts of the world as well as offering this region many other potential benefits and opportunities as a result of its utilisation.
- Currently the **Mount Gambier City Council is promoting itself as a Learning City**, with a number of initiatives aimed at promoting further education opportunities in the region.
- **The level of educational attainment in the Limestone Coast has grown** over time, with significant growth in Certificate III and IV and Bachelor degrees, reflecting the growth in trades and professional jobs within the region. The region has **lower than state proportions of people with a degree or higher** and above average proportions of individuals with Certificate III or IV level qualifications.
- Residents of the Limestone Coast have **below average levels of school achievement**, with 32.22% having completed Year 12, compared to 44.76% for the State.
- **Shifts in demand** by industry sectors for workers, and an aging population of workers in several key growth industry sectors are factors which present challenges for the region. **The two highest employing industries have seen a decrease in employment demand:** Agriculture, Forestry and Fishing by 18% and Manufacturing by 17%. **Other key industries have seen growth in employment** from 2001 to 2011: Health by 48%, Education by 24%, Construction by 44%, Retail Trade by 13.5%, Professional, Scientific and Technical Services by 15.5%, Public Administration and Safety by 44% and Other Services by 20.7%. **Approximately 50% of workers in the Agriculture, Forestry and Fishing, Health Care and Social Assistance, Education and Transport, Postal & Warehouse industries are aged 45 years and over.**
- **There is a strong view that in some of the apprenticeship and trades areas, course structure and length of training are barriers** to entry and experience.

- **There is a view that uncertainty over temporary visa holders (457)** converting to permanent residency, causes some income earned by migrants to be 'sent back home' rather than being spent in the region. This lack of residency security constrains migrant workers from purchasing properties and building certain futures for their families.
- **An increasing presence of Universities in the region is lifting the potential for people to undertake higher education activities.** There is support for further investments and course delivery by Universities and it is felt that the region's diverse economy could be a springboard for a multi-faceted education and training hub.
- **The regional TAFE network needs to be reinvigorated** to ensure it continues to play a leading role in the tertiary sector.
- **Skills development is regarded by many as the key to innovation and economic development.**
- **Career development services are seen as valuable for supporting the work choices of all job seekers** and there is a call for better provision of career development in schools.
- **Regional leadership is highly regarded but many people believe that too few do too much and the renewal base for leaders is thin.** The RDA is being called on to promote leadership and to sponsor and encourage people into current and future leadership roles.

Analysis of our region shows that in order to further develop a sustainable community, we will need to focus clearly on economic development and diversification, to enable innovative practice as industry adapts to global trends and pressures. We will need clear data about workforce supply and demand, analysis of trends and the role of leadership within the community, and strategies to support the growth of aspects of leadership such as succession planning, leader development of individuals and leadership development through strengthening the connection between individual leaders and the systems within which they operate.

Our priorities are:

- **Promoting skills and workforce development**
- **Championing the establishment of an innovation hub**
- **Promoting access to higher education**
- **Supporting leadership and entrepreneurial development**

SUSTAINABLE (ECONOMIC, ENVIRONMENTAL AND SOCIAL) COMMUNITIES AND POPULATION GROWTH

ECONOMIC

Key issues from research and consultation that support identified regional priorities are:

- **Median household income has grown over time** from \$875 to \$937(\$/week) with an increase of the median mortgage repayments (\$/month) during that period from \$867 to \$1,148.
- **The unemployment rate across the region fluctuates** with the highest rate of unemployment in Mount Gambier in stark contrast to the Tatiara which has close to full employment. Since 2005 the regional unemployment rate has been consistently on the rise with the overall rate of 4.6% as at March 2012 being slightly below the state unemployment rate of 5.2%.
- **Agriculture, Forestry and Fishing** employs 17.2% of workers. Demand for employment in this sector has decreased in the census period 2001 to 2011 by 18%.
- **Manufacturing** employs 13.9% of workers including food and beverage manufacturing, wood & paper manufacturing, metal product manufacturing and machinery and equipment manufacturing. Demand for employment in this sector has decreased in the census period 2001 to 2011 by 17%.
- **Retail Trade** employs 11.9% of the working population and covers food, personal and household goods, motor vehicle and services to timber products. Demand for employment in the region has risen in the census periods 2001 to 2011 by 13%.
- **Health Care and Social Assistance** is the fourth largest employing 9.7% of workers in the region and includes hospitals and nursing homes, medical and dental services, veterinary services and childcare services. Demand for employment in this sector increased by 48% between the census periods 2001 to 2011.
- **Construction** is the 5th largest industry in the region employing 7.1% of the workforce. Demand for employment in this sector grew by 44% from the census period 2001 to 2011.
- **The Education** sector employs 6.5% of workers in the region making it the 6th largest industry. Demand for employment in this sector has increased by 24% in the census period 2001 to 2011.
- **The Accommodation, Cafes and Restaurants** services industry employs 6.6% of our workforce which puts it as the 7th largest employer in our region. Demand for employment in this sector increased by 15% from the census period 2001 to 2011.

- The **Transport, Postal & Warehouse** industry is the 8th largest employer in our region employing 4.0% of workers in the region. Demand for employment in this sector grew by 3% in the census period 2001 to 2011.
- Some other industries in the region which currently have lower employment numbers have shown strong growth in the 2001 to 2011 census periods. For example Wholesale Trade (29% increase), Professional, Scientific and Technical Services (15% increase), Public Administration and Safety (44% increase) and Other Services (21% increase). **This reflects the increased importance of the service sector in the region's economy.**
- **Visitation to the Limestone Coast represents almost 15% of all regional South Australia visitation** and almost 9% of the total SA visitation.
- **Accommodation occupancy has increased over the last 12 months by 1%** from 45.7% to 46.7% and in dollar terms equates to a \$1M increase in takings across the region from \$20M to \$21M.
- **Industry based tourism is strongly related to the region's key food and wine sectors**, with much of the employment related data contained in the agriculture, forestry and fisheries statistics.
- **The South Australian Tourism Commission, South East Local Government Association Member Councils, RDALC and Limestone Coast Tourism developed the recently reviewed Destination Action Plan 2012–2015** which is focused on delivering long-term growth for the Limestone Coast region, given tourism expenditure is projected to grow by 46% by December 2020.
- Attracting almost 660,000 visitors each year including an average of 40,000 (8%) international visitors, the Limestone Coast is in the top 3 regions most visited in South Australia outside of Adelaide. Of these visitors, a total of almost 2 million nights' accommodation are spent in the region with annual expenditure of \$278M injected into the local economy.
- **Capacity of wastewater treatment infrastructure in the Mount Gambier area is an inhibitor to industry and business growth.**
- **Strategic planning for industrial land and for zoning requirements** to take into account land use change is required.

Our priorities are:

- **Increasing value adding to agricultural, marine and horticulture production of premium food and wine.**
- **Increasing advanced manufacturing particularly in the forest and forest products industry.**
- **Increasing exports and expansion of markets for regional products.**
- **Maximising alternative energy production (wind, wave, biomass and geothermal).**
- **Developing industry clusters to maximise economic development within the region.**

- **Increasing Research and Development relevant to the region's industries.**
- **Providing support for Small Business development and sustainability.**
- **Implementation of the Destination Action Plan 2012–2015.**

ENVIRONMENTAL

Key issues from research and consultation that support identified regional priorities are:

- **The introduction of South Australia's Marine Protected Areas (Marine Parks) is proposed to further enhance and protect the marine environment** and will complement management and sustainability of the valuable wild catch fishery and the important tourism and business activity associated with the recreational fishing sector.
- **Underground water resources in the South East are essentially contained within two regionally extensive aquifer systems, an upper, unconfined aquifer and a deeper confined aquifer. The waters of both the confined and unconfined aquifers and key associated water dependent ecosystems are protected by water allocation plans which provide a framework for their sustainable management.**
- **The objective of managing the major land degradation issue of dryland salinity in the Upper South East has seen the implementation of the Upper South East Dryland Salinity and Flood Management Program. Emphasis is being placed on ensuring the existing and new drainage infrastructure is used for the dual purpose of managing salinity to protect productivity while seeking to, where possible, deliver water of appropriate qualities to supply water needs of wetlands when it is available.** Reliable rainfall and the dual aquifer system ensures that communities can exist and agricultural activities in particular can flourish through access to quality water resources.
- **The State and Commonwealth have made significant investment in regional infrastructure and modification of flow paths** and further investigations to assist in the supply of surface waters to regional wetland systems, including the Coorong. The increasing emphasis on ensuring surface waters are redirected to meet the needs of surface water dependent ecosystems has continued to evolve.
- **Water management and use through a range of irrigation technology is at an advanced level of skill and expertise.** There are opportunities to further build these capabilities and to target green industries and the greening of existing industries.
- **There is a need for region wide planning for the carbon market** to achieve dual benefits including biodiversity outcomes and carbon sequestration, while meeting the requirements of the relevant water policy.

- **Ongoing research and development in relation to the influences of climate change and climatic variability is critical.**
- It is evident that **changes in climatic variability may have potentially significant impacts** on existing township and road infrastructure, in particular for the coastal and near coastal environment. This issue requires further investment in planning and infrastructure modification both to protect existing environmental, cultural and heritage values and to safeguard current and future infrastructure.
- **A number of renewable energy projects are either in place, planned and committed or under consideration.**
- **The renewable energy sector needs to have coordinated across agency support.**
- **The region must have a greater focus on water reuse and stormwater management.**

Our priorities are:

- **Advocating for maintenance of South East drainage schemes of artificial rivers or watercourses**
- **Influencing the upgrade of waste water treatment facilities**

SOCIAL

Key issues from research and consultation that support identified regional priorities are:

- **Australian born people make up 86.7% of the population of the region.**
- **Recent migration, principally from New Zealand, United Kingdom, Philippines and India,** has added to the contribution made by post war emigration from the United Kingdom, Italy and The Netherlands.
- **Refugee arrivals since 2007 have been primarily from Burma and the Democratic Republic of the Congo.**
- **The Aboriginal & Torres Strait Islander population grew slightly** from 776 people in 2006 to 1,094 people in 2011 and has a young profile with 48.26% under the age of 20 years.
- **A major regional health service is centered around the Mount Gambier Public Hospital and the co-located Private Hospital. Smaller sub-regional Hospitals provide local and back up services** in Millicent, Penola, Naracoorte, Bordertown and Kingston, together with a community Hospital in Keith.
- **There are communities within the region and within towns that face obstacles in accessing such services** and the use of innovative technologies and public transport solutions will assist and complement direct access to those services.

- **Attraction and retention of Doctors is an issue** facing many of the smaller health services. Birthing rates are falling in some centres (Millicent as an example) as a consequence of reduced staffing / practitioner availability.
- **Adequate funding for all health services across the region is paramount** and in recent times the plight of the community Hospital at Keith, with their inability to obtain secure Government funding into the future, has been raised as a key issue for the Upper South East region.
- **10 Year Health Service Plans have been completed.** The Country Health SA Health Service Implementation Planning – South East Implementation Plan Years 1-3 has commenced and will be critical to ongoing improvement in overall health care delivery.
- **Using the Australian Early Development Index, within the Limestone Coast 18.4% of children are vulnerable on one or more domains,** with 10.2% of children vulnerable on two or more domains. Children who score in the lowest 10% when compared to the AEDI population are classified as developmentally vulnerable.
- **The Limestone Coast Community Services Round Table has an Action Plan** which targets the areas of Homelessness Collaboration, Complex Case Management, Supportive Housing Allocation, Community Engagement & Access, Violence Against Women Collaborations, Streetlink Working Party, Communications Strategy Group, Suicide Prevention Group, Specialist Assistance School Group, Research & Evidence Group and Transport Issues.

Our priorities are:

- **Development of a whole of region Social Inclusion Action Plan.**
- **Production of a spatial map and data set identifying existing aged care facilities, occupancy rates and demand.**
- **Lobbying for the retention of existing services at smaller regional hospitals.**
- **Lobbying for adequate mental health services to meet the growing demand in the region.**

POPULATION

Key issues from research and consultation that support identified regional priorities are:

- **The population of the Limestone Coast has grown at a rate of 1.38% since the 2006 census.** Population growth is not even across the region with decreases in five of the seven local government areas that make up the Limestone Coast region.
- **Consultation processes identified that whilst people in the region generally support a significantly increased population, they were unsure of how or where industry growth and employment opportunities (outside of natural growth patterns) were going to come from.**
- **People felt that the South Australian Government does not recognise the development potential that the Limestone Coast region offers.**
- **There is a strong case for aligning those growth planning with the planning of the Natural Resources Management Board in relation to water availability (under current policy settings).** The two way relationship between planning for population growth within the limits of water availability and the planning of water management to support areas of growth needs to be recognised.
- **Historically the region has not had a strong record in attracting tourism grant funding** and more focus can be paid to that activity as recent success with a number of grant applications shows.
- **The lifestyle aspects of the region need to be well promoted** to attract significant numbers of visitors and new residents.
- **Tourism in the region could be significantly enhanced by a stronger service culture** being embedded in businesses over time.
- **It is important we continue with efforts to update and market promotional material** highlighting the key advantages and opportunities of the region aimed at attracting new residents, and outside investment.
- **The community feels that the region should be better promoted to Governments for the opportunity for growth that it presents.** There is also a strong call for a growth target within a growth plan which is underpinned by specific actions and rationale for sustainability.

Our priorities are:

- **Promotion of the "LiveGrowAchieve" marketing material for the Limestone Coast.**
- **Development of an investment prospectus for the region.**
- **Implementation of the Destination Action Plan 2012-2015.**



¹ Population statistics in several local government areas are influenced by local factors: In the District Council of Grant there has been a boundary change; in the District Council of Robe, there are many holiday homes and high tourist numbers in summer; in the Tatiara District, increases in the size of farms and farm machinery and changes in employment in meat processing facilities have had an impact on population statistics

ACCESS TO INTERNATIONAL, NATIONAL & REGIONAL MARKETS

Key issues from research and consultation that support identified regional priorities are:

- **The Green Triangle Freight Action Plan has not been adequately implemented since its release and greater urgency needs to be paid to funding the key strategic priorities of that Plan.**
- **Funding for road maintenance is considered inadequate and roadside vegetation presents hazardous conditions on some major regional roads.**
- **Located on the Dukes Highway with good access to Adelaide, Melbourne and Sydney via the Riverland, the Tatiara is perfectly located to be a Transport Hub.**
- **Access to whole of region telecommunications and high speed broadband services is still considered by many in the community as not at an acceptable and competitive level.**
- **Electricity supply and capacity in the regional network is a cause for concern in some areas.** Upper South East residents cite Bordertown as being near capacity and growth in coastal communities requires the system to be analysed for adequacy.
- **Maintenance and upgrading of the South East Drainage Network** of some 800 bridges and culverts is a priority to ensure safe movement of vehicles and freight.

- **Local Government in coastal zones is calling for more investment in marine infrastructure** to support the commercial fishing sectors and to boost tourism and recreational fishing.
- **Recent major upgrades to the Mount Gambier and Districts airport have been undertaken which now strongly positions the airport for increased capacity and services.** Apart from charter services, the airport is currently serviced by a single commercial carrier with the cost and frequency of flights regularly raised as issues.

Our priorities are:

- **Championing the implementation of the Green Triangle Freight Action plan and road upgrades.**
- **Promoting increased power availability and reliability.**
- **Promoting mobile phone coverage and high speed broadband availability.**
- **Supporting improved marine infrastructure.**
- **Advocating for maintenance of South East drainage schemes.**

COMPARATIVE ADVANTAGE AND BUSINESS COMPETITIVENESS

Key issues from research and consultation that support identified regional priorities are:

- **There are opportunities to further build on capabilities in water management and use and to target green industries and the greening of existing industries.**
- **The renewable energy sector needs to have coordinated across agency support.** To value add to this sector, the development of a maintenance centre for sustainable, renewable energy, together with a hub for innovation and research and development for this sector could be positioned in the region.
- **There is a need to better engage the high spending sector of the tourist market and to target marine based and coastal attractions and the region's RAMSAR listed sites, to promote elite and unique tourism experiences.**
- **Given the availability of water both through the underground aquifer and rainfall, food and beverage production is seen as an area for expansion.**
- **There are opportunities for the Education sector to grow the number of students and the diversity of courses offered in the region.**

- **To build on current learning and skill development initiatives in Health so that they are sustainable and act as an attraction and retention strategy for the health and medical workforce, a research centre for health could be considered.**

Our priorities are:

- **Maximising alternative energy production (wind, wave, biomass and geothermal).**
- **Developing industry clusters to maximise economic development within the region.**
- **Increasing Research and Development relevant to the region's industries.**
- **Promotion of the "LiveGrowAchieve" marketing material for the Limestone Coast.**
- **Implementation of the Destination Action Plan 2012-2015.**

6. REGIONAL PRIORITIES

Regional priorities for RDA Limestone Coast fall under 5 key areas for action these being:-

- Economic development and diversification
- Infrastructure
- Human Capital development
- Promotion of the region
- Community wellbeing

1. Economic Development and Diversification

It is widely acknowledged across the Limestone Coast region that our key natural assets, a diverse economy and the management structure for innovative and sustainable use of groundwater resources, provide a real opportunity for population growth and for the region to markedly increase its contribution to State and National development. Sustainable economic development will be the key driver for population growth across our region. The RDA will undertake a representative and facilitation role to encourage and support investment across the whole economic development spectrum and work closely with the NRM Board to ensure all development encompasses sustainable and innovative natural resource management. The Limestone Coast region may not reach its full economic potential without significant Government input in planning for regional growth. A concentrated effort is required to capitalise on the natural resource base of the region to increase food production outputs across the whole chain, maximise value adding opportunities, leverage greater investment in tourism development and support innovation in industry and small business growth.

