



Regional Development
SOUTH AUSTRALIA

RESPOND

RECOVER

THRIVE

SEPTEMBER 1ST, 2020

THE REGIONAL BLUEPRINT

Regional Development South Australia

RECOVERY, RE-IMAGINING & GROWTH

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MESSAGE FROM THE CHAIR



"Regional Development South Australia across all 8 RDA's and their Boards has taken the lead to research, consult and create the Regional Blueprint that will drive the region's economic success post the current pandemic.

It is based on wide consultation in the regions with Local Government, industry, member councils, and business associates.

The RDA's and their Boards are an integral part of their regional footprint and provide a bipartisan and leadership role across all of their stakeholders to unify and assist in driving a strong economic and social future. The Boards are chaired by respected and experienced community leaders who are passionate about their region and the State as a whole.

This Blueprint provides an informed and central reference point for all levels of Government and key stakeholders.

It is a consolidated fully encompassing document of all of the regional SA RDA's detailed recovery strategies including fully scoped and shovel ready infrastructure projects.

The Regional Blueprint will be live and updated as required to ensure its accuracy and relevancy."

Hon. Rob Kerin - Chair Regional Development South Australia

With thanks to

Jan Turbill
Chair, RDA Adelaide
Metro

Ivan Venning
Chair, RDA
Barossa & wider
region

Mark Sutton
Chair, RDA Far
North

James Sexton
Chair, RDA Hills
& Coasts

Neil Martinson
Chair, Murraylands
& Riverland

Bryan Trigg AFSM
Chair, RDA Eyre
Peninsula

Peter Gandolfi
Chair, Limestone
Coast

Bill Vandeppeer
Chair, RDA Yorke &
Mid North

EXECUTIVE SUMMARY

The Regional Development Australia network in South Australia is unique in that it is a genuine partnership between Federal, State and Local Governments.

RDA's work in a unified manner across all levels of Government, supporting and advocating for strong economic development strategies and policies for the regions. The role of their Boards to assist in this facilitation is critical. Their knowledge and experience, and the fact that they are deeply embedded into their regional communities, with the trust, credibility and capability to bring together all of the key stakeholders to work in a unified way drives success. It is also important to note that whilst they are passionate about the region they represent, they are also incredibly collaborative, seeking to work together across boundaries for the betterment of the State.

This South Australian Blueprint has been designed as a strategic reference "go to" document that all levels of Government can turn to, to be advised on regional priorities and infrastructure needs. It has been created after extensive consultation within and between regions and encapsulates the key themes, drivers and priorities strategically identified by each region that will drive a sustainable economic future for regional South Australia.

Sound economic and evidence-based analysis underpins the fully scoped projects and investment opportunities that are collated into the Investment Pipeline. Many are highly confidential and full details can be obtained on that basis via the relevant RDA Board.

In closing, the RDA South Australia Boards recognise the enormous investment that all three levels of Government are committing to the regions, as a result of drought, bushfires and the pandemic.

Sincere thanks are given to the following for their ongoing support and commitment to the regions:

- Assistant Minister Marino and the Department of Infrastructure, Transport, Regional Development and Communications
- Minister Basham and the Department of Primary Industries and Regions South Australia
- Mayor Sam Telfer and the Local Government Association
- Each and every Local Council for their ongoing support

Without this close and proactive relationship it would be impossible to achieve the work that is delivered.

ECONOMIC FOREWORD

by SA Centre for Economic Studies

The State's economic progress, its social cohesion and the development of its natural resources depends entirely on the economic performance, social vitality and natural resource management of all its regions. There is no meaningful sense in which "the State" transcends the sum of its regional component parts, taking into account interdependencies between them.

The overarching objective of Regional Development South Australia (RDSA) for regional development is to help to create prosperity and a high quality of life for individuals, families and communities in regional South Australia, and to promote business development as the basis for community prosperity and development.

Regional South Australia contributes to the wealth and well-being of South Australia disproportionately to its population size. It is the source of the largest part of South Australia's exports and the largest part of the food we eat and wine we drink; it is the custodian of most of our natural resources and environmental assets; and it has significantly shaped the history, the culture and, in fact, the identity of the State.

South Australia's economy is largely driven by its regions and this is more the case as we address the impact of Covid-19. Our regions are diverse, reflecting differences in their endowments of natural resources, economic geography, their history of development and the mix and relative size of economic activities undertaken. South Australia's agriculture, aquaculture, forestry, fishing and mining industries, are predominantly located in regional South Australia.

