



REGIONAL ROADMAP 2017-2020



An Australian Government Initiative



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1. MESSAGE FROM THE RDA LIMESTONE COAST COMMITTEE

We are pleased to present the Limestone Coast Regional Roadmap 2017-2020.

The Limestone Coast 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. The 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 detailed in this report have been identified following an extensive consultation process that encompassed business, industry, local government, regional stakeholders and the broader 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 growth.

The Roadmap is an important document for the region that can be used by stakeholders to inform and support decision making, contribute 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.

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



Alan Richardson
A/Chair

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2. EXECUTIVE SUMMARY

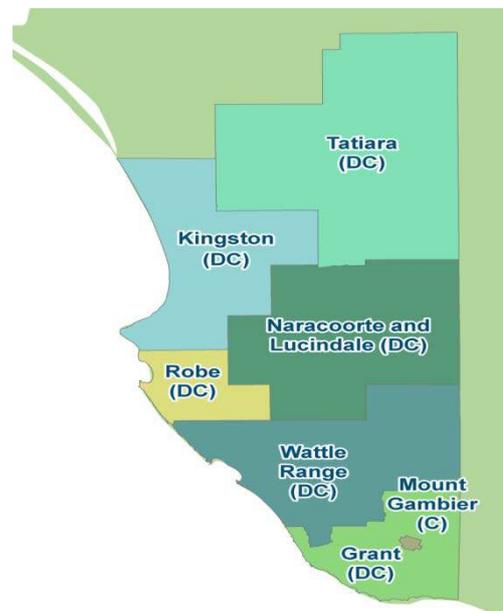
The executive summary provides an overview of the Limestone Coast Region outlining its Strengths, Challenges, Needs and Opportunities as well as outlining its relationship to neighboring regions in Victoria which share a common border. It identifies the Regional Plan Priorities identified by Regional 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 64,569 people (ABS Estimated Resident Population 2016). The region houses many of South Australia's key agricultural 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 sustainably managed fishing resources
- A wealth of natural resource attractions
- Attractive region in which to live and work



Challenges

- An aging and relatively static population
- Changes to industry structure and workforce skills needs
- Competing in a global economy
- Social infrastructure to meet the region's needs
- Maintaining or improving the region's hard infrastructure requirements

Needs

- Infrastructure upgrades
- Greater diversity of freight and transport options
- Broader education and training options
- High speed and reliable communications
- Applicable research and development capabilities
- Increased specialist health and aged care services
- Access to a skilled and growing workforce
- Development of regional leaders and entrepreneurs

Opportunities

- High value added manufacturing and agribusiness
- Sustainable use of natural resources to develop existing and new industries
- High-end services and product development
- Develop emerging industries, such as alternative energy and cellulose fibre products
- High end tourism services

Greater Green Triangle Region

Together with the neighbouring Western Districts of Victoria, this wider region is often referred to as the Greater 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 has been its ability over the years to successfully unite under the Greater Green Triangle banner.



REGIONAL PLAN PRIORITIES

In compiling this Regional Roadmap, a series of consultations were undertaken throughout the broader community over several months to gather information on the key priorities, issues and opportunities for the region. The main body of the document describes in detail those issues with the following considerations:-

- Human Capital
- Sustainable Communities and Population Growth
- Access To International, National and Regional Markets
- Comparative Advantage and Business Competitiveness

The resulting 5 key areas for action will be:-.

Human Capital Development (Population Growth, Skills and Leadership Development);

Although sustainable economic development will be the key driver for population growth across our region, it will be reliant on human capital development within the Limestone Coast.

Priorities are:-

- Promoting skills and workforce development for all
- Promoting and encouraging access to higher education
- Supporting leadership and entrepreneurial development
- Promotion of the region as a great place to work and live

Social Capital;

Access to services and facilities for the delivery of health and aged care needs across the Limestone Coast region will underpin and support key strategies for population growth and economic development.

Priorities are:-

- The retention and/or increase to accessible medical services across the region.
- Effective and appropriate mental health services to meet the needs of the region.
- Effective and accessible drug rehabilitation and support services for the region.
- Lobbying for the retention of existing services at smaller hospitals and increased specialist services across the region.