Regional Priority	Location	Key partners
Increasing value adding to agriculture, marine and horticulture production of premium food and wine	Region wide	RDALC PIRSA Local Government Industry
Increasing advanced manufacturing particularly in the forest and forest products industry	Region wide	RDALC DMITRE PIRSA Local Government Industry
Increasing exports and expansion of markets for regional products	Region wide	RDALC DMITRE PIRSA Local Government Industry
Maximising alternative energy production (wind, wave, biomass and geothermal)	Region wide	RDALC DMITRE PIRSA Local Government Industry
Developing industry clusters to maximise economic development within the region	Region wide	RDALC DMITRE PIRSA Local Government Industry
Increasing Research and Development relevant to the region's industries	Region wide/ Mount Gambier	RDALC DMITRE PIRSA Local Government Industry Tertiary Institutions
Providing support for Small Business development and sustainability	Region wide	RDALC DMITRE DIICCS RTE

2. Infrastructure

To achieve population growth and overall economic development within the Limestone Coast region, significant investment is required to maintain and construct supporting infrastructure.

The RDA will work collaboratively with all levels of Government and the private sector, to drive and secure planned investments in strategic infrastructure projects.



3. Human Capital Development (Population Growth, Skills and Leadership Development)

Sustainable economic development will be the key driver for population growth across our region but will be reliant on Human Capital development within the region.

The RDA will act to facilitate population growth and to encourage and foster skills and leadership development.



Regional Priority	Location	Key partners
Championing the implementation of the Green Triangle Freight Action plan and road upgrades	Region wide	RDALC RDABSW DPTI Local Government Industry Infrastructure Aust RDV
Advocating for investment for the maintenance and upgrade of infrastructure association with the South East Drainage and Watercourse network, particularly as it relates to regional transport, industry and agriculture	Region wide/ Upper and Lower	RDALC Local Government DEWNR DPTI
Influencing the upgrade of waste water treatment facilities	Mount Gambier	RDALC Local Government SA Water
Promoting increased power availability and reliability	Region wide/ Bordertown/ Coastal locations	RDALC Local Government SA Power Networks Industry
Promoting mobile phone coverage and high speed broadband availability	Region wide/ Mount Gambier	RDALC Local Government Communications provider NBNSCO
Supporting improved marine infrastructure	Coastal locations	RDALC Local Government DPTI

Regional Priority	Location	Key partners
Promoting skills and workforce development	Region wide	RDALC Local Government Industry DFEEST
Championing the establishment of an innovation hub	Mount Gambier	RDALC DMITRE PIRSA Local Government Industry Tertiary Institutions
Promoting access to higher education	Region wide/ Mount Gambier	RDALC Local Government DFEEST Industry Tertiary Institutions
Supporting leadership and entrepreneurial development	Region wide	RDALC Local Government PIRSA DMITRE DFEEST Training Providers

4. Promotion of the Region

The Limestone Coast boasts wonderful lifestyle opportunities, however, consultation undertaken by the RDA indicated that more can be done to promote those lifestyle experiences and opportunities, which will act as a catalyst for strong growth in the number of people visiting or relocating to the Limestone Coast region. The RDA will work collaboratively with all levels of Government and play a stronger role in promoting growth opportunities across the region and demonstration that the Limestone Coast is a great place to visit and an even better place to live.

Regional Priority	Location	Key partners
Promotion of the "LiveGrowAchieve" marketing material for the Limestone Coast	Region wide	RDALC Local Government
Development of an investment prospectus for the region	Region wide	RDALC Local Government Invest in SA
Continue to support implementation of the Destination Action Plan 2012-2015	Region wide	RDALC Local Government Invest in SA



5. Community Well being

Access to services and facilities for the delivery of health and personal care across the Limestone Coast region, together with affordable housing, will underpin the key strategies for population growth and economic development.

The RDA will consult with, and advocate on behalf of, community and health care bodies, to assist and support regional efforts for increased health and aged care services, and assist with the coordination of a whole of region Social Inclusion Action Plan in conjunction with the work of the Limestone Coast Community Services Roundtable.

Regional Priority	Location	Key partners
Development of a whole of region Social Inclusion Action Plan	Region wide	RDALC Local Government Limestone Coast Community Services Roundtable
Production of a spatial map and data set identifying existing aged care facilities, occupancy rates and demand	Region wide	RDALC Local Government SERIC Aged Care Facilities
Lobbying for the retention of existing services at smaller regional hospitals	Region wide	RDALC Local Government SA Health Service providers
Lobbying for adequate mental health services to meet the growing demand in the region	Region wide	RDALC Local Government SA Health Service providers

7. RDA ACTIVITIES / PROJECTS / INITIATIVES

This section summarises how RDA Limestone Coast will progress each of the regional priorities identified in the previous section.

1. Economic Development and Diversification

**PRIORITY:- Increasing value adding to agricultural marine and horticulture production of premium food and wine
Increasing exports and expansion of markets for regional products**

ACTIVITIES

- As part of the Limestone Coast Economic Diversification Reference Group in conjunction with SELGA, consult with PIRSA and other key regional agricultural bodies, regarding the progression of an industry growth plan for the region. The Plan to consider primary production and value added processing opportunities.
- Revisit the Regional Branding initiative undertaken by the Regional Development Board in the early 2000's and report on how a strategy for implementation of a similar program could be undertaken, possibly using the "grass fed" livestock tag as a key driver for brand imaging the region's food industry.
- Lobby for Government investment in Mediterranean agriculture, including R&D and industry development.
- Partner with the SA Government on an R&D project to understand the potential market for produce from this region in emerging markets.
- Identify barriers to markets and actions to address them.
- Identify the type and quantity of commodity products being exported from this region.
- Identify opportunities and barriers to add value to products being exported from the region.
- Determine which of these identified opportunities are likely to be commercially viable and promote to potential investors.
- In partnership with DMITRE and Austrade, undertake market assessments and provide information to assist regional businesses with export opportunities.
- Identify and assist regional businesses that are export ready, to commence exporting goods or services or to expand current export markets.

PRIORITY:- Increasing advanced manufacturing particularly in the forest and forest products industry

ACTIVITIES

- As part of the steering committee for the Cellulosic Value Chain Study being undertaken by the VTT Technical Research Centre seek to progress the outcomes of the study.
- Meet with the chair of the South Australian Forest Industry Advisory Board (SAFIAB) and key stakeholders to assist with the implementation of the SAFIAB blueprint.
- Lobby for Government investment in the actions arising from the Cellulose Fibre Chain Study, including R&D and industry development.

PRIORITY:- Maximising alternative energy production (wind, wave, biomass and geothermal)

ACTIVITIES

- Promote opportunities for investment in renewable energy projects.

PRIORITY:- Developing industry clusters to maximise economic development within the region

ACTIVITIES

- Identify and prioritise cluster opportunities for businesses in the food, advanced manufacturing and mining support industries.

PRIORITY:- Increasing Research and Development relevant to the region's industries

ACTIVITIES

- As part of the Limestone Coast Economic Diversification Reference Group in conjunction with SELGA, consult with PIRSA and other key regional agricultural bodies, regarding the progression of an industry growth plan for the region.
- Work collaboratively with government bodies and key industry stakeholders to establish an innovation hub.
- Promote the innovation hub; facilitate broad industry and R&D investment.
- Lobby SA Economic Development Board to influence government decisions regarding regional investment in R&D infrastructure.

PRIORITY:- Providing support for Small Business development and sustainability

ACTIVITIES

- Promote and deliver a suite of assistance and business advisory services & programs for local businesses & community groups.
- Actively promote and inform local businesses of opportunities to participate in major State or National development projects.
- Conduct planned workshops across the region aimed at assisting business knowledge, sustainability and profitability.
- Provide assistance to small business in the form of information and advice tailored to their specific need.
- Provide details of relevant support material and information for Small Business available through both State and Federal programs.
- Investigate available sources of finance for small business.
- Determine current lending requirements from financial institutions.
- Assist businesses to develop sound business plans in line with the requirements of lenders.
- Refer small business to relevant Local Government services as appropriate and provide relevant information to Local Government on the needs and challenges of small business in each local Government area.

2. Infrastructure

PRIORITY:- Championing the implementation of the Green Triangle Freight Action plan and road upgrades

ACTIVITIES

- Approach the State Transport Minister to assist in updating the Green Triangle Freight Action Plan, with a view to including other inter-regional and public transport projects and to assist in a renewed push for funding support to implement the GTFAP through Infrastructure Australia.

PRIORITY:- Advocating for investment for the maintenance and upgrade of infrastructure associated with the South East Drainage and Watercourse network, particularly as it relates to regional transport, industry and agriculture

ACTIVITIES

- In conjunction with the South East Water Conservation and Drainage Board lobby governments **both State and Federal** for adequate funding levels through SEWCDB and DPTI for the maintenance and upgrade of this infrastructure which is vital to the region's prosperity.

PRIORITY:- Influencing the upgrade of wastewater treatment facilities

ACTIVITIES

- Lobby for the upgrade of the Finger Point Waste Treatment Facility which is currently at capacity, to prevent this being an impediment to the future development of Mount Gambier.

PRIORITY:- Promoting increased power availability and reliability

ACTIVITIES

- Work with ElectraNet to review the Limestone Coast Electricity Supply network and report on a planned upgrading framework for implementation to address under capacity issues and to accommodate planned regional growth.

PRIORITY:- Promoting mobile phone coverage and high speed broadband availability

ACTIVITIES

- Work with Telstra Country Wide and other communications providers to identify and highlight telecommunications black spots and non-coverage areas impinging on economic and community development in the region.
- Work with NBNCo in relation to the planned rollout of the National Broadband Network in the region and ensure the regional community is fully informed of progress.

PRIORITY:- Supporting improved marine infrastructure

ACTIVITIES

- Work with Local Councils to assist with plans and funding for improving marine infrastructure across the region.

3. Human Capital Development

PRIORITY:- Promoting skills and workforce development

ACTIVITIES

- Engage with businesses and industry organisations to identify workforce issues and skills shortages.
- Maintain and increase the capability and service delivery of our skills, career and workforce development unit within the Board, so as to provide:-
 - An effective career development service
 - Support for DFEEST to implement the Skills for Jobs in Regions program;
 - Case specific responses to workforce skills and labour needs and demands
 - Actively support businesses to address workforce demand issues.
- Secure adequate funding to implement the recommendations of the Limestone Coast Workforce: Analysis of supply, demand, emerging trends and opportunities and strategies for regional workforce development Report (October 2009).

PRIORITY:- Championing the establishment of an Innovation hub

ACTIVITIES

- Work collaboratively with government bodies and key stakeholders including tertiary and educational institutions and industry to establish an innovation hub.
- Promote the Mount Gambier innovation hub; facilitate broad industry and R&D investment.
- Market the value of stakeholder involvement and investment in R&D.

PRIORITY:- Promoting access to higher education

ACTIVITIES

- Prepare a report on available higher education and training opportunities in the region and include a 'gap analysis' by key industry sectors, for discussion and action in partnership with Universities, TAFE and other education and training providers.

PRIORITY:- Supporting Leadership and entrepreneurial development

ACTIVITIES

- Undertake a lead role in bringing to fruition the Limestone Coast Economic Diversification Reference Group project "Mobilising Regional Leaders".
- Work with and explore delivery of more leadership and governance training modules in the Limestone Coast region.



4. Promotion of the Region

PRIORITY:- Promotion of the “LiveGrowAchieve” marketing material for the Limestone Coast

ACTIVITIES

- Continue to update, market and promote existing “LiveGrowAchieve” promotional material highlighting the key advantages and opportunities of the region aimed at attracting new residents and outside investment.
- Consider the needs of medical and allied health professionals when developing marketing and promotional material to attract new residents to the region and work with the LC Medicare Local to distribute material to prospective practitioners and recruitment agencies.
- Seek funding to undertake appropriate research to identify a sustainable population target for the Limestone Coast, as a platform for development of a Spatial Growth Plan.
- Work with Local Government to support Fly-in Fly-out initiatives for the mining sector.

PRIORITY:- Development of an investment prospectus for the region

ACTIVITIES

- Develop a prospectus for the region aimed at potential investors.
- Approach potential investors to showcase the region to them.
- Work closely with local government to showcase the region to potential investors.

PRIORITY:- Continue to support implementation of the Destination Action Plan 2012–2015

ACTIVITIES

- Partner with SELGA to regularly engage with the South Australian Tourism Commission, to monitor and report on the Commission's marketing of tourism in the Limestone Coast.
- Create an alliance with Local Government and tourism marketing bodies with an interest and responsibility for marketing the Great Ocean Road and work on a strategy for leveraging off that tourism icon for broad regional benefit.
- Develop and progress to investment and funding status, a schedule of marine based and other tourism industry related investment projects, in partnership with local Councils.

5. Community Wellbeing

PRIORITY:- Development of a whole of region Social Inclusion Action Plan

ACTIVITIES

- Undertake a leadership role in the coordination of a whole of region Social Inclusion Action Plan, by working with all relevant stakeholders particularly the Community Services Roundtable, to bring together research already undertaken and identify any gaps.
- Work with community and regional groups to identify and understand relevant issues across the region.
- Provide input, regional intelligence and make submissions where appropriate on issues affecting or likely to affect the Limestone Coast community.
- Partner with Local Government and other agencies to assist and facilitate the coordination of regional strategic planning issues.
- Engage with the Regional Health Service cluster through the Health Advisory Councils to support health plan implementation and to understand constraints which may impact on population growth.

PRIORITY:- Production of a spatial map and data set identifying existing aged care facilities, occupancy rates and demand

ACTIVITIES

- In partnership with SELGA, engage the South East Resource Information Centre (SERIC) to produce a spatial map and data set, identifying existing regional aged care facilities, occupancy rates and demand for accommodation, to assist planning for new facilities.

PRIORITY:- Lobbying for the retention of existing services at smaller regional hospitals

PRIORITY:- Lobbying for adequate mental health services to meet the growing demand in the region

ACTIVITIES

- Working in close association with relevant Health Advisory Committees and Medicare Local and South East Local Government Association member councils, lobby the State Government for the retention of existing services at smaller regional hospitals and for adequate mental health services to meet the growing demand in the region.

To assist with the achievement of the regional priorities RDA Limestone Coast will continue to undertake the following activities which are proposed to impact positively on a number of priorities.

- Maintain regular dialogue with a range of community stakeholders to identify emerging issues, which might present a threat to growth in the region.
- Continued attendance and membership of key stakeholder groups, Boards and/or Committees.
- Regularly attend at meetings of Local Councils and the South East Local Government Association.
- Engage with SELGA Member Councils to establish an opportunity for RDALC and neighbouring Victorian RDAs to participate in regular forums, for the purpose of developing closer ties.
- Work in partnership with the South East Natural Resources Management Board on areas of mutual interest. Promote Government programs to local government, business and community groups for the benefit of the region.
- Facilitate and assist the process of developing quality applications to various funding programs.
- Promote the RDA as a regional organisation able to support and assist parties with an interest in developing regional infrastructure.
- Schedule regular meetings with regional business and trader groups, to assist and support efforts to address policy barriers to business investment and growth.
- Actively promote and inform local businesses of opportunities to participate in major State or National development projects.
- Promote relevant Government programs and use other means to assist regional businesses with potential for capitalising on research and development opportunities, to expand product and service capability.
- Engage with the broader community to provide support and assistance using the resources and expertise of the RDA Board and staff.

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APPENDIX 1 – REGIONAL PROFILE

OVERVIEW OF THE REGION

The Limestone Coast Region (South East of South Australia) lies midway between the capital cities of Adelaide and Melbourne, covering the south-eastern section of South Australia and encompasses the Local Government areas of the City of Mount Gambier; District Councils of Grant, Kingston, Robe and Tatiara; and the Naracoorte Lucindale and Wattle Range Councils.

Together with the neighbouring Western Districts of Victoria, this wider region is often referred to as the Green Triangle Region and represents a very important political, community and industry based alliance. There is a real connectedness between the communities comprising the Green Triangle, geographically in terms of proximity to the State capitals of Adelaide and Melbourne; at Local Government level where the cooperation for strategic purposes is very deliberate; and across businesses and the communities through sport, cultural and social interactions.

One of the key political and marketing strengths of each part of the region is the ability to unite under the Green Triangle banner.

The Limestone Coast region supports a population of 64,105



people (ABS Census 2011) with 40% (or 25,804 people) living in the Mount Gambier LGA. When combined with the Grant and Wattle Range LGAs, the Lower South East area accounts for 70% of the region's population, leading to a centralisation of services and greater employment opportunities in that area. The City of Mount Gambier is the second largest city in South Australia, behind only Adelaide and together with a number of towns across the region, including Naracoorte, Millicent, Penola, Bordertown, Keith, Robe, Kingston and Lucindale, provides a range of business, retail and community services.

Australian born people make up 86.7% of the population of the region. Recent migration, principally from New Zealand, United Kingdom, Philippines and India, has added to the contribution made by post war emigration from the United Kingdom, Italy and The Netherlands. Refugee arrivals since 2006 have been primarily from Burma and the Democratic Republic of the Congo. Some parts of the region have seen growing numbers of migrants from the Middle East, particularly, Afghanistan. The Aboriginal & Torres Strait Islander population grew slightly from 776 people in 2006 to 1,094 people in 2011 and has a young profile with 48.26% under the age of 20 years.

The region houses many of South Australia's key resource based companies and covers an area of some 21,337 square kilometres with fertile soils, reliable rainfall and significant groundwater resources. The climate is characterised by cool wet winters and mild to hot, dry summers. Average annual rainfall varies considerably, from approximately 850mm in the south of the region to 450mm in the north of the region.

The Limestone Coast region contains a very diverse range of industry sectors which makes for a robust and expanding business community. An economy capitalising on the region's significant groundwater resources and built from traditional agriculture based activities, has now expanded to include forestry, tourism, engineering, transport, retail, health, education and service industries.



