





# ACKNOWLEDGEMENT OF COUNTRY

Regional Development South Australia would like to acknowledge the traditional owners of the land of South Australia across which we work and pay our respects to their elders past, present and emerging.

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## THE REGIONAL BLUEPRINT



HON. ROB KERIN

# EXECUTIVE CHAIR SUMMARY

There are 8 Regional Development Australia incorporated entities in South Australia that play an important role for their regions, working with multiple layers of government and business to develop sustainable economic growth across the state.

Their deep connection to the communities and industries in their regions enables them to identify issues and opportunities and bring together multiple stakeholders and allies to deliver place-based solutions as required. South Australia's RDAs also have a strong collaborative approach, and wherever possible, work together across boundaries for the betterment of the State. The network in South Australia enjoys support from all three levels of government with RDA Adelaide Metro, as the capital city RDA, lobbying for pro-regional policy at the State and Federal level while also connecting metropolitan businesses and investors with regional projects.

The Regional Blueprint, which has been created through collaboration by the 8 RDAs under the auspices of RDSA, will drive regional economic success through highlighting the strengths, priorities and opportunities in each region. The Blueprint is attentive to local government economic plans and key state and federal governments strategies and has been produced through comprehensive local consultation with communities, industry, business networks, regional agencies, Indigenous organisations, and member councils. The key themes and priorities have been strategically identified by each region to grow a sustainable economic future for regional South Australia.

The RDAs work on both specific place-based initiatives as well as those that best serve regional South Australia more broadly. You will find information on individual regional pages, but you will also see common issues that affect all regions including regional workforce, migration, housing, water, infrastructure, and investment. Many projects, especially our Investment Pipeline, span across several regions of the State. Significant economic and evidence-based analysis underpins the fully scoped projects and investment opportunities that are collated in this document.

The South Australian RDA Boards recognise the enormous investment that all three levels of government are delivering to the regions.

Sincere thanks are given to the following key stakeholders for their ongoing support:

- Minister Catherine King MP and Minister Kristy McBain MP and the Department of Infrastructure, Transport, Regional Development, Communications and the Arts
- Minister Claire Scriven MLC and the Department of Primary Industries and Regions
- · Mayor Angela Evans and the Local Government Association of South Australia
- · All Local Councils for their ongoing support

Without these valued relationships it would be impossible to deliver the place-based and state-wide solutions that are so critical to long term regional growth.

#### Hon. Rob Kerin

Executive Chair Regional Development South Australia



BY DANIEL WILLSON

# ECONOMIC FOREWARD

The ongoing evolution of the COVID-19 pandemic continues to present both substantial challenges as well as interesting opportunities, with certain patterns of behaviour established through the pandemic emerging as lasting changes to the way we live and work.

Many people – particularly those working in services industries – have benefited from the shared epiphany relating to the fact they can choose where and how they work, and (to a much greater extent than previously) where they wish to work from. This is manifesting in both the jobs people choose to take, and where they are choosing to work from.

The job mobility rate (the proportion of the workforce having changed jobs within the three months prior) has increased by approximately 20 per cent since the pandemic began, at 3.3 per cent in February 2022 compared with the decade average of 2.8 per cent).[i]

Similarly, the rates at which people are working from home have also increased substantially since the beginning of the pandemic, with various studies indicating this rate having increased by roughly half from around 40 per cent of workers regularly working from home in the pre-pandemic period to more than 60 per cent of workers since.

The fact that people are consciously choosing where to work, and where to work from, has two important implications for regional South Australia. Firstly, the competition for skills and talent is likely as intense as it has been before, with jobless rates remaining near historic lows and vacancies remaining unfilled across sectors. Secondly, more people are choosing to spend more time where they want to be, rather than where they think they need to be.

This phenomenon may not be immediately evident in the latest 2021 Census data, which shows that although South Australia's regional population grew by more than 3 per cent between the 2016 and 2021 census periods, growth for South Australia as whole exceeded 6 per cent. However, there are a number of other observations which point to a more complicated situation.