Infrastructure;

To achieve population growth and overall economic development within the Limestone Coast region, significant investment is required to maintain and/or construct key supporting infrastructure. Stakeholders will need to work collaboratively with all levels of Government and the private sector to drive and secure planned investments in strategic infrastructure.

Priorities are:-

- Championing the implementation of the up-dated Green Triangle Freight Action plan.
- Upgraded regional airport to handle larger aircraft, offering more diversity in freight and passenger services.
- Advocating for the continued 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.

- Promoting increased power availability and reliability.
- Promoting mobile phone coverage and high speed broadband availability.
- Supporting improved marine infrastructure.
- Support the development of high-end tourism accommodation facilities.

Investment Attraction;

The Limestone Coast region may not reach its full economic potential without accessing resources from outside of the region. A concentrated effort will therefore be required to engage with all levels of Government, and the private sector, in promoting growth opportunities in the region. It will be necessary to demonstrate to investors that the Limestone Coast region has a stable and buoyant economy, with significant investment potential across a broad range of industry sectors. It is widely acknowledged that our key natural assets, a diverse economy and the management structure for innovative and sustainable use of groundwater resources provides real opportunities to increase contribution to State and national GDP. Stakeholders will need to undertake a representative and facilitation role to encourage and support investment across the whole economic development spectrum, whilst ensuring all investment and development encompasses sustainable and innovative resource management.

Priorities are:-

- Working with all levels of Government to promote the Limestone Coast as a strong stable investment opportunity.
- Focus on attracting investments into value adding to agricultural, marine and horticulture production for premium food and wine, and advanced manufacturing in the forest and forest products industry.
- Increasing exports and expansion of markets for regional products.
- Development of an investment prospectus for the region.

Environment;

There is no doubt that the economic wealth of the region is based around the abundant natural resources, and more specifically, access to a reliable quality water supply. However, it's also acknowledged that it's imperative that these natural resources need to be effectively managed, and that any economic development or growth be undertaken in a sustainable manner.

Priorities are:-

- Focus on renewable energy opportunities
- Support bioenergy projects and initiatives
- Influencing the enhanced management of waste streams and water treatment facilities
- Support improved water reuse and storm water management activities
- Encourage and support investment in planning and infrastructure modifications to protect existing environmental assets.

3. VISION FOR THE REGION

“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 community making the most of its natural resources to sustainably produce premium food, wine and valued added products which are exported from the region for premium prices.

The region will be seen as an attractive place to live, providing a wonderful regional lifestyle, have a comprehensive range of services and facilities, the opportunity to earn an attractive income and all enhanced by a reasonable cost of living and affordable housing for all.

The Limestone Coast will be the home to innovative and progressive industries, supported by a strong and diverse educational presence.

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 markets.

The region will move its production capabilities further up the value chain and increasing the value that is added within the region.

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

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

All 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 in ensuring policy settings support regional development, and act as a stimulus for the growth of the region through effective planning for regional growth.

4. ROLE OF THE RDA

RDA Limestone Coast 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 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.
- The provision of an employment support service (Career Development Services) that assists those in the Limestone Coast that are re-considering future employment options.
- Our aim is to help individuals make informed choices about the next step they will take, whether it be for further education, training or work.

RDA Limestone Coast is a partnership between three levels of Government:-

- the Australian Government through the Department of Industry, Innovation and Science;
- the State Government through a number of projects and programs that RDA Limestone Coast delivers on its behalf.
- Local Government through the Limestone Coast Local Government Association (LCLGA) 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 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)*.

In addition to the strategic role played by the Board and its staff, RDA Limestone Coast plays a key service delivery role through the ongoing provision of business and community assistance programs and support across the Region, including:-

- Business & Investment Attraction
- Business Advisory Services
- Skills, Career & Workforce Development

RDA Limestone Coast also plays a hosting role for officers from Department of Industry, Innovation and Science and the South Australian Department of State Development, all co-located within the Forestry SA 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, and as a result, RDA Limestone Coast has an information provision and advocacy role in relation to current and future policies and programs. For example, the Australian Government's "Regions 2030 – Unlocking Opportunity" approach to the 5 key spheres of importance for regional Australia are;

- Jobs and economic development
- Infrastructure
- Health
- Education
- Communications

Furthermore, these 5 key spheres of importance were also identified throughout the consultation process undertaken by RDA Limestone Coast, and subsequently incorporated into the Regional Roadmap 2017 -2020 findings and priorities.