Key regional industries include AGRICULTURE, FORESTRY AND FISHING; (this includes viticulture, aquaculture, horticulture, beef and dairy production, prime lamb and wool production, grain and seed production); MANUFACTURING (this includes timber processing, winemaking and agricultural product processing); RETAIL TRADE; HEALTH CARE AND SOCIAL ASSISTANCE; EDUCATION AND TRAINING; CONSTRUCTION; ACCOMMODATION AND FOOD SERVICES and TRANSPORT.

Underground water resources in the South East are essentially contained within two regionally extensive aquifer systems, an upper, unconfined aquifer and a deeper confined aquifer. The unconfined aquifer is the principal source of underground water used in the South East Natural Resource Management Region, given its relatively shallow depth and good quality for productive purposes. This unconfined aquifer supports one of the most productive irrigated agriculture industries in South Australia. Reliable rainfall and the dual aquifer system ensures that communities can exist and agricultural activities in particular can flourish through access to quality water resources.

The Limestone Coast has many unique landforms and distinctive natural characteristics that have originated from a long, complex geological history. The region is characterised by a series of stranded dune ranges that rise between 20–50m above interdunal plains. These plains can be inundated over winter and

host a variety of internationally recognised wetland systems including the Ramsar listed Bool and Hacks Lagoons, Piccaninnie Ponds and part of the Coorong and Lower Lakes Wetlands. The region also hosts an extensive network of limestone sinkholes and caves, which includes the iconic World Heritage Fossil Site at the Naracoorte Caves.

With 378km of coastline extending from just north of Salt Creek in the Coorong, south to the Victorian border the coastline provides the basis for many of the regions' industries, including tourism and is valued for its scenic qualities, quality fresh seafood and for usage for recreational activities.

Thirteen major landscape features have been identified for the region. These landscapes support a diverse range of natural resources related industries including dryland and irrigated agriculture and forestry. The health of these landscapes is vital to the continued prosperity of industries and the regional economy.

This unique natural resource base gives the Limestone Coast region competitive advantage and will be one of the key drivers of community and economic growth.

1. HUMAN CAPITAL

The Limestone Coast region is diverse and productive - to stay competitive and to be innovative it needs to build the education and skills base of its community.

REGIONAL WORKFORCE CHALLENGES AND PRIORITIES

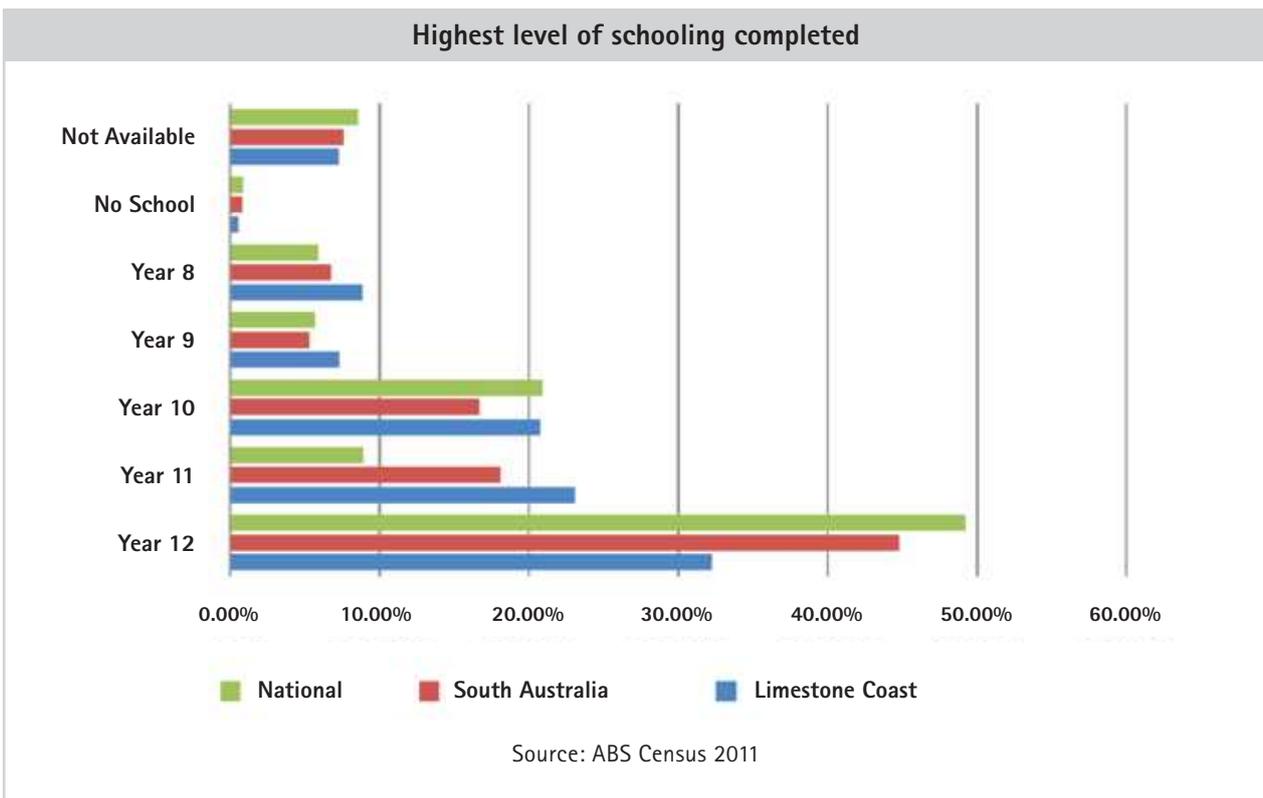
To build additional capacity to be a smart, competitive region, able to innovate and respond to change, the Limestone Coast needs a more highly educated and skilled population. Traditionally the region has been an agrarian community with skills passed on through family businesses. The impact of technology, legal frameworks, globalisation of markets, environmental considerations, political forces, competition and changes to the size and mechanisation of industry within the region mean that business and specific technical skills are needed if Limestone Coast businesses are to be competitive. The challenge is to provide access to education and skills development that is relevant and to build the capacity of education service providers.

Building the capacity of the region will have both economic and social benefits. Businesses that have the skills and capability to innovate and grow provide economic benefits for themselves and for the region. Individuals who gain new skills and qualifications are able to access a wider range of job and career opportunities and to make decisions that give them a secure future.

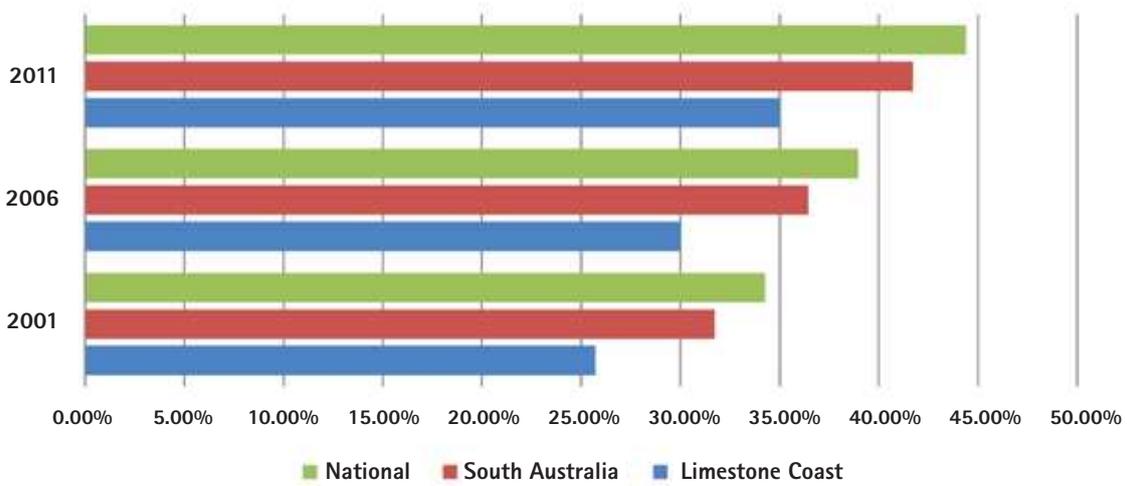
Investment in research facilities and capacity which is focused toward innovation is vital for ongoing growth and improvement in the productivity, profitability, competitiveness and sustainability of the region's industries.

EDUCATION PROFILE OF THE REGION

The region has seen significant increases in the numbers of people with post school qualifications over time, but there is a gap when compared with state and national data. This gap is also evident in school completion data.

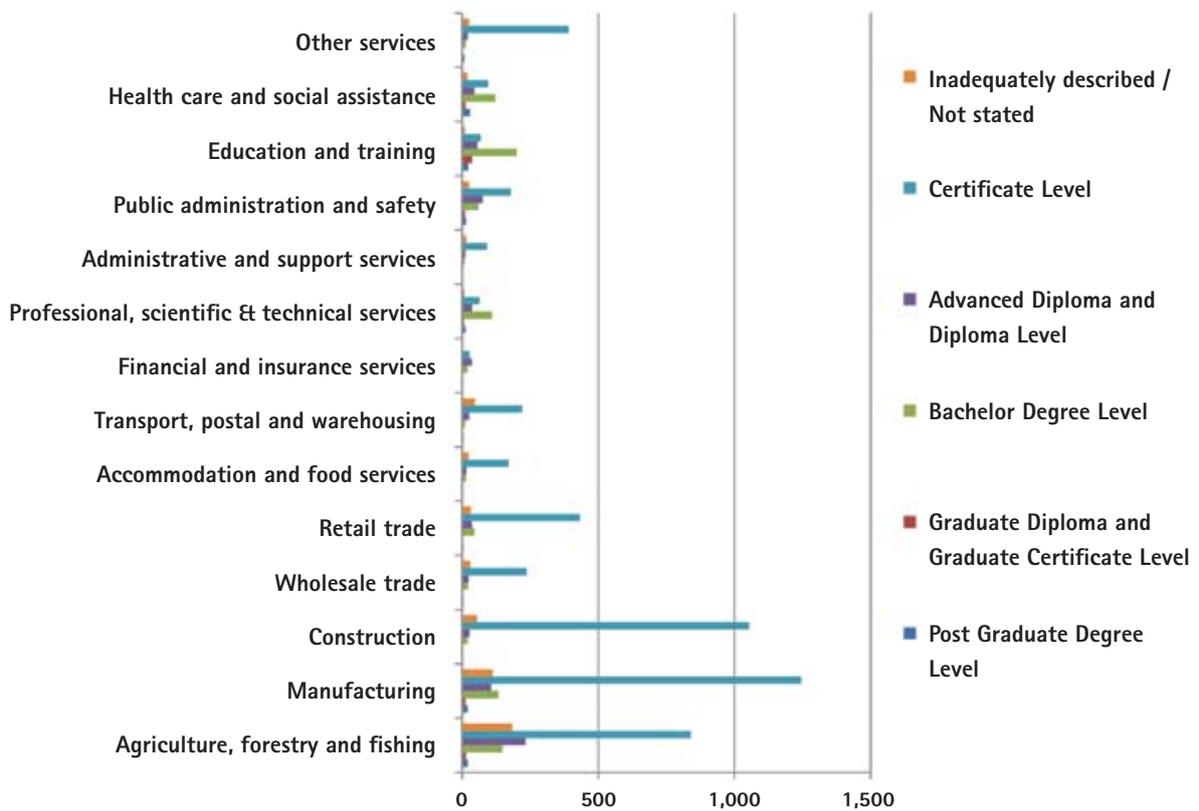


Percentage of population with post school qualifications over time



Source: ABS Census 2011

Level of Education Attainment by Industry sector 2011



Source: ABS Expanded Community profile 2011

People with a Bachelor degree or higher, work in greater numbers in the industries of Agriculture, Manufacturing, Education and Training, Health Care and Social Assistance, and Professional, Scientific and Technical Services. The high numbers in Agriculture, Forestry and Fishing may point to increasing skill needs as enterprises become larger, use advanced technology for irrigation, forest management, pasture management and animal husbandry. People with a Certificate III or IV, work across all industries with higher numbers in Retail and Wholesale Trade, Construction, Manufacturing and Agriculture, Forestry and Fishing.

SKILLS TRAINING AND EDUCATION CHALLENGES

The Limestone Coast Region has 29 Reception-Year 7 (R-7) schools, 5 R-12 (including one with a kindergarten and one with a Child Parent Centre); 6 Secondary schools; 1 special education school; 3 Independent Learning Centres; and 25 preschools. The

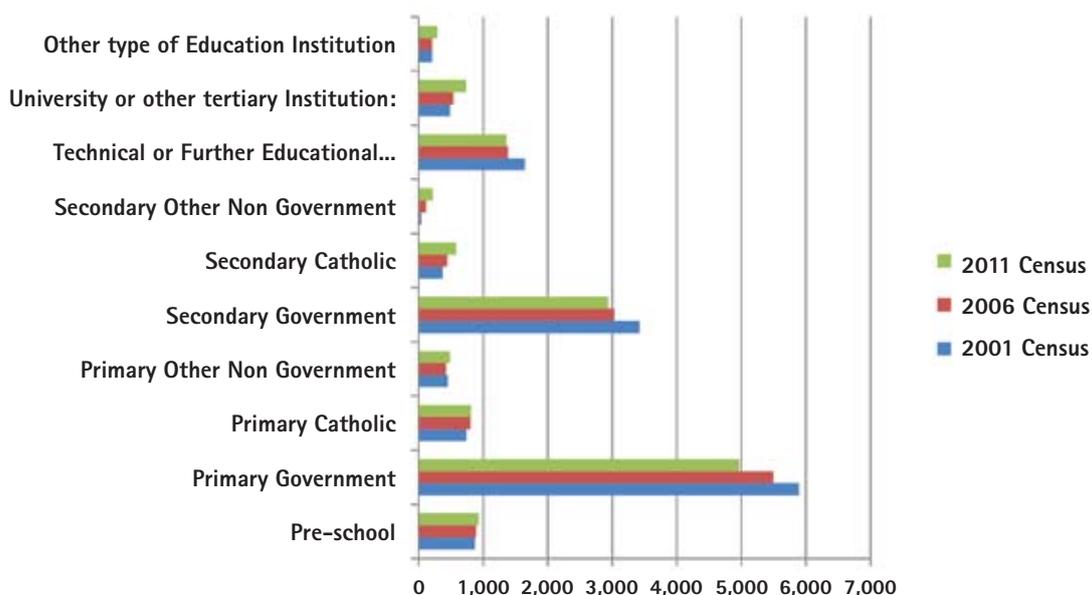
Catholic Education sector in the region is represented by one co-educational R – 12 school and two primary schools. There are three independent schools, including a co-educational R-12 school in Mount Gambier.

The region has Independent Learning Centres which are located away from the "traditional" school site.

The Limestone Coast region has a Trade School for the Future which is located at the Grant High School campus, which brokers school based apprenticeships where apprenticeship brokers match job ready students to local employers.

The region offers numerous learning options for students delivered through the Vocational Education and Training program, including Automotive, Construction, Information Technology, Hospitality, Racing, Retail, Seafood, Agriculture, Engineering, Electro Technology, Furniture, Viticulture, Community Services, Business Services, Health, Tourism and Hairdressing.

Time series data shows changes in student numbers from 2001 to 2011



Source: Time series census data 2001, 2006, 2011

The retention rate to year 12 has improved over the last five years, but remains below the state average. The Year 8 to 12 retention rate in Government schools in the Limestone Coast in 2008 was 76.4%, approximately 8% lower than the State average.

Access to tertiary education is available through TAFE SA Regional, the largest provider of vocational education and training in SA, and until 2010 has been offered at its main campus in Mount Gambier and through learning centres in Millicent, Naracoorte, Bordertown and Kingston. Recent downsizes have seen Millicent, Bordertown, Kingston and Naracoorte Centres with limited courses available usually through distance education. There is also a trend towards external and online study for a number of courses that have previously been offered face to face at the Mount Gambier Campus. Many schools have individual linkages with TAFE SA with students accessing a number of different courses combining SACE studies with vocational education. There are a number of other Registered Training Organisations situated within the region as well as other training providers that work within the Limestone Coast on a needs basis. The scope of these organisations includes training in forestry, transport, retail, hospitality, business and agriculture and other occupational areas.

Higher education is available both locally and through external delivery mode. The University of South Australia, through their Mount Gambier Regional Centre has offered undergraduate on campus studies across four disciplines since 2006 and is offering an Education degree from February 2013. The Flinders University operate their highly successful Rural Clinical School and Southern Cross University offers forestry studies and Environmental Science.