Regions are the primary source of growth in our export industries. Evidence of the importance of the diverse production and output from our regional economies is available in the trade performance of our regions and the South Australian economy. In the last ten years this is exhibited in strong export growth in a number of Asian economies especially China and India but also, less noted, Malaysia, Indonesia, Vietnam and Thailand. All are in South Australia's top 10 export destinations. Our regions are at the forefront of new and emerging export opportunities such that in 2005/06 exports from South Australia to these fast growing Asian economies represented 21.8 per cent of the State's total exports, by 2010/11 exports to these economies represented 44.4 per cent of South Australia's total exports and today this figure is approaching 50 per cent. Our regionally based mining and mineral processing industry including iron ore, copper, lead and other minerals and agricultural and aquaculture products such as wool, wheat and seafood and many other value added goods have all experienced market growth in Asia.

Existing industries are expanding while government and business investment underpins new and emerging sectors including renewable energy, hydrogen fuel, gas and LNG production, manufacturing and food processing and domestic and international tourism. In prospect are developments in e-business, e-education and e-health which will enhance the long-term trend of growth in employment in the services sector.

ECONOMIC FOREWORD

by SA Centre for Economic Studies

Business Investment

Business activity and investment is ultimately the source of sustainable regional development and growth – it is what jobs and incomes are based on. RDSA has identified enabling infrastructure for transport, communications, energy and water supply, to drive economic growth, employment growth, and export performance. A low interest rate environment into the foreseeable future provides the platform to boost regional investment.

Population and Productivity Growth

Regional populations have stabilised in the last few years. High labour productivity and high output per employee are characteristics of regional economies most notably in mining, agriculture and utilities. With low net overseas migration in prospect and a predicted slowdown in economic growth, enhancement to productivity, including investment in education and training will be the key to boosting employment, output and exports. Growth in productivity through reforms to 'red-tape' and investing in a healthy, well educated, skilled workforce will reinforce the competitive edge of our regional economies.

Diversification and Localism

Economic and industry diversification leads to critical population mass, continued population growth, retention of young people with the expansion of job prospects, while at the same time it helps to reduce vulnerability to the consequences of on-going structural economic change. Opportunities will arise from, inter alia, the anticipated slow recovery in the global economy, the desire for greater self-sufficiency and a review of supply chains that have been exposed by Covid-19. What opportunities are created will be shaped by regions themselves, in partnership with government and the business community. Our regional cities will play an even greater role as service hubs in their region (including in regional tourism; e-health; e-education; social assistance; employment in aged, disability and community care; and youth services) which will further diversify local economies. The trend towards greater 'localism' will place a premium on drawing on local knowledge and local institutions in all markets but especially in linking local employers to education, training and skills formation for future employees.

Assoc Professor Michael O'Neil
Executive Director
SA Centre for Economic Studies
University of Adelaide

RDA STATE STRATEGY SUMMARY

Themes

1. Strategic Investment
2. Jobs Creation
3. Vibrant regional towns with population growth
4. Value creation with advanced tech & value adding
5. Capitalising on new opportunities & emerging trends

A Whole New World

The world has changed so rapidly since March 2020 that there is no ability to truly project the period of time that it will take for a global recovery, in whatever form that may take. The impact of Covid-19 has forced the rapid adoption of a growing range of education, information, government, and community services online, whilst businesses have been forced to revisit their models to access online sales channels, delivery systems, and new processes and systems to be able to keep their businesses alive. Consumers similarly have become used to operating across digital channels, and many of these new behaviours will continue post the relaxing of restrictions, as they are in many cases more practical and cost effective.

RDA recognises that this has created an emerging trend to have greater control over the products and services that we consume, to seek out local supply, to manufacture and produce within our own country, and to reduce our reliance wherever possible on imports. This creates a different strategic future, with new realities and opportunities to address.

The Response

The South Australian RDA Boards have led extensive and collaborative consultation and created individual strategic recovery plans specific to their regions, that will now be actively implemented. The opportunity to draw together these strategies into a Statewide plan to enable a central voice and reference point was recognised and adopted.

Significant Government Support and Investment

RDA recognises the significant financial and policy driven support and programs that both the Federal and State governments are delivering, underpinned by local government for the regions. The RDA's regional plans that they have developed recognise, align and leverage the available funding grants and programs on offer.

Population
505,175

of
Businesses
45,042

GRP
\$27B

of Jobs
205,958

COVID-19
impact

↓ 7.6%
decrease

↓ 6.1%
decrease

Pipeline Project Total Value
\$27.8B

RDA STATE STRATEGY SUMMARY



Key Macro Factors Influencing Strategy

Macro issues have significantly impacted thinking and planning, and whilst many are not new, they play a heightened role in the new future planned. The strategies address:

1. Defeating Distance

Improvements in physical transport, telecommunications and access to digital connectivity.

