

SUNSHINE COAST Regional Roadmap

2013 - 2016



An Australian Government Initiative



Acknowledgements

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FINAL DRAFT
26 August 2013

From the Chair of Regional Development Australia Sunshine Coast

The final draft of the *2013-16 Regional Roadmap* has drawn upon ideas and strategies from key organisations, regional leaders and all levels of government to articulate regional priorities for the Sunshine Coast.

These regional priorities are designed to address the significant challenges and opportunities that face the Sunshine Coast, which is a maturing and successful region, rich in natural, capital and human assets.

The region's outstanding natural assets and enviable lifestyle have been the basis behind significant population growth. Its capital assets are growing and the development of the Sunshine Coast University Hospital offers a significant opportunity, among other projects.

However, the region's greatest asset is the committed, passionate and highly skilled people who are willing to make a difference. It is through their efforts that we will prosper as a region.

Collaboration and partnership will be critical to the region's continuing success and a decisive feature of the *Roadmap*.

It is through collaboration and partnership with community and business groups and all three levels of government that all stakeholders can participate in discussion, debate the issues and play a role in determining the priorities that will drive the future prosperity of the region.

The development of the *Roadmap* is a journey, a work-in-progress that reflects contributions from organisations and key community leaders from across the region to articulate an overall strategic direction for the Sunshine Coast. Regional Development Australia Sunshine Coast committee and staff are proud to take part in this journey.

Celebrating our advantages and working to overcome our challenges, together we have an enormous opportunity to prosper as a vibrant, modern community with a sustainable and enviable lifestyle.



Prof Max Standage
Chair
Regional Development Australia Sunshine Coast

Executive summary

The *2013-16 Regional Roadmap* builds upon the success of the past with the inclusion of ideas and contributions from a wide range of stakeholders over an extensive consultation process, demonstrating an ongoing commitment to a collaborative approach.

The *Roadmap* includes a solid evidenced-based approach to the region's fundamental economic, social and environmental metrics, followed by analysis and community consultation, resulting in the identification of five regional priorities which are underpinned by three important principles.

This document outlines a range of actions and projects that RDA Sunshine Coast is undertaking in partnership with key stakeholders, which are aligned to these regional priorities.

The *Roadmap* is intended as a resource for the wider community; ongoing contributions are welcomed through the principles of being responsive and flexible to community input.

A clear message from the *Roadmap* process highlights that while the region has enviable strengths such as lifestyle advantages, a strong tourism base and emerging health and education sectors, it also has its challenges. These include a growing population, inadequate and/or aging infrastructure, high youth unemployment, and the need to build a cohesive and united approach to articulating regional aspirations.

State of the region 2013-16

RDA Sunshine Coast embarked on an investigation and thorough understanding of the region's key measures before developing the regional priorities. This data has been compiled as an attachment to this *Roadmap*, and is available as a resource document on RDA Sunshine Coast's website.

Population growth is the key driver of many of the region's challenges, including a fundamental shift in its workforce, and an ageing affect that will lead to a significant labour shortage. In response to these workforce projections, recommendations highlight the need to continue making the region attractive by reducing infrastructure bottlenecks, as well as review and assist the capacity of key industries to adapt to new technologies.

Vision and regional priorities

RDA Sunshine Coast activities, development of regional priorities and delivery of on-the-ground projects are largely directed by its vision and mission statements.

Vision: A Sunshine Coast that is innovative, dynamic, connected and sustainable.

Mission: To connect people from within our region and across other regions to strengthen business growth, generate innovative sustainable solutions and enhance community development.

RDA Sunshine Coast has identified the following significant regional priorities to deliver on this vision.

Economic development

The region needs to nurture high potential economic development sectors towards global competitiveness and optimise major projects such as the University Hospital and other transformational initiatives to ensure they have far reaching benefits across the Sunshine Coast community. RDA Sunshine Coast's role is to facilitate a community vision and optimise community commitment towards achievable and timely outcomes, as well as influence investment and policy decisions that best represent communities of interest and the entire region.

Examples of economic development projects being undertaken by RDA Sunshine Coast include active participation on the Sunshine Coast Health Sector Panel and helping to enhance coordination, connectivity and cooperation between enterprises along the food value chain in the *Food Futures* project.

Investment and infrastructure

Securing funding and the timely implementation of large strategic infrastructure is a significant priority for the region. The challenge is to balance competing priorities, funding requests and galvanize community support behind strategic high priority projects that will have long-term benefits. RDA Sunshine Coast's role is to be the trusted advisor to government by providing relevant, accurate and timely input into policy debates. It can also help broker relationships for multi-party investment outcomes.

RDA Sunshine Coast investment and infrastructure projects include the advocacy and support for critical infrastructure projects such as upgrades to the Bruce Highway and the Sunshine Coast Airport in partnership with a range of organisations.

Digital innovation

The Sunshine Coast can become a leader in new technology deployment and innovation through collectively imagining and creating new opportunities using tomorrow's technology, today. The challenge is to articulate and implement the Sunshine Coast's digital vision in a timely manner to gain regional advantage, as many other regions across Australia are competing to become leaders in this area. RDA Sunshine Coast's role is to accelerate the dialogue and capture the community's vision to underpin confidence towards investment and implementation of that vision.

The *Digital Futures* project is an example of an RDA Sunshine Coast initiative that aims to drive access to, and adoption of, key technologies that support the transition to a digital economy. Furthermore, RDA Sunshine Coast is leading a collaborative project across South East Queensland aimed at researching and demonstrating the viability of flexible telework centres to increase productivity and reduce travel-related congestion and stress.

Human capital

The Sunshine Coast's population is projected to continue to grow, including the proportion of older residents, according to the workforce study recently completed by Deloitte Access Economics (2013). The study found that the size and proportion of industries in the region will also change in line with global trends and regional competitiveness, resulting in changing demand for labour and supply challenges. In response to these changing dynamics the region needs to increase investment in talent and skills to position the Sunshine Coast to better meet the needs of future labour demand.

RDA Sunshine Coast's role is to partner with community leaders to help lead the agenda and build regional capacity through the identification and fostering of key levers of change, as well as track and measure key labour force measures to benchmark progress. Recommendations from the recent Deloitte Access Economics Report will be considered by the various project partners including RDA Sunshine Coast and will lead to a collaborative strategy for the region.

Sustainable communities

The Sunshine Coast community must design its own future by nurturing the people and places of value. By acknowledging and articulating things of value, the community can protect those most vulnerable and enhance opportunities to realise the vision for a Sunshine Coast that is innovative, dynamic, connected and sustainable. The challenge is in effectively balancing competing priorities, resources and timeframes. RDA Sunshine Coast's role is to encourage stakeholders leading regional development projects to engage with communities of interest at each stage to ensure the creation of a vibrant and sustainable future.

Region-wide projects that meet the needs of both present and future generations are to be supported and fast-tracked where possible. An example is the recently announced *Valdora solar farm*, being built to meet at least 50 per cent of Sunshine Coast Council's energy needs for the next 30 years and create a hub for the region's cleantech industries.

Underpinning these five regional priorities is the need for regional leadership, flexibility and responsiveness, as well as good governance and effective administration.

Next steps

Every organisation and community leader has a role to play in helping the region identify economic development goals, develop deep and long-lasting solutions for environmental sustainability, and build social inclusion strategies that will create equity and diversity.

Together, the community can work towards these aspirations and engage in an ongoing dialogue that will shape the region well into the future.

Regional Development Australia Sunshine Coast is committed to local solutions that reflect the community's diverse needs and aspirations.

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VISION

RDA Sunshine Coast's vision for the region was established in early 2010:

A Sunshine Coast region that is innovative, dynamic, connected and sustainable

MISSION

To connect people from within our region and across other regions to strengthen business growth, generate innovative sustainable solutions and enhance community development.

EVOLUTION OF A VISION FOR THE REGION

A summary of the evolution of the development of a regional vision, along with links to *The Queensland Plan* development, is included in Attachment 3.

Role of the RDA

RDA Sunshine Coast is a partnership between all three levels of government and aims to use combined resources more efficiently to develop the Sunshine Coast community to strengthen business growth, generate innovative environmental solutions and enhance community development.

It provides strategic and targeted responses to local issues and builds partnerships between governments, regional development organisations, the private sector and other regional stakeholders. RDA Sunshine Coast provides additional support through networking opportunities, partnership building, project planning, development and regional advocacy.

RDA Sunshine Coast is a not-for-profit community organisation led by local government, business and community leaders. Committee members are all volunteers and have been ministerially appointed.

Made up of 55 committees, the Regional Development Australia network covers metropolitan, rural and remote regions across the country. The committees are strong advocates for their region and, as drivers of change, have a pivotal role in ensuring regional Australia's long-term sustainability.

RDA Sunshine Coast has identified specific outcomes that complement the national RDA outcomes.

National RDA outcomes

- Enhanced community engagement and consultation
- Improved regional planning
- Enhanced whole-of-government approach
- Enhanced awareness of government programs
- Improved community and economic development

RDA Sunshine Coast outcomes

- Improved social cohesion, cultural understanding and collaborative partnering across all sectors of the social landscape
- Improved level of information flow and community understanding of the vast range of policy programs and initiatives available from the state and federal governments
- Improved community networks and collaborative partnering, stakeholder participation, capacity and capability
- Increased contribution to identifying and implementing sustainable economic development solutions that diversify the economy and protect the environment
- Promotion and support of new innovative industries across all business and NFP sectors
- Greater support to the business community via on-going participatory activities and events
- Participation in all regional planning activities and events to maximise information currency
- Organisational governance practice to meet recognised international standards
- Regular facilitation and engagement with community participation activities and events

Regional Development Australia Fund

The Regional Development Australia Fund has contributed almost \$1 billion to capital infrastructure projects identified as priorities by local communities across Australia.

The Sunshine Coast community has benefited from recent RDA Fund (RDAF) allocations, as outlined in the table below.

Rounds	Funds awarded to	Project	RDA Funds awarded	Total value of the project
RDAF 1	Maleny Community Centre	Maleny Community Centre	\$1,655,000	\$1,727,000
RDAF 3	Eumundi District Historical Association	Discover Eumundi Heritage and Visitor Centre Building extension	\$165,000	\$228,000
RDAF 4	Sunshine Coast Council	Sunshine Coast Regional Tennis Centre redevelopment	\$773,000	\$2,576,000
RDAF 5	Sunshine Coast Council	<i>To be advised</i>	\$649,000	\$649,000+
RDAF 5B	<i>Decision pending at time of writing</i>			
TOTALS			\$3,242,000	\$5,180,000+

Community consultation

RDA Sunshine Coast's community priorities focus on harnessing the advantages of a digital economy, supporting the development of a regional Workforce Development Strategy and realising the full economic and social benefits associated with key regional infrastructure.

These actions are supported by promoting the Regional Development Australia Fund, developing leadership across the region and seeking to tackle difficult issues such as youth unemployment, the creation of smart communities and the development of greater social inclusion.

RDA Sunshine Coast achieves these priorities through a commitment to its core roles and responsibilities, such as regular consultation with the community, businesses, non-profit organisations and all levels of government.

RDA Sunshine Coast seeks to articulate local priorities, identify resources, engage stakeholders, contribute to policy debate and formulate solutions. The organisation supports, promotes and disseminates information on government policy initiatives for the community's benefit and takes a leadership role in bringing together organisations to take advantage of government programs, policies and initiatives.

RDA Sunshine Coast encourages community involvement on issues such as jobs creation and skills development, supporting the disadvantaged, helping the local environment, marketing the region, coping with population change and upgrading infrastructure.

Committee members are all volunteers and work with local communities to identify the issues and develop solutions to secure sustainable long-term jobs, investment and regional prosperity and address environmental and social inclusion issues.

RDA Sunshine Coast leverages its own resources, available funding opportunities and the capacity of existing businesses and organisations to identify potential areas to diversify the regional economy through partnership projects which are aligned with the *Roadmap's* regional priorities.

Further detail on community consultation outcomes can be found in Attachment 2.

The 2013 Regional Roadmap

The *Roadmap* provides an overview of the Sunshine Coast economy in its *State of the Region* report and outlines the regional priorities that RDA Sunshine Coast can implement in collaboration with industry leaders and organisations.

The *Roadmap's* overall strategic direction is designed to address the significant challenges and opportunities that face the Sunshine Coast, which is a maturing and successful region, rich in natural, capital and human assets and a strong identity that has national and international recognition.

The regional priorities have been developed through more than 25 community consultations with the business community, all three levels of government, education/research providers and community groups.

The *State of the Region* report provides an in-depth overview of the people, lifestyles, employment, businesses, threats and opportunities in the region, using latest data from a variety of sources including the Australian Bureau of Statistics (ABS).

The information in the *State of the Region* report underpins and informs RDA Sunshine Coast's regional priorities and projects.

The following summary is an extract from the *Sunshine Coast State of the Region 2013* report provided in Attachment 1. This report was developed as a stand-alone document to inform the wider Sunshine Coast community on key economic, social and environmental metrics and is provided as a public resource available on the RDA Sunshine Coast website (www.rdasunshinecoast.org.au).

Summary of key statistics

The Sunshine Coast region, home to more than 320,000 people, covers over 3,000 sq km from Noosa's northern beaches to Caloundra and the Glasshouse Mountains in the south and west to Kenilworth.

The Sunshine Coast is a diverse and robust regional community relatively dependent on traditional economic sectors such as tourism, construction and retail. What is often described as a number of inter-connected villages, these pockets of urban density along the Coast are interspersed and surrounded by natural environmental, agricultural and recreational spaces to create a highly desirable lifestyle.

This lifestyle has led to considerable population growth over the years, which creates both challenges and opportunities. While the population growth rate has recently slowed down, it is still significant and will continue to drive the local economy forward.

Key statistics for the Sunshine Coast are summarised in the table below:

Factor	Sunshine Coast score
Population growth 2012(P)	+1.8%
Population increase 2012 (P)	5,766 people
Employment Feb 2013	151,600 people
Unemployment May 2013	5.5%
Youth unemployment (15 - 24yr) May 2013	14.5%
Volunteering 2011	20.2% of population
% Managers/Professionals Feb 2013	33.2%
Participation in Uni education 2011	13.5%
Economy size 2010/11	\$13.8 billion
Number of businesses 2011	31,758
Tourism visitors Dec 2012 pa	9.1 million
Open space	120,000 hectares
Average water use per person May 2012	178 litres
Number of households with internet	78.9%
% use motor vehicle as main method of travel to work	80%

Map of the region



Source: Sunshine Coast Council

Please note: The map above represents both the RDA Sunshine Coast geographical region as well as the Sunshine Coast Council boundaries. From 1 January 2014 the local government boundaries will change and Divisions 11 and 12 will become the Noosa Council; however the RDA Sunshine Coast boundaries will remain unchanged and include the entire region.

Human capital

A key feature of the region has been its strong population increases. Since 2001 the population has grown 30.5% and added 75,457 people over this time (ABS). The Sunshine Coast's share of Queensland population growth has slowed from more than 10% in 2002, 2003 and 2004 to 6.7% by 2012 (ABS). The reasons for the slowdown include the overall weaker economy, the soft tourism market which is a critical industry to the Coast, and infrastructure limitations. It is still the case, however, that the Sunshine Coast has been one of the fastest growing regions in Australia, and growth returned in 2012.

Several factors have driven these increases, including the relaxed lifestyle, favourable climate and more than 200km of coastline.

Employment outlook based on current population projections

Deloitte Access Economics recently completed a study called Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions (2013). The report forecasts the workforce to expand by 59% over the next 20 years, to just under 250,000 people. As a share of total Queensland employment, the Sunshine Coast region has recorded a gradual rise over the past decade. That trend is projected to continue to 2031-32, with the region's share of employment across Queensland increasing from 6.6% to 6.8%.

Growth in labour demand in the Sunshine Coast region is therefore expected to generally outpace growth in Queensland over the forecast period, driven primarily by an expected faster rate of working-age population growth for the region. Assuming migration continues as per the long-term trend, the inflow of residents to the region is expected to counter-balance the ageing effect, as existing residents increasingly move into age cohorts where labour force participation is lower.

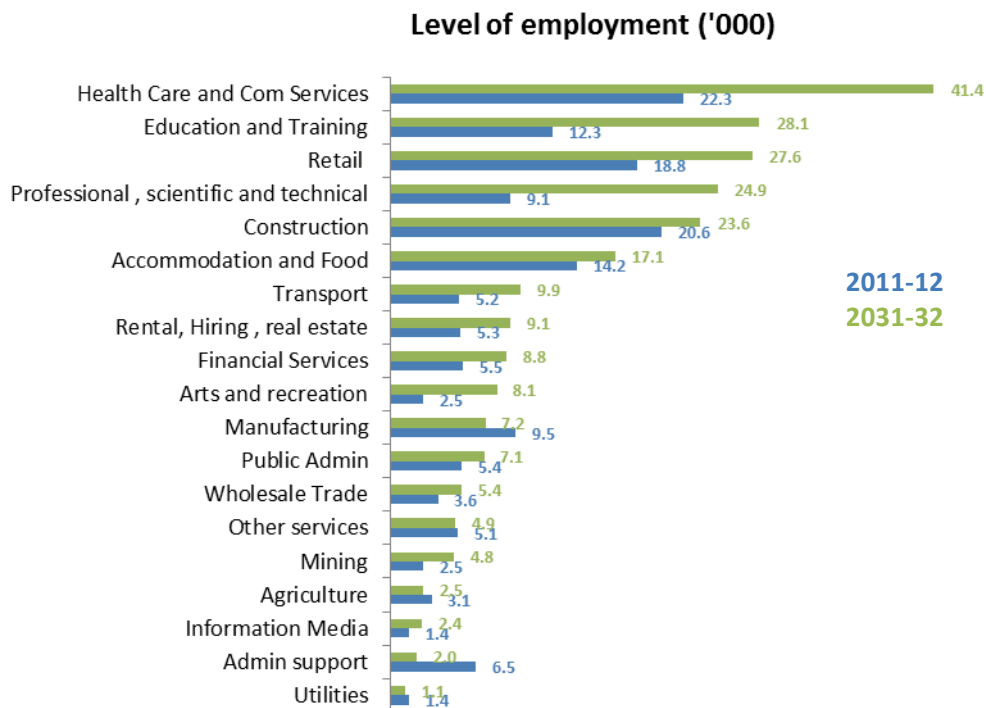
The Deloitte report also finds that the ageing of the population and its retirement from the workforce will lead to a significant labour shortage for Queensland overall, and the Sunshine Coast from about 2020.

At the industry level (shown in the chart overleaf) large growth areas include health care and social assistance, education and training, professional, scientific and technical services, and tourism (although still subject to cyclical influences).

On the other hand, agriculture and manufacturing are likely to see workforce reductions.

Developing and attracting a more educated workforce and managing the redeployment of workers between these industries will be a regional issue.

CHART A) SUNSHINE COAST REGION EMPLOYMENT BY INDUSTRY, 2011-12 AND 2031-32



Source: Deloitte Access Economics, Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions, 2013

The growth in employment across service-related industries is expected to generate a strong increase in knowledge workers in the Sunshine Coast region over the next two decades.

Demand for professionals and managers is expected to be particularly strong over the period, followed by community and personal service workers, lifted by growth in health and hospitality workers. On the other hand, demand for unskilled work is expected to be flat. This has significant implications for the Sunshine Coast as the unskilled (often young uneducated people) will find it more difficult to find work, potentially leading to disenfranchisement.

The Deloitte Workforce Planning Research report (2103) identifies three key areas the region will need to focus on to maintain jobs growth:

- Continue to make the area attractive by addressing infrastructure limitations.
- Tap into the growth potential of the resource industry
- Review the capacity of key industries to adapt to new technologies.

Education

Education is one of the key drivers of the region's social, cultural and economic development and is recognised as a fundamental human right by the United Nations Educational, Scientific and Cultural Organisation (UNESCO).

The Sunshine Coast currently has 88 schools, two universities and five TAFE campuses contributing towards educational opportunities in the region.

The University of the Sunshine Coast and Central Queensland University actively partner with local industries and businesses through various research programs to provide important links between students and the workforce.

The Australian Bureau of Statistics 2011 Census and Sunshine Coast Community Profile (2011) show the following levels of educational qualifications in the region:

- Fewer people on the Sunshine Coast have a degree or higher (14.2%) than the Queensland average (15.9%), although the gap is narrowing.
- Among 15-24 year olds 13.5% are attending university compared with the Queensland average of 16.7%. This is a substantial increase from 1996 when only 4.1% of Sunshine Coast residents in this age group were attending university. This growth can be attributed to the establishment and subsequent growth of two local universities in the region, the University of the Sunshine Coast (USC) and Central Queensland University (CQU).








Education plays an important role in community development and there is already some anecdotal evidence that the school system is close to capacity. Based on the population scenarios, a substantial investment will need to be made in education facilities to keep up with the forecasted demand.

Sustainable communities

The Commonwealth Scientific and Industrial Research Organisation (CSIRO) has identified six global megatrends that are changing the way we live in their *Our future world: Global megatrends that will change the way we live* report (2012). The identification of these megatrends has implications at both the global and local levels, and they are also being used to inform the development of *The Queensland Plan (2013)*.

The six global megatrends have economic, social and environmental sustainability repercussions for the Sunshine Coast, and have assisted in the identification and enhancement of the regional priorities. These trends include the declining supplies of natural resources, decreasing biodiversity, a global shift towards the rising power of Asia, an ageing population, a digitally enhanced world and rising demand for experiences over and above products (CSIRO, 2012).