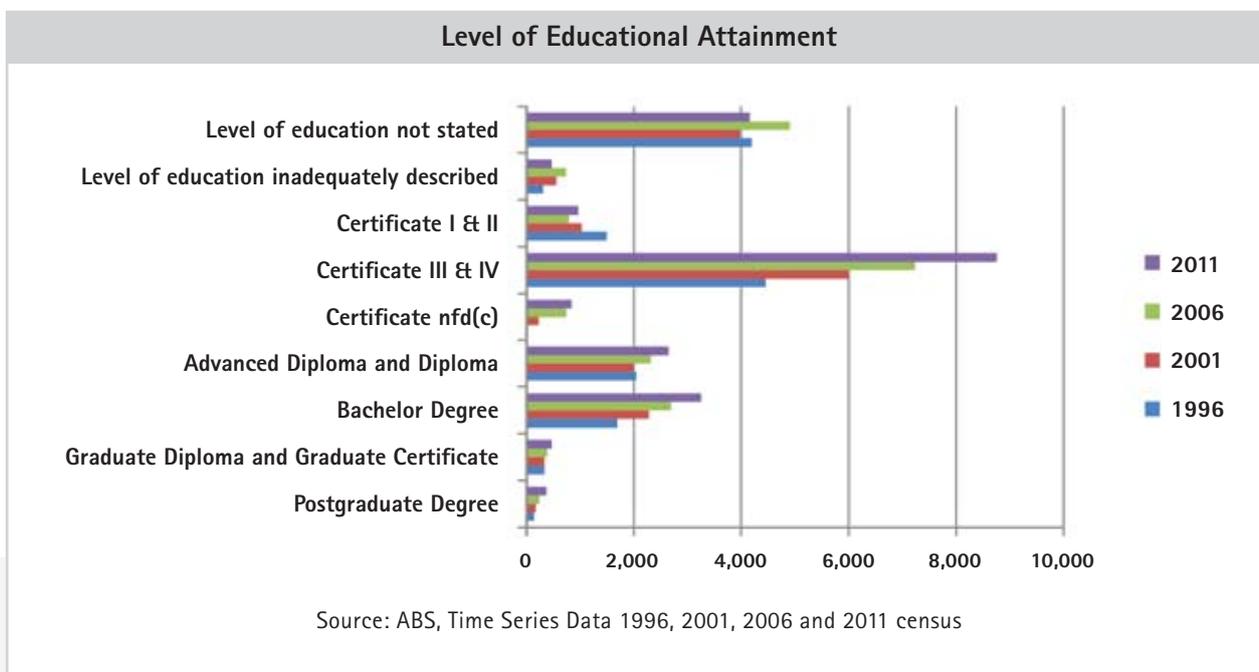
This much improved access to university studies was the result of extended planning and lobbying by a number of key organisations in the region led by a local university steering committee. Currently the Mount Gambier City Council is promoting itself as a Learning City, with a number of initiatives aimed at promoting further education opportunities in the region.

In addition, external modes of delivery support Limestone Coast residents to study through a wide range of universities and regional training organisations.

The level of educational attainment in the Limestone Coast has grown over time, with significant growth in Certificate III and IV and Bachelor degrees, reflecting the growth in trades and professional jobs within the region. The region has lower than state proportions of people with a degree or higher and above average proportions of individuals with Certificate III or IV level qualifications.

As at 31st December 2011 there were 833 traineeship and apprenticeship completions in the Limestone Coast area whilst 2,532 people were listed as an Apprentice or Trainee in training, compared to 2,143 at the same time in 2007. This includes a variety of different trades and vocations. Research data shows that in general young men are primarily employed in Retail, Accommodation, Construction, Manufacturing and Agriculture, Forestry and Fishing while young women tend to work in the Retail and Accommodation Sectors.

Residents of the Limestone Coast have below average levels of school achievement, with 32.22% having completed Year 12, compared to 44.76% for the State.

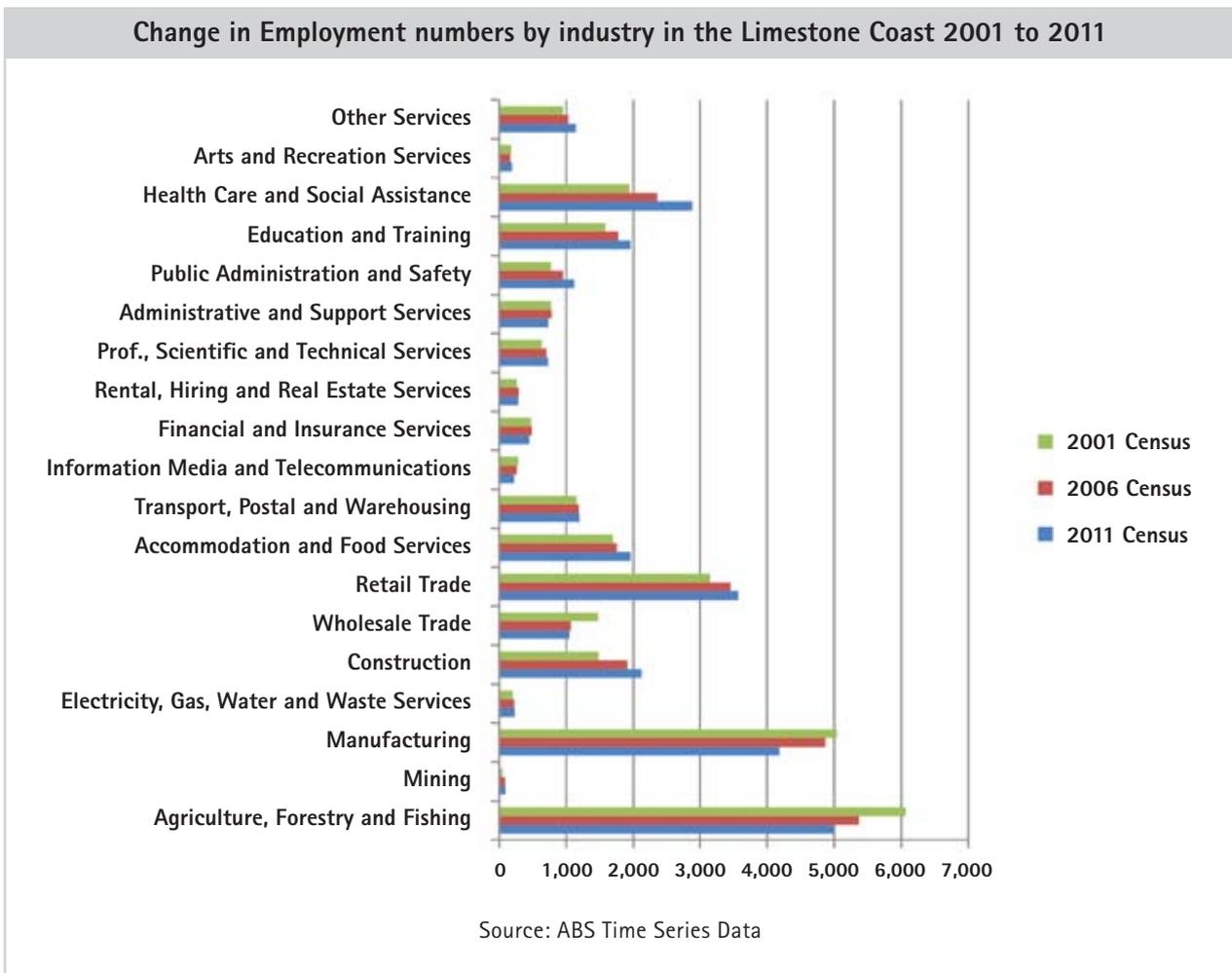


FACTORS AFFECTING THE DEMAND AND SKILL PROFILE

Shifts in demand by industry sectors for workers, and an aging population of workers in several key growth industry sectors are factors which present challenges for the region.

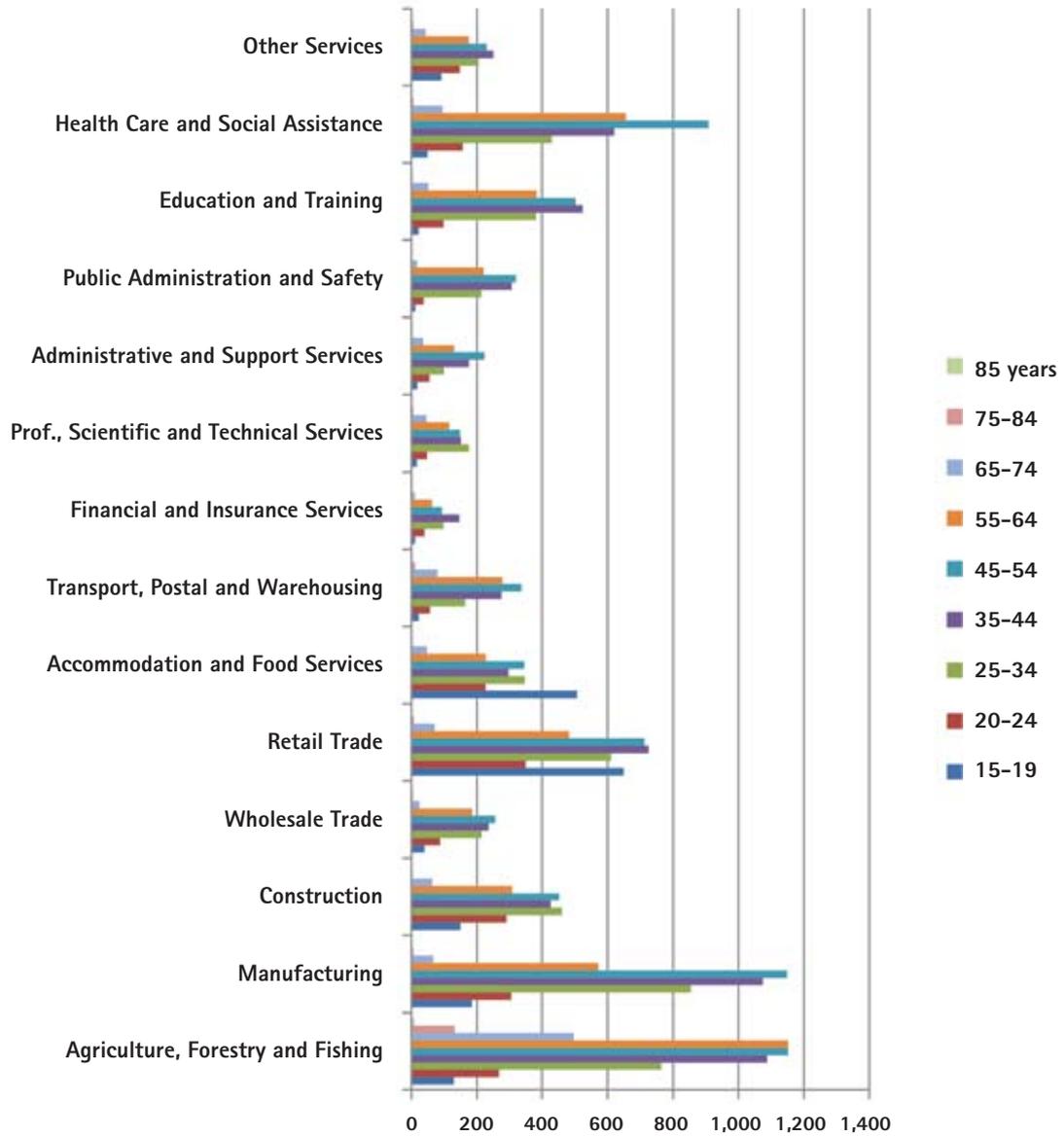
There have been shifts over time in numbers employed in key industries. The two highest employing industries have seen a decrease in employment demand: Agriculture, Forestry and Fishing by 18% and Manufacturing by 17%. Other key industries have seen growth in employment from 2001 to 2011: Health and Social Assistance by 48%, Education and Training by 24%, Construction by 44%, Retail Trade by 13.5%, Professional, Scientific and Technical Services by 15.5%, Public Administration and Safety by 44% and Other Services by 20.7%

These changes have an impact on the type of training that needs to be delivered in the region, and on the need to develop a strong innovation agenda across the region.



Approximately 50% of workers in the Agriculture, Forestry and Fishing, Health Care and Social Assistance, Education and Training and Transport, Postal and Warehousing industries are aged 45 years and over. These four industries face significant workforce issues as this cohort leaves the workforce. The challenge is to address the impact on workforce succession and recruitment procedures.

Age of workers by Industry sector 2011 census



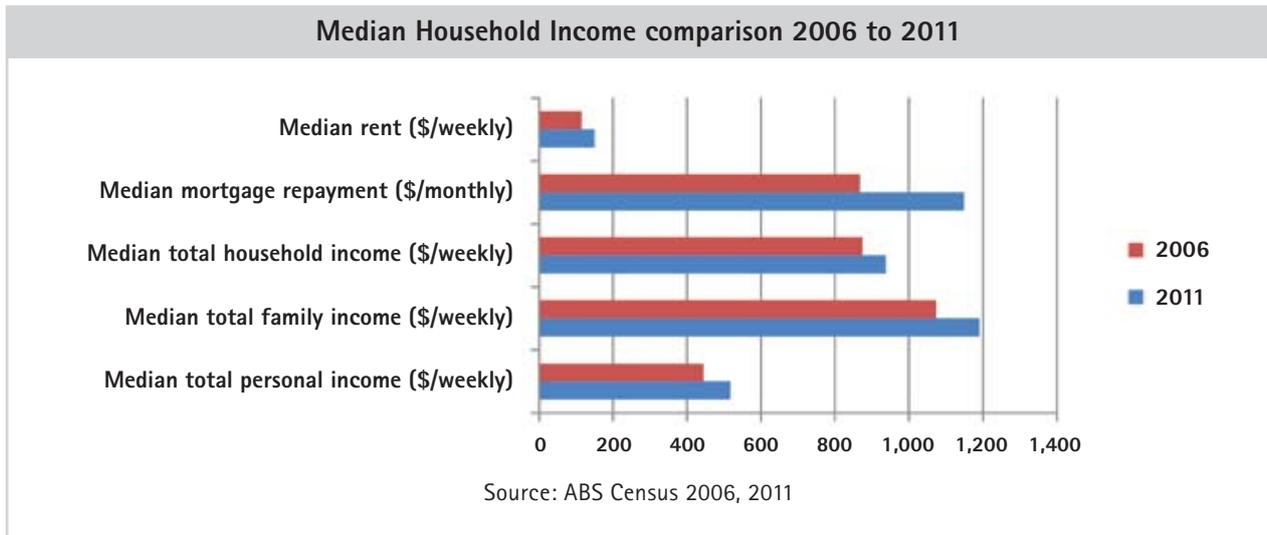
Source: ABS 2011 Census data

2. SUSTAINABLE (ECONOMIC, ENVIRONMENTAL AND SOCIAL) COMMUNITIES AND POPULATION GROWTH

ECONOMIC

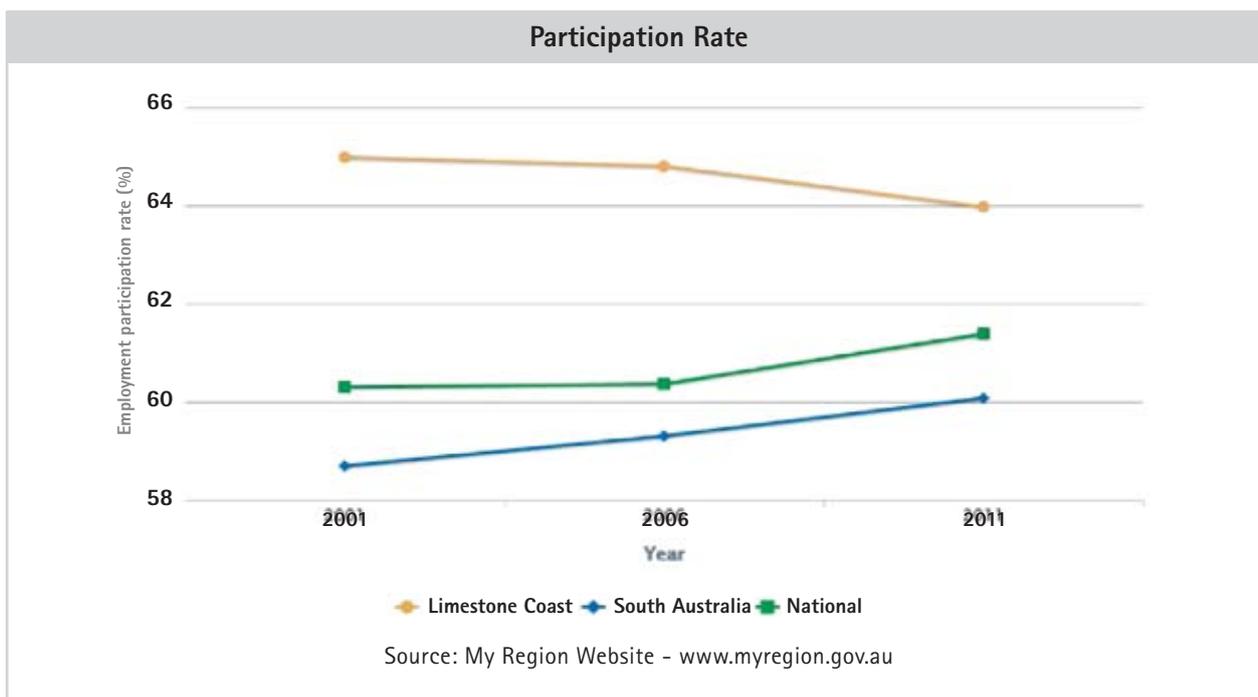
SOCIO ECONOMIC PROFILE

Median household income has grown over time from \$875 to \$937, with an increase of the median mortgage repayments (\$/month) during that period from \$867 to \$1,148.



The unemployment rate across the region fluctuates with the highest rate of unemployment in Mount Gambier in stark contrast to the Tatiara which has close to full employment. Since 2005 the regional unemployment rate has been consistently on the rise with the overall rate of 4.6% as at March 2012 being slightly below the state unemployment rate of 5.2%.

Unemployment Rate comparison March 2011 to March 2012					
Statistical Local Areas (SLAs)	Unemployment Rate (%) March 2011	Unemployment March 2011	Unemployment Rate (%) March 2012	Unemployment March 2012	Labour Force March 2012
Kingston	3.6	49	3.2	44	1,384
Naracoorte and Lucindale	3.1	163	3.3	175	5,288
Robe	3.1	25	3.2	26	819
Tatiara	2.3	99	2.2	96	4,446
Grant	3.7	185	3.4	171	5,090
Mount Gambier	7.3	1,010	6.6	920	13,984
Wattle Range	4.8	335	4.7	328	37,993



CHANGES IN INDUSTRY COMPOSITION

The top 8 industries by employment in the Limestone Coast region as at the 2011 census are:-

Agriculture, Forestry and Fishing employs 17.2% of workers. Demand for employment in this sector has decreased in the census period 2001 to 2011 by 18%. This sector includes sheep, cattle and grain farming, dairy farming, forestry and logging, fishing, horticulture, viticulture and fruit growing. The agricultural industry in the region is diverse. Key sectors include beef, sheep, dairy, wool, seed, cropping, viticulture, lobster and abalone fisheries, horticulture and forestry.