2. Global Exposure

Managing existing export markets with the reduction in access to freight corridors and their financial capacity to purchase.

3. Diverging Places

Attracting population growth. There is an emerging trend of those living in highly populated cities seeking a new life in regional areas, as they adjust to new working from home measures, and the advent of new technologies.

4. New Economies

Demand for cleaner energy is resulting in the development of alternative energy sources – and growth in business services, scientific and technical services, health care and social assistance, and education both delivered regionally and online.

5. Environment at Risk

Challenges abound through declining condition of natural assets, declining biodiversity, climate change, extreme weather events and bio security risks.

Priorities

1

Investment & Job Creation:
Investment in qualified projects regionally to drive jobs and business and social confidence, leading to economic recovery and growth. These projects are created via RDA's ability to build business and industry networks as a driver of innovation, whilst liaising with all levels of government. Those that create multiple vertical industry opportunities and/or create access to emerging technologies are of particular interest. Some projects will be region specific, however RDA's are also focused on collaborating to leverage investment and opportunities across regions.

Tourism:

Driving regional recovery for businesses by capturing the largest possible slice of the \$65b tourism spend by Australians, now that they will be forced to travel in their own backyards.

Skilled Workforce:

Be a delivery agent for job networks across the regions, work with training providers to ensure workers are appropriately skilled and engage with governments for funding, policy and visa needs.

2

3

4

5

Population Growth:

Work with all levels of government and key stakeholders to retain and attract citizens to local regional communities.

Affordable and Accessible Supply of Key Resources:

Encourage investment, infrastructure, regulation and policy change as required to deliver key resources including: water, energy, telecommunications and digital connectivity, transport.

ADELAIDE HILLS, FLEURIEU & KI

Population
129,995

of
Businesses
11,468

GRP
\$5.41B

of Jobs
40,892

COVID-19
impact

↓ 8.8%
decrease

↓ 6.4%
decrease

Pipeline Project Total Value
\$1.55B

The Adelaide Hills, Fleurieu and Kangaroo Island has been one of the hardest hit areas over the past six months, with drought, bushfires and COVID severely impacting businesses and communities.

The region contributes over \$5 billion in economic activity for South Australia and is vital for long-term recovery of the State.

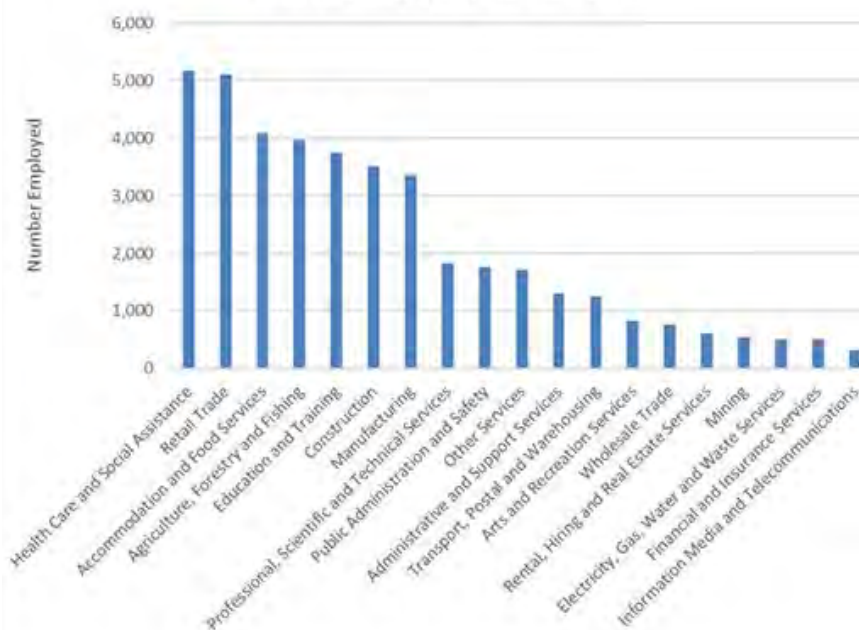
RDA Adelaide Hills, Fleurieu and Kangaroo Island is proud to partner with these fine communities and strongly support their priority projects to stimulate long term economic growth and prosperity.