A summary of the Sunshine Coast's key economic sectors

<h3>HEALTH</h3>	<p>The health sector on the Sunshine Coast is growing at a rapid rate. With more than 20,000 people employed it is the second largest employer after the retail sector.</p> <p>The 'business of health' provides employment and private enterprise opportunities, and services a growing (and ageing) population. The new University Hospital is a catalyst for enormous opportunity.</p>	
<h3>EDUCATION & RESEARCH</h3>	<p>AEC estimates the education sector's contribution to GRP in the region is \$967 million pa, with considerable growth expected over the next 20 years (Deloitte, 2013).</p> <p>Both education and research are high-value industry sectors that are key enablers for the region through the long-term provision of highly skilled labour.</p>	
<h3>PROFESSIONAL SERVICES</h3>	<p>In February 2013, 33.2% of the region's workforce was classified as either managerial or professional, by the ABS. Employment growth in this category is expected to exceed 135% over the next 20 years (Deloitte, 2013).</p> <p>Knowledge workers are linked with high productivity and high-value returns, a key aspiration articulated and reinforced by local government economic development strategies over the recent years.</p>	
<h3>TOURISM</h3>	<p>Tourism is a key driver of the Sunshine Coast economy, contributing to both the accommodation and food service sectors and, in part, the retail sector and supporting professional services.</p> <p>9.1 million trips were made to the Sunshine Coast in the year to December 2012. During 2012 the number of day trippers surged by 26%, while the international market weakened by 3.8%.</p>	
<h3>AGRIBUSINESS & FOOD</h3>	<p>Agribusiness and food play a strong role on the Sunshine Coast. The Queensland Government estimates the food value chain contributes \$18.7 billion pa to the state's economy, including 267,000 jobs.</p> <p>The Sunshine Coast region has a rich history of primary production, sophisticated food manufacturing outlets, and a high number of internationally renowned restaurants, coupled with a growing population and visitor numbers.</p>	
<h3>CONSTRUCTION</h3>	<p>Construction is the third largest employer (employing 18,900 workers on the Sunshine Coast in 2012) and a major contributor to the local economy.</p> <p>The Sunshine Coast economy heavily relies on the construction sector due to the past (and future) population growth and the need to service residential demand.</p>	
<h3>MINING</h3>	<p>The mining sector has a strong potential for growth on the Sunshine Coast with an already significant Fly In Fly Out (FIFO) workforce.</p> <p>With an airport scheduled for an upgrade and a region-wide focus on the digital economy, the Sunshine Coast region is positioning itself to capitalise on not only a flexible workforce but also to be 'a hub for the mining services sector of the future'.</p>	

Economic

The Sunshine Coast local economy is measured by the region's Gross Regional Product (GRP), estimated by AEC Group at 13.8 billion in 2010/11. The four key pillars influencing the growth and development of Queensland as articulated by the State Government are construction, mining, agribusiness and tourism; each one is highly important and relevant to the Sunshine Coast. In addition to the four pillars, the Sunshine Coast region has identified five high-value industries: health and wellbeing, education and research, aviation, clean technology and knowledge industries/professional services.

“Attracting and developing high-value industries is a critical building block for a new economy that is responsive to national and global demand and has greater resilience. These high-value industries have the potential to generate a range of enduring career opportunities and higher paying jobs for the local community.”

- Excerpt from the Draft Sunshine Coast Economic Development Strategy 2013-2033

Environment and social

Many of the environmental and social challenges facing the region are a result of the last four decades of strong population growth and associated development, resulting in social infrastructure capacity problems and low housing affordability. On the positive side, the region has a strong history of community activism and social enterprise (Sunshine Coast Council Community Plan, 2011).

Sustainability Indicators developed by the Sustainability Research Centre at the University of the Sunshine Coast highlight areas that yielded positive results, as well as areas of concern, and where action is needed.

Indicators showing a positive result included economic diversity, safety, wellbeing, health, water use, renewable energy and air quality. Action is needed in the areas of biodiversity, climate change, cost of living and community engagement. Other indicators of concern include population density, transport, employment, volunteerism, food production, waste, fish stocks and education (USC, 2013).

Access to international, national and regional markets

Digital connections are transforming business, social and environmental opportunities on a daily basis. The digital economy has been identified by numerous reports at the global, national, state and regional levels as an enabler that will drive innovation and access to multiple markets, most recently by Australian Government, Department of Broadband, Communications and the Digital Economy (2013) in the *Advancing Australia as a digital economy strategy*.

At the local level, building capacity as well as assisted pathways within the small to medium enterprise (SME) sector is a key recommendation to meet the objectives of digital leadership, as outlined in the outcomes from a digital workshop held on the Sunshine Coast (Explor, 2012).

Transport demand (private, public and freight) has been growing strongly, as can be expected in a region that has also grown strongly in terms of GRP growth and population increase. There are signs that infrastructure is having difficulty coping with this demand, which is impacting negatively on accessing other markets.

Comparative advantage and business competitiveness

The Regional Australia Institute (RAI) has released an interactive map called [In]Sight which tracks the competitiveness of Australia's 560 Local Government Areas (LGAs) and 55 Regional Development Australia regions. [In]Sight uses 59 measurable indicators across ten themes to better understand each region's potential for growth and change.

The RDA South East Queensland (SEQ) Coordination Initiative undertook further analysis to cluster the indicators in line with the Council of Australian Governments (COAG) framework for regional economic development based on the determinants of long-term regional growth. This analysis included data from the *MyRegion* website to provide a framework with a common lens through which regions can consider regional development. A summary of the results of this analysis is provided below.

Factor	Sunshine Coast ranking / 55 RDAs
University qualification (% of working age population)	14
Technical qualification (% of working age population with certificate and diploma)	3
School performance – Primary (% students in top 2 bands)	25
School performance – Secondary (% students in top 2 bands)	19
Building approvals per capita	5
Wage/labour costs (average wage and salary income)	42
Young unemployment (% persons in the labour force aged 15-24 looking for work)	47
Business in technology and related industries (% of workforce employed by technology related businesses)	13
Human resources in science and technology	25
Access to tertiary education services (% of working age population attending higher education institute)	16

Further information, including measures and values mapped to the COAG framework, and data sources is provided in Attachment 4.

Focusing our efforts

Regional Development Australia Sunshine Coast has been working collaboratively with local communities, agencies and governments to identify and prioritise the opportunities and challenges currently facing the region.

Community consultation during 2013 (outlined in Attachment 2) resulted in a fine-tuning of the priorities identified in 2012, and a re-focus of RDA Sunshine Coast efforts relative to other local organisations. The following priorities have been identified and expanded further in this section:

1. Economic development
2. Investment and infrastructure
3. Digital innovation
4. Human capital
5. Sustainable communities

Key projects have been mapped against each of these priorities to form the basis of a regional priorities framework, as summarised on the next page. This framework was made available to the community in a brochure format for further consultation and engagement after being launched at the Sunshine Coast Mayor's business roundtable in May 2013.

These regional priorities are underpinned by three important concepts that are critical for success, guiding RDA Sunshine Coast activities and behaviours to positively reflect upon the regional priorities:

Regional leadership

A collaborative, purpose-driven approach from all stakeholders will help overcome the challenges facing the region and deliver unity and integrity through regional leadership.

A future can be realised where the Sunshine Coast region can clearly and consistently articulate its competitive advantage and aspirations with common themes, echoed by a range of community and business leaders across the region.

Proactively monitor events and developments: Be responsible and flexible

By being responsive and flexible, RDA Sunshine Coast will deliver real value and further strengthen relationships with key stakeholders in the region. To illustrate, RDA Sunshine Coast views the development of the *Roadmap* and the identification of regional priorities as a journey in partnership with community leaders and responding positively to community needs.

Deliver good governance and effective administration

The professional and efficient execution of day-to-day business activities and projects is essential for RDA Sunshine Coast's success. This principle has been included in the *Roadmap* as a guide for RDA Sunshine Coast behaviour as well as an aspiration to be a positive role model of corporate governance and effectiveness within the community.

RDA Sunshine Coast 2013-16 Regional Roadmap Framework

Vision: A Sunshine Coast that is innovative, dynamic, connected and sustainable.

Mission: To connect people from within our region and across other regions to strengthen business growth, generate innovative sustainable solutions and enhance community development.

Regional priorities

Economic development

Nurture high potential economic development sectors towards global competitiveness by fast tracking and optimising major projects that will have far reaching benefits across the Sunshine Coast community. Priority economic development sectors for the region include health and wellbeing, education and research, tourism and events, professional and knowledge services, agriculture and food, aviation and clean technology.

RDA Sunshine Coast projects:

- ❑ Health Hub precinct development (Health sector panel) – *Support role*
- ❑ Food Futures: Agri-food connection project – *Collaborative role*
- ❑ Assist with ongoing project development in partnership with the Sunshine Coast Council's economic development planning process – *Support role*

Collaborators: Sunshine Coast Council, Noosa Council, Queensland Government, University of the Sunshine Coast, business and industry groups.

Investment and infrastructure

Provide evidence-based support for key private and public infrastructure projects that will result in investor confidence and timely action for the region's long-term benefit. Advocate for public, private and multi-party investment opportunities (including regulatory environments) that will positively affect economic, social and environmental outcomes.

RDA Sunshine Coast projects:

- ❑ Advocate for the upgrade of the Bruce Highway north of Caboolture – *Collaborative role*
- ❑ Integrated transport infrastructure planning – *Collaborative role*
- ❑ Other infrastructure projects (ie high speed broadband, fibre optic undersea cable, Airport upgrade, Maroochydore Principal Activity Centre, community arts and entertainment infrastructure) – *Support role*
- ❑ 'Impact investment' opportunities for multiple outcomes – *Lead role*

Collaborators: All three levels of government, community and business groups, RDA Moreton Bay and capital investors.

Digital innovation

Capture the unique opportunity of broadband and information technology development to further the economic and social wellbeing of communities across the Sunshine Coast region. Foster innovation and enhance local capabilities to help drive the uptake of digital solutions.

RDA Sunshine Coast projects:

- ❑ Digital Futures project coordination – *Lead role*
- ❑ Digital Work Hub project – *Lead role*
- ❑ Explore investment opportunities as catalysts for change and/or pilot projects – *Collaborative role*
- ❑ Broadband Today Alliance – *Support role*

Collaborators: Education providers, all three levels of government, Innovation Centre Sunshine Coast, business and industry groups, RDA Moreton Bay, RDA South East Queensland group and capital investors.

Human capital

Ensure our region has the skills, capacity and leadership to meet the needs of the future, particularly in the face of a continued aging population and economic variations. Increase our key labour force measures over time as lead indicators for both economic and social prosperity.

RDA Sunshine Coast projects:

- ❑ Regional Workforce Planning project – *Collaborative role*
- ❑ Youth employment – *Support role*
- ❑ Contribute to regional leadership and collaborative visioning alongside key stakeholders – *Collaborative role*

Collaborators: Education providers, Sunshine Coast Council, Noosa Council, business and industry groups, community groups, RDA Moreton Bay, employers and job seekers.

Sustainable communities

Deliberately design our future by listening to our communities and carefully managing our landscape, with a particular focus on agribusiness and the food value chain. Enhance community connections, protect scarce resources, foster innovation and respect the competing needs of each other, in response to the 'More from less' global megatrend identified by CSIRO.

Ensure that social, environmental and cultural objectives are addressed in **all** key regional activities.

RDA Sunshine Coast projects:

- ❑ Improved transport networks: connectivity and accessibility – *Collaborative role*
- ❑ Clean tech futures for regional advantage – *Support role*

Collaborators: Sunshine Coast Council, Noosa Council, Queensland Government, community groups, Sunshine Coast Environment Council, Clean Tech group and education providers.

Regional leadership

Underpinning the regional priorities is the necessity for regional leadership. The Sunshine Coast region is currently facing some considerable challenges including a relatively static local economy, an over-reliance on a narrow group of economic sectors and a changing local government environment. A collaborative, purpose-driven approach will help overcome these challenges and ultimately deliver regional unity and integrity. Commitment from all stakeholders and effective delivery is essential.

Proactively monitor events and developments: Be responsible and flexible

Deliver good governance and effective administration

Regional Priority 1

Economic development

Nurture high potential economic development sectors towards global competitiveness by fast tracking and optimising major projects and initiatives that will have far reaching benefits across the Sunshine Coast community.

Regional economic development requires the continued growth of traditional economic strongholds such as the tourism and construction sectors, as well as a priority focus on new and emerging high-value industries.

RDA Sunshine Coast has been working in collaboration with regional partners on the draft Sunshine Coast Economic Development Strategy 'Sunshine Coast the natural advantage' currently out for public consultation at the time of writing.

The draft strategy identifies a number of priority industry sectors which are important to the Sunshine Coast region. They are categorised as high-value industries due to the reduced reliance on population growth as a foundation for success and their potential for generating high value investment and higher-paying, enduring employment for the community.

These industry sectors include health and wellbeing, education and research, knowledge industries and professional services, tourism, sport and leisure, agribusiness, clean technologies, and aviation.

The four traditional pillars of the Queensland economy, identified by the State Government as tourism, construction, agribusiness and mining, are also of significant importance to the region and will continue to be strongly supported.

A key factor in the identification of priority sectors is the growing demand for goods and/or services in each of the priority sectors identified. An example is the growth opportunity in the clean technology sector, with growth being driven by the earth's diminishing resources (CSIRO, Our Future World 2012).

Nearly all of the Sunshine Coast industry sectors can assist towards the region's aspiration of becoming a net exporter of goods and services over time (Sunshine Coast Draft Economic Development Strategy, 2013), achieved by focusing beyond the region's boundaries to both domestic and global markets.

OPPORTUNITY

Fast track and optimise major projects such as the University Hospital and other transformational initiatives that will have far reaching benefits across the entire Sunshine Coast community.

CHALLENGE

Due to the large scale and multi-stakeholder complexity of these projects, the challenge will be to create timely outcomes that best represent community interests.

RDA SC ROLE

Facilitate a community vision and optimise community commitment towards achievable and timely outcomes. Influence investment and policy decisions that best represent communities of interest and the region as a whole.

In response to the 2012 Australian Government white paper 'Australia in the Asian Century', the Sunshine Coast region is seeking to target export opportunities to Asia. A recent trade and investment delegation to Asia (2013) led by the local Mayor was seen as a first step and yielded a positive response.

Targeted investment in transformational projects in priority sectors is required to kick-start growth and creates significant economic development opportunities. An example is the establishment of the Oceanside Kawana Health Precinct, including the significant investment in the new Sunshine Coast University Hospital, due for completion in 2016.

The new hospital is projected to achieve significant economic benefit for the region, with a multiplier effect benefiting the broader community beyond the health and wellbeing sector.



Innovation Centre Sunshine Coast: A University of the Sunshine Coast company providing business incubation and accelerator services. *Image courtesy of Sunshine Coast Council.*

Regional Priority 2

Investment and infrastructure

Provide evidence-based support for key private and public infrastructure projects that will result in investor confidence and timely action for the region's long-term benefit. Advocate for public, private and multi-party investment opportunities (including regulatory environments) that will positively affect economic, social and environmental outcomes.

The Sunshine Coast requires investment in both the renewal of ageing infrastructure and creation of new infrastructure to meet growing demand.

Sunshine Coast projects requiring investment include:

- Sunshine Coast Airport upgrade; benefiting tourism, mining (FIFO), aviation, general export and trade opportunities.
- Bruce Highway upgrade north of Caboolture; benefiting tourism, export and trade opportunities as well as community wellbeing.
- Maroochydore Principal Activity Centre including an arts, convention and entertainment precinct; for long-term sustainable urban development, benefiting knowledge industries and professional services sectors.
- The timely and efficient delivery of the Oceanside Kawana medical precinct and Sunshine Coast University Hospital; benefiting the health and wellbeing sector.
- Integrated transport planning and improved transport networks; for long-term economic and community wellbeing creating efficient and effective corridors and linkages (see also Regional Priority 5).
- Digital infrastructure, including high speed broadband for digital innovation as a key enabler for economic growth (see also Regional Priority 3).

OPPORTUNITY

Secure funding and timely implementation for large strategic infrastructure projects for the Sunshine Coast.

CHALLENGE

Navigate competing priorities and funding requests for the region and galvanize community support behind strategic high priority projects that will have long-term benefits.

RDA SC ROLE

Be the trusted advisor to government by providing relevant, accurate and timely input into policy debates. Help best represent the community's interests through a partnership approach.

Infrastructure planning, design and implementation is inherently complex, time consuming and expensive; it is a challenge that must be overcome.

Capital investment can come from multiple sources such as public, private, Australian and/or international. Regardless of the source, capital investment is always preceded by a comprehensive analysis that includes demand projections and financial modelling.

The Sunshine Coast is competing against similar regions for scarce capital investment resources and must provide a solid evidenced-based approach for each project to secure timely investment. The region must also embrace innovative investment trends such as impact investing to be competitive.

The distinguishing feature of impact investing is the intention to achieve both a positive social, cultural and/or environmental benefit *and* some measure of financial return (Australian Government, Impact Australia Report, 2013). Project opportunities regarding impact investing are explored on page 33.

Investor confidence is critical and the Sunshine Coast region must be competitive to create an operating environment conducive to investment and business.

As sustainability is a key regional focus, the design, investment and delivery of infrastructure that meets sustainability goals are an additional challenge not to be ignored.

The stakes are high, and so is the reward. Regional infrastructure and investment is paramount to regional success.



Bruce Highway congestion: A regular occurrence north of Caboolture. *Image courtesy of APN.*

Regional Priority 3

Digital innovation

Capture the unique opportunity of broadband and information technology development to further the economic and social wellbeing of communities across the Sunshine Coast region.

Foster innovation and enhance local capabilities to help drive the uptake of digital solutions.

Little, if anything, has changed the shape of business and society in the past 20 years as much as information technology and the internet.

It has affected how we work, live and play. It impacts every aspect of our life from economic activity to healthcare, education and security.

Technology has the capacity to give businesses and organisations access to new markets, change the way they innovate and create, and provide value to both customers and stakeholders.

Technology gives consumers unprecedented access to goods, services, information and knowledge, enhancing their wellbeing.

Demand for data downloaded over fixed lines has been growing at a compound rate of 62% according to the Australian Government's *Advancing Australia as a Digital Economy* (2013).

The same report estimates that if 10% of Australian employees were to telework 50% of the time, the total annual gain to the Australian economy would be around \$1.4 - \$1.9 billion.

Information technology will continue to expand in scale and sophistication. Advantage will go to communities that know when and how to tap into the benefits that come with advanced technologies, whether in a commercial, educational, healthcare, security or other context.

New technology will also affect our future workforce as structural changes to the global economy affect local economies; it raises the question of which industries will disappear versus what are the new industries of the future?

The Sunshine Coast is well placed to benefit from the continued growth in the digital economy with Census data showing 73% of occupied households on the Coast already connected via broadband, which is above the national average (ABS).

The region must not only embrace change, but also drive innovation and best practice at all levels to provide a platform for the region's creative businesses and communities to thrive.

OPPORTUNITY

The Sunshine Coast can become a leader in new technology deployment and innovation through collectively imagining and creating new opportunity using tomorrow's technology, today.

CHALLENGE

Articulate and implement the Sunshine Coast's digital vision in a timely manner to gain regional advantage, as many other regions across Australia are competing to become leaders in this area.

RDA SC ROLE

Accelerate the dialogue and capture the community's vision to underpin confidence towards investment and implementation of that vision.

Regional Priority 4

Human capital

Ensure our region has the skills, capacity and leadership to meet the needs of the future, particularly in the face of a continued aging population and economic variations. Increase our key labour force measures over time as lead indicators for both economic and social prosperity.

Focus on education attainment and capacity building to meet projected demand and create resilience at a regional level to help adapt to change.

With population growth projections expected to continue, labour demand will also continue to grow substantially, resulting in supply challenges.

Both employer and employee requirements will not only expand, they will also evolve. Some changes will be modest, paced and manageable. Other changes will involve dramatic long-term shifts in labour market dynamics and near-to-medium-term spikes in demand for certain skills.

These dynamics can have profound and widespread effects on employers and employees. The health care and social assistance sector for example, is projected to increase substantially, followed closely by professional, scientific and technical services, education and training (Deloitte, 2013).

Workforce and employment planning is about better predicting and catering for these medium and long-term trends to optimise the relationship between labour demand and supply.

The region's youth are vulnerable with higher than average youth unemployment on the Sunshine Coast placing our future generations at considerable risk. A strong focus on educational attainment in those industry sectors projected to grow will increase the number of people who achieve not only a job but a long-term career pathway.

Growth in the local population over the past several years has been largely driven by the key coastal industries of tourism, retail and construction, as well as lifestyle considerations. This has attracted a more flexible workforce to the region.

The population is facing some structural changes over the long-term as it progressively gets older, adding further challenges to effective workforce planning.

Without effective workforce and employment planning, regional development can be severely compromised. Long-term planning and action is required in partnership with community leaders.

OPPORTUNITY

Increase the investment in both talent and skills to position the Sunshine Coast to better meet the needs of future labour demand.

CHALLENGE

The Sunshine Coast will have a continued ageing population. Industries will change, resulting in changing demand for labour, and supply challenges.

RDA SC ROLE

Partner with community leaders to help lead the agenda and build regional capacity through the identification and fostering of key levers of change, as well as track and measure key labour force measures to benchmark progress.

Regional Priority 5

Sustainable communities

Deliberately design the future by listening to communities and carefully managing the landscape, with a particular focus on agribusiness and the food value chain. Enhance community connections, protect scarce resources, foster innovation and respect the competing needs of each other, in response to the 'More from less' global megatrend identified by CSIRO.

Ensure that social, environmental and cultural objectives are addressed in all key regional activities.

In order to realise the vision of an innovative, dynamic, connected and sustainable Sunshine Coast it is important to nurture the people and places of value. By acknowledging and articulating the things of value, the community can then protect what is most vulnerable.

In an increasing digitally-connected world, it is of paramount importance to focus on the desires and dreams that motivate the community to connect, create, consume and collaborate. It will take respect and compassion. It will also take a strong and disciplined focus not to compromise future generations to meet the present generation's needs.

Due to population growth the region's green space and diverse landscape may be at risk. Community leaders must ensure diversity and productivity within the Sunshine Coast landscape by creating prosperous and efficient agribusiness and other compatible land-use opportunities, as outlined in the Sunshine Coast Rural Futures Strategy (2012).

The Sunshine Coast Community Plan (2011) takes an inclusive approach to community consultation and articulates the community's aspirations, such as sustainability, connectedness, creativity and the need to manage growth.

Connecting people to places, for example, is the foundation for an efficient transport system. Inefficiencies in the Sunshine Coast transport network have been highlighted by Nielsen research (2010) conducted for the Community Plan and need to be addressed. These inefficiencies negatively impact on our social and community wellbeing, as well as the environment through inefficient use of fossil fuels.

Productivity, sustainability and liveability are interdependent concepts; sustainability therefore should be addressed in each regional project.

OPPORTUNITY

Realise the vision for a Sunshine Coast that is innovative, dynamic, connected and sustainable.

CHALLENGE

Effectively balance competing priorities, resources and timeframes.

RDA SC ROLE

Encourage those stakeholders leading regional development projects to engage with communities of interest at each stage to ensure the creation of a vibrant and sustainable future.

Regional leadership and underpinning concepts

Underpinning the five regional priorities in this *Roadmap* is the need for regional leadership, flexibility and responsiveness, as well as good governance and effective administration.

Regional leadership

Realising a unified vision and approach is a strategic challenge requiring individual and collaborative leadership, action, and the development of practices across sectoral and sub-regional boundaries.

A concerted, energetic response to the call to action could deliver significant benefit for the region; a failure to answer could be a significant missed opportunity.