Strength and the diversity of the region's agricultural industries in part results from two very comprehensive drainage schemes. The Lower South Eastern Drainage Scheme was commenced in the mid 1800s with the objective of systematically draining land inundated during the winter months, to make prime land available for grazing and cropping. The Drainage Scheme is managed to maximise the objectives set down, via a series of open drains and weirs and which also by necessity contains in excess of 800 bridges and culverts on public and private properties to ensure access and vehicular movements on local state and national highways in the region. A deep drainage system in the Upper South East was commenced in the late 1990s and was principally established to assist in combating dryland salinity. Both schemes are designed to maximise the productive capacity of the region.

Fishing ports servicing the well managed and sustainable commercial fishery (Southern Rock Lobster) are located predominantly in the Limestone Coast region. This small but productive part of the coastline yields an average \$80m wholesale value from the lobster catch annually and provides 400 full time jobs, which are essential to the small coastal townships in the region.

Forestry is currently undergoing a rejuvenation process, after several years of difficult trading conditions. Innovation to broaden the product and customer base so that the industry is globally competitive is a focus.

The Limestone Coast Economic Diversification Forum held in September 2012 and the recommendations from the Cellulose Fibre Value Chain study, will provide clear direction for this industry. RDA will take a lead role in supporting and implementing outcomes from these initiatives.

Manufacturing employs 13.9% of workers including food and beverage manufacturing, wood & paper manufacturing, metal product manufacturing and machinery and equipment manufacturing.

Demand for employment in this sector has decreased in the census period 2001 to 2011 by 17%. Current economic conditions are having an impact in the sector as forest products struggle in depressed export markets, engineering margins and markets contract and firms make decisions about the level of maintenance work they carry out. Longer term, there are opportunities for growth as these industries recover.

Key employment in this sector in the region is in food product, beverage, wood, pulp, paper, converted paper, primary metal, metal, fabricated metal, machinery and equipment manufacturing. This industry has 36.3% of its workforce aged 45 years and over. 76.5% of the workforce is male. 87.2% of the workforce is in full time work. The majority of manufacturing enterprises within the region have less than 20 employees with the exception of wood processing and pulp and tissue manufacturing, where major employers host several hundred workers.

Retail Trade employs 11.9% of the working population and covers food, personal and household goods, motor vehicle and services to timber products.

Key employment in this region in this sector is in food, motor vehicle and motor vehicle parts retailing.

Demand for employment in the region has risen in the census periods 2001 to 2011 by 13%. Demand in this sector is influenced by both the domestic and international economy. The ability of people to travel to retail centres and the increase of larger franchise and national brand stores is affecting smaller towns and enterprises within the region. As this is a sector which usually experiences high turnover as it traditionally has provided work for school students and young people, there are likely to be ongoing employment opportunities in the region.

Health Care and Social Assistance is the fourth largest employing 9.7% of workers in the region and includes hospitals and nursing homes, medical and dental services, veterinary services and childcare services.

Demand for employment in this sector increased by 48% between the census periods 2001 to 2011. The establishment of the Mount Gambier Hospital as one of four regional hospitals in South Australia, an aging community, child care needs, growth in community and home based services, and higher expectations and possibilities for health care, have all contributed to this increase.

Key employment in this sector in this region is in Hospitals, medical and other health care services, residential care and social assistance.

Construction is the 5th largest industry in the region employing 7.1% of the workforce. This industry covers general construction and construction trade services including civil works. Key employment in this sector in this region is in building construction and construction services. Demand for employment in this sector grew by 44% from the census period 2001 to 2011. A strong economic cycle, residential property strength and low interest rates have contributed to this. Current economic circumstances have slowed this growth.

The **Education and Training** sector employs 6.5% of workers in the region making it the 6th largest industry. This includes pre-school, school and post school education facilities. Demand for employment in this sector has increased by 24% in the census period 2001 to 2011.

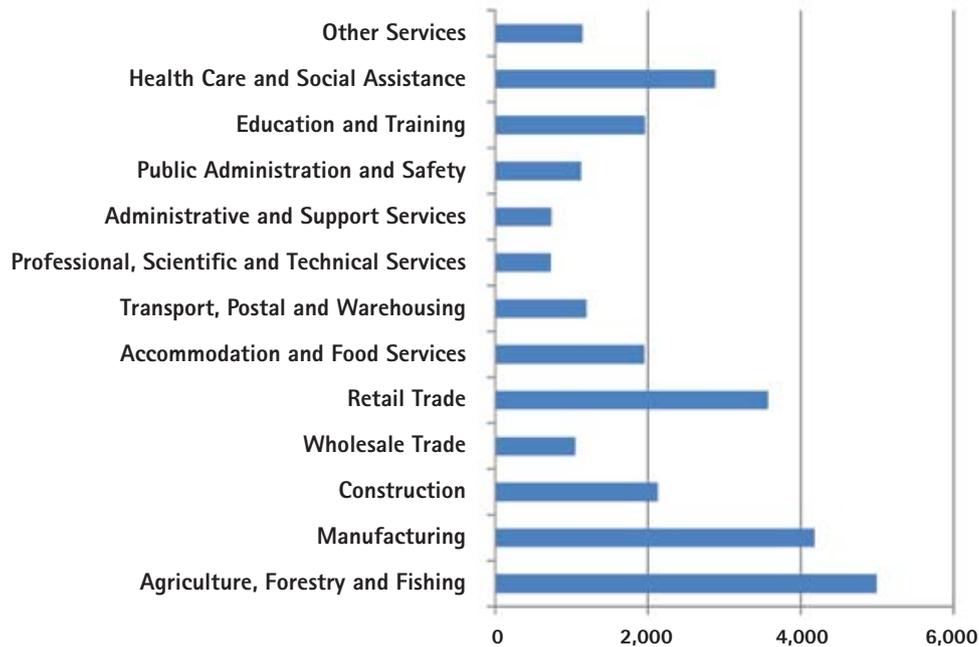
The establishment of a Centre for the University of South Australia and university courses by Southern Cross University in Mount Gambier, the rise in age for compulsory school attendance and the delivery of a range of training by Registered Training Organisations, has influenced this increase. Key employment in this sector in this region is in pre-school and school, and tertiary education.

The **Accommodation, Cafes and Restaurants** services industry employs 6.6% of our workforce which puts it as the 7th largest employer in our region. Employment in this industry is often casual in nature and includes accommodation, pubs, taverns, bars, cafes, restaurants and clubs. Demand for employment in this sector increased by 15% from the census period 2001 to 2011. Increases reflect trends to eat out and to buy prepared food. Key employment in this sector in the region is in food and beverage and accommodation.

The **Transport** industry is the 8th largest employer in our region employing 4.0% of workers in the region. This industry includes road and air transport, services to Transport, Postal & Warehouse facilities. Demand for employment in this sector grew by 3% in the census period 2001 to 2011. With an increased freight load in the region as the blue gum plantations are harvested, this growth can be expected to rise. Key employment in this sector in this region is in road transport and postal and courier pickup and delivery.

Some other industries in the region which currently have lower employment numbers have shown strong growth in the 2001 to 2011 census periods. For example Wholesale Trade (29% increase), Professional, Scientific and Technical Services (15% increase), Public Administration and Safety (44% increase) and Other Services (21% increase). This reflects the increased importance of the service sector in the region's economy.

Employment numbers by industry



Source: ABS Census 2011

The largest employers in the region comprise a healthy mix of local, national and global enterprises together with Government (including Local Government, Commonwealth/State Government employees in health, education and forestry). Medium size enterprises exist right across the region in agriculture, horticulture, food processing, engineering, transport, viticulture, tourism and earth moving. Small business (less than five employees) in the region is estimated to make up around 75% of total businesses operating.

For the year ending December 2013, the Limestone Coast attracted 664,000 visitors to the region staying a total of 1,669,000 nights. Visitation to the Limestone Coast represents almost 15% of all regional South Australia visitation and almost 9% of the total SA visitation. Accommodation occupancy has increased over the last 12 months by 1% from 45.7% to 46.7%. In dollar terms this equates to a \$1M increase in takings across the region from \$20M to \$21M, noting that the state average of occupancy only increased 0.2% from 62.7% to 62.9% with takings increasing from \$399M to \$417M.

The region boasts a number of natural attractions, including the World Heritage Fossil Site at the Naracoorte Caves, the Kanawinka Geotrail, including the Blue Lake and the recently listed Ramsar site of Piccanninie Ponds. The canonisation of Australia's own St Mary of the Cross MacKillop and our links to the Coorong region may present opportunities for increasing tourism visitation.

The South Australian Tourism Commission, South East Local Government Association Member Councils, RDALC and Limestone Coast Tourism reviewed the Destination Action Plan 2012-2015 which is fine-tuned to deliver long-term growth for the Limestone Coast region. Given tourism expenditure is projected to grow by 46% by December 2020 it will be imperative we focus on the key strategies outlined in this document.

PRIORITIES AND OPPORTUNITIES

Analysis of our region shows that in order to further develop a sustainable community, we will need to focus clearly on economic development and diversification, to enable innovative practice as industry adapts to global trends and pressures. We will need clear data about workforce supply and demand, as detailed earlier, and analysis of trends and the role of leadership within the community, and strategies to support the growth of aspects of leadership such as succession planning, leader development of individuals and leadership development through strengthening the connection between, individual leaders and the systems within which they operate. The following strategies are planned for action:

- Develop strategies to match supply and demand for labour in industries in the Limestone Coast.
- Establish systems for workforce supply and demand data collection, monitoring and access – that is, workforce information management, risk assessment of supply and regional monitoring
- Implement programs to support understanding of workforce development strategies
- Support new and emerging industry development
- Coordinate services that provide facilitation of enterprise development
- Promote opportunities for work in the region

ENVIRONMENTAL WATER MANAGEMENT

The Limestone Coast has many unique landforms and distinctive natural characteristics that have originated from a long, complex geological history. The region is characterised by a series of stranded dune ranges that rise between 20–50m above interdunal plains. These plains can be inundated over winter and host a variety of internationally recognised wetland systems including the Ramsar listed Bool and Hacks Lagoons, Piccaninnie Ponds and part of the Coorong and Lower Lakes Wetlands. The region also hosts an extensive network of limestone sinkholes and caves, which includes the iconic World Heritage Fossil Site at the Naracoorte Caves.

With 378km of coastline extending from just north of Salt Creek in the Coorong, south to the Victorian border the coastline provides the basis for many of the regions' industries, including tourism and is valued for its scenic qualities, quality fresh seafood and for usage for recreational activities.

The introduction of South Australia's Marine Protected Areas (Marine Parks) is proposed to further enhance and protect the marine environment and will complement management and sustainability of the valuable wild catch fishery and the important tourism and business activity associated with the recreational fishing sector. The region is home to a variety of flora and fauna and habitats that include heath woodlands and forestry, grassy woodlands, dry heath land and mallee, scattered trees, open water wetlands and rising springs. This range of habitats is home to a range of nationally threatened species. Many beaches are strongly influenced by wave energy and also offer a range of habitats for species including migratory birds listed under international conservation agreements.

Underground water resources in the South East are essentially contained within two regionally extensive aquifer systems, an upper, unconfined aquifer and a deeper confined aquifer. The unconfined aquifer is the principal source of underground water used in the SE NRM Region, given its relatively shallow depth and good quality for productive purposes. This unconfined aquifer supports one of the most productive irrigated agriculture industries in South Australia. It is a major source of water for stock and domestic use, irrigated agriculture and for the forestry industry. The confined aquifer is separated from the overlying unconfined aquifer by a thick, low permeability clay-rich aquitard. The confined aquifer is used as the primary water supply for eight towns in the region and is also an important source of water for irrigation and aquaculture. The waters of both the confined and unconfined aquifers and key associated water dependent ecosystems are protected by water allocation plans which provide a framework for their sustainable management.

The surface waters of the region are largely of an ephemeral nature and support an important array of water dependent ecosystems across the South East. Four ephemeral creeks cross the SA VIC border. Post European settlement change in landuse has significantly altered the landscape of the South East resulting

in the loss of many areas of wetland habitat, with less than 6% of the original wetland extent now remaining. One of the key factors in this change over time has been the construction of a regional surface water drainage system, designed to move surface water from the landscape to enhance the productivity for agricultural purposes. The objective of managing the major land degradation issue of dryland salinity in the Upper South East has seen the implementation of the Upper South East Dryland Salinity and Flood Management Program. Emphasis is being placed on ensuring the existing and new drainage infrastructure is used for the dual purpose of managing salinity to protect productivity while seeking to, where possible, deliver water of appropriate qualities to supply water needs of wetlands when it is available. Reliable rainfall and the dual aquifer system ensures that communities can exist and agricultural activities in particular can flourish through access to quality water resources.

Key skills and business services have evolved over time, in the areas of efficient water use technology and development, providing a further economic and employment benefit to the region and beyond, as those acquired skills can be used in other developing areas.

Thirteen major landscape features have been identified for the region. These landscapes support a diverse range of natural resources related industries including dryland and irrigated agriculture and forestry. The health of these landscapes is vital to the continued prosperity of industries and the regional economy.

This unique natural resource base gives the Limestone Coast region competitive advantage and will be one of the key drivers of community and economic growth.

Diverse agricultural production occurs in the region on a number of soil types, some of which are quite sub-region specific, such as the famous wine producing terra rossa soils. When combined with the water resources described above, it is logical that this plan forecasts increased agricultural, food and wine outputs.

Tourism is a vibrant industry with the food and wine experience being a key component. Natural resources however, are a long term contributor to the visitor experience through access to the Naracoorte Caves, other cave systems which support underwater diving experiences, the Blue Lake in Mount Gambier and many widely acclaimed wetlands. The diversity of the region's natural resources has been recognised in the SATC Tourism Destination Action Plan (2012) as a platform to grow tourism that currently experiences the highest visitation in South Australia outside the Adelaide metropolitan area.

The State and Commonwealth have made significant investment in regional infrastructure and modification of flow paths and further investigations to assist in the supply of surface waters to regional wetland systems, including the Coorong. The increasing emphasis on ensuring surface waters are redirected to meet the needs of surface water dependent ecosystems has continued to evolve.

PROACTIVE ACTION TO REDUCE CARBON EMISSIONS

The Limestone Coast region has reliable rainfall and particularly in the lower part of the region, high rainfall compared to other regions of South Australia. Water management and use through a range of irrigation technology is at an advanced level of skill and expertise. There are opportunities to further build these capabilities and to target green industries and the greening of existing industries.

It is imperative for the RDA to work in partnership with the SENRM on issues related to the Commonwealth Government's Clean Energy Future initiatives. This includes the need for region wide planning for the carbon market to achieve dual benefits including biodiversity outcomes and carbon sequestration, while meeting the requirements of the relevant water policy.

Ongoing research and development in relation to the influences of climate change and climatic variability is critical. Particular focus is needed for the irrigation and broader rural sectors to continually improve and innovate. In addition it is evident that changes in climatic variability may have potentially significant impacts on existing township and road infrastructure, in particular for the coastal and near coastal environment. This issue requires further investment in planning and infrastructure modification both to protect existing environmental, cultural and heritage values and to safeguard current and future infrastructure.

The development of a spatial growth plan for the region will enable the examination of any constraints on population growth across the entire region, in particular water security for the area serviced by the Keith Pipeline (River Murray water), specifically in terms of economic sustainability of domestic and stock water supplies.

A number of renewable energy projects are either in place, planned and committed or under consideration. These are situated on the coast and lower south east. They include:

- Geothermal projects with a range of companies including Geothermal Resources Ltd (the Crower project), and Panax Geothermal Pty Ltd (the company Hot Dry Rocks is providing consultancy services to Panax Geothermal).
- Wind power projects are already providing power and income in the region, with additional projects being built and planned.
- Wave energy is being investigated for areas off the southern coast of the region.
- Biomass projects using forest residues and seaweed are either in place or at an advanced or conceptual planning stage.

The Climate Institute commissioned McLennan Magasanik Associates (MMA) to assess the potential contribution of renewable energy to regional employment. MMA concluded that South Australia is expected to see renewable energy output grow by over 200% by 2020 and is one of the states to most benefit from renewable energy projects. The report estimated clean energy investment from committed and planned projects in South Australia to be \$87 million for biomass, \$2,122 million for geothermal and \$6,076 million for wind.



This growth would lead to 788 permanent jobs and 3798 peak construction jobs in South Australia. The Limestone Coast is seen as a clean energy 'hot spot' and the report anticipates 497 permanent jobs (both existing and new for operation and maintenance), 2,858 peak new construction jobs and new local expenditure of \$1,202 million (goods and services, purchase of biomass materials, payments of rent to farmers for wind turbines) in the region.

In addition there will be indirect employment opportunities in the manufacturing of equipment and the provision of services and materials, some of which will be within the region.

The renewable energy sector needs to have coordinated across agency support. To value add to this sector, the development of a maintenance centre for sustainable, renewable energy, together with a hub for innovation and research and development for this sector could be positioned in the region.