Priorities

- 1 Well planned and managed regional population growth with well serviced communities
- 2 Health & well being – Healthy regional communities enjoying a safe and active lifestyle with high levels of amenity
- 3 Well-connected regional communities freely accessing services, social opportunities, jobs and commercial markets
- 4 Highly skilled, highly participatory regional labour force matched to the needs of regional industry and business
- 5 More regional jobs for regional residents with less commuting leading to a greater contribution of the region's labour force to the regional economy
- 6 Strong economic growth in the region driven by servicing the growing population and leveraging off comparative advantage with a special focus on industries with the potential to increase exports
- 7 Strong foundation of connected, innovative small businesses taking advantage of an early mover status in the NBN roll out and populations of highly skilled professionals in the region
- 8 Well managed unique natural environment, valued as an asset in the social and economic development of the region and protected for future generations

Jobs by Industry Sector

Employment by Industry 2018/19-
RDA Adelaide Hills, Fleurieu & KI



Source: National Institute of Economic and Industry Research (NIEIR) 2019.

BAROSSA & WIDER REGION

The Barossa Gawler Light Adelaide Plains region lies some 80km to the north of Adelaide, well serviced to Port and International Airport by the Northern Connector and Expressways. Wine associated industries account for nearly 40% of the GRP strongly supported by growing high value agriculture including high tech horticulture, livestock and grain and value adding to primary production. Brand salience is strong.

Emerging strengths requiring further infrastructure include Equine and Creative industries. Premium products supported by a global brand and an unspoiled and picturesque natural environment support high value tourism with limitless possibilities.

The region has strong liveability appeal and is a population growth hotspot. Services include outstanding education and research facilities and the high level of amenity has attracted highly qualified health professionals – a new hospital to support them is an infrastructure gap.

The ambition of RDA Barossa Gawler Light Adelaide Plains is to grow and strengthen regional competitive advantage and economic diversity grounded in sustainable resource management, competitive businesses and people and place.

Population
73,933

of
Businesses
5,609

GRP
\$3.52B

of Jobs
28,139

COVID-19
impact

↓ 7.8%
decrease

↓ 10.8%
decrease

Pipeline Project Total Value
\$2.3B

Priorities

- 1 Water
- 2 Wine Food and Tourism Value Chains and cross-sectoral clusters
- 3 Brand and Destination Development, including townships
- 4 Emerging opportunities: Creative Industries and shared facilities
- 5 Equine industry infrastructure and skills

Jobs by Industry Sector

Employment (total) by industry 2018/19



Source: National Institute of Economic and Industry Research (NIEIR) ©2019 Compiled and presented in economyid by J3 the population experts.

FAR NORTH

Regional Development Australia Far North (RDAFN) covers a vast region of 799,850 square kilometres which takes in the sparsely settled country of the north of South Australia.

The region incorporates two of Australia's tourism icons - the Flinders Ranges and the Outback.

The region contains the majority of SA's priority mineral exploration regions and the cross roads of Australia's national land transport network.

Significant opportunities for economic growth in the northern region exist in the sectors of resources, tourism, transport, defence, services, food and arts.