The community is starting to evolve in its thinking and recognises the need for a comprehensive regional approach, demonstrated by the formation of the Sunshine Coast Economic Development Taskforce and the collective approach led by the Urban Development Institute of Australia in bringing together over a dozen different organisations to address regional planning challenges in response to the Sunshine Coast draft planning scheme.

Illustrating this point, the OECD states in the *How Regions Grow* (2009) policy brief that ‘even if governments want to stimulate economic activity by developing infrastructure; pushing investment projects forward can be difficult without clear road maps based on agreed priorities, needs assessments and stakeholder buy-in’. It is in this context that RDA Sunshine Coast plays an important regional role.

The Sunshine Coast region will be able to clearly and consistently articulate its competitive advantage and aspirations along common themes if every stakeholder takes a collaborative approach.

Proactively monitor events and developments: Be responsible and flexible

RDA Sunshine Coast recognises and embraces the diversity of thinking regarding strategic and operational priorities across the region in the development of its *Roadmap*. It is critically important that all stakeholders are open and flexible to meet the community’s needs in finding agreement on ‘big ticket’ priorities. In addition, diversity of views and opportunities must also be allowed to flourish to maintain forward momentum and a cohesive, united region.

Deliver good governance and effective administration

The continued efficient and transparent operations within RDA Sunshine Coast are not only essential for the effective delivery of outcomes, but critical to build trust and meaningful partnerships. RDA Sunshine Coast is committed to continue being an example of effective community representation and an organisation of value in the Sunshine Coast region.

RDA activities and projects

Regional Development Australia Sunshine Coast has a discrete and defined set of resources available for activities and projects; it is therefore important to prioritise project opportunities where RDA Sunshine Coast can add demonstrated value.

The projects outlined below are under constant review in line with the principle of being responsible and flexible, and almost always delivered in partnership with collaborating organisations to ensure greater impact.

Economic development

HEALTH HUB PRECINCT DEVELOPMENT (HEALTH SECTOR PANEL)

Lead role: Sunshine Coast Health Sector Panel

Support role: Regional Development Australia Sunshine Coast

The Sunshine Coast Health Sector Panel is coordinated by Sunshine Coast Council and consists of senior industry, community and government stakeholders including a Regional Development Australia Sunshine Coast representative.

The panel is actively promoting business and investment attraction opportunities associated with the new Sunshine Coast University Hospital (SCUH) medical training and research centre.

New infrastructure projects such as the SCUH present an array of social and economic benefits that should be leveraged for the benefit of the entire region. This can only be achieved through widespread consultation and engagement with stakeholders. A holistic approach to construction and development is required as the infrastructure project moves from planning stages through to implementation stages.

FOOD FUTURES: AGRI-FOOD SECTOR CONNECTION PROJECT

Co-lead roles: Regional Development Australia Sunshine Coast, Queensland Government Department of State Development, Infrastructure and Planning, University of the Sunshine Coast and Sunshine Coast Council

Regional Development Australia Sunshine Coast, in conjunction with the above organisations, is actively implementing a food futures project focused on supply chain issues, business and industry development.

The project will enhance coordination, connectivity and cooperation between enterprises along the region's food value chain, ie from primary producers to distributors, manufacturers through to consumers.

In addition to links along the value chain, the project will increase geographical links and Sunshine Coast distribution networks, as well as links between neighbouring coastal catchments and the Mary Valley.

The Australian Government's National Food Plan (2013) will inform the development of Sunshine Coast regional food industry activities, as will Queensland Government food and agribusiness initiatives.

This project also aims to increase food-based tourism opportunities on the Sunshine Coast, strongly aligned to its tourism sector as one of the region's major economic drivers.

Investment and infrastructure

ADVOCATE FOR THE UPGRADE OF THE BRUCE HIGHWAY NORTH OF CABOOLTURE

*Lead: Sunshine Coast Economic Development Leadership Forum**

Support roles: Regional Development Australia Sunshine Coast and neighbouring RDAs

The 33km section of the Bruce Highway between Caboolture and Caloundra needs to be upgraded from two to at least three lanes (both ways), including the removal of grade intersections.

This will improve the highway's safety, capacity and efficiency and has the potential to be addressed in partnership with other Regional Development Australia organisations (ie Wide Bay Burnett and Mackay, Isaac Whitsundays) which are similarly eager to improve the Bruce Highway as it extends north from our region as a primary State thoroughfare.

INTEGRATED TRANSPORT INFRASTRUCTURE PLANNING

*Co-lead roles: (to be confirmed) Queensland Department of Transport and Main Roads, Queensland Government and Sunshine Coast Council***

Support roles: Regional Development Australia Sunshine Coast, University of the Sunshine Coast

The provision of efficient and accessible transportation is one of the central mechanisms to facilitate economic, social and environmental opportunities within the region's urban structure.

The challenge for regional development within the Sunshine Coast is attaining the balance between strengthening the connection of major inter-regional transport routes for continued economic diversification, and improving accessibility of local transport networks to connect people with major activity centres, health and knowledge hubs, recreational and cultural precincts.

RDA Sunshine Coast will actively investigate regional transport issues in partnership with key stakeholders. In particular, RDA Sunshine Coast will actively investigate and advocate for:

- i) Upgrades to the north coast rail line including dual track railway and alignment of the route between Landsborough and Nambour to boost frequency, speed and reliability of rail services and meet increased demand for passenger and freight transport
- ii) Investigation of people movement options across the region.

In addition to the above hard infrastructure opportunities: bridging the governance gaps to support the necessary conditions (economic, investment, community and political/institutional) for the provision of integrated land and transport planning.

ADVOCATE AND SUPPORT INVESTMENT OPPORTUNITIES FOR THE SUNSHINE COAST AIRPORT

Lead role: Sunshine Coast Council

Support roles: Regional Development Sunshine Coast, Queensland Government, Australian Government

The proposed upgrade of the Sunshine Coast Airport has been identified by the Draft Sunshine Coast Economic Development Strategy as one of the critical infrastructure projects in the region.

RDA Sunshine Coast recognises the positive economic and social implications of the proposed upgrade on tourism, mining (FIFO), aviation as well as general export and trade opportunities. The project is essential towards meeting the region's economic development needs.

** As noted in the Draft Sunshine Coast Economic Development Plan*

*** From 1 January 2014 there will be two councils within the RDA Sunshine Coast region (Sunshine Coast Council and Noosa Council). RDA Sunshine Coast will collaborate with both councils on projects that are mutually beneficial.*

IMPACT INVESTMENT OPPORTUNITIES

Lead role: Sunshine Coast Council and various investors

Strong support role: Regional Development Australia Sunshine Coast

Corporate social responsibility and sustainability practice have redefined the 'licence to operate' for companies doing business, driving a range of investment practices that are no longer solely focused on financial return, which in turn has driven innovative capital investment models including impact investing.

RDA Sunshine Coast recognises the importance of investment attraction to create diverse, strong and vibrant communities, and can play a role in helping form innovative partnerships and alliances with a range of stakeholders for multiple outcomes, including financial, social and/or environmental outcomes.

There is a requirement to showcase the region's successful industries, build confidence in the region as a thriving and competitive business region and assist in the development of new entrepreneurial opportunities, including public infrastructure.

Digital innovation

DIGITAL FUTURES STRATEGIC SNAPSHOT PROJECT

Lead role: Regional Development Australia Sunshine Coast

Collaborative roles: Sunshine Coast Council, University of the Sunshine Coast Innovation Centre

Regional Development Australia Sunshine Coast is collaborating with key regional stakeholders to drive access to, and adoption of, key technologies that support the transition to a digital economy, indicated by the nine themes identified in the Sunshine Coast Digital Futures Strategic Snapshot (Explor, 2012).

Advances in information and communications technology have already changed the way business is conducted and will continue to improve efficiency in almost all sectors of the Sunshine Coast economy. Connectivity within a decentralised region such as the Sunshine Coast is essential to place people closer to the jobs, facilities, goods and services they desire and connect them to the global community. The region can ensure ongoing economic viability by becoming both innovators and early adopters of new technology.

DIGITAL WORK HUB PROJECT

Lead role: Regional Development Australia Sunshine Coast

Strong supportive roles: Regional Development Australia (Gold Coast, Moreton Bay, Redlands and Logan, Brisbane) under the RDA SEQ Coordination Initiative and the Council of Mayors South East Queensland

The Digital Work Hub Project is a 12-month project that will provide a regional focus to the growing body of research and case studies regarding collaborative workspaces worldwide and in Australia.

This project aims to create the case for 'innovation centres' in local communities across South-East Queensland (SEQ) to increase productivity and diversity through greater regional employment and reducing travel-related stress. The final research report will include economic analysis, regional assessment and site typologies, concept imagery and potential business models.

The research will look at demand and supply factors, analyse available data and interview target groups such as employers and employees to develop a communication strategy for broad engagement across SEQ.

The SEQ Council of Mayors recently recognised this project in its Priorities for South East Queensland document (June, 2013) outlining a co-contribution of \$4m to the project.

Each research phase during 2013 will be uploaded to www.digitalworkhub.com.au. The project website will provide news about regional events and results, and link to ongoing conversations nationally and internationally.

BROADBAND TODAY ALLIANCE

Collaborative roles: Regional Development Australia Sunshine Coast, Sunshine Coast Council along with other regional councils and organisations across Australia

The Broadband Today Alliance is a collaborative alliance of local government, RDA and Regional Organisations of Councils (ROCs) built on the premise of sharing information and advocating for the resources to assist the localised transition to a digital economy. Over 135 local governments are members with more than eight million Australians represented across all States and Territories.

RDA Sunshine Coast is an active committee member, representing the needs of the Sunshine Coast as well as the entire RDA and Regional Organisations of Council networks.

Human capital

REGIONAL WORKFORCE PLANNING PROJECT

Collaborative roles: Regional Development Australia Sunshine Coast, Regional Development Australia Moreton Bay, Department of Education, Employment and Work Place Relations, Australian Government, University of the Sunshine Coast and Sunshine Coast Council

This multi-staged project began with comprehensive research which detailed the Sunshine Coast and Moreton Bay regions' current workforce, and projected anticipated growth over the next 20 years.

The study analysed the workforce from both a skills and scale perspective to help the regions meet labour-market demand driven by regional infrastructure projects and the resource sector boom with minimal disruption on other industries.

The report has now been finalised. RDA Sunshine Coast and its partner organisations intend to work together to share the research findings more broadly, as well as lead the development of a region-wide Workforce Development Strategy, utilising the Future Focus: 2013 National Workforce Development Strategy (Australian Workforce and Productivity Agency, 2013) as the foundation.

PRIORITY EMPLOYMENT AREA PROJECT

Lead role: Department of Education, Employment and Work Place Relations, Australian Government (Local Employment Coordinator)

Support role: Regional Development Australia Sunshine Coast

The Priority Employment Area project is an Australian Government initiative that invests in specific regions across Australia to address local labour market challenges.

RDA Sunshine Coast seeks to regularly collaborate with the local Priority Employment Area Committee and its work in the Sunshine Coast region to assist job seekers and connect them with future employers.

These activities include expos, conferences and public forums which are integral to regional engagement, a continuation of RDA Sunshine Coast's extensive community consultation program, and will support the delivery of projects aimed at assisting employment outcomes for local residents.

YOUTH EMPLOYMENT

Lead roles: Department of Education, Employment and Work Place Relation Australian Government (Local Employment Coordinator), Sunshine Coast Youth Partnership Inc, Queensland Youth Industry Links
Support role: Regional Development Sunshine Coast

RDA Sunshine Coast has worked with a number of organisations to undertake the Sunshine Coast Youth Summit in the past two years. The Summit supports organisations to understand youth employment challenges on the Sunshine Coast and assists in the future development of workforce planning. The Summits have improved community and business engagement with schools and fostered whole-of-community support for young people's learning and development. This has been achieved through informing and engaging educators, career advisors, youth organisations, community organisations, business and industry on the challenges facing the region's youth.

Sustainable communities

IMPROVED TRANSPORT NETWORKS (management)

Collaborative roles: Regional Development Australia Sunshine Coast, Sunshine Coast Council (with others to be confirmed).

Regional Development Australia Sunshine Coast advocates for a region-wide review of the management of the Sunshine Coast public transport network (frequency, reliability, intermodal connections and routes). It includes improved data sets regarding travel behaviour and urban density models, the quality and legibility of pathways and cycleway networks. The management and quality of that infrastructure and associated services is critical.

Data collected for the Sunshine Coast Council Community Plan (Nielsen, 2010) rated the issue of connectedness and accessibility, particularly via improved public transport, as the second highest issue after managing growth, as well as health and wellbeing, when residents were asked what they wanted the region to be like in the future.

These critical issues of connectivity and accessibility are intrinsically linked to the hard infrastructure priority projects (listed earlier under investment and infrastructure) and must be integrated into the feasibility of current key local transport mode options including, but not limited to, light rail and priority bus corridors.

CLEANTECH FUTURES FOR REGIONAL ADVANTAGE

Lead role: Cleantech Industries Sunshine Coast

Support roles: Sunshine Coast Council and Regional Development Australia Sunshine Coast

The Australian Government's Clean Energy Futures program contains significant opportunities to transition to a low carbon region. Local government is also committed to clean energy, as evidenced by the recent announcement of the Valdora solar farm initiative, projected to cover Sunshine Coast Council's energy needs for the next 30 years.

Industry diversification and job development that supports sustainable development is a key focus for RDA Sunshine Coast. The regional advantages associated with embracing low carbon and environmental solutions must be harnessed for their economic and environmental benefits. Clean technology industries provide substantial benefits to entrepreneurial businesses across a variety of categories. Maximising these benefits will create jobs and increase economic prosperity across the region.

Attachment 1: State of the region

The Sunshine Coast regional profile

The **State of the Region** section of the *2013 Regional Roadmap* provides an in-depth overview of the people, their lifestyles, employment, businesses, the threats and opportunities within the Sunshine Coast region, using latest data from a variety of sources including the Australian Bureau of Statistics (ABS). It examines human capital, economic, environmental, social, and population factors, accessing markets and comparative advantages of the region.

Key statistics for the Sunshine Coast are summarised in the table below.

Factor	Sunshine Coast score
Population growth 2012(P)	+1.8%
Population increase 2012 (P)	5,766 people
Employment Feb 2013	151,600 people
Unemployment May 2013	5.5%
Youth unemployment (15 – 24yr) May 2013	14.5%
Volunteering 2011	20.2% of population
% Managers/Professionals Feb 2013	33.2%
Participation in Uni education 2011	13.5%
Economy size 2010/11	\$13.8 billion
Number of businesses 2011	31,758
Tourism visitors Dec 2012 p.a.	9.1 million
Open space	120,000 hectares
Average water use per person May 2012	178 litres
Number of households with internet	78.9%
% use motor vehicle as main method of travel to work	80%

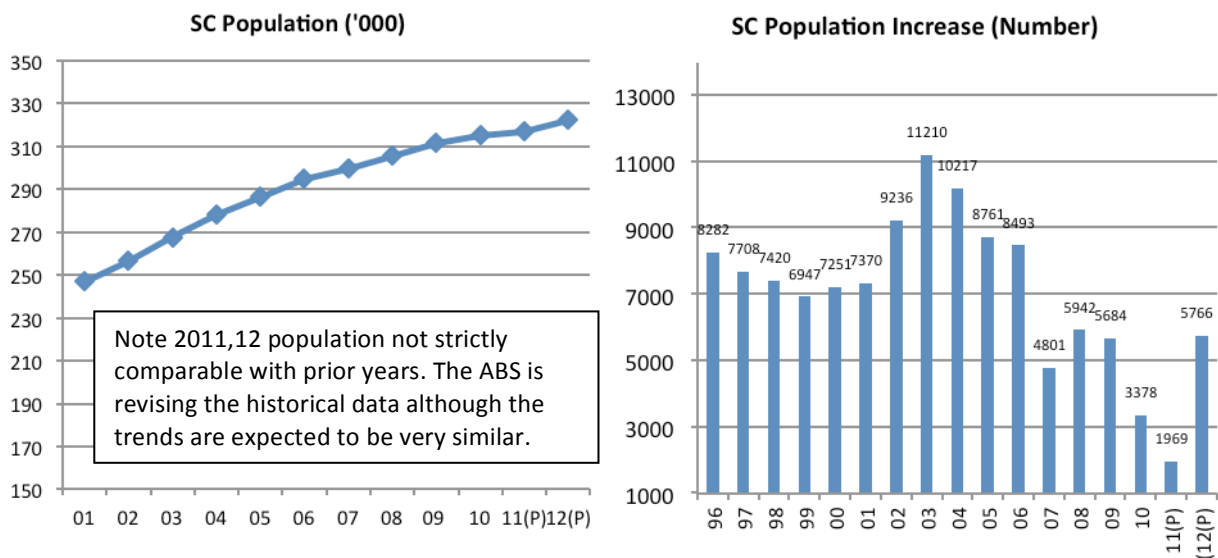
Human capital

Current population

A key feature of the region has been its strong population increases. Since 2001 the population has grown 30.5% and added 75,457 people over this time. The Sunshine Coast's share of Queensland population growth has slowed from more than 10% in 2002, 2003 and 2004 to 6.7% by 2012. The reasons for the slowdown include the overall weaker economy, the soft tourism market which is a critical industry to the Coast, and infrastructure bottlenecks. It is still the case, however, that the Sunshine Coast has been one of the fastest growing regions in Australia with growth bouncing back in 2012.

Several factors have driven these increases, including the relaxed lifestyle, favourable climate and more than 200km of coastline.

CHART 1 SUNSHINE COAST POPULATION LEVELS AND INCREASES, 1996 TO 2012



Source: ABS Regional Population Data

The charts above reflect this increase. Since 2002 the growth rate in absolute numbers of people has increased as more people have been attracted to the region. Even since the GFC started in 2008, the Sunshine Coast has added 16,797 people, the equivalent of a small town.

CHART 2 REGIONAL EMPLOYMENT AND UNEMPLOYMENT

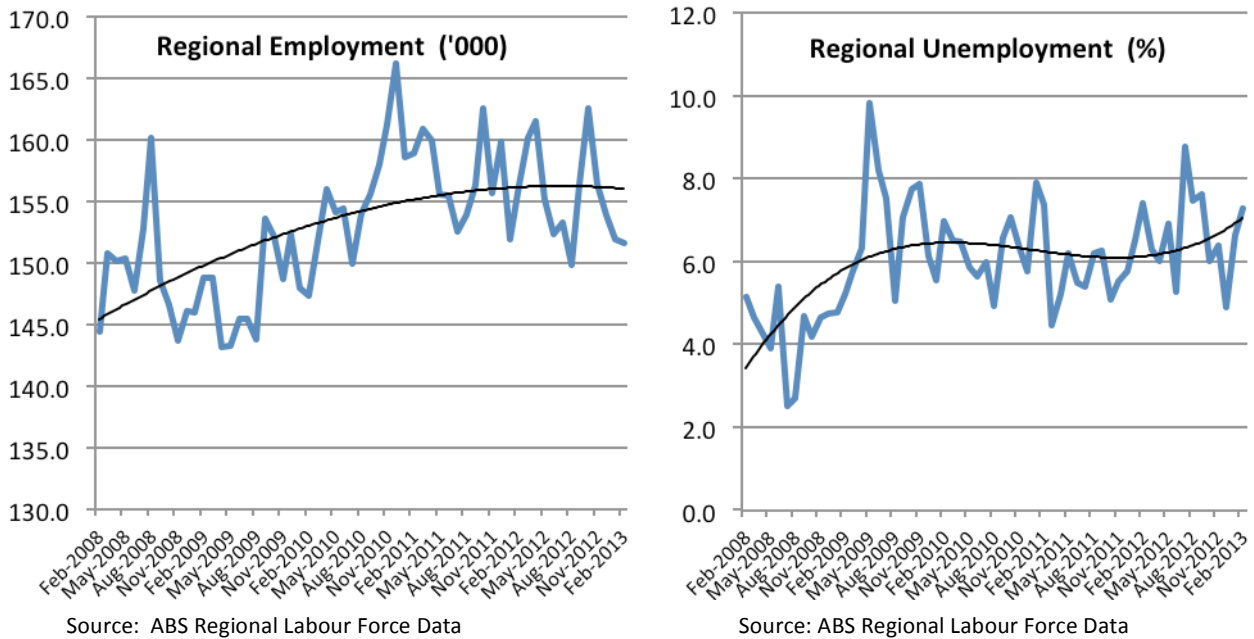


Chart 2 Regional employment and unemployment shows the Coast has not been immune to the impacts of the GFC. During this time employment has levelled while unemployment has trended up.

Youth unemployment

Employment statistics from 2011 ABS Census data indicates that the majority of 15-24 year olds in the region were employed in the retail industry (25%), followed by accommodation and food services (22.6%) and construction (10.7%). In total, these industries employed 58.4% of 15-24 year olds. This largely reflects the region’s economic base and employment opportunities. Alternative employment options need to be developed for young people outside these core industries.

According to the ABS labour data, young people in Queensland continue to experience significantly higher rates of unemployment at 15.5% among those not attending full-time education, compared to 6.6% across all age categories in 2012.

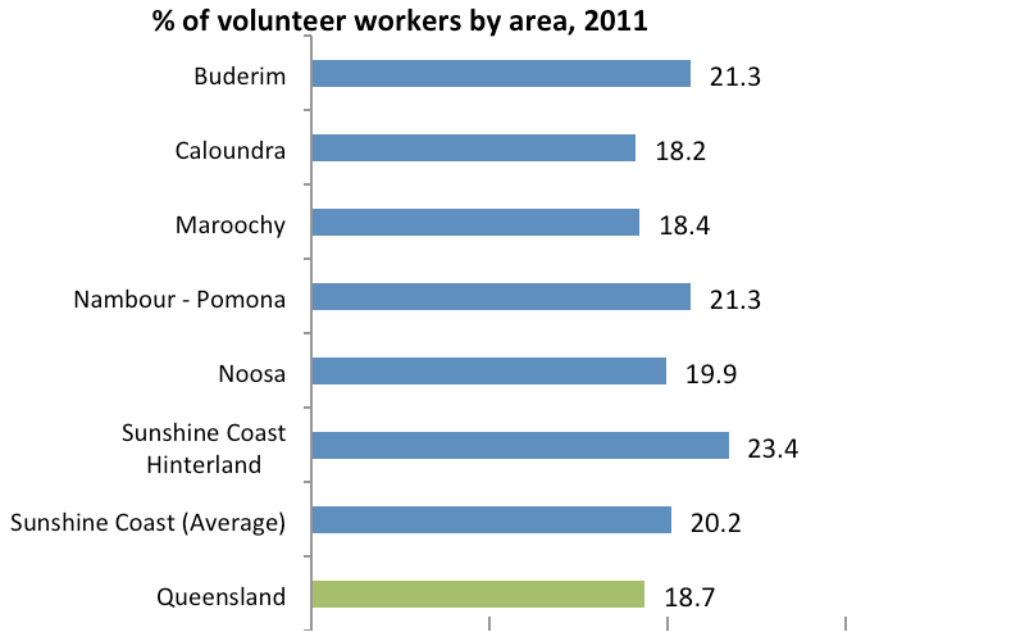
This is further compounded in the Sunshine Coast where youth unemployment has reached an unacceptably high level. The 2010 Sunshine Coast Youth Summit survey found that youth unemployment was the second most important issue concerning young people living in the region.