Evidence to the contrary of conclusions drawn purely on Census data include:

 Regional migration statistics showing net movements of residents into regional South Australia from greater metropolitan Adelaide during 2021, suggesting net movements to regional areas within the latest census period.
 [ii]

#### THE REGIONAL BLUEPRINT

#### **ECONOMIC FOREWARD CONTINUED**

- · Rental vacancies becoming increasingly hard to come by, with average rental vacancy rates in regional local government areas across South Australia falling to 0.53 per cent in April 2022.[iii]
- · Although overnight visitation remains down across the state, regional South Australia is outperforming the state as a whole, holding nearly 90 per cent of its visitation between 2020 and 2022 compared with just 75 per cent for the state, and overnight expenditure actually increasing 14 per cent to \$2.5 billion.[iv]

Together, these points of evidence suggest that South Australians are choosing to spend a greater share of their time in regional South Australia; they may not yet be choosing to relocate in great numbers, but the evidence points to an interesting set of revealed preferences around where they'd rather be.

Where people choose to spend their time matters, with people investing more of their skills, ideas, disposable income and capital in regional and rural areas in greater proportions than in recent history.

This presents both opportunity (for economic growth and community invigoration) and a call to action, in order to attract people to regional South Australia by giving them opportunities and reasons to experience these parts of our state.

As a network, RDSA has an important role to play in working with stakeholders to meet this call to action and seize the opportunity available to grow our regional population. We continue to play this vital role through our activities in the following areas:

- Creating opportunities to undertake meaningful, prosperous work in and from the regional areas, and ensuring adequate infrastructure is in place to support an increasingly flexible workforce
- · Facilitating access to appropriate housing to accommodate people living and working in regional areas on both shortterm and permanent basis. This represents a key challenge to securing population and economic growth in regional areas, with the historic lack of population growth inhibiting growth in housing stock going forward.
- · Securing suitable services and amenities to enable people to participate in the workforce and support a quality of life that is attractive to people.

#### Daniel Willson

Economic and Workforce Manager Regional Development Australia Yorke and Mid North Bachelor of Economics and Bachelor of International Studies



# REGIONAL SOUTH AUSTRALIA

Like the rest of the world, Regional South Australia has had to deal with multiple challenges which have been exacerbated by the pandemic.

While our regions deal with multiple issues, including access to reliable sources of water and variable digital connectivity, it is the lack of an available and skilled workforce which is most severely impacting businesses, both seasonally and permanently. We are also experiencing a housing and accommodation crisis which is at critical levels across the state, and migration, which is so important in supporting regional economies, has been severely affected by the pandemic.

Regional Development South Australia, as an independent and bipartisan network, is well-placed to provide specific local intelligence to address these and other issues affecting our regions. RDSA also plays a significant role in coordinating projects and sharing information across all three levels of Government to create place-based solutions and a clear strategic vision for Regional South Australia.

With strong relationships throughout their regions, communities and business networks, RDAs have and will continue to play a "connector" role and provide feedback to governments at the State and Federal level so they can create policy and frameworks to address regional issues.

RDAs have continued to focus on attracting new projects to the regions facilitating significant private and public sector investment across regional South Australia. There are now 782 projects being tracked with a combined total of \$44.637 billion in the RDSA investment pipeline.

In order to support this pipeline of opportunities, investment in critical infrastructure needs to be aligned and coordinated effectively across all three levels of Government. RDA will work closely with public and private sector partners and bring together the necessary key stakeholders to ensure these opportunities are not lost. Our goal is to deliver long-term, sustainable outcomes for regional South Australia.

## STATISTICS

510,557

............

**POPULATION** 

\$ 29.36B

GRP

...........

54,889

NUMBER OF BUSINESSES

............

206,584

NUMBER OF JOBS

...........