Population
26,602

of
Businesses
1,223

GRP
\$3.15B

of Jobs
14,693

COVID-19
impact

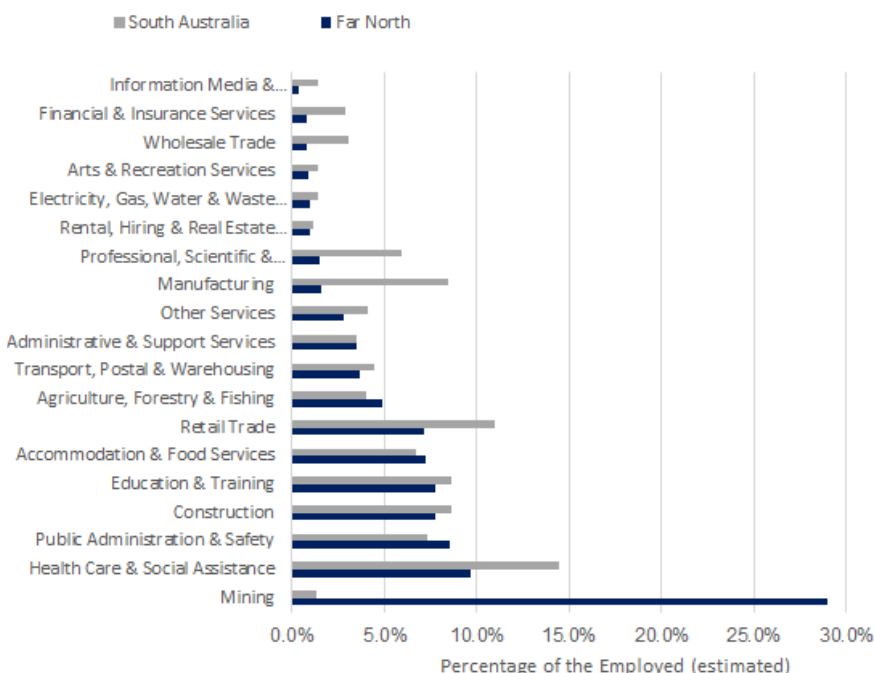
↓ 5.65%
decrease

↓ 3.2%
decrease

Pipeline Project Total Value
\$7.3B

Jobs by Industry Sector

Employment (total) by industry 2018/19



Priorities

1. Unlocking transport and access solutions: sealing the Strzelecki Track to open up South Australia to industry, tourism and business.
2. Connectivity: advancing communications connectivity and access across the region, in particular in the remote areas.
3. Tourism: harnessing the visitor economy through investment in new developments and promotion of the region.
4. Private investment: support private investment by local and regional businesses and attraction of new industries and businesses
5. Collaboration: support collaboration with other RDA's across SA and Australia to share ideas and grow local knowledge.
6. Tertiary education: Support the Community Owned Tertiary Education Centre initiative in the region.
7. Population: support projects/initiatives which assist in positioning the region for new residents to live, work and play.
8. Decentralisation: support the movement of government offices to the region.



LIMESTONE COAST

Population
67,092

of
Businesses
7,644

GRP
\$3.9B

of Jobs
32,769

The diversity and strength of the Limestone Coast's agribusiness sectors position the region for long term growth and prosperity.

During 2018 the region set a path to deliver \$700 million in growth annually and more than 5,700 new jobs by 2026. The Limestone Coast Growth Strategy identified that significant job growth would come from service-based sectors including tourism, education, healthcare and social assistance. A dynamic labour market is imperative to support local businesses to grow and adapt to these new opportunities.

Economic recovery from COVID-19 will relate to new opportunities and the enduring competitiveness of the region's agriculture, forestry and fishing foundations.

COVID-19 impact

↓ 8.1% decrease

↓ 6.1% decrease

Pipeline Project Total Value
\$510M

Priorities

- 1 Invigorate the working age population, by attracting & retaining more people across the region to fill key skills gaps and support vibrant & sustainable regional communities.
- 2 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.
- 3 Capture employment opportunities in growing sectors of healthcare and social assistance
- 4 Support the development of a vibrant business ecosystem
- 5 Collaboration to develop a more coordinated regional tourism market
- 6 Securing investment to deliver regional infrastructure priorities enabling growth

Jobs by Industry Sector

Employment (total) by industry 2018/19



Source: National Institute of Economic and Industry Research (NIEIR) 2019 Completed and presented in economy 33 by 34 the 2020/21 reports

MURRAYLANDS & RIVERLAND

The Murraylands and Riverland region, including the Mallee, abounds with investment opportunities in infrastructure, property and business. Our strengths include advanced agriculture, premium food and wine production, manufacturing, tourism, renewable energy, and freight and logistics.

Our vision for the next decade is that the Murraylands and Riverland is recognised internationally as a vibrant, world leading circular economy with high-performing businesses, resilient communities and individuals with a deep sense of wellbeing and connection with the world around us.

We are well-positioned to recover from the impacts of COVID-19, with agriculture (accounting for 30% of the region's economic value) holding firm through the crisis and domestic tourism poised to breathe life back into our world class tourism offerings, including internationally recognised nature-based, motorsport, wildlife safari, and food and wine experiences.