This is an area that requires focus to ensure that today’s youth are trained and skilled to be welcomed into tomorrow’s workforce.

Volunteers

The Sunshine Coast has above average levels of volunteers, with 20.2% of the population undertaking some form of volunteering, compared to 18.7% of the Queensland population. This is a reflection of the Coast’s older age profile, as older people (especially retired) are more likely to volunteer.

CHART 3 PERCENTAGE OF POPULATION THAT VOLUNTEER 2011



Source: 2011 Census

CHART 4 SUNSHINE COAST TOURISM EMPLOYMENT FEBRUARY 2013



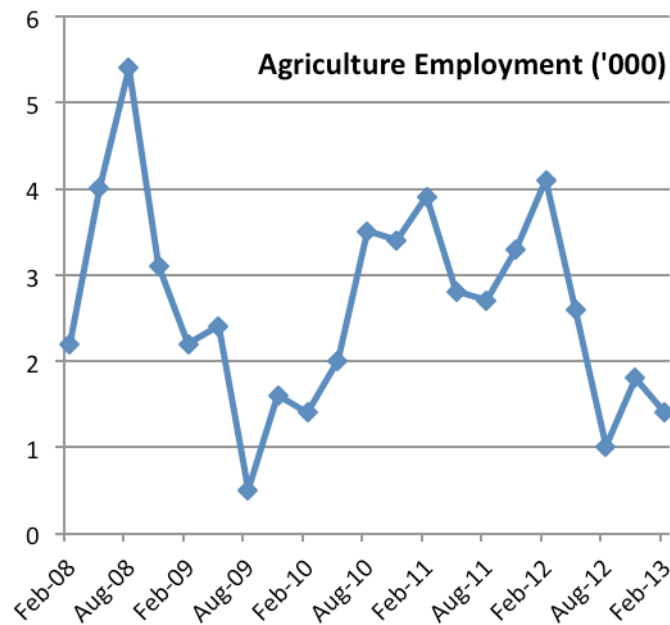
Source: Derived by EMDA from ABS Regional Labour Force Data

As Chart 4 above shows, tourism employment numbers grew in 2010 since the GFC, but then softened due to the weaker inbound market.

Sunshine Coast agriculture

Agriculture (including fishing and forestry) employment is a small component of the Sunshine Coast employment market. ABS estimates that 1,400 people work in this industry. However, these figures do not include the broader category of food and beverage supply and distribution. Sugar cane production is a big component of agriculture on the Coast.

CHART 5 SUNSHINE COAST AGRICULTURE EMPLOYMENT FEBRUARY 2013



Source: ABS Regional Labour Force Data

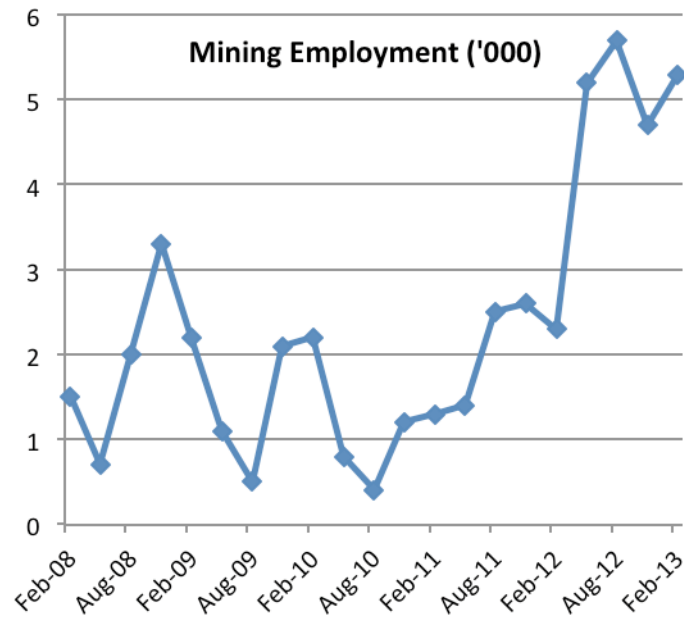
Sunshine Coast mining

Although there is no direct mining activity in the region, the Sunshine Coast is playing an increasingly important role as a service centre and a base for Fly-In-Fly-Out (FIFO) workers, and for mining support businesses.

Employment in the Sunshine Coast mining sector has significantly increased to 5,300 workers in the past 12 months.

With the cost of providing accommodation in the mining regions well documented, FIFO is expected to grow; the Sunshine Coast's desirable location makes it an appealing solution.

CHART 6 SUNSHINE COAST MINING EMPLOYMENT FEBRUARY 2013

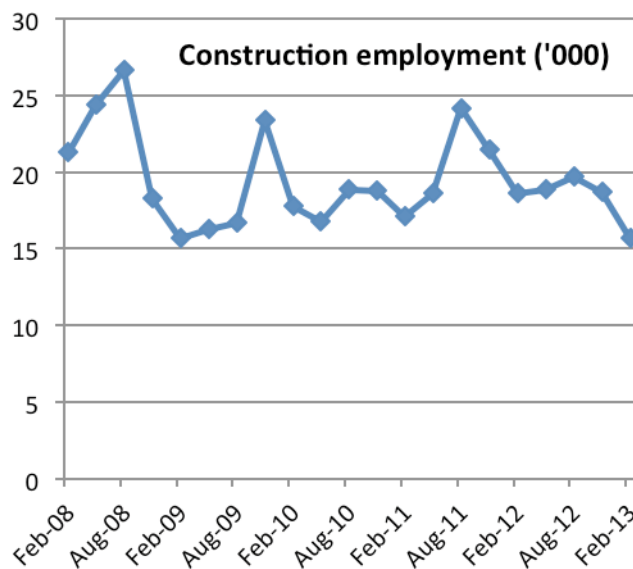


Source: ABS Regional Labour Force Data

Sunshine Coast construction

Construction is one of the major industries on the Sunshine Coast and currently employs 15,700 workers. Although this is below the peak from earlier years, it has remained fairly constant due to the region's continued population expansion.

CHART 7 SUNSHINE COAST CONSTRUCTION EMPLOYMENT FEBRUARY 2013

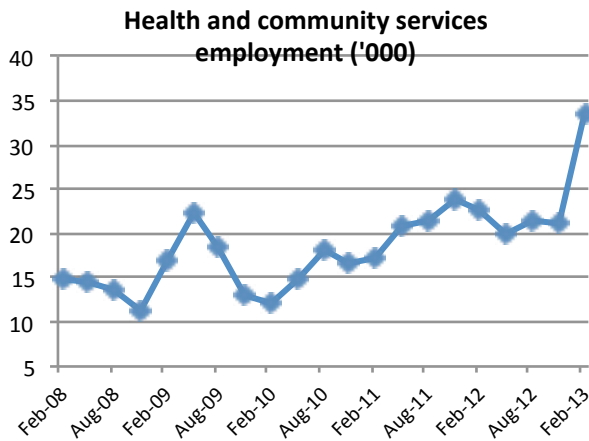


Source: ABS Regional Labour Force Data

Sunshine Coast health and community services

Health and community services is one of the largest sectors on the Sunshine Coast with 33,600 people employed in this sector. Although the February 2013 figure looks high, the overall growth trend is strong. The chart below shows that numbers have been steadily increasing. Since 2007 this sector has increased by 19,000 on the Sunshine Coast.

CHART 8 SUNSHINE COAST HEALTH AND COMMUNITY SERVICES EMPLOYMENT FEBRUARY 2013

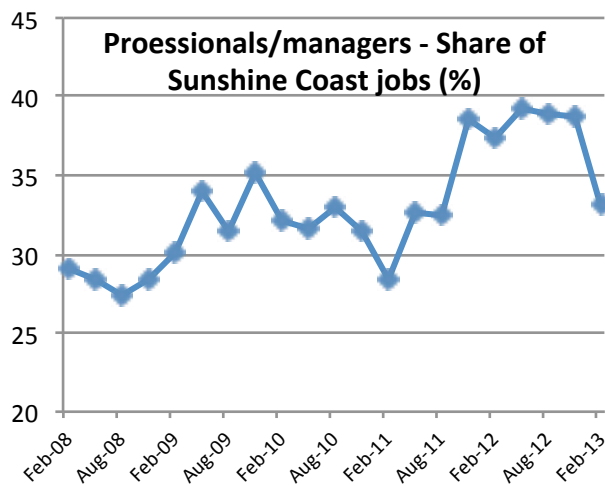


Source: ABS Regional Labour Force Data

Sunshine Coast occupations

The workforce’s skill level is increasing, with professionals and managers accounting for a higher share of the overall Sunshine Coast workforce. In February 2013, 33.2% of the region’s workforce was classified by the ABS as either managerial or professional. Although share has softened recently, the trend growth is clear.

CHART 9 SUNSHINE COAST PROFESSIONALS/MANAGERS SHARE OF EMPLOYMENT FEBRUARY 2013

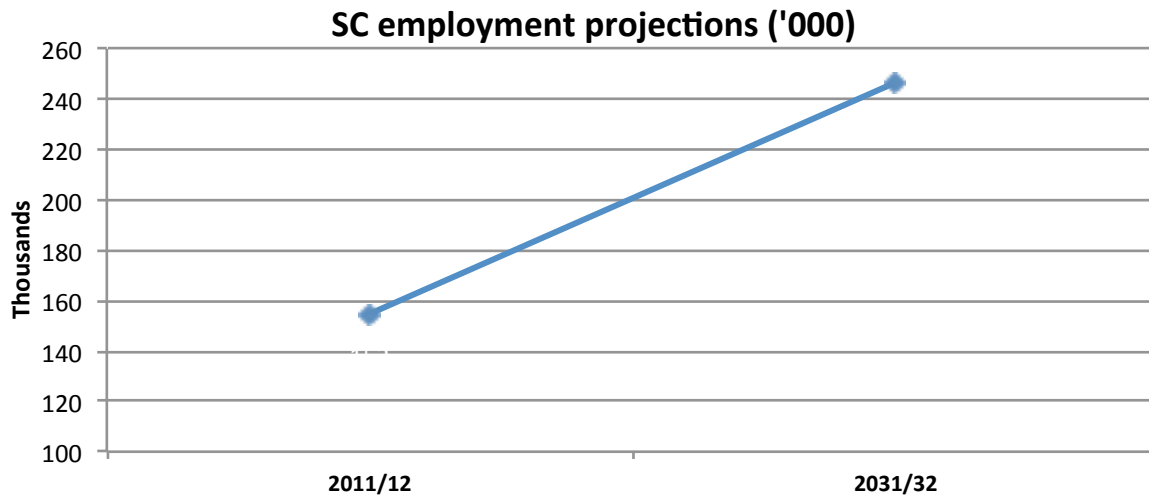


Source: ABS Regional Labour Force Data

Employment outlook for the region based on current population projections

Deloitte Access Economics recently completed a Workforce Planning Research study for RDA Sunshine Coast with the resulting forecast workforce change shown in the chart below.

CHART 10 REGIONAL EMPLOYMENT PROJECTIONS



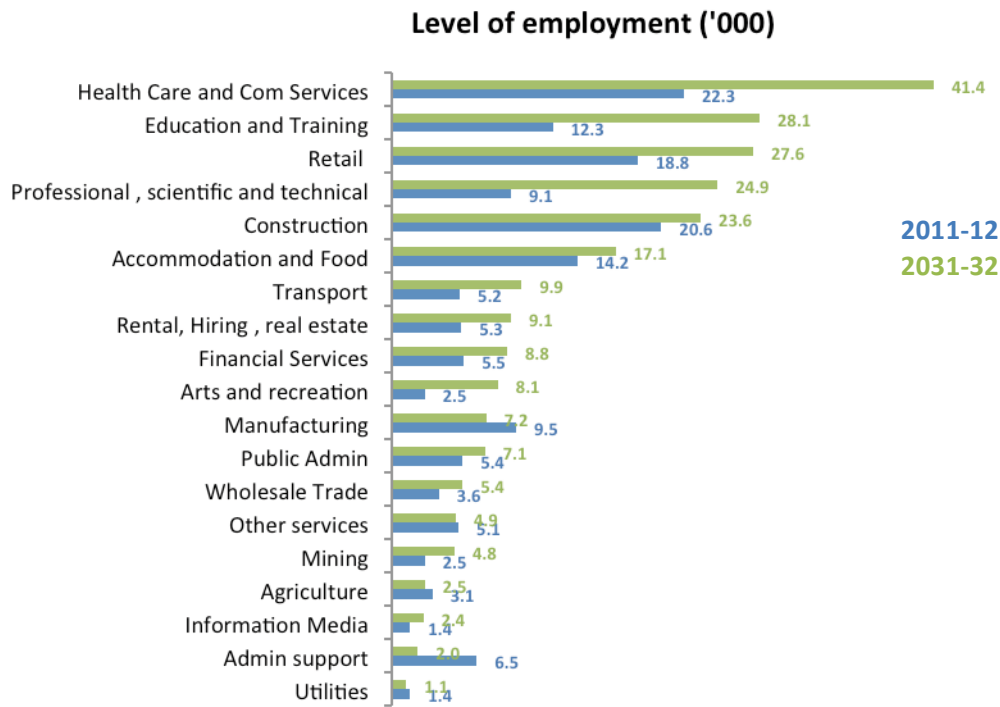
Source: Deloitte Access Economics Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions, 2013

The workforce on the Sunshine Coast is forecast to expand by 59% over the next 30 years and is expected to be just short of 250,000 people. As a share of total Queensland employment, the Sunshine Coast region has recorded a gradual rise over the past decade. That trend is projected to continue to 2031-32, with the region’s share of employment across Queensland increasing from 6.6% to 6.8%.

Unsurprisingly, growth in labour demand in the Sunshine Coast region is expected to generally outpace growth in Queensland over the forecast period, driven primarily by an expected faster rate of working-age population growth for the Sunshine Coast region. Assuming migration continues as per the long-term trend, a continued inflow of residents to the region would be expected to counter-balance the ageing effect as existing residents increasingly move into age cohorts where their labour force participation is lower.

At the industry level (shown in the chart overleaf) large growth areas include health care and social assistance, education and training, professional, scientific and technical services, and tourism. On the other hand, agriculture and manufacturing are likely to see reductions. Developing and attracting a more educated workforce and managing the redeployment of workers between these industries will be a regional issue. This report also finds that due to the ageing of the population and its retirement from the workforce, Queensland overall and the Sunshine Coast will see a significant shortage of labour from about 2020.

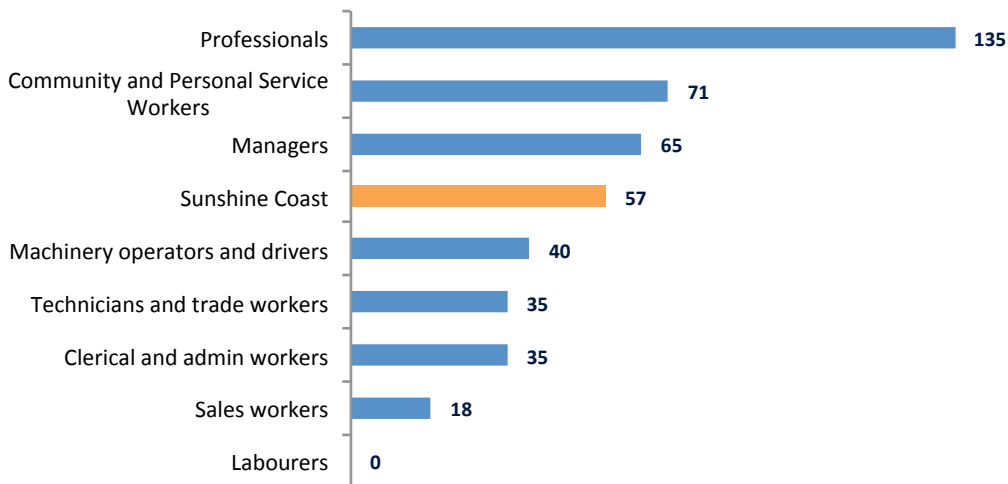
CHART 11 SUNSHINE COAST REGION EMPLOYMENT BY INDUSTRY, 2011-12 AND 2031-32



Source: Deloitte Access Economics Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions, 2013

The growth in employment across service-related industries is expected to generate a strong increase in knowledge workers in the Sunshine Coast region over the next two decades.

CHART 12 EMPLOYMENT GROWTH BY OCCUPATION TYPE, SUNSHINE COAST REGION, 2011-12 TO 2031-32 (%)



Source: Deloitte Access Economics Workforce Planning Research for the Sunshine Coast and Moreton Bay Council Regions, 2013

As Chart 12 shows, demand for professionals and managers is expected to be particularly strong over the period, followed by community and personal service workers, lifted by growth in health workers and hospitality workers. On the other hand demand for unskilled work is expected to be flat. This has significant implications for the Sunshine Coast as the unskilled (often young uneducated people) will find it more difficult to find work, leading to disenfranchisement.

This workforce planning report identifies three key areas the region will need to focus on to maintain jobs growth:

- Continue to make the area attractive by reducing infrastructure limitations.
- Tap into the growth potential of the resource industry.
- Review the capacity of key industries to adapt to new technologies.

Employment opportunities

The Sunshine Coast requires suitable employment to be generated for the key lifestage sectors, including key employment growth areas for families. The types of jobs created will also need to be attractive for these segments, ie family-friendly, good wages and opportunities for advancement.

Attracting singles and couples will also require opportunities for this segment to improve their skills and assist them in promotion opportunities (Keep Australia Working Sunshine Coast - Moreton Bay 2010).

In addition, a greater emphasis will be needed to reduce the level of youth unemployment and actively work toward a target unemployment rate below the State average. Another area requiring focus is working with the business community to use the skills and experience available in the older demographic groups. Many people close to retirement or semi-retired in this region have exceptional skills and experience that could be better used. There is also value in increasing opportunities for the older population to take on new skills and learning opportunities that can lead to employment options.

Education

Education is one of the key drivers of the region's social, cultural and economic development and is recognised as a fundamental human right. Formal education on the Sunshine Coast is primarily provided through government and non-government schools, tertiary education, including TAFE and university campuses, various business and training colleges.

The Sunshine Coast currently has 88 schools, two universities and five TAFE campuses contributing towards educational opportunities in the region.

The University of the Sunshine Coast (USC), located centrally at Sippy Downs, provides more than 100 degree programs in undergraduate and postgraduate study and employs almost 500 staff. More than 8,904 students are enrolled during 2013 across the faculties of Arts and Social Sciences, Business, and Science, Health and Education.

Central Queensland University (CQU) Australia has a campus at Noosaville with approximately 1200 students enrolled during 2013 and offers a wide range of programs through both distance education and on-campus study modes. Programs available to study on-campus include teacher education at all levels from pre-school to secondary teaching, nursing and midwifery, multimedia, and postgraduate programs in the creative arts, as well as a full research program for Masters and Doctoral students in a wide range of disciplines.

These universities actively partner with local industries and businesses through various research programs to provide important links between students and the workforce. USC also partners with local Year 11 and 12 high school students to enrol in university courses to prepare them for a university career.

There are also further education opportunities offered to Sunshine Coast communities through less formal channels such as the University of the Third Age. Sunshine Coast Council has recognised the importance of informal and community education learning opportunities and has established an Adult Learning Cooperative offering a variety of adult classes, and conducts learning activities through council libraries (SCC Community Planning Fact Sheet 9).

The Australian Bureau of Statistics 2011 and Sunshine Coast Community Profile, show the following levels of qualifications in the region:

- Among the Sunshine Coast population, fewer people have a degree or higher (14.2%) versus Queensland (15.9%) but the gap is narrowing due to the presence of the University of the Sunshine Coast.
- Among 15-24 year olds 13.5% are attending university compared with a Queensland average of 16.7%. This is a substantial increase from 1996 when only 4.1% of Sunshine Coast residents in this age group were attending university.

Education plays an important role in community development and there is already some anecdotal evidence that the school system is close to capacity. Based on the population scenarios, a substantial investment will need to be made in education facilities to keep up with the possible demand.

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

Economic

The economic value of the region

The Sunshine Coast region's gross regional product (GRP) has been growing strongly over the last 20 years, although growth has slowed recently due to the GFC. The size of the region's economy is estimated by AEC (June 2011) at \$13.8 billion in 2010/11.

Key drivers of this economic growth have been:

- Strong population increases on the Sunshine Coast.
- Growth in key coastal industries such as tourism, retail and construction.
- Attracting a more flexible workforce.

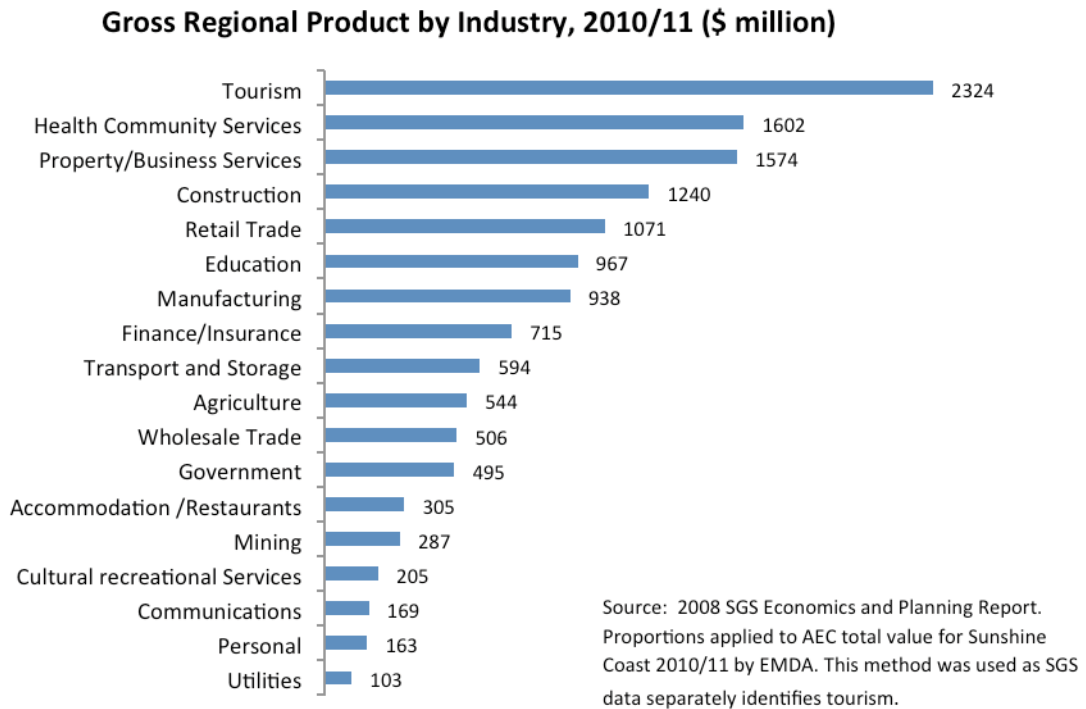
This economic activity supports approximately 31,758 businesses on the Sunshine Coast; 85.3% of these businesses have five or less employees. The number of employees per business is similar to the Australian average of 84.8% (source: Economic Development Strategy 2010-2014).