\$ 44.637B

TOTAL VALUE OF PIPELINE PROJECTS

# STRATEGIC ALIGNMENT

Regional Development Strategy

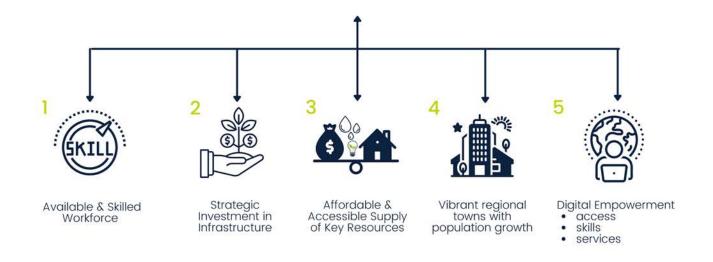
#### **Facilitate** Co-ordinate Land, Water & **Trade & Investment Environment Regional Voice Regional Investment** Increased foreign Our vision for a investment, international strong planning and Engage regional stakeholders, Focus on initiatives that result in partnerships and exports regulatory foundation will businesses and communities increased trade, productivity, will support our economy to identify ways to grow enable us to balance profitability, sustainability and to assist the local growth sustainable growth ecosystem to build global with sharing competitiveness of resources **Skills & Innovation** Infrastructure Leadership **Regional Services** & Skills Engage and give regional Targeted skilling will Identify regional service gaps and put in place services for leaders access to We're committed to generate the responsive development opportunities, community safety, well being building the state's economic workforce needed to and livability and have strategies in place to and social infrastructure to continue driving support worker shortages enhance the economy innovation, research and and livability of commercialisation in South Australia growth sectors <u>Improve</u>

## **Promote**

#### **Regional Connectivity**

Identify and enhance digital connectivity through telecommunications and data infrastructure, making sure infrastructure programs including transport, network solutions engage representatives for local input

# RDSA PRIORITIES



Leadership & Skills

Investment

Services

Voice

Connectivity

### REGIONAL DEVELOPMENT STRATEGY PRIORITIES

## **IMPLEMENTATION**

RDSA will support the development of an implementation plan which is closely aligned to PIRSA's regional development strategy priorities to deliver cross regional infrastructure solutions.

While a "regional deal" for the whole of South Australia may not be possible, RDAs will work with Industry and Local Governments to identify common issues and suggest evidence-based solutions which can be applied across regions where appropriate. In order to achieve this, there must be genuine collaboration, and the recognition of the need for cross regional infrastructure and how that can deliver long-term economic growth.

# MAJOR PROJECTS

Each RDA within the South Australian network provides integral support to government departments and businesses within each of their regions and works to develop a range of projects in cooperation with various domestic and international stakeholders.

RDA project involvement can start from the seeding of the idea, through to bringing required stakeholders together, identifying and helping to remove barriers, or assisting to source much needed funding. Whatever the focus, RDAs deliver the place based knowledge and expertise necessary to progress the project. To date, RDAs have enabled billions of dollars of investment throughout the State, which has created a significant number of jobs in the regions.

Businesses, large and small, are providing tailored support for their projects from initial scoping and feasibility studies, through to assistance with grants applications and project partner identification. Whatever the size of the project, RDAs can assist in transforming the idea into a reality.

RDAs have engaged with and supported a broad range of projects from traditional industries to new and diverse sectors. The new Hydrogen Hub in Whyalla, the plant-based protein factory expansion in Murray Bridge and the Mt Gambier TAFE campus expansion have all received strong support from the state government and will deliver significant investment into multiple regions. RDA's will support these and other significant investments by leveraging our extensive network of commercial and public sector contacts to address both immediate and long term needs, especially in the areas of workforce and housing.