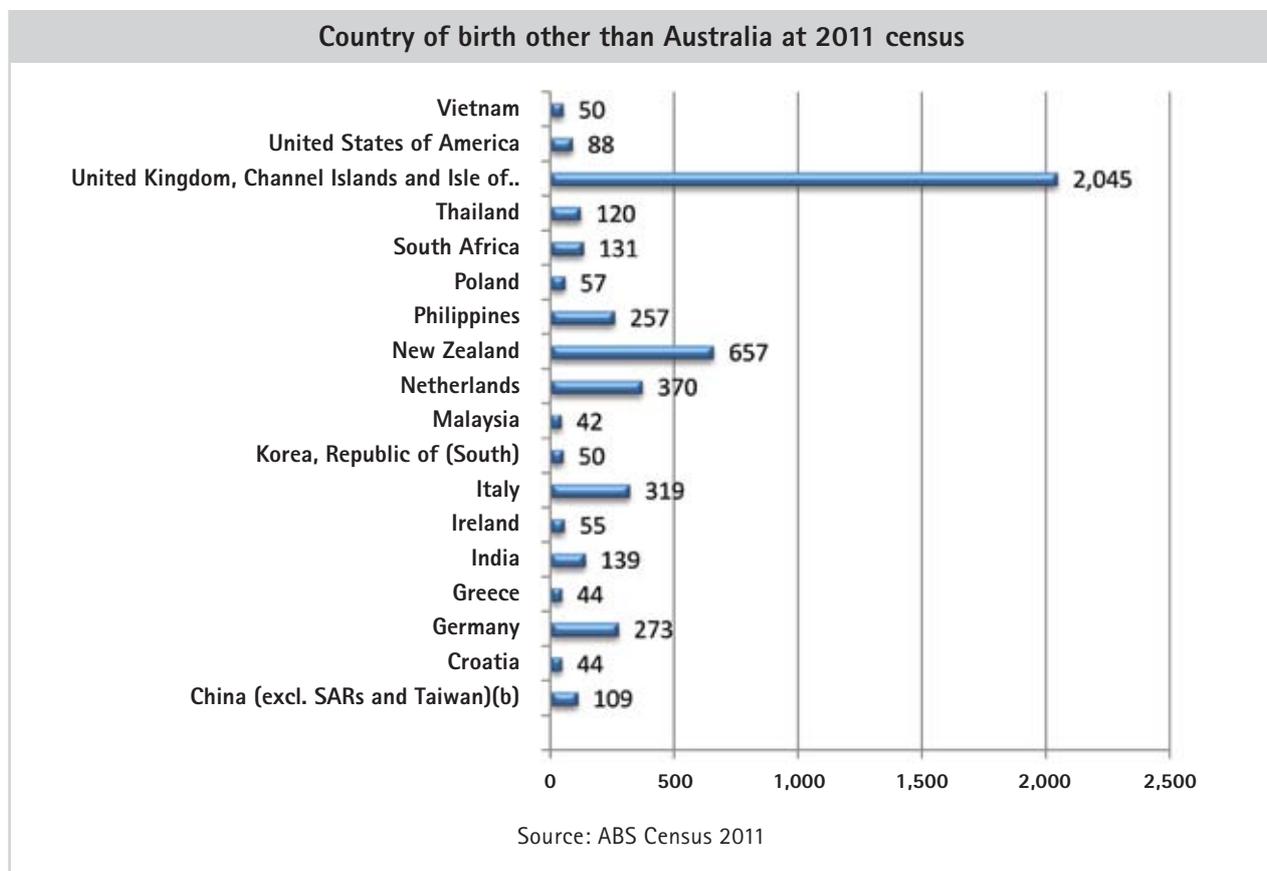
SOCIAL

URBAN GROWTH PRESSURES

- Mount Gambier growth leading to boundary changes between local government areas and re defining of zones
- Increase in rural living zones as people opt for a lifestyle with acreage
- Availability of Industrially zoned land
- Water treatment issues
- Access to high speed and reliable communication

CULTURAL DIVERSITY

Australian born people make up 86.7% of the population of the region. Recent migration, principally from New Zealand, United Kingdom, Philippines and India, has added to the contribution made by post war emigration from the United Kingdom, Italy and The Netherlands. Refugee arrivals since 2006 have been primarily from Burma and the Democratic Republic of the Congo. Some parts of the region have seen growing numbers of migrants from the Middle East, particularly, Afghanistan. The Aboriginal & Torres Strait Islander population grew from 776 people in 2006 to 1,094 people in 2011 and has a young profile with 48.26% under the age of 20 years.



Humanitarian and skilled migrants and their families require services and support to ensure positive settlement experiences. The Department of Immigration and Citizenship has identified Mount Gambier as a location for continuation of its refugee settlement program. Whilst the resident Migration Resource Centre provides early, ongoing settlement support for this particular group, skilled migrants do not generally attract the same level of assistance.

Service providers, particularly in the health, education, employment and local government sectors have continued to work collaboratively to address settlement issues despite ongoing challenges.



HEALTH AND AGING

Health and education services are the cornerstones for ensuring quality of life and in many parts of the region existing services are good and plans to improve them will enhance access, although in other parts of the region improvements will still need to be made. A major regional health service is centered around the Mount Gambier Public Hospital and the co-located Private Hospital. The Hospital is a 24/7 Accident and Emergency acute service facility with a range of specialist, surgical and allied health services, supported by a comprehensive community health service. Smaller sub-regional Hospitals provide local and back up services in Millicent, Penola, Naracoorte, Bordertown and Kingston, together with a community Hospital in Keith. There are communities within the region and within towns that face obstacles in accessing such services and the use of innovative technologies and public transport solutions will assist and complement direct access to those services. Retention of Doctors is an issue facing many of the smaller health services. Adequate funding for all health services across the region is paramount and in recent times the plight of the community Hospital at Keith, with their inability to obtain secure Government funding into the future, has been raised as a key issue for the Upper South East region.

QUALITY OF LIFE

The Socio-Economic Indexes for Areas (SEIFA) is a product developed especially for those interested in the assessment of the welfare of Australian communities. The ABS has developed four indexes to allow ranking of regions/areas, providing a method of determining the level of social and economic wellbeing in each region.

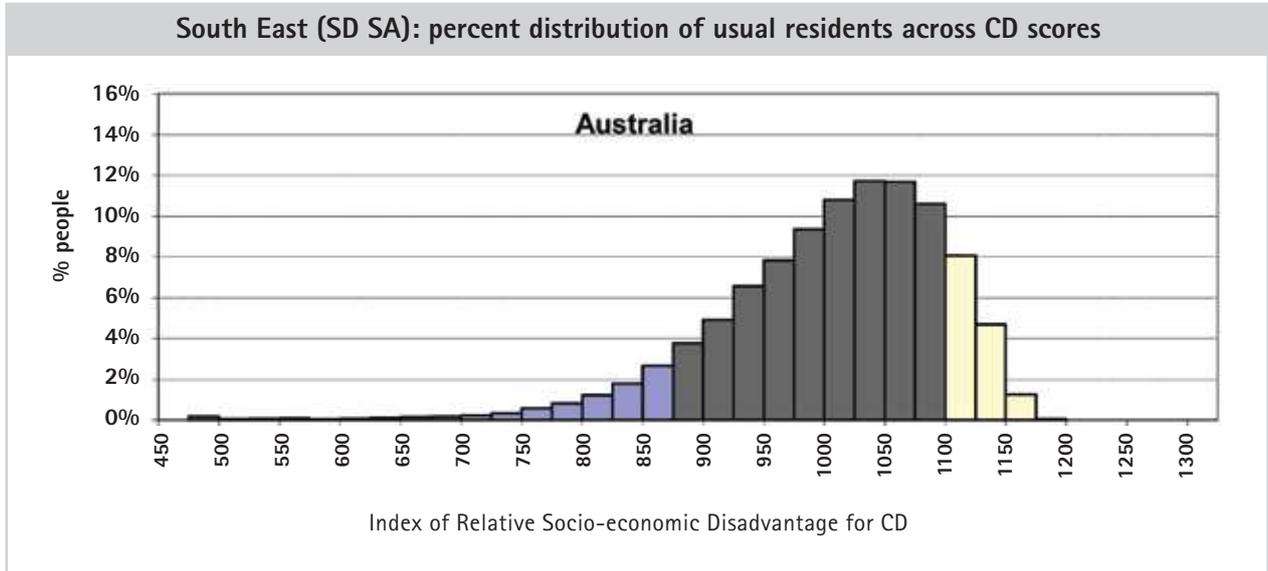
Each of the four indexes summarises different aspects of the socio-economic conditions of people living in a Census Collection District (CD) area; each is based upon a different set of social and economic information from the 2006 Census. The indexes provide more general measures of socio-economic status than is given by measuring, for example, income or unemployment alone.

The four 2006 SEIFA indexes are:

- Index of Relative Socio-economic Disadvantage: is derived from Census variables related to disadvantage, such as low income, low educational attainment, unemployment, and dwellings without motor vehicles.
- Index of Relative Socio-economic Advantage and Disadvantage: a continuum of advantage (high values) to disadvantage (low values) which is derived from Census variables related to both advantage and disadvantage, like household with low income and people with a tertiary education.
- Index of Economic Resources: focuses on Census variables like the income, housing expenditure and assets of households.
- Index of Education and Occupation: includes Census variables relating to the educational and occupational characteristics of communities, like the proportion of people with a higher qualification or those employed in a skilled occupation.

The concept of relative socio-economic disadvantage is neither simple, nor well defined. SEIFA uses a broad definition of relative socio-economic disadvantage in terms of people's access to material and social resources, and their ability to participate in society. While SEIFA represents an average of all people living in an area, SEIFA does not represent the individual situation of each person. Larger areas are more likely to have greater diversity of people and households.

	CDs with this range of scores are in the lowest decile for Australia (approx.)
	CDs with this range of scores are in the 2nd to 9th decile for Australia (approx.)
	CDs with this range of scores are in the highest decile for Australia (approx.)

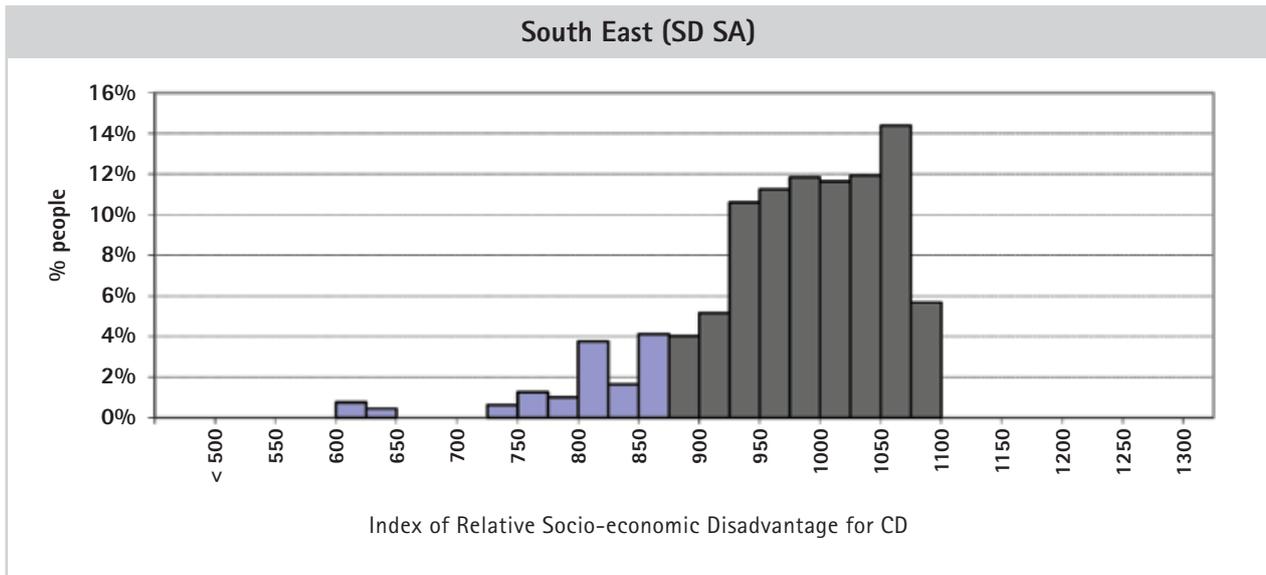


The Australian Early Development Index (AEDI) looks at development in 5 domains. The five domains are:-

- Physical health and wellbeing
- Social competence
- Emotional maturity
- Language and cognitive skills (school-based)
- Communication skills and general knowledge

The physical, social, emotional, cognitive, behavioural and language development of a child is integrally connected to that child's life experiences and environment. How a child learns and develops across each domain influences wellbeing and competence for life. Children with vulnerability in more than one domain are more likely to be at risk of disengaging from school at an early age.

Within the Limestone Coast 18.4% of children are vulnerable on one or more domains, with 10.2% of children vulnerable on two or more domains; however, percentages do vary considerably throughout the region. Full details of Australian Early Development Index results by community are outlined in the AEDI Partnership Community Profiles – March 2011 (www.aedi.org.au). Children who score above the 25th percentile (in the top 75%) when compared to AEDI population are classified on track. Children who score in the lowest 10% when compared to the AEDI population are classified as developmentally vulnerable.



Summary of AEDI Results by Community:-

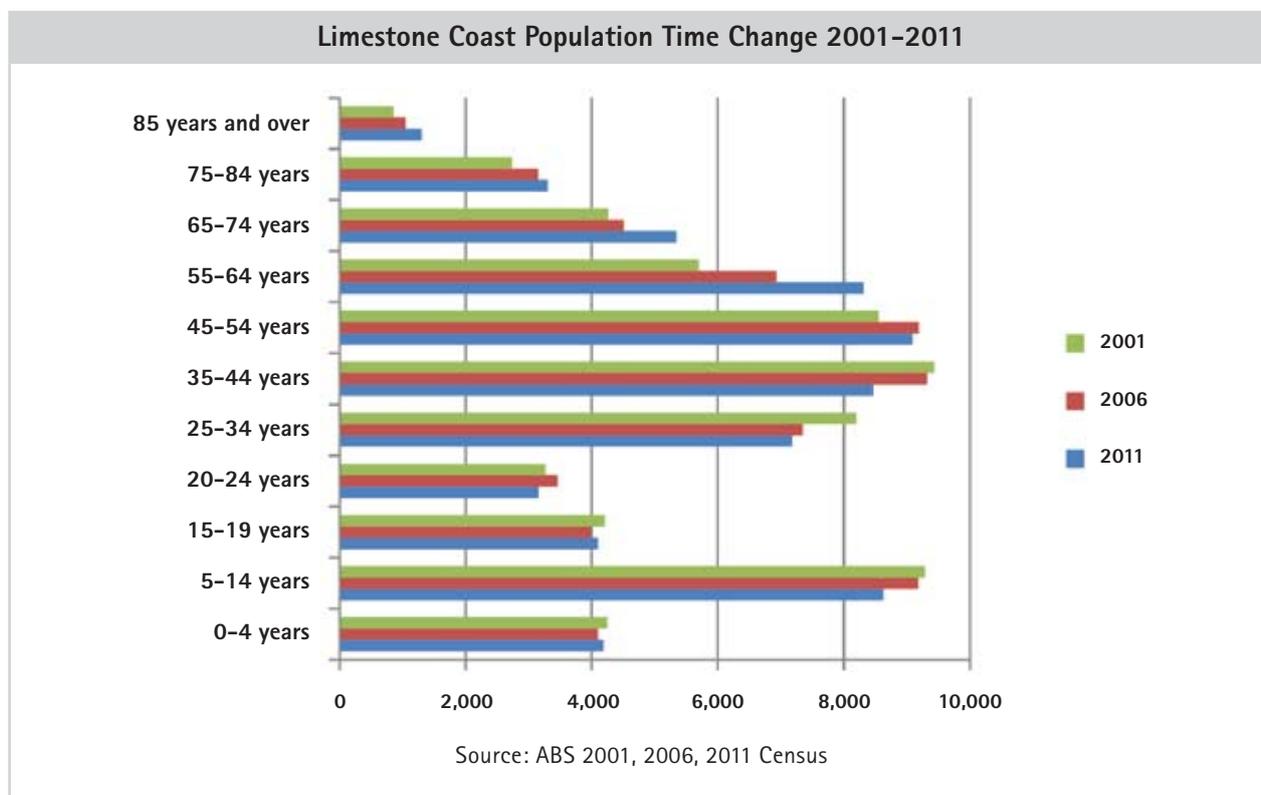
- Mount Gambier Community: AEDI completed for 341 children. Overall there are 15.5 per cent of children developmentally vulnerable on one or more domains of the AEDI and 7.3 per cent are developmentally vulnerable on two or more domains.
- Grant Community: AEDI completed for 71 children. Overall there are 10 per cent of children developmentally vulnerable on one or more domains of the AEDI and 4.3 per cent are developmentally vulnerable on two or more domains.
- Wattle Range Community:- AEDI completed for 145 children. Overall there are 16.1 per cent of children developmentally vulnerable on one or more domains of the AEDI and 10.1 per cent are developmentally vulnerable on two or more domains.
- Naracoorte and Lucindale Community:- AEDI completed for 93 children. Overall there are 20 per cent of children developmentally vulnerable on one or more domains of the AEDI and 8.9 per cent are developmentally vulnerable on two or more domains.
- Robe/Kingston Community:- AEDI completed for 30 children. Overall there are 31 per cent of children developmentally vulnerable on one or more domains of the AEDI and 13.8 per cent are developmentally vulnerable on two or more domains.
- Tatiara Community:- AEDI completed for 87 children. Overall there are 36.3 per cent of children developmentally vulnerable on one or more domains of the AEDI and 25 per cent are developmentally vulnerable on two or more domains.

The Limestone Coast Community Services Round Table has an Action Plan which targets the areas of Homelessness Collaboration, Complex Case Management, Supportive Housing Allocation, Community Engagement & Access, Violence Against Women Collaborations, Streetlink Working Party, Communications Strategy Group, Suicide Prevention Group, Specialist Assistance School Group, Research & Evidence Group and Transport Issues. Each target area has a working group which is guided by a Communications Strategy and Round Table Charter. RDA has representation on the Limestone Coast Community Services Round Table and will actively support the Action Plan it has in place.

In addition RDA will consult with and advocate for increased health and aged care services in the region.