The economic value by industry in the region

Chart 13 Gross Regional Product by industry, 2010/11 shows tourism is the most valuable industry on the Sunshine Coast, estimated to be worth \$2,324 million in 2010/11.

Other industries related to the tourism sector are also strong performers, with construction worth \$1,240 million and retail \$1,071 million per annum.

CHART 13 GROSS REGIONAL PRODUCT BY INDUSTRY, 2010/11



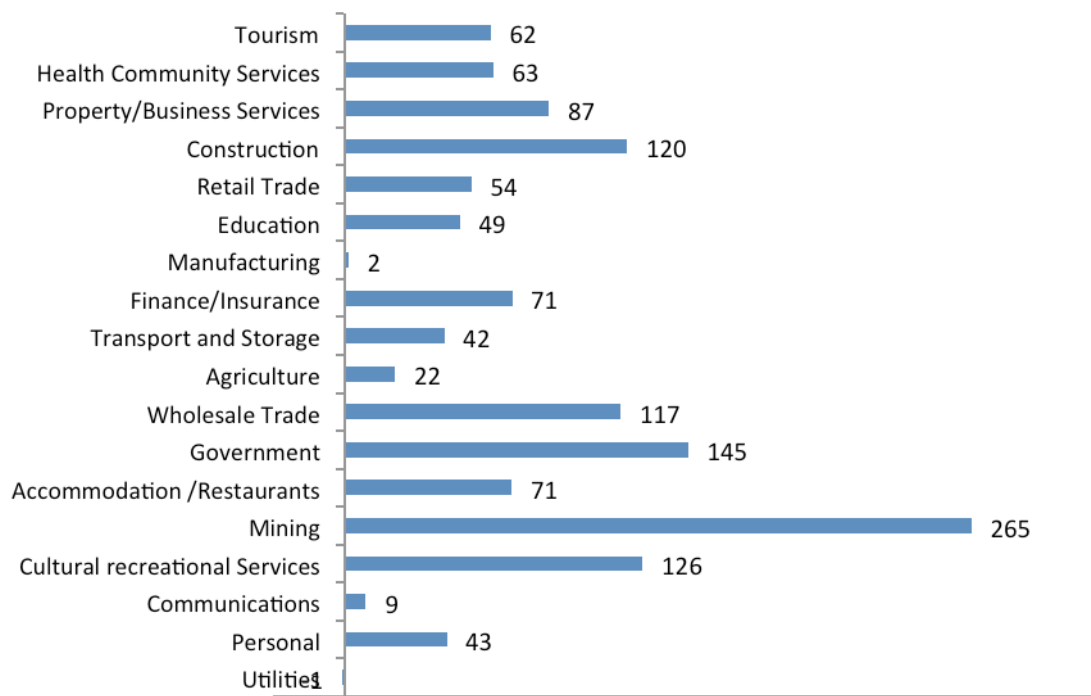
The impact of strong population increases is also evident in other industry sectors, with education, health and community services sectors increasing on the Sunshine Coast.

The emerging diverse nature of the economy is also apparent, with a mining sector worth \$287 million and a manufacturing sector of \$938 million per annum.

Growth industries in the Sunshine Coast region

The largest industries have been growing at impressive rates; tourism has increased by 62%, construction 120% and retail trade 54%. All sectors (other than a minor fall in utilities) have increased, including a slight increase in the manufacturing sector. Chart 14 below represents the changes in GRP across industries.

CHART 14 CHANGE (%) GRP BY INDUSTRY, 2003-2008



Source: SGS Economic and Planning Report 2009

The mining sector has been the most rapidly growing industry (265% since 2003), largely due to the commodities boom. The Coast is emerging as an important service centre to the mining industry.

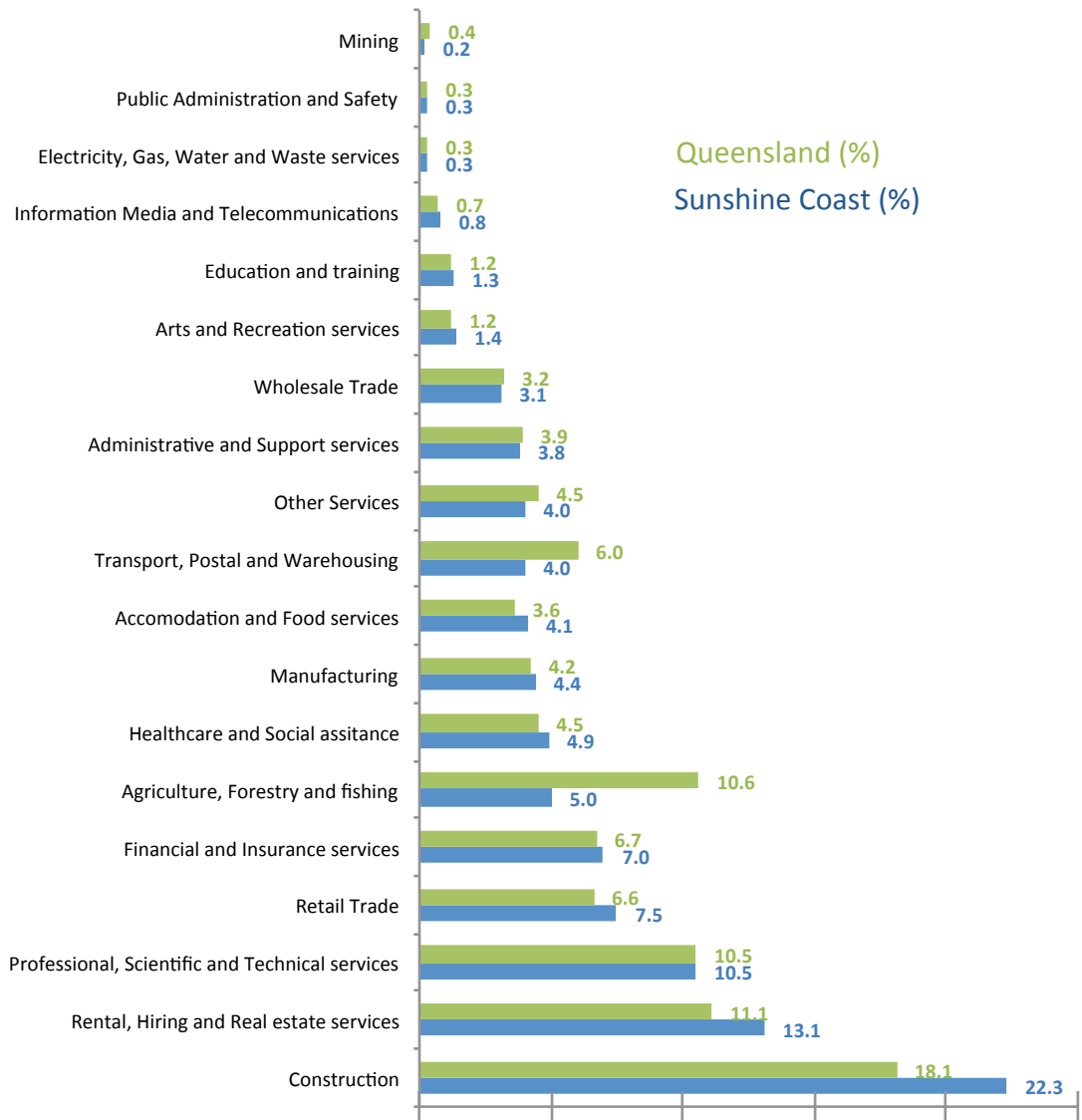
The impact of strong population increases and an ageing demographic is also evident in the strong increase in the health and community services sector.

The growth across all these industries shows that while tourism is a critical component of the Sunshine Coast economy, other industries are also growing, leading to a more diversified economy as it transforms to the third phase.

2011 Industry Profile Sunshine Coast – business numbers

The Sunshine Coast has a bigger proportion of construction industry businesses compared to the Queensland average, which reflects its importance in the region. The Coast has a below average number of agricultural business and is about average in the tourism area compared with Queensland averages.

CHART 15 SUNSHINE COAST INDUSTRY BUSINESS PROFILES – 2011



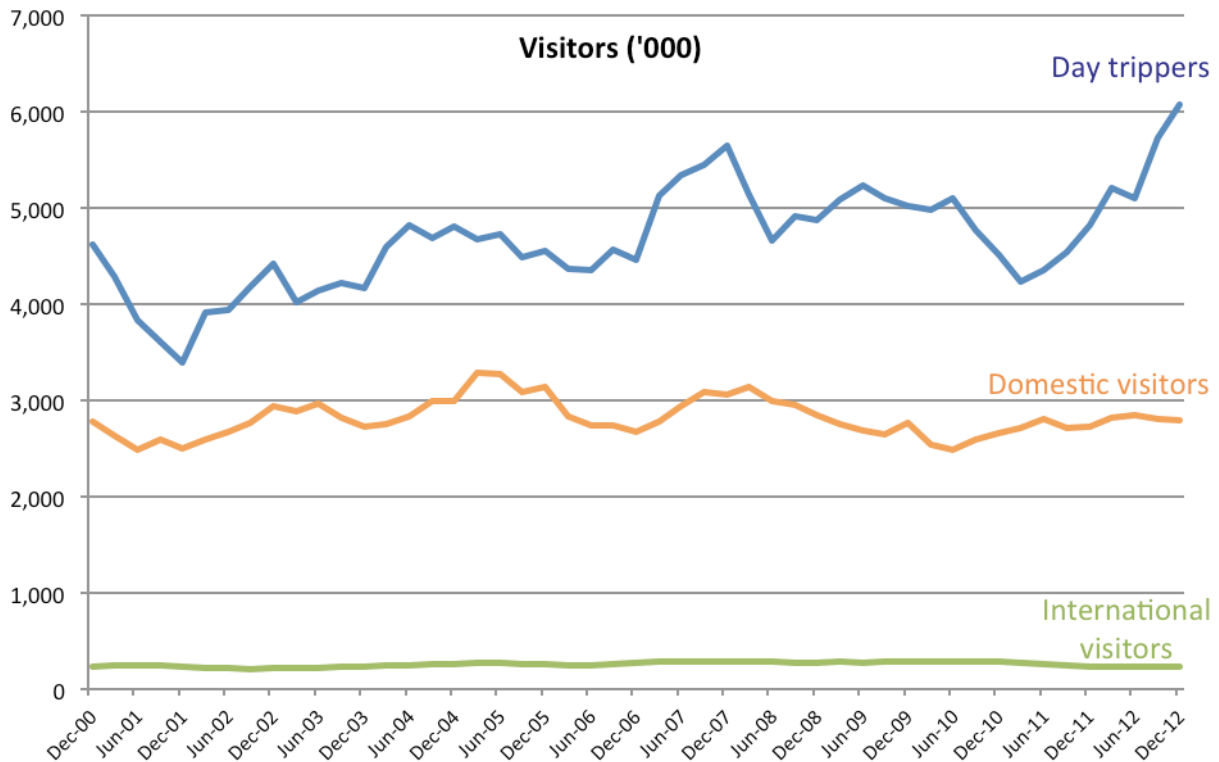
Source: Queensland Government Data

Tourism

Tourism is a major industry which generates a large number of visitors to the region. Using data from Tourism Research Australia, 9.1 million trips were made to the Sunshine Coast in the year to December 2012; this comprises 228,000 international visitors, 2,788,000 domestic overnight visitors and 6,874,000 domestic day trippers.

In the last year the number of day trippers surged by 26%, while the international market weakened by 3.8% due primarily to the GFC. The domestic overnight market has improved slightly by 2.4%.

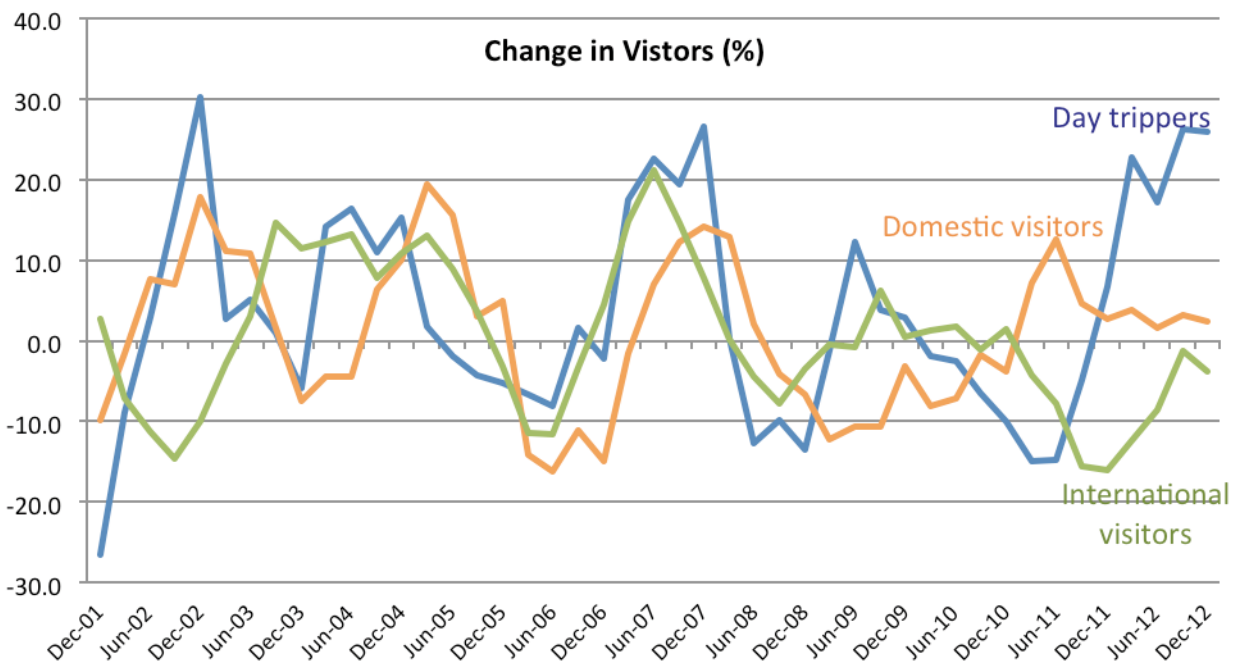
CHART 16 SUNSHINE COAST TOURISM VISITOR NUMBERS, 2000 - 2012



Source: National Visitor Survey and International Visitor Survey

Visitor numbers have been strong over the last decade. There is a need for improved infrastructure, including alternative transport, health care, sport and recreation and cultural facilities to continue to support strong visitor numbers.

CHART 17 SUNSHINE COAST TOURISM CHANGE VISITOR NUMBERS, 2000 - 2012



Source: National Visitor Survey and International Visitor Survey

The growth in day trippers has been very strong recently, with the international market showing signs of a comeback.

Environment

Recreation space

The Sunshine Coast is well endowed with natural environment areas, with almost 120,000 hectares considered open space which contributes to the relaxed community lifestyle. As a key regional attraction it includes public and privately owned land, parks, trails, reserves, bushland, beaches and waterways.

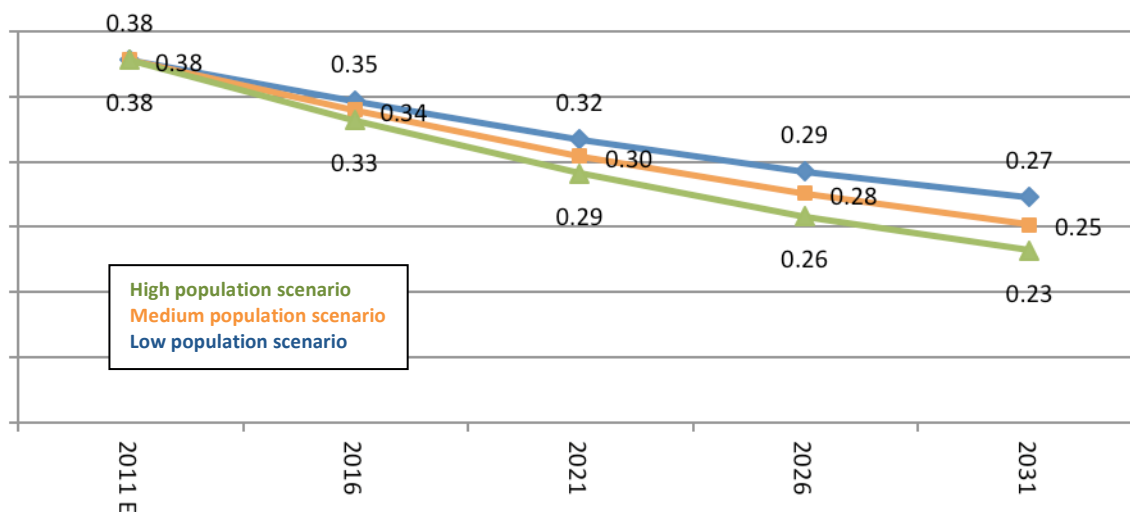
The region’s beaches are a major tourist attraction with an estimated 5.5 million beachgoers annually (SCC Community Planning Fact Sheet 13).

With a diverse range of geographical, geological and topographical features, the Sunshine Coast is becoming increasingly renowned as a centre of biodiversity richness. An example is the Noosa Biosphere Reserve, a UNESCO-recognised conservation area.

Approximately 20,000 hectares is managed by Sunshine Coast Council and the community for environmental, recreational and social purposes. Approximately one third of the total Sunshine Coast region consists of native vegetation, with around half of this vegetation on private land. Council has purchased more than 4,000ha of this land for conservation purposes.

However, the projected strong population increases will place considerable pressure on these natural areas. Chart 18 Average recreation (hectares) area per person shows that the available natural area per person could diminish considerably. Under the high scenario, natural environment per person could fall to 0.23 hectares by 2031, compared to 0.38 hectares per person now. Even under the low scenario, the recreation space could fall to 0.27 hectares per person.

CHART 18 AVERAGE RECREATION (HECTARES) AREA PER PERSON

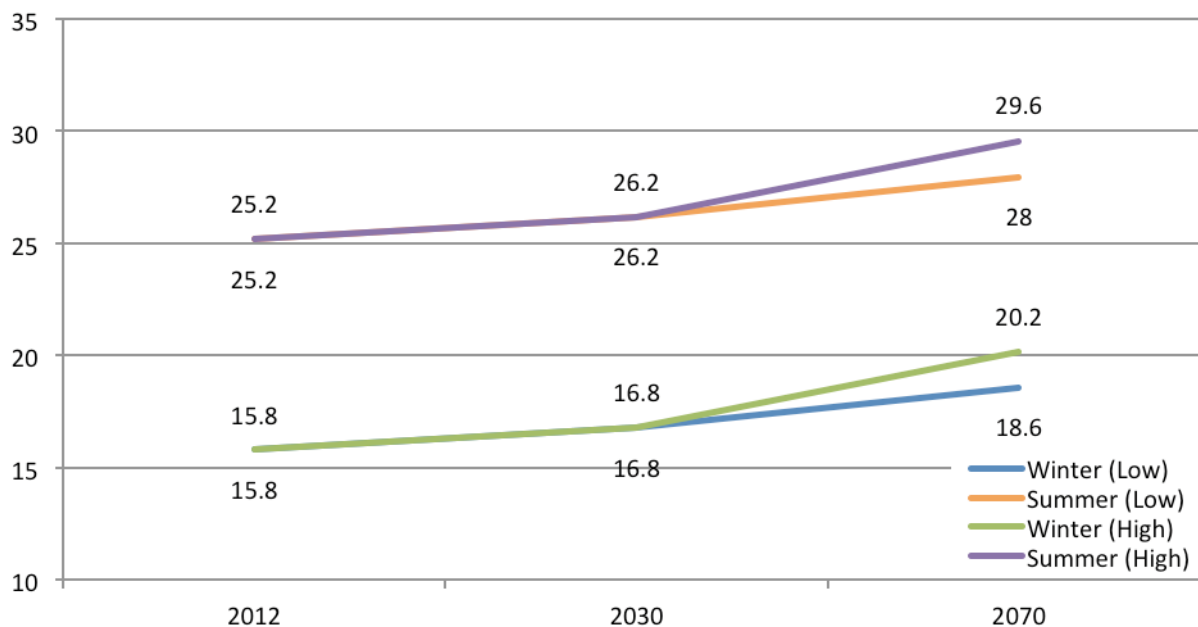


Source: EMDA *Future Coast* Model, derived from open space area (120,000 hectares and assumes there is no change in available area).

Climate change

The Sunshine Coast is expected to experience a number of changes due to climate change. As the chart below shows, average temperatures on the Sunshine Coast are expected to rise into the future. Under a high emissions scenario, mean summer temperatures are expected to rise by 3.4 degrees by 2070 (under the CSIRO best estimate scenario). Under a low emissions scenario, mean temperatures are forecast to increase as shown below.