Population
72,700

of
Businesses
6,600

GRP
\$3.91B

of Jobs
32,350

COVID-19
impact

↓ 7%
decrease

↓ 4.6%
decrease

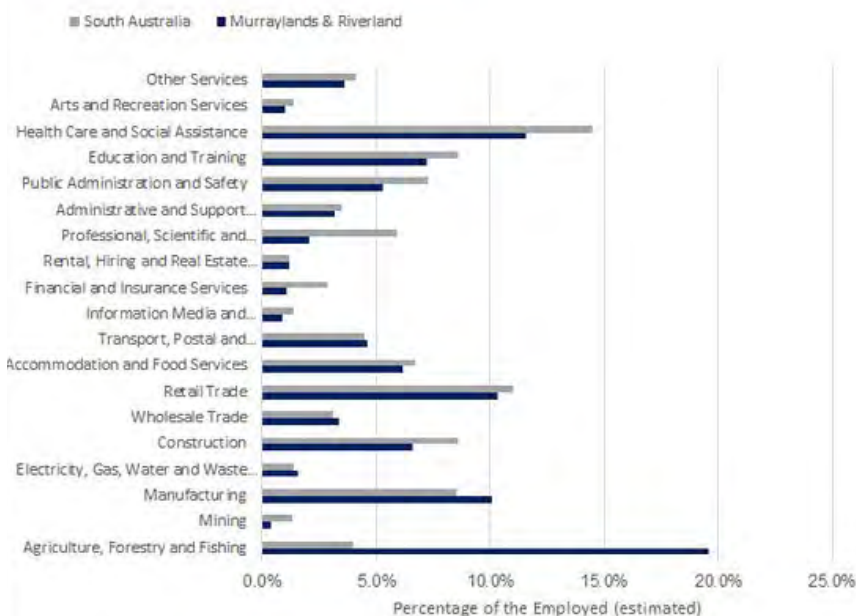
Pipeline Project Total Value
\$1.1B

Priorities

- 1 Attract major project investment to progress our transition to a circular economy
- 2 Support regional businesses to improve performance and advance the region's recognition as a destination of choice to visit and do business
- 3 Develop systems and pathways to meet current and future regional skills demand
- 4 Develop knowledge systems to assist the regional transition to a circular economy
- 5 Continue to improve organisational performance and culture to make the best use of available knowledge, relationships and resources to achieve our goals

Jobs by Industry Sector

Employment (total) by industry 2018/19



EYRE PENINSULA

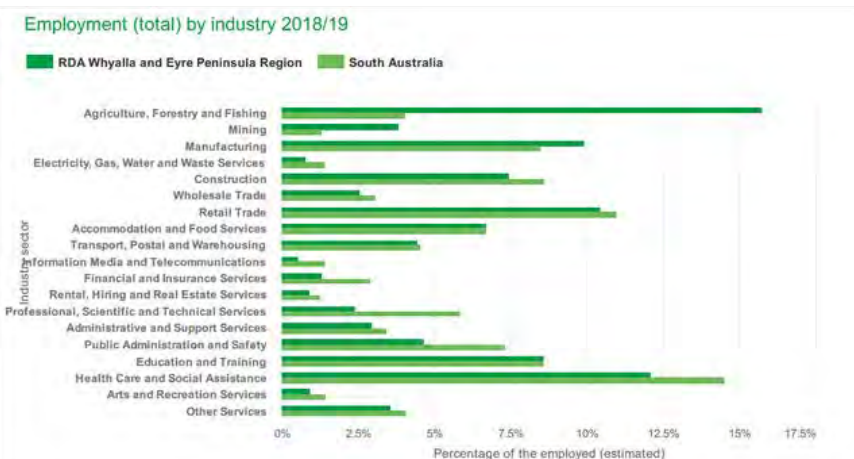
The Eyre Peninsula region is one of the world's richest low carbon energy resource environments, enjoys 2000kms of coastline and 23% of the State's land mass. Agriculture, seafood, mining, manufacturing and tourism have been primary drivers for regional employment and economic growth with multiple flow-on effects nationally and globally.

An export economy and home to Australia's: birthplace of iron ore mining; seafood capital; shark diving; and South Australia's largest export grain production – a seriously great place to live, work and play!

A \$7bn project pipeline (delivering 14,500 new jobs) reflects unprecedented levels of symbiotic business activity intent on leveraging substantial and natural competitive advantages to diversify the economy through renewable energy generation (solar, wind, hydrogen), deep sea multi-use export intermodal, satellite launching and grow smart green manufacturing, value adding to the region's primary production and resources.

Local Government, RDAEP and the Eyre Peninsula Landscape Board have over \$100m in sustainable recovery projects for immediate investment to stimulate employment (800 jobs) and inject cash into local economies including Indigenous communities.

Jobs by Industry Sector



Source: National Institute of Economic and Industry Research (NIEIR) ©2019 Compiled and presented in economy id by id the population experts.



Population
57,805

of
Businesses
5134

GRP
\$3.35B

of Jobs
26,375

COVID-19
impact

↓ 8.7%
decrease

↓ 5.9%
decrease

Pipeline Project Total Value
\$7.0B

Priorities

- 1 Labour force participation and workforce development – jobs growth, education, training and investment.
- 2 Aboriginal well-being, labour force participation and economic development.
- 3 Infrastructure to access and connect communities, production and markets locally and globally (communications, transport, space, education and health).
- 4 Globally competitive sustainable industries supporting healthy local communities with vibrant visitor economies.
- 5 Cost effective, abundant, sustainable water and energy supply to grow population and industry.
- 6 Development of strategic agricultural, mineral, energy (green hydrogen), space and smart manufacturing projects.