State Government

The South Australia Strategic Plan outlines a number of strategic priorities for the State that will form the foundation of their future directions and decisions:-

- Creating a vibrant City
- Safe communities, healthy neighborhoods
- An affordable place to live for everyone
- Every chance for every child
- Growing advanced manufacturing
- Realising the benefits of the mining industry
- Premium food and wine from our clean environment.

Primary Industries and Regions SA (PIRSA) is a key economic development agency in the Government of South Australia, with responsibility for the prosperity of the state's primary industries and regions. Its strategic priorities include;

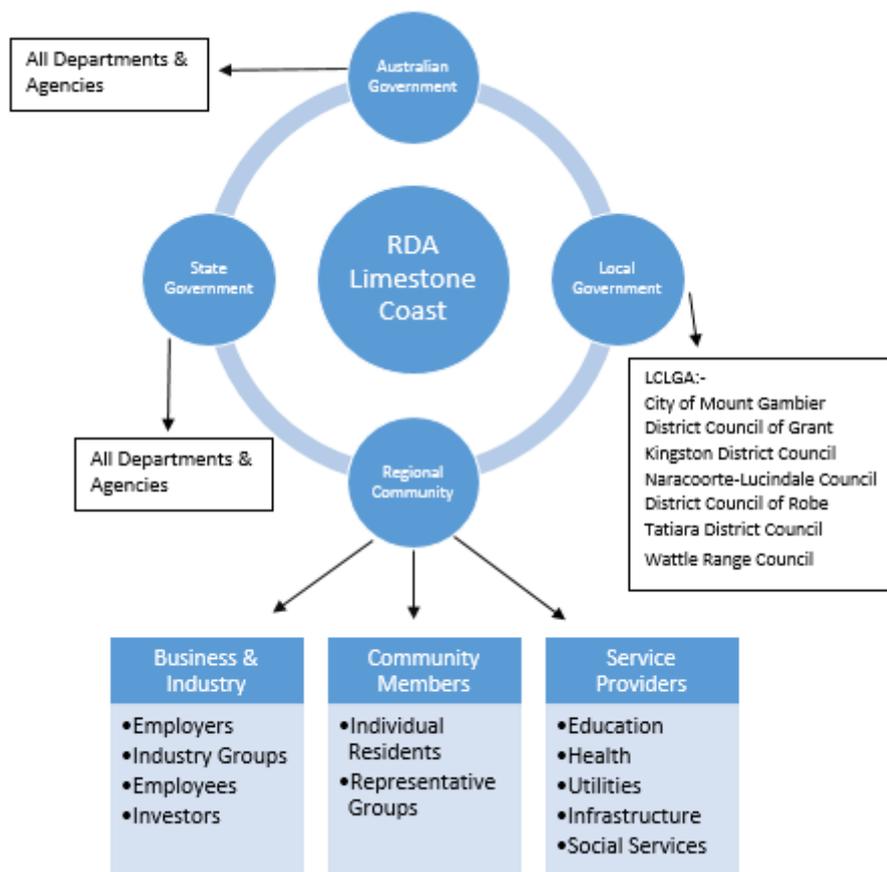
- To effectively influence State and national policy agendas to ensure decisions impacting water, land use, natural resource management and climate change adaptation support sustainable primary production and other regional industries;
- Drive greater connection between government policy making to develop a whole-of-government policy framework that enables industry to innovate, adapt and compete in a rapidly changing international marketplace;
- 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;
- Harness the value-adding opportunities from primary production such as food and wine tourism and food and beverage processing;
- 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
- 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.