## **MAJOR PROJECTS\***

- 1.Space Koonibba Test Range +Whalers Way Orbital LaunchComplex
- 2.Energy ElectraNet Eyre PeninsulaLink + Micro-Grids + Eyre Gatewayand Whyalla Hydrogen Project
- 3. Australian Radioactive Waste Agency
- 4. Telecommunications Connectivity
- 5. Strezlecki Track sealing
- 6.Regional University Hubs -Murray Bridge, Nuriootpa, Pt Pirie , Port Augusta and Mt Gambier upgrade
- 7.Northern Adelaide Plains Food Cluster
- 8. Chef led value creation project
- 9. Multi trail tourism infrastructure
- 10.Remarkable Southern Flinders Ranges - tourism infrastructure
- 11.Regional Circular Economy
  Transition Plan
- 12.Bioenergy Connect 30 projects across 6 industries
- 13.Expert Connection Program Small Business Support
- 14. Mount Gambier Airport Upgrade
- 15.Kangaroo Island Desalination &
   Water Supply
- 16. Community Upskilling Program
- 17.Regional Workforce Coordination & Collaboration Project
- 18. Agri Food Tourism Development Projects

\*Selected from master list of Major Projects

## THE REGIONAL BLUEPRINT





# REGIONAL PROFILES

Each of the 7 regional RDAs, and the capital city RDA within South Australia have worked collaboratively within their regions with key stakeholders to lead or facilitate the development of specific strategic plans. These stakeholders include:

- Local Councils
- LGASA
- Australian Tourism Commission
- Regional Workforce Coordinators
- Key Industry Groups
- Community Leaders
- Indigenous Communities

A snapshot of all regional priorities are captured in the following pages.

# ADELAIDE METRO

RDA Adelaide Metro plays a unique role linking all regions within South Australia to key stakeholders in the metropolitan area.

Our organisation is striving to identify ways to alleviate regional issues through coordinating strategic initiatives between government, stakeholders and industry and collaborating across borders and jurisdictions to drive investment and deliver critical infrastructure.

Our goal is to not only improve the quality of living and business environments across regional South Australia, but lead sustainable, long-term projects that deliver generational benefits to our regions.

RDA Adelaide Metro's top 5 strategic priorities have been driven by broad consultation across the South Australian RDA network.

When setting the strategic priorities, we have ensured that they can deliver outcomes in line with the RDA Charter and address critical issues which are relevant across multiple regions.

The close working relationship that RDA Adelaide Metro has with the seven regional RDA's within the State enables strong collaboration, and we will continue to advocate at both the State and Federal level to facilitate action and deliver results across the entire network.



- Build the profile of and provide advocacy for regional South Australia at the State and Federal level
- 2 Lead state-wide collaboration and migrate projects across the regions where appropriate
- Connect metropolitan businesses to regional projects and drive investment attraction
- 4 Facilitate support for critical regional issues including regional workforce development, migration, housing supply and health/aged care services
- 5 Engage with and lead Commonwealth regional initiatives within South Australia



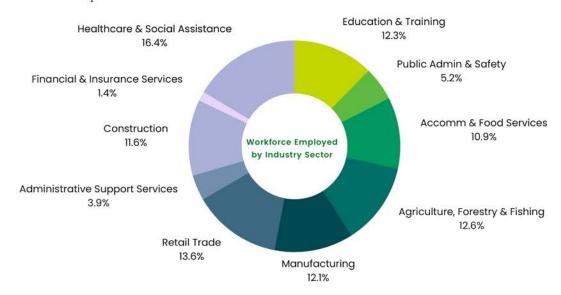
# ADELAIDE HILLS, FLEURIEU & KI

RDA Adelaide Hills, Fleurieu & Kangaroo Island is a geographically diverse region that lies to the east and south of Adelaide. Stretching from the peri-urban to remote and rural areas, the region is highly valued for its livability. As a result, population growth continues to exceed that of the state as a whole.

This geographic diversity also contributes to economic diversity, with the region contributing \$6 billion to the state economy. Healthcare and agriculture comprise the largest FTE employers, with the majority of employment falling into these, and five other key sectors. Following a series of economic shocks, the region has rebounded strongly, achieving stronger growth than the state average.

The ability for infrastructure to keep pace with population growth and potential opportunities is an ongoing challenge across the region. Workforce issues continue to challenge employers, with accommodation and transport impacting accessibility to employment, particularly on Kangaroo Island.

This provides many opportunities across the region to improve industry resilience, increasing housing supply, develop supply-chains, enable private investment, and improve retention of youth in our rural LGA's through tertiary education hubs, and development of new attractions.