CHART 19 PROJECTED TEMPERATURES – SUNSHINE COAST



Source: Derived from CSIRO Climate Change in Australia 2007, best estimate temperature change for Australia applied to current Sunshine Coast average temperatures (Bureau of Meteorology)

According to the Sunshine Coast Council Climate Change and Peak Oil Strategy 2010-2020, climate change is expected to cause the following:

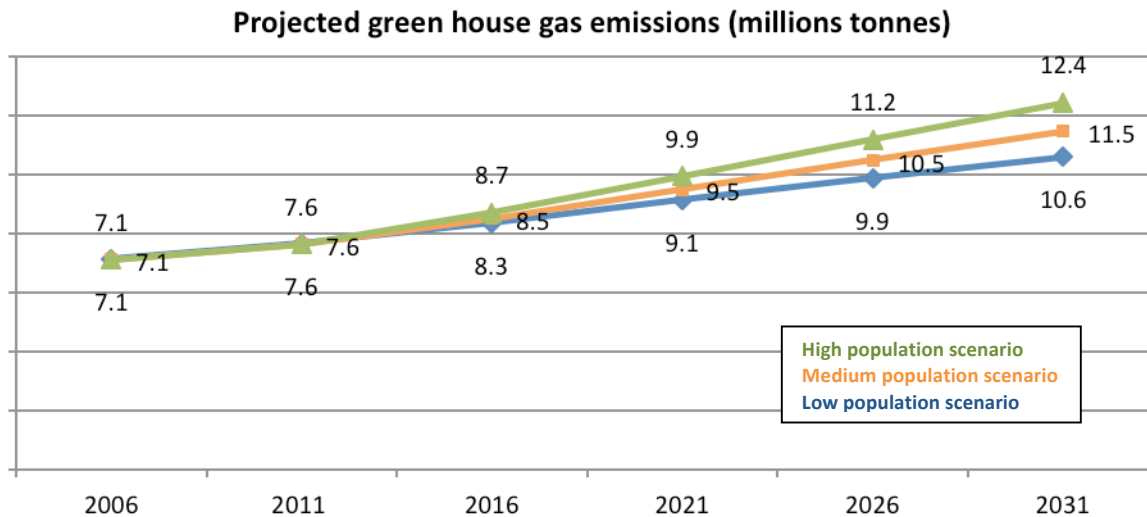
- Reductions in annual rainfall.
- Fewer days per annum when rainfall can be expected to occur.
- Shifts in mean seasonal rainfall.
- Shifts in mean monthly rainfall.
- Changes in the intensity and frequency of extreme rainfall events.
- Sea levels are also expected to rise.

Such impacts, especially sea levels rising and the increased likelihood of more extreme weather including flooding, mean the land available for further urban development, especially close to the coast, may be even more restricted.

Projected emissions

Chart 20 identifies the increases in greenhouse gases that could be expected from further population growth. Total greenhouse gas emissions are forecast to grow under each scenario, which assumes that current levels generated per capita do not increase. Under the high scenario, emissions almost double by 2031 due to population increases.

CHART 20 SUNSHINE COAST CURRENT AND PROJECTED GREENHOUSE GAS EMISSIONS



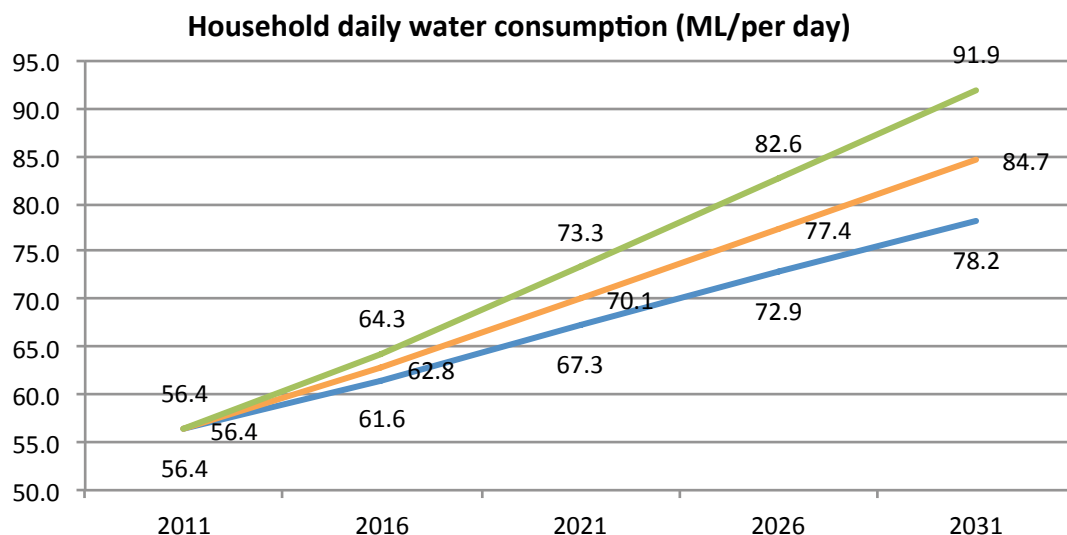
Source: EMDA *Future Coast* Model, based on current Australia per capita production of 24.1 tonnes per person per annum (Source: Australia Greenhouse Accounts Dec. 2011) and assumes no change per capita.

Water resources

The reductions in annual rainfall due to climate change will also place pressure on the Sunshine Coast’s water resources.

Current dams include Lake Macdonald, Baroon Pocket, Cooloolabin, Poona, Ewen Maddock and Wappa, each one controlling the release of water downstream. The Mary River intake also supplies water to the region.

CHART 21 SUNSHINE COAST HOUSEHOLD PROJECTIONS TO 2031



Source: EMDA *Future Coast* Model, based on data from water agencies

Water usage on the Sunshine Coast was 178 litres per person in May 2012; this figure was used as the average for future projections. (Note: the daily water consumption per person on the Sunshine Coast was more than 300 litres before changes were made in consumption).

Chart 21 above shows that household demand for water will grow strongly if the population growth scenarios eventuate. By 2031 water consumed by households under the high population increase scenario is projected to nearly double to 91.9 ML/per day. Even under the low scenario, water consumption could increase to 78.2 ML/per day.

It is unlikely that the increased demand for water could be met by new dams. The region has already experienced difficulty in getting new dams approved, with the proposed Mary Valley Dam shelved. Future water needs are more likely to be met by developing new water catching and saving technologies, rather than relying on new dam construction.

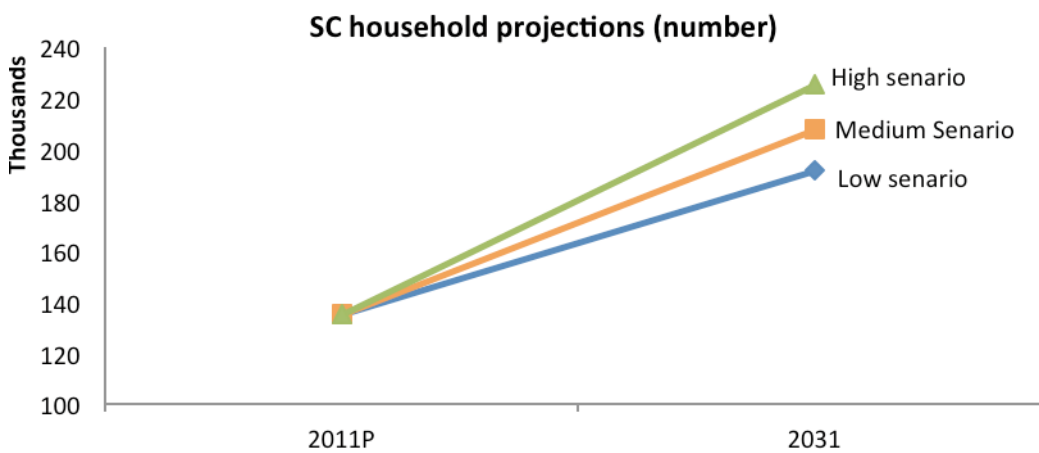
Social

Urban development profile

The number of dwellings required to meet future population levels has been modelled under each of the population scenarios shown later in this section.

By 2031, 59,909 dwellings (45.2% increase from 2011) would be required to meet the low scenario population increase. If the high scenario populations were met, then an additional 96,810 (73.1% increase from 2011) dwellings would be required in the region.

CHART 22 SUNSHINE COAST HOUSEHOLD PROJECTIONS TO 2031



Source: EMDA *Future Coast* Model, based on number of people per dwelling, ratios from the ABS Census, 1996, 2001, 2006, 2011.

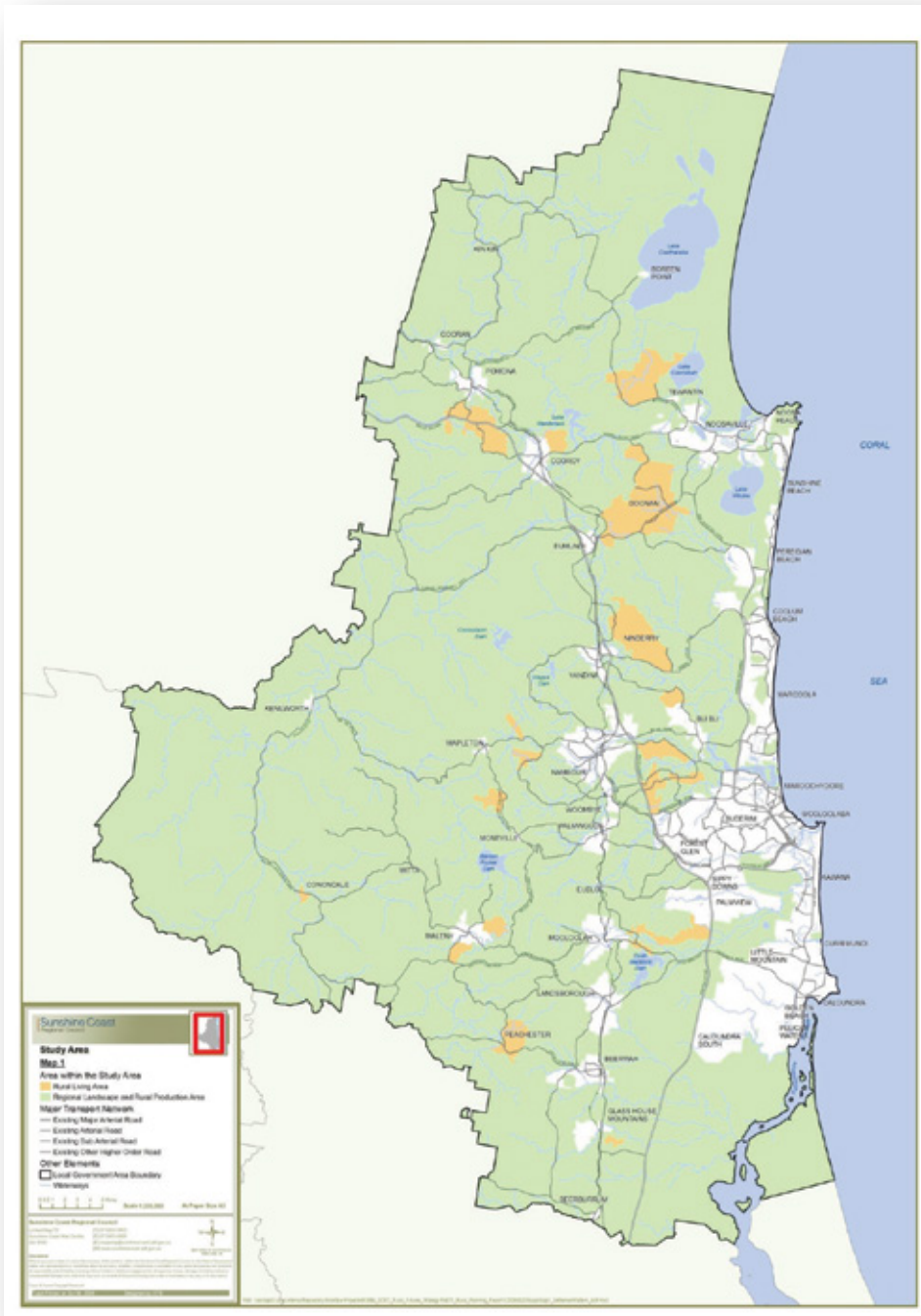
TABLE 1 DWELLING SCENARIOS FOR THE SUNSHINE COAST – 2031

Series	Number of dwellings 2011P	Dwellings 2031	Dwelling increases 2011 to 2031	% increase 2010 to 2031
Low	134,870	191,480	56,610	42.0
Medium	134,870	207,478	72,608	53.8
High	134,870	225,123	90,253	66.9

Source: EMDA *Future Coast* Model – based on data from water agencies

Map 2 below shows there are limited opportunities to expand the urban area. The non-urban areas on the Sunshine Coast contain critical natural areas including National Parks, State Forests, good quality agricultural land and constrained land. To maintain the natural values and characteristics of the region and improve opportunities for affordable living, a diverse range of housing opportunities need to be considered within the existing urban areas (including Palmview and Caloundra South).

MAP 2: SUNSHINE COAST URBAN AREA



Source: Sunshine Coast Council

Urban density

The Sunshine Coast region has a population density of 102.7 people per square kilometre, far less overall than the Gold Coast (284.2 people per square kilometre), and total Greater Brisbane (135.6 people per square kilometre). However, this lower average is a combination of high density locations such as Noosa (405.9), Nambour (346), Maroochydore (1241.3) and Mooloolaba (2055.8). In the case of Mooloolaba this is about the same density as a suburb in a major capital city.

The overall lower level density is due to development constraints on multi-story units, the level of open areas (National, State parks etc) and cane field areas which are prone to flooding and therefore are unsuitable for urban development. These open areas and low density are a core appeal for some residents living on the Sunshine Coast and there is a desire to maintain this low density.

However 'Our Place Our Future' consultations found that while respondents wanted population growth to be managed, a substantial majority supported discrete areas of higher density in appropriate locations with careful management of the impacts of density on local character (The Affordable Living Strategy 2010). Overcrowding, i.e. traffic congestion, is becoming evident in high density areas.

According to the Socio-Economic Indexes for Areas (SEIFA - developed by the ABS from the 2011 Census), the Sunshine Coast has a significantly lower proportion in the most advantaged quintile (11.4%), compared with 20.0% for the State and only 12.8% in the lowest quintile (20.0% for the State). The reason could be attributed to a higher level of reasonably well off retirees in the region, boosting incomes among older people. However, increases in the general cost of living are having an impact and an increasing number of retirees and the older demographic are now facing financial hardship.

The five localities with a lower SEIFA score on the Sunshine Coast include Caloundra-Kings Beach-Moffat Beach-Shelley Beach, Cooroy, Nambour-Burnside and district, Cooran-Federal, and Maroochydore. Low socio-economic areas tend to have poorer health and physical activity measures such as Type 2 Diabetes and obesity, in particular where there are larger numbers of those aged 65+. These five localities have high numbers of people aged 65 years and over and have a greater unemployment rate compared with the rest of the Sunshine Coast (SCC Community Profile – accessed 4 October 2010).

Health

Sunshine Coast residents' health is generally in line with the Queensland population. Overall though, they are slightly less obese with 57.4% of Sunshine Coast residents classified as having an unhealthy weight compared with 60.1% for the Queensland population. (Source: Self reported health status, Sunshine Coast hospital and Health Service, Medicare Local 2011-12).

The region is serviced by three public hospitals (Nambour, Caloundra and Maleny) and five private hospitals. A new \$1.57 billion, 450 overnight bed tertiary level hospital and a \$60.8 million medical training and research centre is planned for Kawana to improve health services on the Sunshine Coast. As the centrepiece of the Kawana Health Campus, the Sunshine Coast University Hospital will be a teaching and research facility offering the community a higher level of more specialised health services. The centre will have the capacity to train 1300 doctors, nurses and allied health professionals every year to staff local hospitals.

Nambour General Hospital (NGH) is the main referral hospital on the Sunshine Coast and provides a range of services including specialist and acute care. The small size (bed numbers and clinical support services) and limited service capability at Caloundra, Noosa, Gympie and Maleny hospitals limits the role these facilities can play in expanding service capacity and capability.

There is already evidence that the hospital system is having difficulty coping with the growing demand for services on the Sunshine Coast:

- Patients at NGH experience long waiting times and the hospital has consistently high occupancy levels.
- There is significant flow of Southern Cluster (and its broader catchment) residents to Brisbane hospitals for care. Southern Cluster residents also access fewer health services (in any location) than is expected, compared to the rest of Queensland (indicated by a low Relative Utilisation score). These factors highlight the need for an adequate and appropriate mix of clinical services and more effective arrangements for delivering services locally. Service areas where analysis indicates that Sunshine Coast residents have lower access than the state average include dermatology, endocrinology, gastroenterology, rehabilitation, palliative care and geriatric management (Queensland Government 2010).

It is already anticipated that the undersupply will worsen until the Sunshine Coast University Hospital is operational in 2016.

The Sunshine Coast-Wide Bay Southern Cluster Projected Inpatient Bed Requirements shows that by 2022 the region's current capacity of 592 beds would need to increase to 1,187 beds, an increase of 595. To meet this need the Sunshine Coast University Hospital is planned to be expanded to 738 beds by 2021 (Queensland Government 2010). This will also extensively alleviate the outflow to Brisbane.

Ageing of the population

The Sunshine Coast's ageing population will have an impact on the need to plan appropriate health services and infrastructure for the region. The current population aged 65+ is 18%. It is estimated that by 2026 this will increase to 21.8%, while the population aged 85+ is expected to almost treble.

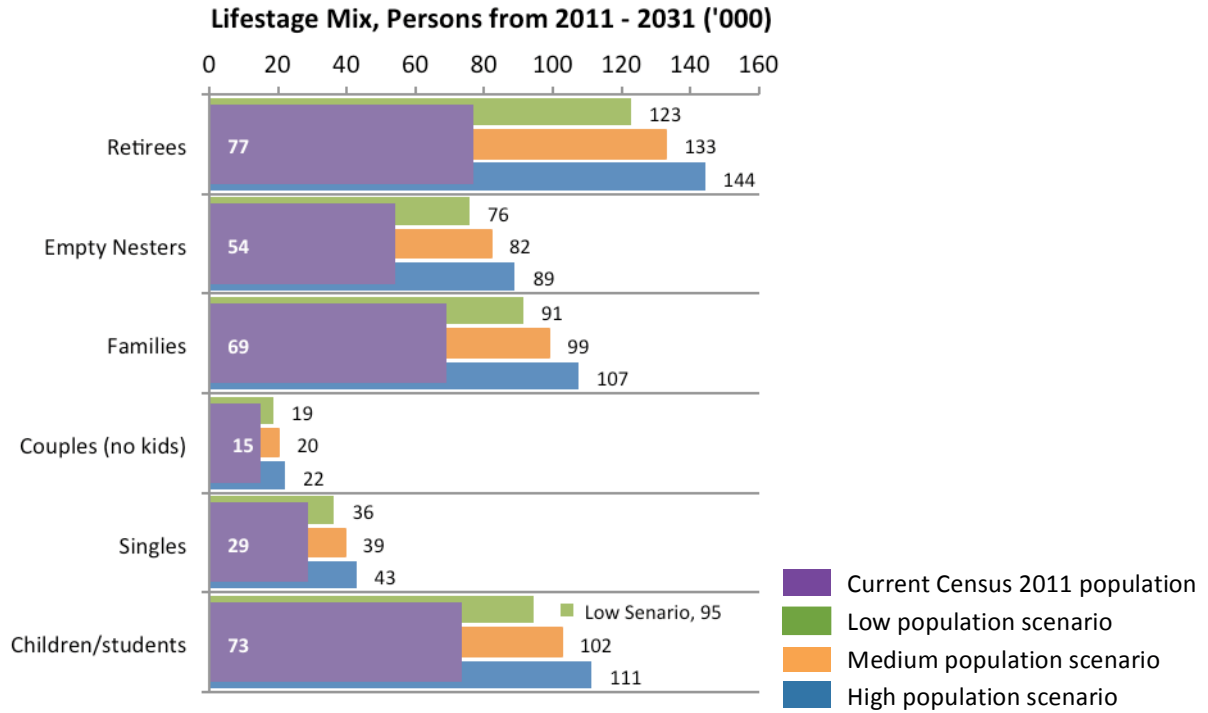
An active and healthy community is resilient and enhances the quality of people's lives. A number of programs are planned or underway to increase population health and physical activity outcomes on the Sunshine Coast. These programs were triggered by a series of poor health indicators, including a higher rate of musculoskeletal system disease and mental and behavioural disorders than the Australian population. The major causes of death and illness on the Sunshine Coast include coronary heart disease, stroke, chronic obstructive pulmonary disease, depression and lung cancer (SCC Community Planning Fact Sheet 8).

Sunshine Coast Council plans to undertake a targeted program to increase health and physical activity outcomes in the five higher scoring areas of socio-economic disadvantage on the Sunshine Coast. Generally such areas often have a higher aged population, unemployment, Aboriginal and Torres Strait Islander communities, diabetes, obesity, poor diet, smoking and lower physical activity.

SCC has endorsed a Wellbeing Charter for the Sunshine Coast, with the goal being an active and healthy community that is resilient and enhances the quality of people's life. RDA Sunshine Coast supports initiatives and partnerships that contribute to wellbeing, and healthy and active communities.

The lifestage projections in Chart 23 Sunshine Coast lifestage mix, 2031 identifies all segments will grow over the next 20 years, particularly the older age groups (empty nesters and retirees). The key strategic economic issue is how to manage this population increase so that it is sustainable and provides the Sunshine Coast with a vibrant population base that is economically productive.

CHART 23 SUNSHINE COAST LIFESTAGE MIX, 2031



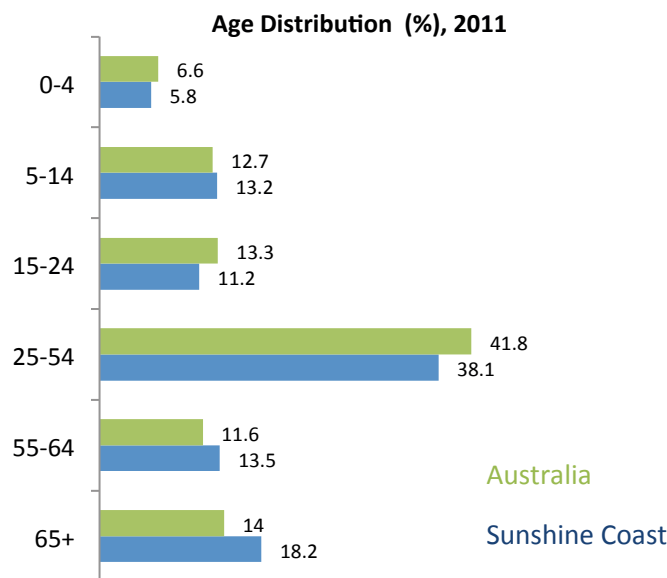
Source: EMDA Future Coast Model based on ABS and OESR data

Population

Current population characteristics

The Sunshine Coast's population can be characterised as reasonably typical of Australia overall in terms of profile; the key differences/similarities are highlighted in Chart 24 below.

CHART 24 SUNSHINE COAST AGE DISTRIBUTION, 2011



Source: ABS Census 2011

The region's age profile departs significantly from Australian averages in some age categories. For example, older people in the 65+ category represent 18.2% of the Sunshine Coast population, whereas they account for 14% of Australia's population. The Sunshine Coast also has an over representation of 55-64 year olds. These differences reflect the appeal of the Sunshine Coast as a retirement destination. As a consequence, there is an under-representation in other age groups such as younger adults and 25-54 year olds, who usually leave the area in search of work. The region's population has aged further since the 2006 Census.