Local Planning

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

- LCLGA Strategic Plan (2014 - 2019)
- Limestone Coast 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
- Country Health SA through the local Health Advisory Councils
- Green Triangle Freight Action Plan
- Priorities to Grow Our Visitor Economy by 2020 (LCLGA)
- Tourism Regional Strategy Consultation Feedback - November 2016 (LCLGA)

STAKEHOLDERS



5. ANALYSIS OF THE REGION

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

- **HUMAN CAPITAL**
- **SUSTAINABLE (ECONOMIC, ENVIRONMENTAL & 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:

Access to tertiary education is available through a number of organisations, including TAFE SA Regional, the largest provider of vocational education and training in SA. However, as the trend towards external and online study continues to grow, this in-turn creates challenges for the organisations such as TAFE SA that have historically been based around face-to-face delivery.

Continual changes around the TAFE network creates uncertainty across the region and needs to be resolved to ensure it continues to play a leading role in the tertiary sector.

The structure of some apprenticeship and trade courses are seen as barriers.

Access to a broader range of higher education choices is slowly improving both through local (face-to-face) and external delivery modes, including two Universities that have facilities in Mount Gambier;

University of South Australia, which currently offers;

- Foundation Studies
- Indigenous Participation Pathway
- Business
- Education (both early childhood and primary)
- Nursing & Social Work
- Music

Flinders University: operating their highly successful Rural Clinical School, providing medical education experiences for students enrolled at Flinders University in Bachelor of Medicine and community based allied health programs.

Career development services are seen as valuable tools for supporting the work choices of all job seekers.

Unemployment rates for the last 6 years in the Limestone Coast have been below both South Australian and Australian figures for the same period.

Demand for strong regional leadership from the public and private sector is seen by many as crucial to this region's future prosperity.

Effective mentoring to support and develop the broader community is considered invaluable to the region's growth.

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

The need for improved efficiencies by industry to meet market demands is impacting on the make-up and size of the region's workforce.

Investment in research and innovation facilities is seen as vital for ongoing growth and improvement in the productivity, profitability, competitiveness and skills base of the region's key industry sectors.

Priorities are:

- **Promoting skills and workforce development**
- **Promoting access to higher education**
- **Supporting leadership, mentoring and entrepreneurial development**
- **Innovation and diversification across key industry sectors**

Sustainable (economic, environmental & social) communities and population growth

ECONOMIC

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

Gross Regional Product has been relatively steady at around \$3.5b p.a. since 2010, whilst exports have also remained steady at around \$2.8b p.a. during the same period.

The region has seen strategic investments into key industry sectors over several years, reflecting a level of confidence in the region's economy and capabilities. It should be noted that many of the investments have been supported (financially) through Government assistance programs.

Unemployment rates across the region continue to fluctuate with the highest rate of unemployment in lower part of the Region, around Mount Gambier and surrounds, whilst upper parts of region have areas of almost full employment. The region's unemployment rate has improved in recent years, and is currently 5.4% (South Australia 6.7%, nationally 5.8%). However, youth unemployment remains very high at 14.4%, compared to the overall South Australian rate of 15.1%.

Agriculture, Forestry and Fishing in the Limestone Coast region is the largest employer, directly generating 5,534 local jobs in 2015/16. This represents around 18% of all workers, which has declined from around 20% in 2005, and had an industry output (total sales) for the 2015/16 period of \$1.978b.

Manufacturing employs 13.7% 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 also decreased from 14.6% from the period 2010/11. Industry output for the manufacturing sector in 2015/15 totaled \$1.218b.

Retail Trade employs 12.6% of the working population and covers food, personal and household goods, motor vehicle and services to the timber sector. Demand for employment in the region has increased from 11.8% since the 2010/11 period.

Health Care and Social Assistance is the fourth largest, employing 10.1% 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 from 9.4% in 2010/11, whilst the sector generated approximately \$301M for the 2015/16 period.

Construction is the 6th largest industry in the region employing 6.4% of the workforce. However, demand for employment in this sector has declined from 7% since 2010/11.

The **Education** sector employs 6.8% of workers in the region, which is slightly up from 6.6% as at the 2010/11 period.

The **Accommodation, Cafes and Restaurants** services industry employs 6.8% of our workforce which puts it as the equal 5th largest employer in our region. Demand for employment in this sector increased from 6.5% over the last 5 years.

The **Transport, Postal & Warehouse** industry declined in employment from 4.4% in 2010/11 to 3.8% in 2015/16.