- Well planned and managed regional population growth with well serviced communities
- 2 Healthy regional communities enjoying a safe and active lifestyle with high levels of amenity and wellbeing
- Well-connected regional communities freely accessing services, social opportunities, jobs and commercial markets
- 4 Pighly skilled, highly
  participatory regional work
  force matched to the needs of
  regional industry and
  business
- More regional jobs for regional residents with less commuting leading to a greater contribution by the region's workforce to the regional economy
- Strong economic growth in the region driven by servicing the growing population and leveraging our comparative advantage with a special focus on industries with the potential to increase exports



# BAROSSA, GAWLER, LIGHT & ADELAIDE PLAINS

The Barossa, Gawler, Light and Adelaide Plains region lies some 80 kms to the north of Adelaide, and is well connected to the Port of Adelaide and Adelaide International Airport by the Northern Connector and Expressway.

Wine and associated industries account for nearly 40 per cent of GRP strongly supported by high value agriculture including livestock, grain, pulses and high and low tech horticulture. Tourism is popular and brand salience is strong. Climate independent water (recycled water) is a key infrastructure initiative and value added food products present opportunity for further investment.

Emerging strengths in creative industries and equine industries support the economic base and offer diversity but further facilities investment is required.

Health, education and research are growing sectors, which are also complementary to core industries. Due to significant population growth there is demand for a new hospital.

#### **KEY PRIORITIES**

- Water
- 2 Brand and destination
- Climate resilience
- 4 Inclusive housing and transport options
- 5 Innovation, infrastructure and workforce in:
  - · Wine & Tourism
  - Food & Agriculture
  - The Creative Economy
  - Education
  - · Health & Allied Health
  - · Equine industries



# Overview Tracked investment projects - 130 Total Value - \$2.289 B 74,905 15,710 \$3.5B 27,821 Population Number of businesses GRP Number of jobs

# EYRE PENINSULA

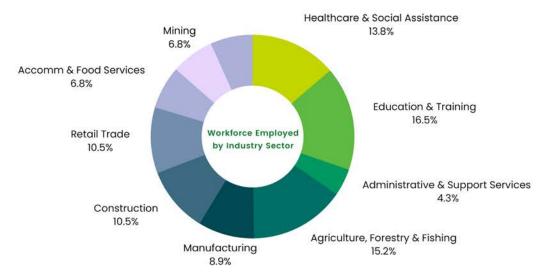
Eyre Peninsula is one of the world's richest low carbon energy resource environments, comprised of over 2,400kms of coastline and 23 per cent of the State's land mass.

The region has a strong export economy and is home to Australia's seafood capital, shark diving, and iron ore mining, while also delivering the largest share of South Australia's export grain production. The region can now also claim to be home to Australia's new space and hydrogen production industries.

The traditional industry sectors of agriculture, seafood, mining and manufacturing have been joined by tourism and aged-care as primary drivers for regional employment and economic growth, with multiple flow-on effects nationally and globally.

A \$14.9bn project pipeline capable of delivering 9,000 jobs has been identified reflecting unprecedented levels of symbiotic business activity intent on leveraging the region's substantial and natural competitive advantage.

Diversifying the economy through satellite launching, renewable energy production (solar, wind, hydrogen), multi-use ports and smart green manufacturing will value add to the region's primary production and resources.



- Regional Liveability: attract, train, retain and house the workforce needed to support business growth
- Pealthcare Services: recruitment and retention of Doctors and other allied healthcare professionals
- Housing and Accommodation: a rolling supply of shovelready land to provide a mix of housing choices and styles
- Economic Diversification:
  establishment of new and
  emerging industries (space,
  cybersecurity, hydrogen,
  mining, closed-loop systems,
  renewables)
- Enabling Infrastructure:

  provision of non-climate dependent water sources, reliable electricity supply, high-speed connectivity, as well as new and upgraded road, rail and port infrastructure
- Visitor Economy: facilitate sustainable development of the visitor economy