In the two decades to 2026, the number of people over the age of 65 is predicted to more than double (from 47,554 to 100,774), while the number of people over the age of 85 is likely to almost treble.

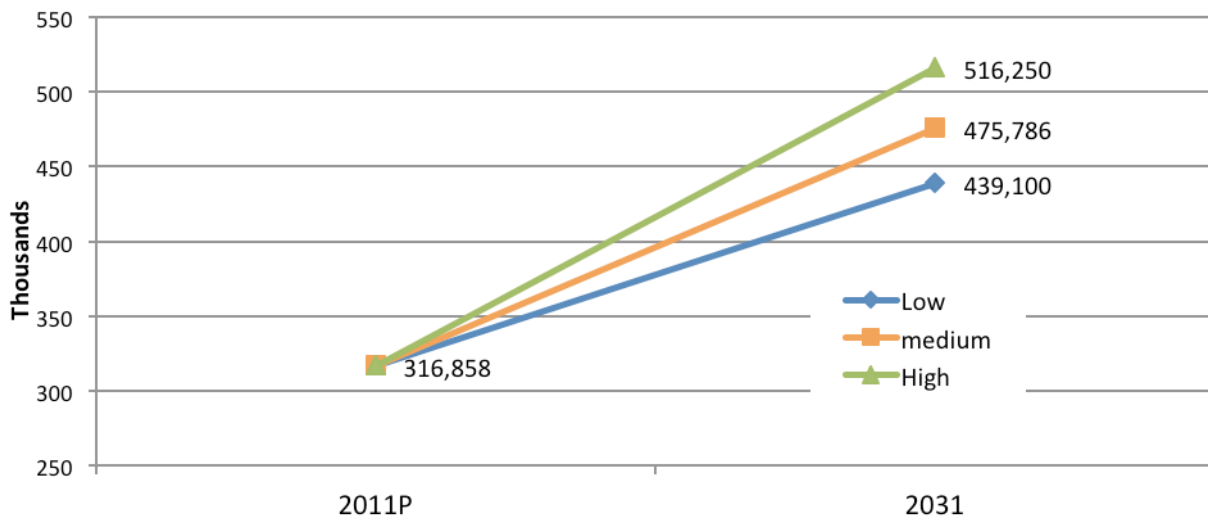
Although this structural ageing of the population is a national phenomenon, the impacts are experienced earlier and more profoundly in sea change communities like the Sunshine Coast, than they are in non-coastal communities.

The ageing population has many implications including increased expenditure associated with income support, adequate provision of health and disability services and increased need for family and community care. Changing demographics of the region will also lead to transformation in urban form across the Coast, with increased need for health hubs and the number, type and location of relevant services (SCC Community Planning Fact Sheet 02).

Future population levels

The Queensland Treasury has developed population scenarios for the region based on various demographic assumptions (see Chart 25). They have prepared low, medium and high population increase scenarios to 2031, however, at the time of publication these had not been revised with the 2011 Census data. To allow for this, the growth rates forecast by Treasury have been applied to the 2011 data. This takes into account that the 2011 actuals are much lower than the low forecast level. Over the last year (2012) the region added 5,766 people per year, which is in line with the low end of the population projections.

CHART 25 SUNSHINE COAST POPULATION PROJECTIONS TO 2031



Source: 2011 Actual ABS Regional Population Australia, 2031. EMDA using Queensland Treasury growth rates applied to 2011 actuals.

The population is projected to grow strongly under each scenario. By 2031, even under the low series (depicted by the blue line in Chart 25), the population is forecast to grow to 439,100, an increase of 38.6% from 2011. Under the medium scenario (red line) a 50.2% increase is forecast, and under the high scenario (green line) a 62.9% increase is forecast (see Table 2 below).

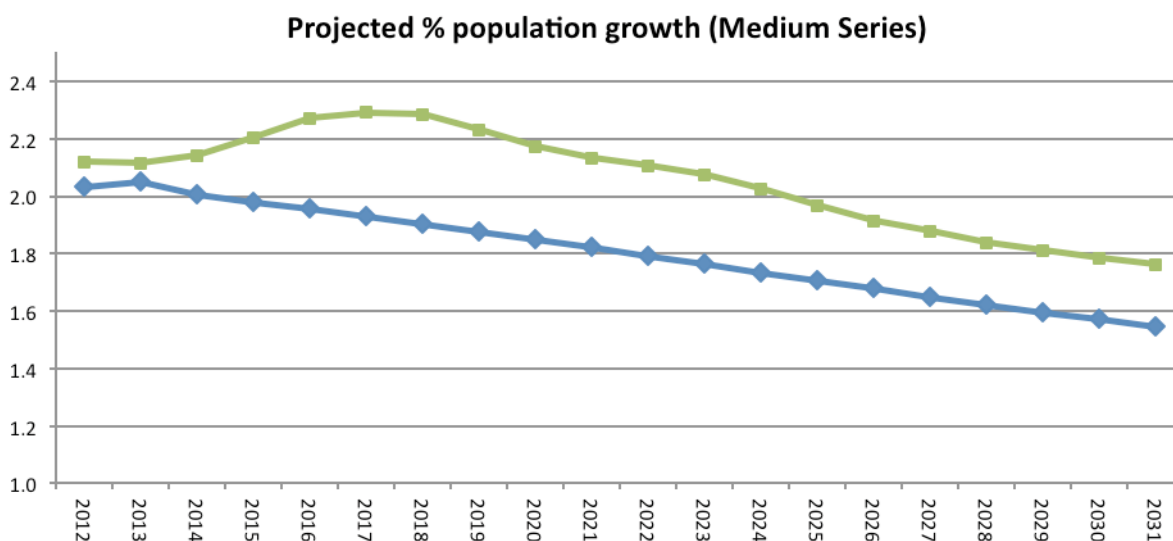
TABLE 2 POPULATION SCENARIOS FOR THE SUNSHINE COAST POPULATION

Series	Popn Level 2011A	Popn level 2031	Popn increase 2011 to 2031	% increase 2010 to 2031
Low	316,858	439,100	122,242	38.6
Medium	316,858	475,786	158,928	50.2
High	316,858	516,250	199,392	62.9

Source: 2011 Actual ABS Regional Population Australia, 2031. EMDA using Queensland Treasury growth rates applied to 2011 actuals.

Under each population scenario, the Sunshine Coast is forecast to grow faster than Queensland overall (in Chart 26 below the medium series is shown). Even under the low scenario, considerable further investment in infrastructure will need to be made.

CHART 26 SUNSHINE COAST PROJECTED % POPULATION GROWTH (MEDIUM SERIES)



Source: 2011 Actual ABS Regional Population Australia, 2031. EMDA using Queensland Treasury growth rates applied to 2011 actuals.

Under the high scenario the population would become similar in magnitude to a capital city such as Canberra and would require substantial investment in infrastructure to maintain the quality of residents' lifestyles.

It is stressed that these projections essentially show what the region could grow to should the circumstances allow. There is considerable debate in the region about this issue.

Population levels – lifestage

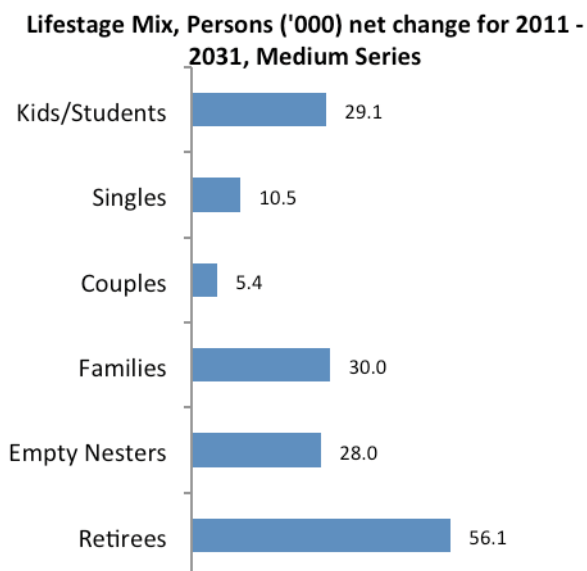
Expert economists EMDA have developed a population model by lifecycle, with the results shown in Chart 27 below.

It identifies the possible change in the Sunshine Coast's lifecycle composition over the next 20 years under the medium population scenario. It shows that an additional 56,100 retirees are expected, an additional 30,000 adult members of families and 29,100 of their children. The growth in retirees is consistent with Australia's aging population. Singles and couples are also forecast to grow, but only by 15,900.

There will be a requirement for key infrastructure to meet the needs of each lifestage in the future:

- Children/students: educational institutions
- Singles: education/vocational opportunities, career opportunities
- Couples (no children): career opportunities
- Families: education (for children), career opportunities
- Empty nesters: career/work opportunities
- Retirees: leisure, health facilities and increasingly some job opportunities

CHART 27 SUNSHINE COAST LIFESTAGE MIX, 2006



Source: EMDA Future Coast Model, derived from ABS Census 2011 data

Sunshine Coast Indigenous population

The Sunshine Coast has a below average population of Indigenous people (1.5%) – 4,589 people, compared with the Australian average of 2.6%. The term indigenous refers to both Aboriginal and Torres Strait Islander people.

The age structure of the Sunshine Coast's indigenous population is much younger than those of non-indigenous descent. Sixty-four per cent (64%) of the local indigenous population is under the age of 30, whereas the proportion of non-indigenous residents under the age of 30 is at 34%. Indigenous teenagers represent 17.6% of the local indigenous population, whereas non-indigenous teenagers represent

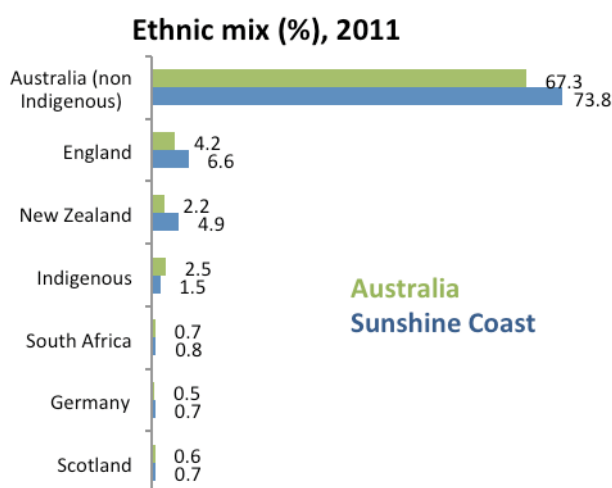
only 9% of the local non-indigenous population. The medium personal income of the indigenous population is \$418 per week, lower than that of the non-indigenous population which is \$521 per week.

The Sunshine Coast has a small indigenous population (1.5%) that is seeking a cultural centre and place to use for community meetings and activities including youth leadership and cultural awareness programs. Local indigenous service providers report that the indigenous population is experiencing a number of issues including social isolation, affordable accommodation and difficulty accessing services and programs (Community Planning Fact Sheet No 3). Such a centre can support programs and activities to meet these needs. Indigenous unemployment needs to be addressed at a local level while supporting employment skills, training and programs at a national level.

Ethnicity

Chart 28 shows that the Sunshine Coast has a population that is predominantly born in Australia (73.8%), which is higher than the Australian average (67.3%). There are 75 non-English speaking countries of birth represented on the Coast, with a slightly higher proportion of UK and New Zealand born residents.

CHART 28 SUNSHINE COAST ETHNIC MIX (PLACE OF BIRTH), 2011



Source: ABS Census 2011

The University of the Sunshine Coast plays an important role in increasing the cultural diversity of the region through its international student program. In July 2012, there were 776 international students at the university from 61 countries, including Germany, France, Japan, Republic of Korea and India (USC Website July 2012). There are also 132 Indigenous students enrolled at the university. Culturally and linguistically diverse communities can experience language barriers and isolation along with difficulties in accessing services and employment opportunities.

Access to international, national and regional markets

The Sunshine Coast digital economy

The digital economy is defined as online participation and engagement by households and business. It is expected to provide new business development opportunities ranging from merchandise trading, domestically and internationally, to education services and community benefits such as better health and aged care services.

The Sunshine Coast is well placed to benefit from the continued growth in the digital economy. Already 85,167 households (73% of occupied households, Source: 2011 Census) are connected via broadband with a total of 78.9% of occupied households having some form of internet connectivity. This is higher than the national average of 76.8% in total and 69.9% for broadband.

Although data on the business use of information technology is unavailable at the Sunshine Coast level, the recent 2009-10 ABS report on internet commerce shows that nationally it is becoming much more significant with 24.8% of all businesses receiving an order via the internet (source: ABS Business Use of Information Technology 2009-10). As part of the response to this growing opportunity (which will be enhanced by the National Broadband Network), Sunshine Coast Council has created the Sunshine Coast Business and Technology Precinct located next to the Sunshine Coast University. This precinct is expected to assist in providing a knowledge driver economy, high-value job opportunities, maintain the region's attributes and assist in diversifying the economy.

Transport issues

Transport demand has been growing strongly, as can be expected in a region that has also grown strongly in terms of GRP growth and population increase. There are signs that infrastructure is having difficulty coping with this demand and this is impacting negatively on accessing other markets.

- Currently, private motor vehicles are used for the majority of trips on the Sunshine Coast (for example, approximately 80% of Sunshine Coast residents' main method to work was made by private vehicle (ABS, 2011) and this car use is growing faster than total employment on the Sunshine Coast (14.7% versus 11.0%). This trend places ongoing pressure on the local and State-controlled road network to manage demand during peak times).
- Visitors and prospective visitors are saying that congestion on the Bruce Highway is a deterrent (EMDA, 2013).
- Seasonal car parking congestion, especially around Noosa Heads and Mooloolaba, is well documented (EMDA, 2013).
- The Sunshine Coast Airport is also reporting the need to expand to meet demand (Sunshine Coast Operational Plan 2010/2011).

Continuation along this trend (high reliance on the motor vehicle and strong population increases) is likely to lead to the following outcomes for the region:

- Unrelenting pressure for more and wider roads, with consequential loss of natural areas and amenities, more congestion, an urbanised big city feel and a loss of the Sunshine Coast's unique lifestyle qualities.
- Loss of the lifestyle attraction and key competitive edge of the Sunshine Coast for economic development.
- Increased greenhouse gas emissions.

A number of initiatives are proposed to alleviate some of the demand, including:

- Major network additions (eg the proposed CAMCOS public transport corridor, North Coast Rail duplication and the Multi Modal Transport Corridor).
- TravelSmart programs.
- Sustainable transport energy sources (eg electric, hydrogen, hybrid, biodiesel and fuel cells).
- Upgrade of the Bruce Highway.
- Expansion of the Sunshine Coast Airport.
- Additional high order road network connectivity to occur in conjunction with major new development areas.
- Parking charges in selected areas.

However, even these would not adequately meet the projected demand under each population scenario and more infrastructure would be required to meet the needs of a substantial population increase.

State of the region summary

The Sunshine Coast is moving into becoming a large regional economy with a broad economic profile. The core driver of the growth has been the strong population increases over many years, which has seen the region double in size in just under 20 years.

This strong growth has come at a cost. There are signs the current infrastructure is having difficulty coping with the existing demand and there is a strong push from the community to limit the rate of growth to a sustainable level.

The forward population projections and the matching resource requirements clearly illustrate the challenges faced by the region. Even under the low growth Queensland Treasury population projection, population is expected to increase to 439,100 (an additional 122,242 people by 2031). This will place even more pressure to further substantially develop infrastructure across all areas, for example health, education, transport and water.

Strong growth in the region has also had its impact on the environment with losses in vegetation, wetlands and water quality.

It is clear that an alternative regional development model is required, one that provides sustainable growth and opportunities for the region, but does not result in the region becoming a victim of its own success.

Attachment 2: Stakeholder engagement and consultation

Regional Development Australia Sunshine Coast has forged strong partnerships between community, business and government organisations through its commitment towards genuine consultation and collaboration.

Cross region collaboration

The RDA Sunshine Coast mission statement (page 9) has developed over time as a result of community consultation, recently including the concept of cross region collaboration. RDA Sunshine Coast adopted these changes to reflect the opportunity of joint effort for joint reward, with aligned objectives and the opportunity to create greater impact through collaboration.

RDA South East Queensland (SEQ) Coordination Initiative

The RDA SEQ Coordination Initiative is a coalition between the seven RDAs that cover South East Queensland (SEQ) and is designed to address issues that span across the broader region. The initiative is intended to present a united voice on shared issues effecting SEQ and the Northern Rivers of NSW.

RDA Sunshine Coast is an active participant of the initiative and the Chair of RDA Sunshine Coast is also the Chair of the RDA SEQ committee.

A significant project being undertaken by RDA Sunshine Coast on behalf of the RDA SEQ Initiative is the Digital Work Hub project, outlined in the RDA activities and projects section (page 33).

The RDA SEQ Coordination Initiative focuses on six linked themes forming the SEQ Regional Development Framework:

Smart manufacturing specialisations

Goal: We will partner to position the region as a viable destination for manufacturing investment in specialisations that will secure and extend businesses into local and global supply chains that will be sustainable in the long-term.

Transport and logistics

Goal: We will partner to improve the efficiency and effectiveness of existing and new transport infrastructure through improved logistics drawing on opportunities such as those provided by high capacity broadband.

Digital capability

Goal: We will facilitate leadership and strategic intent to make SEQ the most digitally capable region in Australia.

Regional indicators

Goal: We will develop an agreed set of indicators for regional development to assist in priority project identification and performance measurement.

Human capital

Goal: We will address regional skills shortages and employment issues and support initiatives to position the region for the Asian century.

Cross border projects

Goal: We will collaborate with northern New South Wales on projects where there is common interest.

RDA Moreton Bay

RDA Moreton Bay and RDA Sunshine Coast regions share a boundary, with similar challenges and opportunities, particularly given the proximity of both regions to Brisbane.

Joint projects and areas of common interest include:

Human capital: Both regions are facing similar demographic and population growth projections as outlined in the Workforce Planning Research by Deloitte (2013), a report jointly funded by both RDA regions. The effectiveness and reach of local universities such as the Sunshine Coast University is also of importance.

Investment and infrastructure: Both regions are facing transport and regional connectivity challenges. A high priority affecting both regions is the need to upgrade the Bruce Highway north of Caboolture. New communities proposed for Caloundra South and Caboolture West will also affect the regions' infrastructure requirements.

Digital technology: Digital technologies and opportunities such as the Digital Work Hub project are of considerable significance to both regions, with joint project opportunities currently being explored.

Regional collaboration

Over the past 12 months the RDA Sunshine Coast committee has either led or collaborated in more than 50 distinct projects/initiatives, ranging across topics such as workforce planning, digital futures and smart communities, tourism, economic development, transport, youth leadership and opportunity, Sunshine Coast University Hospital, Clean Futures, resources sector, regional priorities roundtables, Sunshine Coast Airport, infrastructure planning and a variety of community forums.

RDA Sunshine Coast's engagement activities range from presenting at conferences, organising forums and conferences, attending meetings, contributing to policy debates, conducting research and strategic planning sessions, outlined in the table below.

Future collaborative efforts are already in the pipeline with significant projects (outlined in the Regional Priorities section) underway in partnership with organisations such as Sunshine Coast Council, Federal Department of Education, Employment and Work Place Relations, Sunshine Coast Health Sector Panel, University of the Sunshine Coast and the Queensland Department of State Development, Infrastructure and Planning.

<i>Details of activities in 2012-13</i>	<i>Key outcomes</i>
<p>Regional Development Australia (RDA) Fund</p> <p>RDA SC hosted an information session in November 2012 to outline the application process for Rounds Three and Four of the RDAF.</p> <p>The presentation was digitally broadcast and made available online.</p> <p>Seven regional projects were selected to proceed to full application stage for Rounds Three and Four.</p>	<p>The RDA Fund is a major opportunity for local community groups and council to seek much needed local infrastructure.</p> <p>The committee selected projects that met clearly identified regional priorities, were backed by a strong level of community support, were ready to proceed and would have a positive long-term impact on the region.</p> <p>Two Sunshine Coast projects were selected by the Australian Government for funding. The Eumundi and District Historical Association received \$165,000 in Round Three for upgrades to the Discover Eumundi Heritage and Visitor Centre. The Sunshine Coast Council received \$773,000 in Round Four towards the redevelopment of the Sunshine Coast Regional Tennis Centre.</p>

<i>Details of activities in 2012-13</i>	<i>Key outcomes</i>
<p>Workforce Planning Research Project RDA SC engaged Deloitte Access Economics to undertake research and modelling. Worked with all stakeholders to identify and collect data on all catalytic projects in the regions. The consultant has completed the final report, formally released on 25 July 2013.</p>	<p>The report will be used to assist regional organisations to develop long-term planning, eg education to assist in pathway development for primary and secondary students.</p>
<p>Priority Employment Area (PEA) - DEEWR joint projects CEO and Deputy Chair are committee members. RDA SC contributed to PEA strategy development and joint projects, eg Workforce Planning Research Project.</p>	<p>Focus on employment challenges in this region and ensure these challenges are included in the Regional Roadmap.</p>
<p>Sunshine Coast Health Sector Panel An investment trip to Sydney was organised with the SC Mayor and Panel members. Meetings were held with a number of organisations looking to invest in the SC. This was a successful trip with four companies now actively involved with the project.</p>	<p>Increase the region's business sector diversity. The health sector is a non-cyclical sector that offers many opportunities for local employment. Reduce unemployment on the SC; create new employment opportunities that are not currently available.</p>
<p>Agri-Food Value Chain RDA SC (with DSDIP staff) coordinated a Food Futures Symposium at the University of the Sunshine Coast. All the research information presented at the Symposium has been uploaded to the RDA SC website.</p>	<p>The symposium created opportunities to enhance coordination, connectivity and cooperation between enterprises along the Sunshine Coast's food value chain.</p>
<p>Transport The RDA SC Chair and CEO met with all local state and federal politicians to ensure they are aware of the importance of key transport projects to the Sunshine Coast's future, in particular the Bruce Hwy. RDA Sunshine Coast coordinated a presentation by a private company to the State Minister for Transport and a number of local members in Parliament House, Brisbane.</p>	<p>The upgrade of the Bruce Highway will create jobs for locals in many sectors as well as alleviate a major transport challenge. The next stage of this project is to conduct an economic impact analysis.</p>
<p>Digital Futures RDA SC completed a number of public presentations on Sunshine Coast Digital Futures, including a Digital Futures Forum. RDA SC developed a Sunshine Coast Digital Futures Strategy Snapshot which has been embraced by key organisations across the region. RDA SC met with State members and promoted the opportunities of high-speed broadband for the region.</p>	<p>By embracing the opportunities of a digital future, the Sunshine Coast region will be better able to offer job opportunities to youth and businesses which are currently struggling. Increased focus by the Sunshine Coast region on the <i>Digital Future</i> will ensure that all aspects of the local economy can benefit from the opportunities being created by digital technology.</p>

<i>Details of activities in 2012-13</i>	<i>Key outcomes</i>
<p>Digital Work Hub Five Regional Development Australia committees (Sunshine Coast, Logan and Redlands, Gold Coast, Moreton Bay and Brisbane) are collaborating on this project, with RDASC responsible for the project management over the 12-month timeframe. Stage 1 Literature Review and Demand Market Research has been completed, with the Regional Analysis and Communication and Engagement strategy underway.</p>	<p>Establishing the base commuter data for journey to work stats across SEQ. Primary research collection based on interviews – key stakeholder across employer and employee groups Initial economic modelling highlighting the value add to local economy across the partner regions. Creation of a website www.digitalworkhub.com.au for all research findings and as the base of social media and local regional forums and information.</p>
<p>Sunshine Coast Resource Sector Action Plan Worked with SCC to advocate for FIFO Coordinator and/or Resource Sector Coordinator. Led a number of key projects listed in the Action Plan, eg Workforce Planning Research Project.</p>	<p>This sector is a key opportunity for employment creation in the region, including the ability to progress the runway re-development at SC Airport.</p>
<p>Contribution to policy debates RDA SC completed submissions on the National Food Plan yellow paper and Sunshine Coast Council's Draft Planning Scheme in 2012/13.</p>	<p>The National Food Plan is a key export opportunity for the region. The Sunshine Coast Planning Scheme affects local planning for the next 8-10 years. RDA SC highlighted some major issues with the draft plan.</p>
<p>SC Youth Summit RDA SC attended the Youth Summit and used information from the Summit to inform the Regional Roadmap.</p>	<p>Increased youth employment outcomes. Increased understanding of youth issues to inform the Regional Roadmap.</p>
<p>Sunshine Coast Economic Development Task Force RDA SC Chair played an active role alongside business leaders to develop a regional economic development strategy.</p>	<p>Draft Sunshine Coast Economic Development Strategy released for community consultation.</p>
<p>Broadband Today Alliance Active committee participation by the RDA CEO</p>	<p>Building a coalition of regions across Australia for the greater uptake of digital technologies</p>
<p>Roadmap Consultation Detailed below</p>	<p>A greater understanding of key regional priorities, roles and responsibilities of various organisations and strengthened relationships.</p>

Roadmap consultation

Regional Development Australia Sunshine Coast implemented a stakeholder consultation project across the region between February and June 2013 to develop a representative and accurate *Regional Roadmap*.