The value of the Tourism and Hospitality sector in the region has fluctuated in recent years, but continues to increase. It's anticipated that revenue from these sectors will increase from \$316M in 2015/16, to over \$457M by 2020. This represents an increase of more than 43%.

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 region attracts more than 600,000 visitors each year, including an average of 48,000 (8%) international visitors. The Limestone Coast is in the top 3 regions most visited in South Australia outside of Adelaide, outstripping both Kangaroo Island and the Barossa regions.

Occupancy rates for accommodation providers in the Limestone Coast is around 43%.

Effective regional branding needs to be embraced by all industries and communities across the region.

Priorities are:

- **Increased value adding to agricultural and horticulture production.**
- **Increased advanced manufacturing in the forest and forest products industry.**
- **Increasing exports and expansion of markets for regional products.**
- **Further develop alternative energy opportunities (i.e. wind, wave, biomass and geothermal).**
- **Development of industry collaboration to stimulate economic development.**
- **Continue to develop tourism opportunities across the entire region, with a focus on the natural resources, food, wine and quality accommodation.**
- **Improve support for Small Business development and sustainability.**

ENVIRONMENTAL

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

The establishment of South Australia's Marine Protected Areas (Marine Parks) in the region complements the existing 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 Limestone Coast are essentially contained within two regionally extensive aquifer systems, an upper, unconfined aquifer and a deeper confined aquifer.

The confined and unconfined aquifers are protected by water allocation plans which continues to provide a framework for their sustainable management.

Energy saving initiatives and bioenergy opportunities are beginning to emerge across a diverse range of industry sectors as a result of a number of Government incentives, including the Australian Energy Productivity Program.

The renewable energy sector needs to have coordinated support across all agencies.

There must be a continued focus on improved water reuse and storm water management activities.

Water management and use through a range of irrigation technology is at an advanced level across the region. Opportunities to further build on these capabilities needs to be embrace by all industry sectors.

Enhanced (future proofing) planning for the region's waste steams cannot be under estimated, and requires a coordinated approach at all levels of Government.

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.

Priorities are:

- **Focus on renewable energy opportunities**
- **Support bioenergy projects and initiatives**
- **Influencing the enhanced management of water resources, waste streams and water treatment facilities**

SOCIAL

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

Australian born people make up the majority of the population of the Limestone Coast region.

Migration has principally been from United Kingdom, Italy, New Zealand, Philippines and India, with recent refugee arrivals (since 2007) having been primarily from Myanmar (formerly Burma) and the Democratic Republic of the Congo.

The regional health service is centered round 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 the community Hospital in Keith.

There are communities within the region and within towns that face obstacles in accessing health services. 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 service facilities in the region.

Increased drug use across the region continues to impact on the community, both socially and financially.

Mental health resources and services are not keeping pace with the demand across the region.

Adequate funding for all health services across the region continues to be a major concern for the community.

Priorities are:

- **Retention and increase of accessible medical services across the region.**
- **Effective and appropriate mental health services to meet the growing demand in the region.**
- **Suitable drug rehabilitation and support services for 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 1.48% since the 2006 census, but not evenly across the region, with decreases in four of the seven local government areas that make up the Limestone Coast region.

Although the region generally supports an increased population, it's unsure of how or where industry growth and employment opportunities will flow from.

The option to decentralise Government (State and Federal) services out into regional Australia, such as the Limestone Coast, is supported by the broader community.

The lifestyle and employment opportunity aspects of the region need to be suitably promoted to attract significant numbers of visitors and new residents.

Tourism in the region could be significantly enhanced by a stronger service culture embedded across all industry sectors.

It is important the region continues with its efforts to update and market appropriate promotional material highlighting the key advantages and opportunities of the region, aimed at attracting new residents and outside investment.

Priorities are:

- **Promotion of the Limestone Coast as a strong alternative to living in a city environment.**
- **Development of (and maintain) a relevant and suitable investment prospectus for the region.**
- **Coordinated approach between local government, industry and the tourism sector when promoting the region as a highly desirable place to live and work.**

Access to international, national and regional markets

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

The Green Triangle Freight Action Plan has not provided the level of results that was anticipated, mainly as a result of a lack of support (funding) by Government.

Funding for road maintenance is considered inadequate and roadside vegetation presents hazardous conditions on many regional roads.