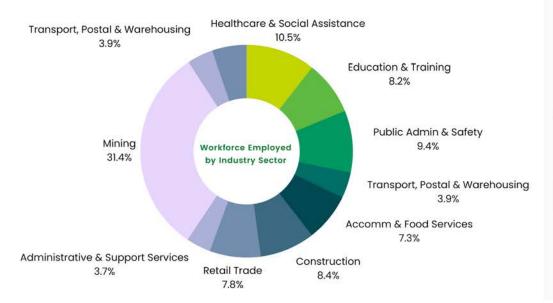


# FAR NORTH

Regional Development Australia Far North covers the vast northern areas of the state, 799,850 square kilometers of rugged beauty rich in natural assets, resilient communities, innovative business, and a diverse industry base.

The region is mineral rich, housing the majority of the state's mineral and resources projects. It has a strong renewable sector, innovative agri-business growth, a stable small business sector and a significant tourism industry with the region incorporating two of Australia's tourism icons – the Flinders Ranges and the Outback.

The region continues to see a positive economic future, with significant infrastructure projects underway, several major projects in various stages of development, an active small business environment, expanding educational facilities/offerings, a great weather season for our pastoral sector, and a slew of other new opportunities to assist the region. The Far North region has and will see increased growth and opportunities.



- Economic Development:
  advancing the major growth
  sectors in the Far North
  Investment Pipeline through
  working with key industry
  sectors and businesses to assist
  them reach their potential
- 2 Strategic Infrastructure
  Investment: identifying
  strategic infrastructure
  requiring investment with of
  focus on connectivity across the
  Far North further opening the
  region to industry, tourism and
  business
- Business Capacity Building:
  support private investment by
  local and reginal businesses,
  and attraction of new industries
  and businesses addressing
  market gaps, as well as
  harnessing the visitor economy
  through the promotion of the
  region
- 4 Population: support projects/initiatives which improve the livability of the Far North Region
- Collaboration: support collaboration with other key stakeholders, including RDA's across SA and Australia to share ideas and grow local knowledge

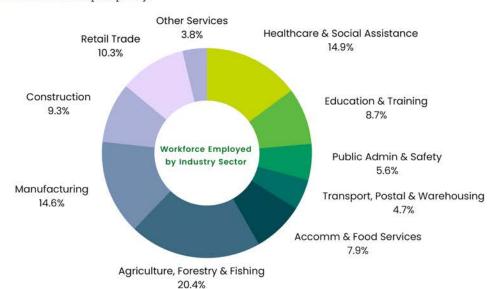


# MURRAYLANDS & RIVERLAND

The Murraylands and Riverland region is known for its community spirit, resilience, technical excellence in irrigation, dryland farming, biosecurity, and food and wine production and, perhaps most of all, for our enviable lifestyle.

The Murray River (Moorundi) is the lifeblood of our region; a natural and economic corridor that sustains our communities, lifestyle and economy. The Murray connects us into Adelaide, through its water supply, and beyond South Australian borders into New South Wales, Victoria and Queensland through the Murray-Darling Basin. The Mallee is our connection to country (Ruwe), with vast open spaces and world leading dryland, livestock and groundwater-fed horticultural production.

Regional Development Australia Murraylands and Riverland (RDAMR) continue to identify ground-level opportunities as we continue to manage the impacts of COVID-19 and disruptions to international markets, such as meeting individual business performance and workforce needs, as well as working with governments and industry to redesign regional ecosystems. RDAMR is working with partner organisations to consolidate multiple regional initiatives into one coherent regional plan and overarching business case for investment by listening to and empowering community to create the right settings for our region to make significant gains in wellbeing, investment and prosperity.