YORKE & MID NORTH

"That the Yorke and Mid North region comes out of the COVID-19 crisis stronger than before. That through the delivery of this recovery plan business and industry resilience is stronger and more energised, our lifestyle is better and there is greater diversity of businesses which are ready to embrace opportunities as they arise'.

Prior to COVID-19, the region was already facing challenges including the significant economic and community wellbeing impacts from prolonged drought. Gross Regional Product was trending down, the region faced higher than state average unemployment and higher levels of social disadvantage. The retail sector was already feeling the impact of a societal shift towards online purchasing and some townships were experiencing closures of businesses in main streets.

Whilst the economic, social and community impact of the COVID-19 coronavirus pandemic present significant challenges, it is important to also acknowledge the learnings and positive 'step changes' that have also occurred as a direct result from the crisis. The learnings and positive changes resulting from the pandemic have informed development of the Yorke and Mid North plan.

Population
77,048

of
Businesses
7,364

GRP
\$3.73B

of Jobs
30,740

COVID-19
impact

↓ 6.2%
decrease

↓ 4.5%
decrease

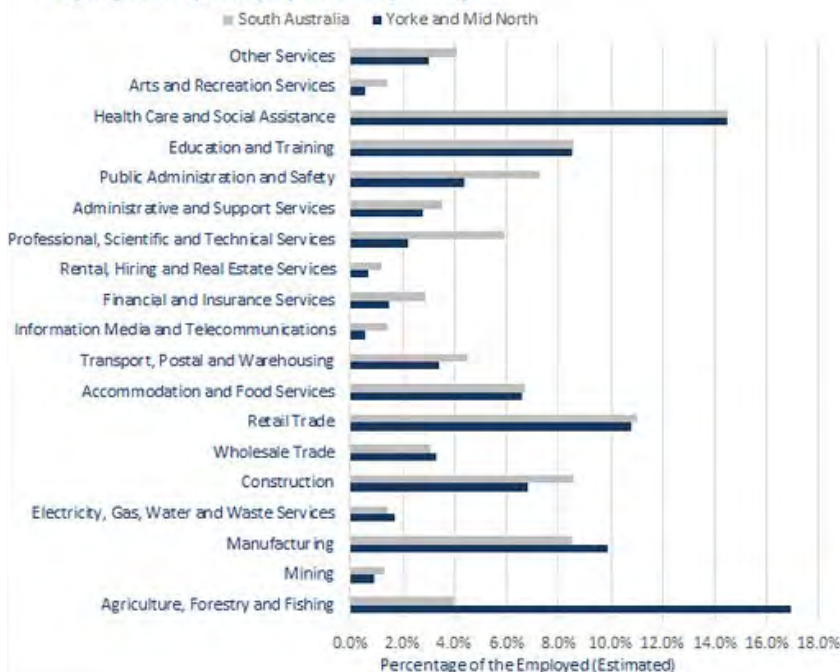
Pipeline Project Total Value
\$7.9B

Priorities

- 1 Adaptive themes including technology use, tourism product attractiveness, lifestyle attraction and business capability.
- 2 Place based strategies to drive local business confidence and building the circular economy.
- 3 Maintaining the Yorke and Mid North's vision for:
 - 3.1 Great Infrastructure and Technology;
 - 3.2 Economy Built on value adding and innovation.
 - 3.3 People with skills to get the job done.