Mount Gambier Airport requires further up-grading to improve both capacity and capability.

The NBN is slowly being rolled out across the region, albeit after numerous and long delays.

Region telecommunications and high speed broadband services is still considered by many in the community as key to the future growth and success of the region.

Electricity cost, supply, capacity and reliability across the region continues to cause concern in many areas.

Maintenance and upgrading of the South East Drainage Network of some 800 bridges and culverts continues to be priority in ensuring safe movement of vehicles and freight.

Investment in marine infrastructure up-grades, to support the commercial fishing sectors and boost tourism and recreational fishing, is considered crucial to securing broader markets for its premium seafood and tourism related activities.

A coordinated, effective and sustained promotion of the region's capabilities and capacity is considered critical to accessing new markets.

Priorities are:

- **Championing the Green Triangle Freight Action plan and road upgrades.**
- **Upgrading the regional airport.**
- **Promoting increased power availability and reliability.**
- **Promoting mobile phone coverage and high speed broadband availability.**
- **Supporting improved marine infrastructure.**
- **Sustained and effective marketing of the region.**

Comparative advantage and business competitiveness

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

Located midway between Adelaide and Melbourne, **the region is seen as an attractive region in which to live, work and raise a family.**

The availability of **abundant natural resources**, which creates a basis for economic and social wealth creation.

Successful manufacturing and value adding enterprises spread throughout the region creating employment opportunities.

Strong and **broadening educational sector** provides options for local, national and international students.

Opportunities for **advanced manufacturing** enterprises based around the region's extensive timber resources.

A strong and diverse **agri sector that supports regional value adding enterprises** in the areas of food and wine production.

A strong and sustainable **world renowned clean and green aquaculture** industry.

Industry based cluster programs creating opportunities for regional businesses to access new and developing markets nationally and internationally.

Potential for further **growth in renewable energy ventures.**

Priorities are:

- **Capitalise on the available natural resources for both work and play.**
- **Increasing Research and Development relevant to the region's industries.**
- **Maximising alternative energy production (wind, wave, biomass and geothermal).**
- **Develop educational based tourism opportunities.**
- **Maintaining the clean green image of the region's produce.**
- **Support developing industry clusters to maximise future opportunities.**

6. REGIONAL PRIORITIES

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

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

Economic Development;

It's acknowledged that the region's key point-of-difference is its abundant natural resources, and more specifically, access to a quality water resource. The need to ensure this critical resource is sustainably managed will continue to be a priority. Without this natural resource, which underpins all the key industries in the Limestone Coast, the push to diversify and expand the region's economy will be doomed to failure. Ultimately, sustainable economic development and diversification will also be the key driver for population growth across the Limestone Coast.

<i>Regional Priority</i>	<i>Location</i>	<i>Key Stakeholders</i>
Increasing value adding to agricultural, 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 State Development PIRSA Local Government Industry AusIndustry
Enhancing the capacity of the Mount Gambier Airport to boost passenger numbers and provide freight options for high value produce.	Mount Gambier/Grant District	RDALC State Development PIRSA Local Government Industry AusIndustry
Increasing exports and expansion of markets for regional products	Region wide	RDALC State Development Austrade PIRSA Local Government Industry
Maximising alternative energy production (wind, wave, biomass and geothermal)	Region wide	RDALC State Development PIRSA Local Government Industry

Developing industry collaboration to maximise economic development within the region	Region wide	RDALC PIRSA Local Government Industry
Increasing Research and Development relevant to the region's industries	Region wide/Mount Gambier	RDALC State Development AusIndustry PIRSA Local Government Industry Tertiary Institutions
Providing support for Small Business development and sustainability	Region wide	RDALC All levels of Govt. Education providers

Infrastructure;

To achieve population growth and overall economic development within the Limestone Coast region, significant investment is required to maintain and/or construct supporting infrastructure. Stakeholders will need to work collaboratively with all levels of Government and the private sector, to drive and secure planned investments in key strategic infrastructure projects.