#### **KEY PRIORITIES**

- Attract investment into circular economy initiatives
- 2 Support regional businesses to unlock their potential, including business planning, workforce development and integration with community
- Improve systems to meet regional skills demand (from training to accommodation)
- 4 Improve our region's capacity to listen to community, demonstrate we have heard, and align initiatives with our region's voice
- Continue to improve organisational performance and culture to make the best use of available knowledge, relationships and resources to achieve our goals

Overview

Tracked investment projects - 64 Total Value - \$2.366 B

73,100

6,500

\$4.2B

32,300

Population

Number of businesses

GRP

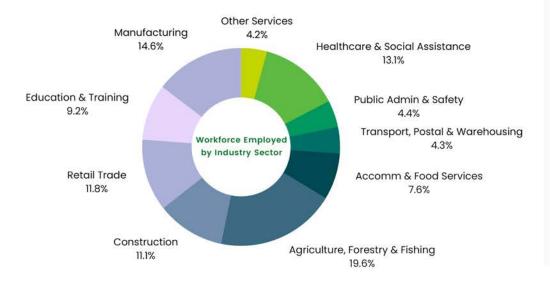
Number of jobs

# LIMESTONE COAST

The Limestone Coast Regional Growth Strategy set a path to deliver \$700m in growth annually and more than 5,700 new jobs by 2026. The strategy identified that the diversity and strength of the Limestone Coast's agribusiness sectors position the region for long term stability. Job growth would come from service-based sectors including tourism, education, healthcare, and social assistance.

The effects of COVID-19 are still impacting business operations in the Limestone Coast, particularly in relation to workforce attraction. With record low unemployment rates, employers are faced with ongoing difficulties in increasing their workforce. The associated issues of the availability of housing supply and access to childcare are further compounding the ability of businesses to grow. The majority of businesses in the Limestone Coast are small, 85% either self-employ or employ one to four people, and they have limited resources and capacity to navigate these added complexities.

With an export led economy particularly reliant on agriculture, forestry, fishing and viticulture, the region is susceptible to the impacts of the continued global disruption of COVID-19 and the vagaries of geopolitics and international trade. While this provides uncertainty in the outlook for agribusiness, the underlying medium-term prospects remain strong.



- Invigorate the working age population, by attracting and retaining more people across the region to fill key skills gaps and support vibrant and sustainable regional communities
- Take advantage of growing global demand for sustainable, high quality agricultural produce by building on our strong reputation for red meat, dairy, wine, horticulture, and fishing, as well as forestry production
- Gapture employment
  opportunities in growing
  sectors of healthcare and
  social assistance
- Support the development of a vibrant business ecosystem
- Collaboration to develop a more coordinated regional tourism market
- Securing investment to deliver regional infrastructure priorities enabling growth
- Support solutions to address the housing shortage across the region



# YORKE & MID NORTH

Yorke and Mid North is currently experiencing the most significant forward pipeline of projects in the last decade. New projects include value adding in Animal and Plant Protein as well as a continuing growth in Renewable Energy enabled by the Interconnector at Robertstown and potential Hydrogen Projects in Port Pirie.

We have continued to see a significant rise in tourism, residential and lifestyle interest commensurate to the increase in our GRP and tourism visitation in many areas which sits above pre-COVID levels.

Our close proximity to Adelaide and centre of transport routes are adding to the attractiveness of the region. Out greatest challenge faces us all- the availability of a workforce and housing for an expanding industrial base. A challenge that is wicked, complex and will require us all to work together to resolve.



- Adaptive themes including technology use, tourism product attractiveness, lifestyle attraction and business capability
- 2 Supplying a local workforce to the supply demand and the provision of housing and childcare to assist in the provision of the workforce
- 3 Maintaining the Yorke and Mid North's vision for:
  - Great Infrastructure and Technology;
  - Economy Built on value adding and innovation
  - People with skills to get the job done



# STAKEHOLDERS

This high-level blueprint is developed with the ongoing input of significant stakeholders across regional South Australia, including industry associations at a state and regional level, regional business groups, chambers of commerce, local government, community leadership organisations including environment leadership alliances and business and industry investors. These are the partners that work with RDA regularly and contribute to long-term strategic planning to deliver outcomes for our regions.



**RDSA CONTACTS** 

# REGIONAL DEVELOPMENT SOUTH AUSTRALIA