POPULATION

The population of the Limestone Coast has grown at a rate of 1.38% since the 2006 census. Population growth is not even across the region with decreases in five of the seven local government areas that make up the Limestone Coast region.

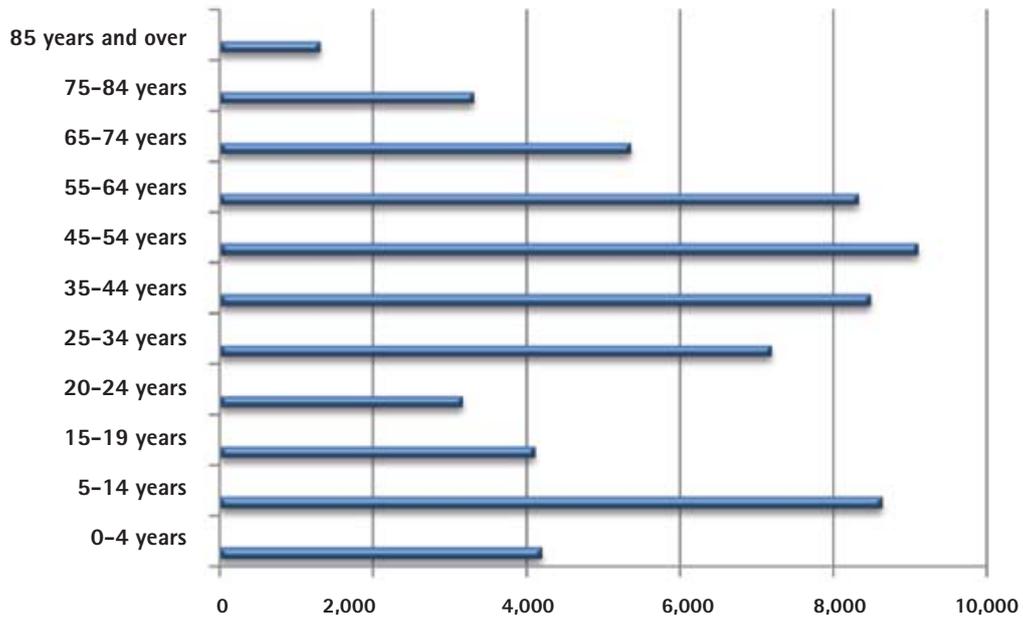


Population growth/decline by Local Government area 2006-2011				
Local Government Area	2006 Census	2011 Census	Growth/decline	% change
Mount Gambier	23,494	25,247	1,753	7.46%
Wattle Range	11,888	11,624	-264	-2.27%
Naracoorte Lucindale	8,080	8,116	36	0.44%
Grant	7,868	7,855	-13	-0.16%
Tatiara	6,864	6,556	-308	-4.69%
Kingston	2,323	2,279	-44	-1.93 %
Robe	1,700	1,398	-302	-21.6%

Source: ABS Basic Community Profiles 2006, 2011 - Based on place of usual residence

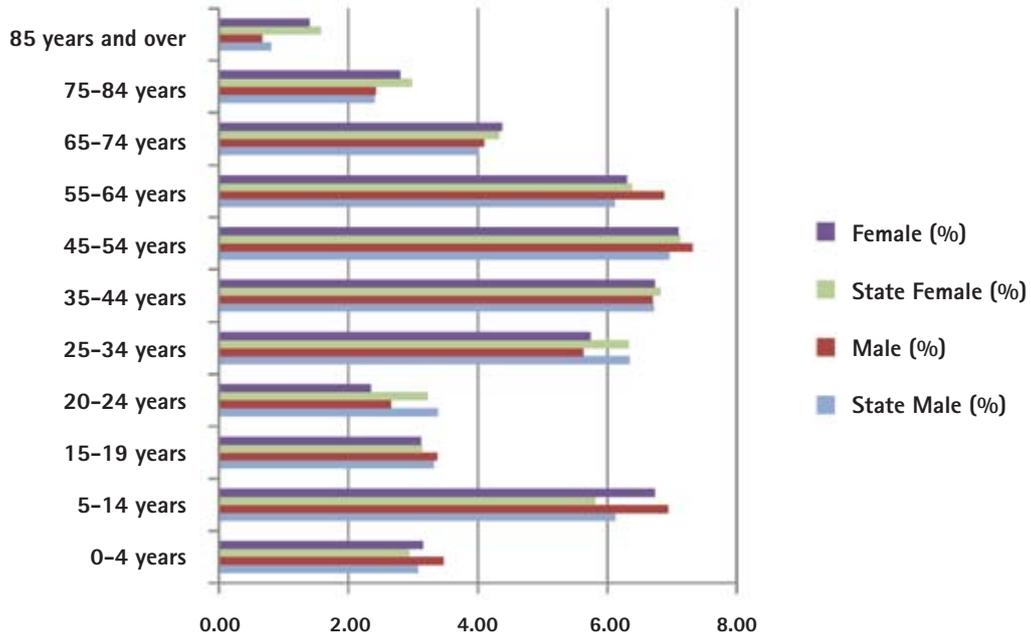
² Population statistics in several local government areas are influenced by local factors: In the District Council of Grant there has been a boundary change; in the District Council of Robe, there are many holiday homes and high tourist numbers in summer; in the Tatiara District, increases in the size of farms and farm machinery and changes in employment in meat processing facilities have had an impact on population statistics

Population by age as at 2011 census



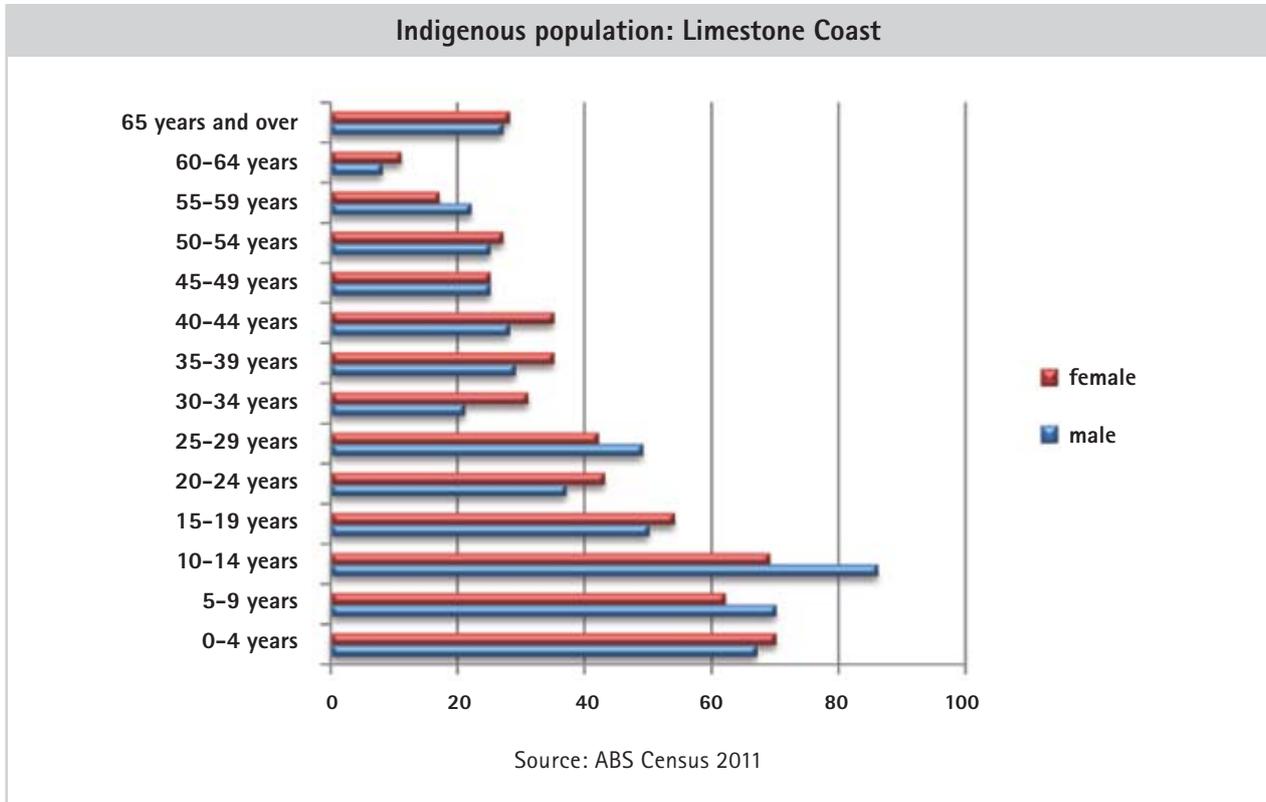
Source: ABS census date 2011

Population percentages by Age and Sex compared to South Australia



Source: ABS Basic Community Profile 2011 - Based on place of usual residence

Approximately 1.73% of the population of the Limestone Coast (1,094 persons) identified as being of Aboriginal or Torres Strait Islander origin at the 2011 Census. This figure is below the State average of 1.90%. Of the 1.73% identified 52.65% lived in the Mount Gambier Council area. The Indigenous population has a younger age profile than the Non-Indigenous population, with 48.26% being younger than 20 years, compared to 26.81%.



3. ACCESS TO INTERNATIONAL, NATIONAL & REGIONAL MARKETS



CURRENT AND FUTURE TRADE PATTERNS

The launching of the South Australia-China Engagement Strategy recognises the long and fruitful sister-state relationship between Shandong Province and South Australia. This is a relationship that has just celebrated its 27th year. Shandong Province has the third largest economy in China, a population of more than 96 million people, and a gross state product of over \$600 billion.

The Shandong-South Australia relationship has progressed with the signing of a Memorandum of Understanding (MoU) to enhance cooperation and development in minerals and resources, agriculture and green food, culture, education and advanced manufacturing.

The strategic partnerships Primary Industries and Regions SA (PIRSA) is building in Fujian Province will link South Australian businesses to food processing, wholesale and retail distribution networks, and facilitate market entry.

A MoU was signed with the Fujian Government in August 2012 to enhance investment in agricultural technology, promote the export of premium produce and collaborate in food safety.

All of these initiatives present opportunities for the Limestone Coast region and highlight the need for RDA Limestone Coast to consult with both DMITRE and PIRSA in the development of the China and India engagement strategy to ensure that existing and export ready companies are fully aware of the SA Government trade initiatives in regard to the above strategies. The recent PIRSA funding announcement in relation to 'clusters' could be directed to industry associations that export (or have potential to export) premium products from the region. This would only succeed with the establishment of a state based consolidator.

A breakdown of the value of imports and exports by industry sector for the RDA Limestone Coast region in 2011/12 is provided in Table 7-3. These data were derived from an input-output (I-O) model for the region, developed specifically for this project. Some of the key points to note from these data follow.

- Expenditure by households accounted for almost 19 per cent of the total value of goods and services imported into the region in 2011/12 from intrastate (i.e. other regions within SA), interstate and overseas.
- Among the intermediate sectors, the top importers in the region in 2011/12 were the manufacturing (14 per cent) and agriculture, forestry and fishing (13 per cent) sectors.
- Expenditure by tourists (\$290m) contributed approximately 10 per cent of the total value of exports from the region in 2011/12. The balance (i.e. 'other exports'), almost \$2.6b, represents the value of goods and services purchased by consumers (i.e. households, businesses, governments, etc.) in other regions within SA, interstate and internationally.
- Total regional expenditure by tourists (\$290m) comprised 6 per cent of the SA total expenditure by tourists in 2011/12 (\$5.1b).
- The top contributors to the value of 'other exports' from the region in 2011/12 were the manufacturing (39 per cent) and agriculture, forestry and fishing (36 per cent) sectors.
- The trade balance (i.e. exports less imports) in the Limestone Coast region in 2011/12 was approximately \$21m.

Table 0-1 Value of imports and exports by industry, LC RDA region, 2011/12

SECTOR	Tourism		Other Exports		Total Exports		Imports	
	(\$m)	(%)	(\$m)	(%)	(\$m)	(%)	(\$m)	(%)
Agriculture, forestry and fishing	0	0.0%	939	36.4%	939	32.7%	358	12.5%
Mining	0	0.0%	2	0.1%	2	0.1%	1	0.0%
Manufacturing	20	6.9%	994	38.5%	1,014	35.3%	400	14.0%
Electricity, gas and water	0	0.0%	29	1.1%	29	1.0%	25	0.9%
Building and construction	0	0.0%	85	3.3%	85	3.0%	216	7.6%
Wholesale trade	8	2.8%	75	2.9%	84	2.9%	103	3.6%
Retail trade	55	18.9%	28	1.1%	83	2.9%	66	2.3%
Accommodation, cafes & restaurants	71	24.6%	25	1.0%	97	3.4%	55	1.9%
Transport and storage	7	2.3%	91	3.5%	98	3.4%	93	3.3%
Communication and publishing services	0	0.0%	22	0.9%	22	0.8%	20	0.7%
Finance and insurance	0	0.0%	60	2.3%	60	2.1%	33	1.2%
Ownership of dwellings b	13	4.6%	0	0.0%	13	0.5%	23	0.8%
Property and business services	3	1.0%	62	2.4%	65	2.3%	100	3.5%
Public administration and defence	0	0.0%	9	0.3%	9	0.3%	35	1.2%
Education and training	0	0.0%	34	1.3%	34	1.2%	26	0.9%
Health and community services	0	0.0%	48	1.9%	48	1.7%	43	1.5%
Cultural and recreational services	8	2.6%	4	0.1%	11	0.4%	7	0.3%
Personal and other services	1	0.4%	6	0.2%	7	0.2%	45	1.6%
Total intermediate	186	64.1%	2,514	97.5%	2,700	94.1%	1,649	57.9%
PRIMARY INPUTS								
Household Income	0	0.0%	0	0.0%	0	0.0%	-	-
GOS and GMI c	0	0.0%	0	0.0%	0	0.0%	-	-
Taxes Less Subsidies	25	8.5%	-3	-0.1%	22	0.8%	-	-
Imports	80	27.4%	68	2.7%	148	5.2%	-	-
Primary Inputs Total	104	35.9%	66	2.5%	170	5.9%	-	-
FINAL DEMAND								
Household Expenditure	-	-	-	-	-	-	529	18.6%
Government Expenditure	-	-	-	-	-	-	293	10.3%
Gross Fixed Capital	-	-	-	-	-	-	231	8.1%
Change in Inventories	-	-	-	-	-	-	0	0.0%
Tourism	-	-	-	-	-	-	80	2.8%
Other Exports	-	-	-	-	-	-	68	2.4%
Final Demand Total	-	-	-	-	-	-	1,201	42.1%
GRAND TOTAL	290	100.0%	2,580	100.0%	2,870	100.0%	2,849	100%

Source ABS (2011a, 2012a,g,h,i,j, and 2013a,b,c), EconSearch (2013), TRA 2013 and EconSearch analysis

REGIONAL INFRASTRUCTURE CHALLENGES AND PRIORITIES

The region is serviced by a network of roads including the Dukes, Princes and Riddoch Highway. Arterial roads within the region are open to B-Double transport vehicles.

Rail services in use in the region are confined to the line which runs from Adelaide through Bordertown to Melbourne. Unused railways within the region exist from Heywood in Victoria, through Mount Gambier to Millicent and from Mount Gambier through Penola and Naracoorte to Wolseley near Bordertown. Reopening of these lines would entail gauge conversion to broad gauge to match adjoining rail services.

Should a resumption of freight rail services occur through re-opening of the regional network, it would be desirable to plan for a new rail alignment north of Mount Gambier, connecting the existing north-south corridor with the line running east towards the Victorian border and onto Heywood.

The region uses the Port of Portland and Port Adelaide for movement of commodities into and out of the region. The Port of Portland is an important naturally deep water bulk commodity port, which has undergone recent significant capital investment to cater for large volumes of woodchips and log from the region's expanding plantation forests, as well as grain, aluminum ingots, mineral sands, livestock, liquid pitch and fertilizer products.

Road and rail links between the region, the Port of Portland and eastern seaboard markets via Melbourne and western markets via Adelaide, cater for the movement of freight into and out of the region. The Green Triangle Freight Action Plan, a Plan which embraces the Limestone Coast and Western Districts of Victoria, sets out a range of key investments needed to accommodate the current freight task and the significant increase in annual volumes which is expected in part due to new plantation timber resources, particularly blue gums. The Plan concludes that connections with Portland and the National Rail Network are imperative, as are much needed upgrades to the Princes and Riddoch Highways and the construction of important heavy vehicle detours around the town of Penola and to the expanding area north of the City of Mount Gambier, to ensure safe and efficient movement of freight. Formation of the Freight Action Plan embracing the wider Green Triangle region, illustrates the extent to which this highly productive region is connected to global markets in its strategic thinking and political leadership.

The region has multiple air services on a daily basis into and out of Mount Gambier from Melbourne and Adelaide. Flight time to these centres is approximately one hour. Mount Gambier Airport is the main regional facility, which has recently completed an upgrade to allow for increased capacity and services, expanding on opportunities for tourism and air freight traffic. There is however, still further upgrade work required. Smaller regional airports are important support for air charter, Royal Flying Doctor, emergency services, industrial purposes and fire fighting through the use of aerial "water bombers".

The South East Local Government Association (SELGA) in recognising the need to review the operations of regional airports initiated a study (2012) to investigate existing and future opportunities and the associated requirements of Council owned and operated airports. The study included the region's major airport at Mount Gambier, which currently has in excess of 100,000 passenger movements annually.