<i>Regional Priority</i>	<i>Location</i>	<i>Key Stakeholders</i>
Continue to champion the implementation of the up-dated Green Triangle Freight Action plan and road upgrades	Region wide	RDALC DPTI Local Government Industry RDV
Advocating for continued 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	Region wide	RDALC Local Government DEWNR DPTI
Promoting increased power availability & 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 providers NBSCO
Supporting improved marine infrastructure	Coastal locations	RDALC Local Government DPTI

Human Capital Development (Population Growth, Skills and Leadership Development);

Sustainable economic development will be a key driver for population growth across our region, but will be reliant on the human capital development within the region. All stakeholders will need to support and facilitate population growth initiatives, whilst also encouraging and fostering skills and leadership development.

<i>Regional Priority</i>	<i>Location</i>	<i>Key Stakeholders</i>
Promoting skills and workforce development	Region wide	RDALC Local Government Industry DSD
Promoting access to higher education	Region wide/ Mount Gambier	RDALC Local Government DSD Industry Tertiary Institutions
Supporting leadership and entrepreneurial development	Region wide	RDALC Local Government PIRSA DSD Training Providers

Promotion of the Region;

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

<i>Regional Priority</i>	<i>Location</i>	<i>Key Stakeholders</i>
Continue to support and promote the Limestone Coast “brand”	Region wide	RDALC Local Government Industry PIRSA
Support the development of an investment prospectus for the region	Region wide	RDALC Local Government DSD
Continue to support the South Australian Tourism 2020 Plan, and LCLGA Priorities	Region wide	RDALC Local Government SATC

Community Wellbeing;

Access to services and facilities for the delivery of appropriate health and personal care across the Limestone Coast will support key strategies for population growth, and economic development. Stakeholders will need to 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.

<i>Regional Priority</i>	<i>Location</i>	<i>Key Stakeholders</i>
Lobbying for adequate aged care services and accommodation for the entire region	Region wide	RDALC Local Government SA Health Service Providers
Lobbying for the retention of existing services at smaller regional hospitals, and increased specialist services across the entire region	Region wide	RDALC Local Government SA Health HACs
Lobbying for adequate mental health and drug support services to meet the growing demand in the region	Region wide	RDALC Local Government SA Health Service Providers

7. RDALC ACTIVITIES & INITIATIVES

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

1. Economic Development

PRIORITY:-

Supporting and/or instigating greater industry collaboration to maximise economic development within the region

ACTIVITIES

- Identify and prioritise collaboration opportunities for businesses in the food, advanced manufacturing and enabling industries.
- Continue to support and work with industry collaboration projects across the region.

PRIORITY:-

Increasing value adding to agricultural marine and horticulture production of premium food and wine, and, increasing exports and expansion of markets for regional products

ACTIVITIES

- In conjunction with all three levels of Government, PIRSA and other key regional agricultural bodies, support the development of and/or define current industry growth plans for the region that consider primary production and value added processing opportunities.
- Work with LCLGA and industry to further progress the Limestone Coast branding.
- 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 currently 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 Department of State Development and Austrade, undertake market assessments and provide information to assist regional businesses with export opportunities.
- Identify and assist regional businesses that are export ready, or have the capacity to become export ready, to commence exporting goods or services and/or expand current export markets.

PRIORITY:-

Increasing Research and Development activities relevant to the region's industries

ACTIVITIES

- Work collaboratively with government bodies and key industry stakeholders to establish an innovation hub.
- Promote the innovation hub to facilitate broader industry and R&D investment.
- Lobby SA Economic Development Board to influence government decisions regarding regional investment in R&D infrastructure.
- Encourage, and work with, education institutions to pursue regionally based R&D initiatives.

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 details of relevant support material and information for Small Business available through both State and Federal programs.
- Assist businesses to develop sound business plans in line with the requirements of lenders.
- Investigate available sources of finance for small business.

2. Infrastructure

PRIORITY:-

Promoting increased power availability and reliability

ACTIVITIES

- Work with ElectraNet and other relevant parties to review the region's electricity supply network and report on a planned upgrading framework for implementation to address under capacity and reliability issues and to accommodate planned regional growth.
- Investigate ways to reduce energy costs for the Region's users.

PRIORITY:-

Advocating for continued 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 local government and the relevant parties, continue to lobby both State and Federal Governments for adequate funding support for the ongoing maintenance and upgrade of the infrastructure which is vital to the region's prosperity.