The project was conducted in three stages:

1. One-on-one consultations with key stakeholder representatives from across the Sunshine Coast region, using a qualitative interview format.
2. Consultation and collaboration with senior staff from RDA regions which border the Sunshine Coast.
3. Distribution of a condensed version of the *2013-16 Roadmap Framework* prior to the development of the full *Roadmap* to stakeholders interviewed during stage one.

Stage 1 objectives

The primary objective of this stage was to better understand the community's reaction to the 2012 Regional Roadmap, and identify opportunities for improvement and further collaboration.

More than 25 priority stakeholders were identified across a variety of sectors, including business, environment, special interest and social groups, education providers, State and Federal Members of Parliament, State and Local Government representatives.

Each group was invited to participate through a meeting format, telephone interview or provide written feedback. The consultation process allowed RDA Sunshine Coast to build on its ongoing positive relationships with the participants.

Consultation process

Interviews and phone conversations were held in March and April 2013. Each session focused on four primary questions:

- What is your general feedback on the document, with a focus on the four priority areas?
- What are your regional infrastructure priorities (in order or priority)?
- Are there any other strategic priorities or opportunities for the Sunshine Coast?
- Are there any other risks, threats or issues identified for the Sunshine Coast?

All responses were recorded and summarised, with the common themes outlined under the sub heading 'stage 1 key findings' below.

Regional context

A study of relevant documents and activities helped inform the consultations, including new research and reports from multiple sources (detailed in the reference documents section). The following activities were particularly important:

- a. At a referendum in March 2013, a majority of residents in the former Noosa Council area voted in favour of de-amalgamation from Sunshine Coast Council (with all de-amalgamation costs to be fully covered by the Noosa residents).
- b. The Sunshine Coast Council Economic Development Unit facilitated a business leader's taskforce during February-June 2013 to identify economic development priorities. Regional Development Australia Sunshine Coast Chair Professor Max Standage was a member of that taskforce.

Stakeholders

The following stakeholders were consulted during March and April 2013:

Type of stakeholders	Stakeholders	Type of consultation	Further information
State and Federal Members of Parliament	(Federal) Member for Fairfax (State) Members for Maroochydore, Noosa, Buderim, Glasshouse and Kawana	Meetings	Some MPs contacted were sufficiently happy with the document and did not feel the need to provide further feedback (ie Kawana MP).

Type of stakeholders	Stakeholders	Type of consultation	Further information
Business and economic groups	Caloundra, Maroochydore & Noosa Chambers of Commerce; Sunshine Coast Chambers Alliance; Sunshine Coast Economic Development Advisory Board; Sunshine Coast Business Council; Urban Development Institute of Australia; Sunshine Coast Business Women's Network	Meetings and phone interviews	
Special interest groups	Sunshine Coast Destinations Ltd (SCDL); Focus Health Network; Sunshine Coast Health Sector Panel	Meetings and phone interviews	Note: SCDL (Sunshine Coast regional tourism body) declined on the basis they were happy with last year's document.
Education	Sunshine Coast TAFE; Central Queensland University; University of the Sunshine Coast (USC)*	Meetings and phone interviews	<i>*USC is represented on the RDA SC committee</i>
Environment and social groups	Sunshine Coast Environment Council; Clean tech sector group; Steps Group*	Meetings and phone interviews	<i>*STEPS Group is represented on the RDA SC committee</i>
Local Government	Sunshine Coast Council senior staff, including representatives from SC Airport; Mayor and CEO of Sunshine Coast Council*	Meeting & formal feedback in writing	<i>*Mayor and CEO are both RDA SC committee members</i>
State Government	Queensland Dept of Transport and Main Roads staff; Queensland Dept State Development Infrastructure and Planning (DSDIP)*	Meetings and phone interviews	<i>*DSDIP Senior Manager is an official observer of the RDA SC committee</i>
Federal Government	Australian Government Dept Employment Education and Workplace Relations (DEEWR)*		<i>*DEEWR Local Area Coordinator is an official observer of the RDA SC committee</i>
Other	Sunshine Coast Daily (media)	Meeting	

Stage 1 key findings

The consultation process identified ten key findings:

1. General agreement with the 2012 Roadmap

Of significant importance was the overwhelming feedback that the majority of stakeholders largely agreed with and congratulated RDA Sunshine Coast on the *2012 Roadmap* document. Small to moderate changes were suggested, many of which related to emphasis of regional priorities. There was a strong message from some stakeholders on the need to align and conform to other regional documents and activities that were also being developed. One stakeholder stated that RDA Sunshine Coast did not reflect the urgent action required to turn the local economy around, and that the 2012 document painted a picture that was 'too rosy'.

2. Where is the social and environmental focus?

Some stakeholders suggested the 2012 document lacked sufficient emphasis on environmental and social objectives. The environmental and social focus is a key differentiator for RDA SC against the backdrop of regional economic development and business agendas.

3. Regional leadership

A strong message from multiple sources was that the Sunshine Coast needed greater regional leadership, and there was a need for all major groups and stakeholders to work together for the region's benefit. A strong regional identity, along with a common purpose and language, were seen as a significant priority for the region.

4. Capacity building

(Specific feedback relating to the 2012 Focus Area 4: Workforce and Employment)

Some stakeholders felt that a greater emphasis should be placed on capacity building and skills development, including a strong focus on the education sector as the building block for our future workforce.

5. Technology and innovation

(Specific feedback relating to the 2012 Focus Area 3: Advancing business & society through technology)

There was strong agreement on this focus area, with a suggestion for a greater emphasis on innovation and community capacity building (ie not only digital infrastructure).

6. Economic sectors

(Specific feedback relating to the 2012 Focus Area 1: Nurture high potential economic development sectors)

There was some confusion about why all the Sunshine Coast priority economic sectors were not listed in the 2012 document; projects listed as RDA-specific activities were mistaken as the only priority economic sectors. A suggested outcome would be to list all priority sectors and articulate the peri-urban nature of the region's economy, and the imperative to grow the economy beyond population growth-based industries.

7. Capital investment

(Specific feedback relating to the 2012 Focus Area 2: Advocate for the delivery of infrastructure)

Some stakeholders felt advocating for infrastructure was a narrow focus and needed to be broadened to include all forms of capital investment (ie public, private, multi-party sources), including private investment in commercial infrastructure through to multi-party investment in public infrastructure.

8. Infrastructure priorities

Each stakeholder was asked for their top three regional infrastructure priorities. The majority responses were for the upgrade of the Bruce Highway north of Caboolture, closely followed by transport networks (including rail upgrades and the airport) and high-speed broadband.

9. Risks and issues

A frequently identified risk was the potential disruption of the Sunshine Coast Council de-amalgamation process to the region. Government systems, processes and culture were also identified as a general impediment to progress.

10. Journey towards a common vision for the region

A unified vision was identified as an essential component to a prosperous region, which was strongly linked to 'regional leadership' as detailed in finding number 3. Discussion of the Sunshine Coast vision 'journey' uncovered a variety of observations on the roles and responsibilities of local stakeholder groups. Conclusions from these conversations form the basis of the vision section detailed in attachment 3 in the *2013-16 Regional Roadmap*.

Stage 1 conclusions

The consultation process was extremely valuable and demonstrated RDA Sunshine Coast's commitment and importance within the region. All feedback received was highly valued and formed the basis of the *2013-16 Roadmap* document. Relationships were strengthened, additional collaborative projects were identified and an ongoing commitment to regional prosperity was articulated by all stakeholders.

Stage 2 consultation

Regional Development Australia senior staff and committee members from bordering regions were identified as secondary stakeholders in the consultation process and contact was made with the Wide Bay Burnett and Moreton Bay regions, and the RDA Coordinator for South East Queensland. *Roadmap* discussions held in May and June focused on similarities and differences, along with collaborative project opportunities.

Stage 3 consultation

A framework version of the *2013-16 Regional Roadmap* and supporting *State of the Region* research were circulated electronically to all stakeholders and published on the RDA Sunshine Coast website during May and June 2013. Community feedback on these regional priorities was considered in the final version of the *Regional Roadmap* published in August 2013.

Ongoing review of the Roadmap

The development of the *Sunshine Coast Regional Roadmap* is a work in progress that reflects contributions from organisations and key stakeholders across the region to articulate an overall strategic direction.

RDA Sunshine Coast seeks to foster closer working relationships with the community and build on partnerships forged over the past 12-18 months to make positive and long term impacts that progress the region.

While the *Roadmap* focuses on current regional priorities, RDA Sunshine Coast believes in being responsive and flexible to the changing environment through ongoing community consultation.

By leveraging its own resources, available funding opportunities and the capacity of existing organisations, RDA Sunshine Coast can identify potential areas to diversify the regional economy through partnership projects which are aligned with the *Roadmap's* regional priorities.

Attachment 3: Evolution of a regional vision

RDA Sunshine Coast's vision for the region was established in early 2010:

A Sunshine Coast region that is innovative, dynamic, connected and sustainable

Around the same time, the Sunshine Coast's three local councils amalgamated into one council which mirrored RDA Sunshine Coast's geographical boundaries. The new council also established its vision for the region.

Sunshine Coast Council's vision is for the Sunshine Coast
to become Australia's most sustainable region - vibrant, green, diverse.

At the time, the committee felt the two visions were compatible and it was appropriate for RDA Sunshine Coast to have a broader remit that included terminology which represented regional and economic development, ie the addition of terms such as 'innovative' and 'connected'.

EVOLUTION OF A VISION FOR THE REGION

Between 2010 and 2013, the Sunshine Coast region adapted to the amalgamated local government environment and weathered the continued effects of the global financial crisis.

During this time, repeated references were made in both the media and public meetings of the need for a unified approach to regional and economic development with a clearly stated vision which everybody could support, as it was felt at the time that there were many competing voices and a fragmented approach.

Therefore, both RDA Sunshine Coast and other stakeholder groups including Sunshine Coast Council and the Sunshine Coast Economic Development Taskforce have identified a clear need for regional leadership, a concept closely related to the vision and expanded upon in the *Roadmap's* regional priorities section.

During 2013, the region is again undergoing another substantial change in local government with the de-amalgamation of Noosa Council from 1 January 2014, making region-wide vision development crucial at this time, and an opportunity for RDA Sunshine Coast to play a co-facilitation role in building a coalition.

RDA Sunshine Coast is of the view that there are many stages in the evolution and development of regional leadership. The recent past has often been characterised as being fragmented, with competing voices and different agendas. In order to progress to the next stage of building a coalition, it is critical that all stakeholders work collaboratively.

The aspiration is that over the next 3-5 years the region will be able to clearly articulate a common vision as well as its comparative advantage and future aspirations, all in a common language used by all major stakeholder groups.

Within that vision, there will be the opportunity to embrace diversity of views, and be inclusive of new opportunities and concepts. It is not expected that a unified vision will create a homogenized perspective; instead it will create a common purpose and direction that will help articulate and build upon the region's strengths.

QUEENSLAND VISION DEVELOPMENT

The collaborative approach identified above as being critical to the development of a regional vision is similar to the state-wide approach to *The Queensland Plan* vision development adopted by the Queensland Government.

The Queensland Plan is a community consultation process conducted during 2013 to help identify and develop a 30-year vision for the State.

Local Members of Parliament are actively working with their communities in a variety of innovative ways, to tap into the thoughts and ideas regarding future aspirations. People from every community whether they are defined by geographic boundaries, demographics or by their interests, have been made welcome to participate.

A community summit was held in Mackay in April 2013 and a second summit will be held in Brisbane in October 2013. The *Queensland Plan* will be released in late 2013.

There is an opportunity for the Sunshine Coast to ensure the region captures the outcomes from this process, in particular those ideas and visions specific to the local region, to help with the identification and support of a regional vision.

For further information visit the Queensland Government website www.queenslandplan.qld.gov.au.

Attachment 4: Regional competitiveness

The Council of Australian Governments (COAG) set a framework for regional economic development based on the determinants of long-term regional growth. This framework provides a common lens through which regions can consider regional development.

The RDA SEQ Coordination Initiative has recently grouped the Regional Australia Institute's competitiveness indicators that constitute the index and included indicators from the *MyRegion* website to complement the regional overview.

Sunshine Coast values and national rankings are provided in the table below and represent the early findings of the analysis. The national ranking is based out of 55, representing the 55 Regional Development Australia regions.

Indicator	Primary source	Date	Frequency	Sunshine Coast	
				Value	National Ranking / 55
HUMAN CAPITAL (EDUCATION AND SKILLS)					
Human capital					27
University qualification (% of working age population)	ABS 2011 Census	2011	5 years	18.40%	14
Technical qualification (% of working age population with certificate and diploma)	ABS 2011 Census	2011	5 years	40.40%	3
Lifelong learning (% of working age population participating in education and training)	ABS 2011 Census	2011	5 years	43.50%	48
Early school leavers (% adult population did not complete year 12)	ABS 2011 Census	2011	5 years	50.20%	12
English proficiency (% population)	ABS 2011 Census	2011	5 years	95.60%	6
Early childhood performance (% children developmentally vulnerable)	Social Health Atlas of Australia	2008	10 years	27.30%	37
School performance - Primary (% students in top 2 bands)	My Schools data		Not clear	31.80%	25
School performance - Secondary (% students in top 2 bands)	My Schools data		Not clear	22.50%	19
Population over 15 with post high school qualification*	ABS 2011 Census	2011	5 years	44.42%	N/A
SUSTAINABILITY (SOCIAL, ECONOMIC, ENVIRONMENTAL)					
Population*	ABS Population by Age and Sex, 2011	2011	Yearly	316,858	N/A
Population growth**	ABS Regional Population Growth, 2010-2012	2012	Yearly	1.8%	N/A
Population age 0-14*	ABS Population by Age and Sex, 2011	2011	Yearly	18.53%	N/A
Population age 15-65*	ABS Population by Age and Sex, 2011	2011	Yearly	63.56%	N/A
Population age 65+*	ABS Population by Age and Sex, 2011	2011	Yearly	17.91%	N/A

Indicator	Primary source	Date	Frequency	Sunshine Coast	
				Value	National Ranking / 55
Economic fundamentals					6
Building approvals per capita (value in AUD '000)	ABS Building approvals Australia		Monthly	\$1.05	5
Wage/labour costs (average wage and salary income)	ABS Wage and salary earner statistics		Yearly	\$38,531	42
Business confidence (higher points higher confidence)	RAI Survey - Business perspectives		NA	3.28	7
Salary income growth rate*	ABS National Regional Profile 2006-2010	2009	Yearly	6.28%	N/A
Essential services					
Access to tertiary education services (% of working age population attending higher education institution)	ABS 2011 Census	2011	5 years	4.80%	16
Access to technical or further education (% of working age population attending)	ABS 2011 Census	2011	5 years	2.50%	50
Access to hospital services (Number of people employed in hospitals in a region per resident population)	ABS 2011 Census	2011	5 years	0.0143	23
Access to allied health services (% of workforce employed in other health services)	ABS 2011 Census	2011	5 years	12.40%	13
Access to primary education services (KM to nearest primary school)	My Schools data		Not clear	2.2	15
Access to secondary education services (KM to nearest secondary school)	My Schools data		Not clear	3.5	12
Institutions					26
Public service (% of workforce employed in the public service)	ABS 2011 Census	2011	5 years	4.10%	51
Local government expenditure (Expenditure per capita)	Queensland government		Yearly	\$1,269	27
Development applications	N.A.				N/A
Regional government influence at state/national level (Business perspectives, higher value for higher influence)	RAI Survey - Business perspectives		N/A	2.83	4
Transparency of local government policy (Business perspectives, higher value for higher transparency)	RAI Survey - Business perspectives		N/A	2.49	3
Clear roles and responsibilities in regional governance (Business perspectives, higher value for greater clarity)	RAI Survey - Business perspectives		N/A	3.18	3
Financial burden of local government (Business perspectives, higher value for bigger burden)	RAI Survey - Business perspectives		N/A	3.2	4
Local government assistance for businesses (Business perspectives, higher value for higher assistance)	RAI Survey - Business perspectives		N/A	2.65	6

Indicator	Primary source	Date	Frequency	Sunshine Coast	
				Value	National Ranking / 55
Natural resources					28
Mineral resources (% local workforce employed in mining)	ABS 2011 Census	2011	5 years	1.30%	29
Timber resources (% local workforce employed in logging)	ABS 2011 Census	2011	5 years	0.10%	35
Commercial fishing and aquaculture (% local workforce employed in aquaculture and fishing)	ABS 2011 Census	2011	5 years	0.07%	23
Coastal access (KM to and from region's population centre to nearest coast)	RAI GIS calculation		N/A	24.1	17
National park (KM to and from region's population centre)	RAI GIS calculation		N/A	15.9	14
Net primary productivity	Australian Bureau of Agriculture and Research Economics data		Not clear	7.5	17
ACCESS TO INTERNATIONAL, NATIONAL AND REGIONAL MARKETS					
Market size					15
Size of economy (Value of business turnover (with SA4))	ABS 2011 Census	2011	5 years	\$11.7Bn	13
Population (Number of working age residents (within SA4))	ABS 2011 Census	2011	5 years	193,001	16
Infrastructure					
Aviation infrastructure (KM to and from region's business centre to nearest airport)	RAI GIS calculation		N/A	15.7	8
Port infrastructure (KM to and from region's business centre to nearest port)	RAI GIS calculation		N/A	91.7	27
Road infrastructure (KM from region's business centre to nearest major highway)	RAI GIS calculation		N/A	2.1	9
Rail infrastructure (KM to nearest railway station/service)	RAI GIS calculation		N/A	10.7	19
COMPARATIVE ADVANTAGE AND BUSINESS COMPETITIVENESS					
Technological readiness					15
Internet connection (% of households with internet connection)	ABS 2011 Census	2011	5 years	67.00%	12
Businesses in technology and related industries (% of workforce employed by technology related businesses)	ABS 2011 Census	2011	5 years	6.70%	13
Workers in ICT and electronics (% employed as ICT and electronics specialists)	ABS 2011 Census	2011	5 years	1.10%	24

Indicator	Primary source	Date	Frequency	Sunshine Coast	
				Value	National Ranking / 55
Business sophistication					8
Dominance of large employers (% of employment by businesses with 20-199 and 200+ employees)	ABS 2011 Census	2011	5 years	3.20%	14
Income source - Own business (Average own unincorporated business income)	ABS, estimates of personal income for small areas, 2009-10	2010		15,941	29
Access to local finance (Number of banks/lending institutions within 50km as a share of total businesses)	Business directory		Not clear	0.95%	14
Exports (Average value of exports per business)	RAI Survey		N/A	3.19%	7
Innovation					35
Human resources in science and technology (Average value of exports per business)	ABS 2011 Census	2011	5 years	3.00%	25
Research and development managers (% employed as research and development managers)	ABS 2011 Census	2011	5 years	0.04%	21
Presence of research organisations (% of research organisations out of all businesses)	Business directory		Not clear	0.00%	29
Expenditure on research and development (Average expenditure on R&D per business (AUD\$ '000))	RAI Survey		N/A	3.2	5

Source: Region Australia Institute, www.regionalaustralia.org.au

*Source: MyRegion Australia, www.myregion.gov.au

** Source: ABS Regional Population Growth

Notes: Regional rankings are made following Regional Australia Institute guidelines

Introduction

The *2013-16 Regional Roadmap*, including the *State of the Region 2013* report, is based on extensive research of the latest data available from a wide range of resources.

If you are looking for further information, we recommend the following websites as a starting point, which provide user-friendly snapshots of the Sunshine Coast region:

- Sunshine Coast Council Community Profile <http://profile.id.com.au/sunshine-coast/industries>
- Sunshine Coast Council Economic Profile <http://economy.id.com.au/sunshine-coast>
- Sunshine Coast Council Social Atlas <http://atlas.id.com.au/sunshine-coast>
- Regional Development Australia My Region <http://myregion.gov.au/profile/sunshine-coast>
- Regional Australia Institute, Regional competitiveness index <http://www.regionalaustralia.org.au/>

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