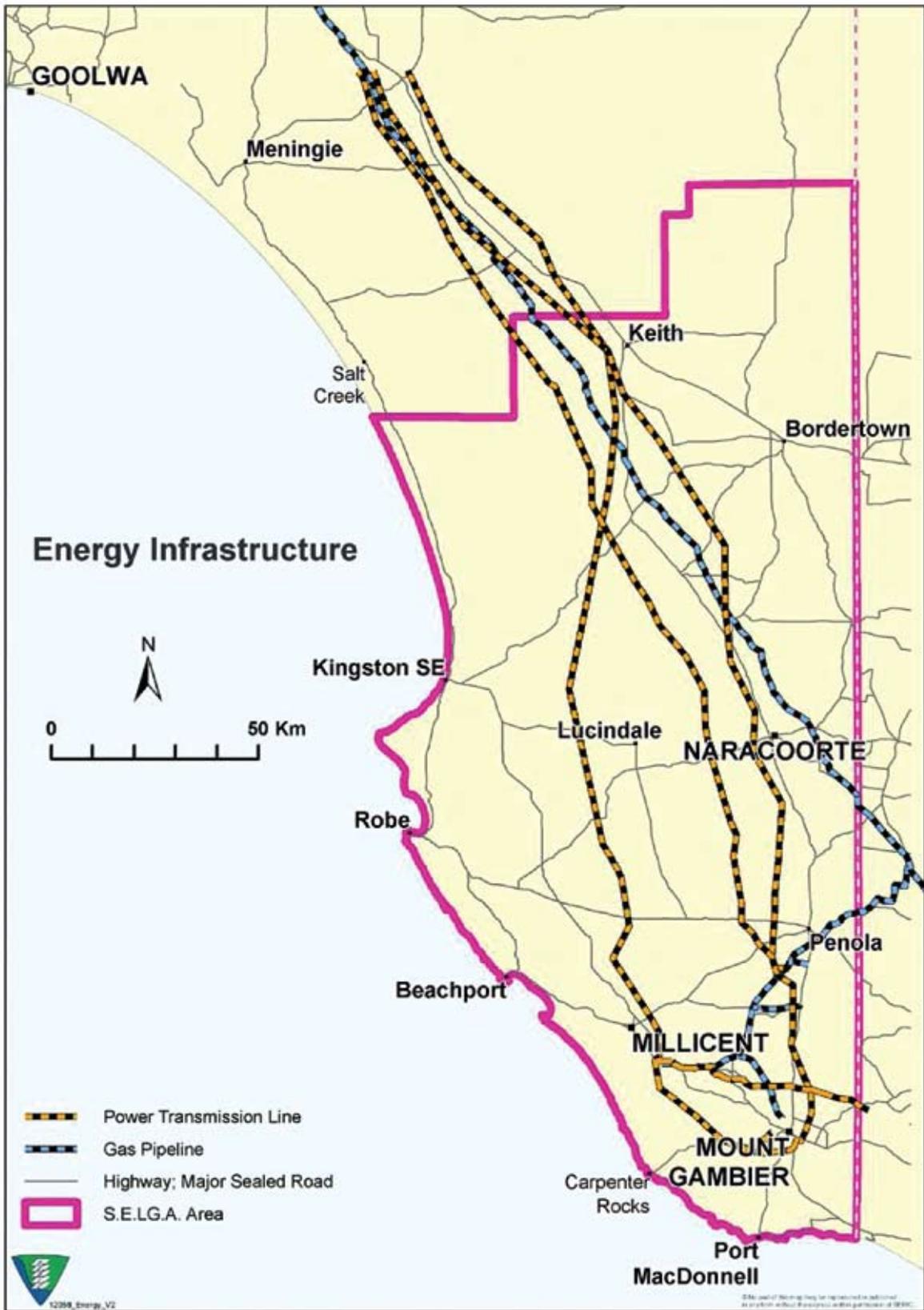
Connections to energy sources are generally good with electricity supplied from a regional loop which connects with the National Grid through access points at Taillem Bend and via the interconnector which runs from Adelaide through the region and into Victoria via Heywood.

A natural gas pipeline (SEAGAS) traverses the region from the Otway Basin in Victoria through Naracoorte and onto Adelaide. That pipeline has off-take points, with the main one connecting to the Katnook gas fields just south west of Penola. Natural gas is supplied to key industries in the lower part of the region and is reticulated to domestic customers in Mount Gambier. Further reticulation over time to other regional centres, such as Millicent, Penola and Naracoorte, would assist with industry development and population growth.

One of the major industry growth opportunities for the Limestone Coast is in renewable energy in the form of wind, geothermal, bio-mass and wave energy and the region's connectivity with the National grid is a key advantage for proposed new investments.

Because of the region's well managed, sustainable water resource, an engineered drainage scheme to increase access to highly productive agricultural land, has been in place for several decades. Important maintenance and investment in the Upper and Lower South East Drainage schemes is an essential part of our infrastructure planning, so that agricultural productivity continues to be enhanced through management of the drainage network. An important goal will be to ensure that over time, more value can be extracted from the drained waters, for productive or environmental benefits.

The region has access to its own GIS planning capability through the South East Resource Information Centre, which is one of only a few similar organisations in Australia. This facility is very much under-valued in terms of the capability it has and which can translate into significant value for money as a planning and scenario setting tool. Ongoing investment in SERIC is required so that it continues to be an integral component of regional planning and industry development in the Limestone Coast and Western Victoria and be able to expand its services as a regional data and information hub. The RDA will work across levels of Government and the private sector to drive and secure planned investments in strategic infrastructure projects.

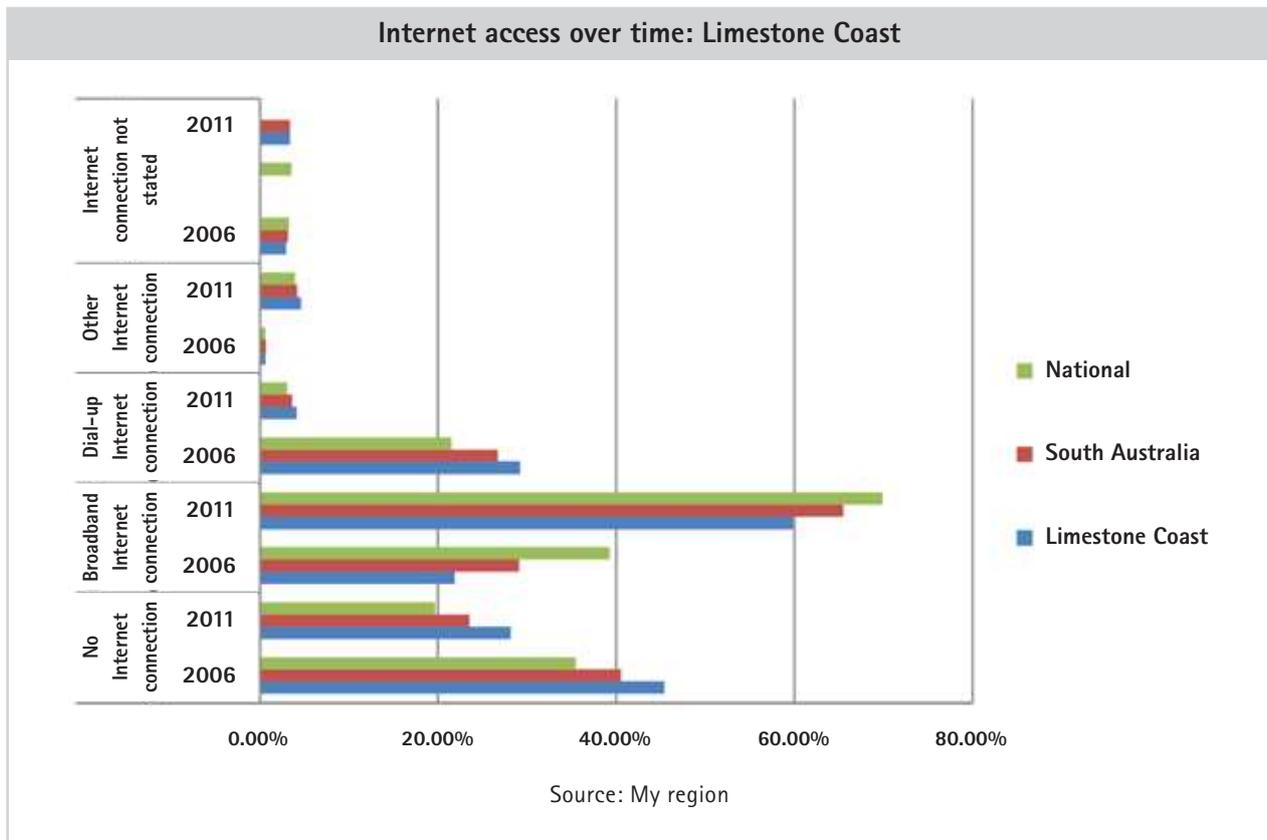


REGIONAL COMMUNICATIONS CHALLENGES AND PRIORITIES

To further facilitate the growth plans outlined in this document, communications systems, especially voice and data capability through access to high speed broadband and improved mobile coverage, is critical. This highly productive region cannot afford to be disadvantaged by having un-predictable and inefficient access to modern telecommunications systems.

The Socio-Economic Profile developed for RDA Limestone Coast in July 2013 by Econsearch showed that the number of dwellings with internet access for the two latest census years (2006 and 2011) increased by 35 per cent. For SA as a whole the total number of dwellings with access to some form of internet increased by 34 per cent. The number of dwellings with no internet access in the Limestone Coast region fell by 35 per cent between 2006 and 2011, this was just below the State as a whole (39 per cent).

In 2011, 28 per cent of dwellings in the Limestone Coast region had no access to any form of internet, compared to 23 per cent for SA as a whole. In the Limestone Coast region the proportion of dwellings with no internet access was highest in Kingston where it was 32 per cent and lowest in Grant where it was 23 per cent, the same as the state average.



The Limestone Coast region is fortunate enough to have all centres within the region included on the current 3 year rollout plan for the National Broadband network. While areas scheduled for the provision of fixed wireless access will have this provided by the end of 2015 according to current planning, the commencement of installation of fibre for some key centres such as Mount Gambier and Naracoorte however, is not scheduled until the third year of the 3 year plan. The RDA will continue to lobby to have key centres such as these brought forward on the rollout schedule. Changes to Federal Government policy may impact on this timing.

The rollout of the NBN will enable exporters to communicate with overseas customers via high speed video conferencing and speed up export documentation approval via biosecurity/DAFF.

While the region is relatively well served by mobile phone and data coverage, areas of poor or non-existent coverage remain. Where these areas are impacting or likely to impact on the productivity of the region, the RDA will work with communications providers to highlight these concerns and seek to have problem areas addressed. Changes to Federal Government policy in relation to coverage in regional areas may impact on how quickly these problems areas can be addressed.

HUMAN INFRASTRUCTURE, NETWORKS AND CLUSTERS

A number of organisations provide services which support workforce development in the region. Federal, State and Local government, education and training organisations, employment services and private companies make up a mix of service provision which can be confusing to both the employer and potential employee. Links between these organisations are dependent on key individuals rather than defined structures and protocols.



Workforce Development Initiatives			
Organisation	Data/Information	Funding/Programs	Expertise/Training
Federal Government Departments	✓	✓	✓
State Government Departments	✓	✓	✓
Local Government	✓		
Regional Development Australia Limestone Coast	✓	✓	✓
School transition programs	✓	✓	✓
Apprenticeships and Traineeships Organisations		✓	
Education and Training Providers			✓
Career Development Centre	✓		✓
Employment Services		✓	✓
Employer reference groups/associations	✓		

RDA Limestone Coast provides a range of workforce development services and works closely with other agencies to ensure a coordinated approach.

Business Service Delivery: Limestone Coast

Organisation	Training Info and services	Skills audit & Training Needs analysis	Succession/Exit planning	Career Coaching and management	Recruitment and induction Staff Retention	Retrenchment services
RDA - Manager S/C/WFD						
RDA - BDO/SBA	☞			☞		
RDA - CDC	☞ ✓	☞ ✓	☞ ✓		☞	
RDA - ATA	☞			✓	☞	✓
RDA - POETP	☞					
RDA - PB	☞	☞		☞		
RDA - TIDO	☞			☞		
Industry groups (e.g. Chambers of Commerce)	☞ ✓		☞ ✓			
RTO's						
Apprenticeship Centres	✓	✓				
Business SA	✓				✓	
Local Government						
AusIndustry						
AusTrade						
Enterprise Connect						
Employment Services		✓X	✓X			
Business to business					✓	
Accountants		✓\$	✓\$	✓\$	✓\$	✓\$
Financial Advisers			✓\$			
Banks			✓\$			
RESJ						
DFEEST						
DMITRE	✓ ☞	☞		☞		☞
PIRSA						
Industry Capability Network						
ISB - S.A.						
ISC - National						
						✓\$

Legend: ✓ Provide information or services ☞ Refer/signpost X Have Eligibility criteria \$ Cost to access



4. COMPARATIVE ADVANTAGE & BUSINESS COMPETITIVENESS

REGIONAL ECONOMIC STRENGTHS

- The region has great potential and positioning itself as a powerhouse for the state would lead to accelerated opportunities.
- There are opportunities to further build on capabilities in water management and use and to target green industries and the greening of existing industries.
- The renewable energy sector needs to have coordinated across agency support. To value add to this sector, the development of a maintenance centre for sustainable, renewable energy, together with a hub for innovation and research and development for this sector could be positioned in the region.
- There is a need to better engage the high spending sector of the tourist market.
- Given the availability of water both through the underground aquifer and rainfall, food and beverage production is seen as an area for expansion. Value adding processes including bottling, contract packaging and distribution and consolidators for marketing produce were seen as important to lift these sectors from "hobby" to a profitable and sustainable business level.
- There are opportunities for the Education sector to grow the number of students and the diversity of courses offered in the region. To enable this to happen, excellent linkages between all educational organisations – schools, TAFE/RTO's/ Universities, will need to be in place.
- To build on current learning and skill development initiatives in Health so that they are sustainable and act as an attraction and retention strategy for the health and medical workforce, a research centre for health could be considered.

REGIONAL ADVANTAGES AND OPPORTUNITIES

- A reliable water supply that is good for business and good for recreation.

- Services that ensure residents experience a standard of living that is on a par with larger cities, along with a wonderful sense of community and laid back approach to life.
- World class national parks and conservation areas, caves, volcanoes, sinkholes and wetlands and wonderful beaches.
- Friendly neighbours, a sense of community and a safe environment.
- Affordable, quality housing and a reasonable cost of living.
- A Mediterranean climate that makes for pleasant living all year round.
- Daily flights and bus services to and from Melbourne and Adelaide.
- Local fine wine regions, delicacies such as barramundi, salmon, abalone and trout and Southern Rock Lobster, succulent meats, and fresh fruit and vegetables.
- A diverse industry base offering many career options.

REGIONAL ARTS, CREATIVE AND SPORTING INDUSTRIES

The region has a diverse range of facilities, events and initiatives which add to the lifestyle advantages of the region. They include:

- A linked network of libraries which are seen as contemporary and community based
- Art Galleries
- Sporting facilities of a high standard which support strong levels of engagement across team and individual sports such as tennis, netball, football, soccer, hockey, baseball, cycling and swimming.
- The natural environment means that fishing, camping, bushwalking, canoeing, surfing and caving are popular
- Events such as Generations in Jazz, Coonawarra after Dark and the Cape Jaffa Seafood and Wine Festival attract large audiences

APPENDIX 2 – STAKEHOLDER CONSULTATION AND PARTNERSHIPS

CONSULTATIVE MECHANISMS

During its first year of operation the RDA Board carried out a thorough consultation process involving Local Government bodies and the wider community, as part of an information gathering process towards production of our inaugural 2010-2015 Regional Roadmap. The Roadmap is representative of both strategic regional priorities and a range of key infrastructure projects aimed at achieving regional development objectives in accordance with the RDA Charter.

In July 2011 the Board undertook an internal review of the current status of the Roadmap document and an Update Report was provided to the Commonwealth Government. This was followed by a more formal consultation program undertaken right across the Limestone Coast Region in late 2011 and early 2012, which included structured sessions with Local Government, business, industry and other stakeholders and community members. A total of 9 sessions were scheduled and individual meetings were also held with interested persons unable to attend those sessions. Some 88 people have contributed to the Roadmap review process, with participants asked to provide input on the ongoing relevance of the current Regional Roadmap; issues or opportunities that had emerged since the development of the inaugural document; and any other general feedback in relation to the work of the RDA Board.

Since these consultations, RDA Limestone Coast has played a contributing role in the Limestone Coast Economic Diversification Forum held in September 2012. This forum convened by the State Government brought together visionary leaders with an understanding of the region's challenges and ability to think innovatively around emerging and future economic development opportunities that could build on the region's comparative advantages.

The Board of RDA Limestone Coast has a broad cross section of representation including local government, industry (including forestry) and social services including aboriginal health.

Staff work closely with business and tourism associations to identify issues and opportunities and the RDA is represented on the Limestone Coast Community Services Roundtable and the Wattle Range Social Issues Committee which meet regularly.



REVIEW

This Limestone Coast Regional Roadmap will be a “living” document, which will constantly be under review to reflect progress and new issues and opportunities as they arise.

A key role of the RDA is to play a leading role in the consultation and engagement process with all stakeholders, to ensure that current and emerging issues relating to our economy and the social and environmental needs of the community are considered and included in the revision process of the Regional Roadmap. The use of social media will play an ever increasing role in this consultation process.

The structured process of review:-

- RDA Members and Staff will monitor and note regular feedback from all stakeholders.
- RDA will participate in the planning and consultation processes of stakeholders.
- An Annual Forum will occur where stakeholders, including local government, industry and community organisations will input to the review process.
- The RDA Board will conduct an internal annual workshop following the forum process.
- All RDA program delivery and service contracts to be reviewed for currency on an annual basis.
- The preparation of an Annual Action/Business Plan.
- Make any amendments to the Regional Roadmap as needed.

The RDA will continue to communicate with all stakeholders on progress with the Roadmap including any revisions of the document.