PRIORITY:-

Continue to champion the implementation of the up-dated Green Triangle Freight Action plan and road upgrades

ACTIVITIES

- Working together with industry, approach the South Australian Government for a renewed push to support the implementation of the GTFAP findings, and its recommendations.

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 the careers development unit within the RDA Limestone Coast, so as to provide:-
 - An effective career development service.
 - Support for S.A. Department of Sate Development to implement relevant and appropriate skills and employment programs in the Limestone Coast.
 - Case specific responses to workforce skills and labour needs and demands.
 - Strategies to increase workforce participation rates.
 - Actively support businesses to address workforce demand issues.

PRIORITY:-

Supporting leadership and entrepreneurial development

ACTIVITIES

- Continue to provide support to the Limestone Coast Economic Diversification Reference Group project to develop and mobilise regional leaders.
- Work with relevant organisations and stakeholders to explore the development and/or delivery of leadership and governance training programs in the Limestone Coast region.

4. Promotion of the Region

PRIORITY:-

Support the development of an investment prospectus for the region

ACTIVITIES

- Working with key stakeholders to develop a prospectus for the region aimed at potential investors.
- Working closely with local government and industry to showcase the region to potential investors.

PRIORITY:-

Continue to support the South Australian Tourism 2020 Plan, and LCLGA priorities

ACTIVITIES

- In conjunction with LCLGA, regularly engage with the South Australian Tourism Commission to monitor and report on the Commission's marketing of tourism in the Limestone Coast.
- Support LCLGA with in pursuing its 5 Priority Areas, namely;
 - International visitation and expenditure
 - Visiting friends and relatives
 - Events
 - Corporate and business visitation and expenditure
 - Collaborating
- Support local tourism industry participants in identifying, applying and securing government funding support for tourism related activities and developments.

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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 Greater Green Triangle banner.



The Limestone Coast region supports a population of 64,569 people (ABS Estimated Resident Population 2016) with 41% (or 26,317 people) living in the Mount Gambier LGA. When combined with the Grant and Wattle Range LGAs, the Lower South East area accounts for 71% 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 agricultural 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 and south to the Victorian border, the coastline provides the basis for many of the region's industries (including tourism) and is valued for its scenic qualities, quality fresh seafood and for numerous 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.

For further details, refer to the '2017-2020 Regional Roadmap Profile Data' supplementary document

Appendix 2

STAKEHOLDER CONSULTATION AND PARTNERSHIPS

CONSULTATIVE MECHANISMS

The RDA Limestone Coast 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 the 2017-2020 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 Limestone Coast Charter.

Mid 2016 the RDA Limestone Coast Board commenced an internal review of the current status of the Roadmap document. This was followed by a more formal and extensive consultation program undertaken right across the Limestone Coast Region in late 2016 and early 2017, which included structured sessions with Local Government, businesses, industry and other stakeholders and community members. A total of 23 sessions were scheduled, in addition to individual meetings that were also held with interested persons unable to attend the sessions. More than 220 people have contributed to the Roadmap review process, with participants asked to provide input on the ongoing relevance of the existing Regional Roadmap; issues or opportunities that had emerged since the development of the existing document; and any other general feedback in relation to the work of the RDA Limestone Coast Board.

In addition to the above consultation process, the RDA Limestone Coast continues to participate in numerous regional forums and information sessions, including the Limestone Coast Economic Diversification Steering Committee. This forum, originally convened by the State Government, has brought together visionary leaders who have an understanding of the region's challenges and an ability to think innovatively around emerging and future economic development opportunities.

The Board of RDA Limestone Coast has a broad cross section of representation including local government, industry (including forestry), community and social services. Staff regularly work with all three levels of Government, the various industry sectors throughout the region, as well as business and tourism associations to identify issues and opportunities.

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.

RDA Limestone Coast 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 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:-

- RDALC Members and Staff will monitor and note regular feedback from all stakeholders.
- RDALC will participate in the planning and consultation processes of stakeholders.
- Regular structured forums will occur where stakeholders, including local government, industry and community organisations will input to the review process.
- The RDALC Board will also conduct internal workshops following the forum(s) process.
- All RDALC 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.