Jobs by Industry Sector

Employment (total) by industry 2018/19



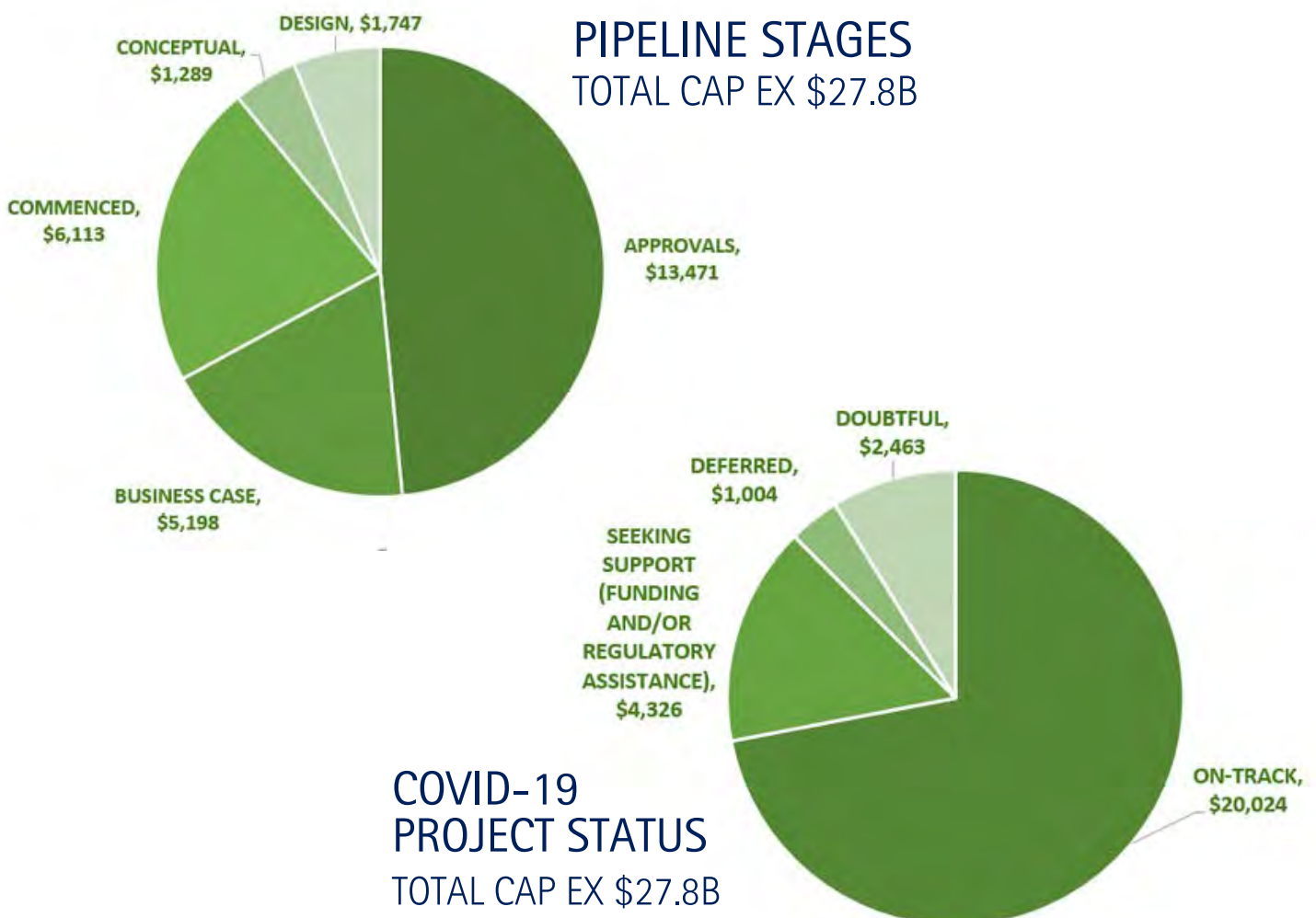
PIPELINE

Responsive Actions already underway by RDA's, based on a bespoke approach to each region's needs and organisational strengths:

- Instigation of a Regional SA Expert Panel with all South Australian RDA's;
- Dedicated Covid-19 resources for businesses on each of our individual websites;
- Increased business training, including through various partners;
- Launch and reinforcement of Business to Business (B2B) programs;
- Individualised business support in light of Covid- 19 impacts;
- Working with major project proponents to assess the impacts of Covid- 19 and progress along the investment pipeline;
- Reinforced buy local campaigns including local buying websites;
- Surveys of our local businesses impacts;
- Marketing of regions, including both love where you live and tourism campaigns;
- Job Matching Initiatives and workforce training initiatives;
- Provision of detailed economic modelling of Covid- 19 to Local Government Partners.

Commentary:

A preliminary assessment of the lifecycles of the Regional Investment Pipelines by RDA's had been undertaken in light of the Covid- 19. We already identify and collate investment pipelines for each of our regions quarterly, understanding that bringing projects to commencement is a lengthy process and all projects will not come to fruition.



STAKEHOLDERS

This high level blue print is developed with the ongoing input of most of the significant stakeholders in regional South Australia, including industry associations at a state and regional level, regional business groups and chambers of commerce, local government, community leadership organisations including environment leadership alliances and business and industry key investors in our region. These are the partners of RDA in our day to day work and long term strategic visioning and prioritising for our regions.



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An Australian Government Initiative



**Local Government Association
of South Australia**