

Regional Development
SOUTH AUSTRALIA

RESPOND | RECOVER | THRIVE

The Regional Blueprint

OCTOBER 2021

Acknowledgement of Country

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

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Executive Chair Summary



The 8 Regional Development Australia entities in South Australia are each Incorporated Associations with professional independent Boards who play an important bipartisan role for their regions.

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 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 and deliver relevant place-based projects, they are also incredibly collaborative, seeking to work together across boundaries for the betterment of the State.

The network in South Australia is unique in that all 7 regional RDAs receive separately negotiated funding from all three levels of Government - Federal, State and Local enabling an independent partnership with extraordinary access as required. RDA Adelaide as the Capital City RDA is Federally funded, with project-based State funding as appropriate. The RDAs work in a unified manner supporting and advocating for strong economic development strategies and policies for the regions with a clear focus on growing strong and confident regional economies that harness their competitive advantages, seize economic opportunities, and attract investment. They are in a unique position to not just identify these opportunities, but connect the most appropriate Federal, State and local government agencies, community organisations, businesses and individuals to make them happen.

RDA Board Chairs

With thanks to:

RDA Adelaide
Jan Turbill

RDA Barossa, Gawler, Light, Adelaide Plains
Rolf Binder

RDA Adelaide Hills, Fleurieu & Kangaroo Island
James Sexton

RDA Far North
Mark Sutton

RDA Limestone Coast
Evan Flint

RDA Murraylands & Riverland
Jodie Hawkes

RDA Yorke & Mid North
Bill Vandepeer

RDA Eyre Peninsula
Bryan Trigg AFSM

Development of the Regional Blueprint

Created through collaboration by the 8 RDAs under the auspice of RDSA, the Regional Blueprint will drive regional economic success through and post the current pandemic.

Built on a place based foundation of comprehensive local consultation within communities, industry, business networks, regional agencies, Indigenous organisations, member councils encapsulating key themes, shared drivers and priorities strategically identified by each region to grow a sustainable economic future for regional South Australia.

The Blueprint is attentive to local government economic priorities and key strategies of state and federal governments including the Regional Development Strategy, Dept of Primary Industries and Regions SA, the State Government's Growth State Agenda Priorities, the South Australian Tourism Commission's SA Regional Visitor Strategy, the Australian Government's priorities for the regions and respective regionalisation policies.'

Priorities

The RDAs work across both specific place-based initiatives as well as those that best serve regional South Australia more broadly. In their individual pages in this Blueprint the place-based work is provided in more detail for each region. The collaborative priorities for the State include enabling:

- An available and appropriately skilled workforce – seasonal and ongoing
- Strategic investment in required infrastructure – current and future proofing
- Affordable access and supply of key resources, including telecommunications, water & power
- Vibrant regional towns underpinned by population growth
- Digital empowerment – access, skills and services

Pipeline of Investment Projects

Economic and evidence-based analysis underpins the fully scoped projects and investment opportunities that are collated into the Investment Pipeline that the RDSA network capture and produce. Many are highly confidential and full details can be obtained via the relevant South Australian RDA Board.

The Regional Blueprint is the "Go To" Reference Document

This South Australian Blueprint has therefore 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.

Recognition

In closing, the SA RDA Boards recognise the enormous investment that all three levels of government are committing to the regions. Recent announcements from the Federal Coalition Government have detailed an even bigger commitment to investing in the regions, and South Australia is well placed to provide a unified vision and strategy to assist in creating economic growth.

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 Angela Evans and the Local Government Association
- Each and every Local Council for their ongoing support

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

Hon. Rob Kerin
Executive Chair



The experiences of COVID-19 have been a mixed bag for many of us, but have reinforced some important lessons across the board. People, firms and jurisdictions capable of working productively in trying circumstances will always do better than those who falter, and those communities who have been able to provide a relatively positive experience through the pandemic have performed more strongly than others (albeit under some difficult circumstances).

This truism certainly holds for regional South Australia, with net population figures showing net migration to the regions through 2021. While this short-term result reflects some of the qualities that make regional areas attractive places to live (open spaces, quality services, employment opportunities), the question becomes how to make this positive trend stick.

Across the board, productivity and employment growth are key to sustaining long-term, viable communities. Productivity growth is required to build competitiveness, which in turn creates increased employment opportunities, and with it populations that support the types of service provision which make a community an attractive and enjoyable place to live.

Answers to the question of how to sustain productivity growth are elusive, but ultimately boil down to brutal arithmetic – more output for the same or fewer inputs. On the one hand, the capital intensity of regional and rural industries maintains its persistent upwards trend, with farm holdings getting bigger and plant and equipment becoming more sophisticated (capable of processing more tonnes or head per hour across primary production sectors). This part is comparatively easy – particularly with low interest rates and accommodating fiscal settings.

The harder and more interesting parts come down to the other elements of multi-factor productivity: the way we organise ourselves from a management perspective and, more importantly, the way we train, retain and attract talented people.

Improving our human capital (and organisational capabilities) present the most important opportunities for regional communities to sustain long-term growth. The priorities for where to start this growth should be on the shoulders of what we already do well, improving the level of skills formation in industries (and workers) employed in regional industries.



This is not to say that every worker needs to become a computer scientist. Instead, workers needs be able to use computing effectively to improve their abilities in their day to day tasks, whether that involves GPS guidance to prevent soil compaction across seasons in cropping enterprises, or remote monitoring to support the delivery of telehealth services. skills represent one dimension of the collection of skills workers will require to deliver greater productivity in regional economies.

Interpersonal skills, entrepreneurialism and creativity will all play a role in supporting growth in regional areas – particularly as the services economy becomes a more important part of regional economies, with health, education and tourism sectors all becoming pivotal to the growth prospects of regional communities.

To nurture this growth, a deliberate, sustained effort needs to be made in investing in regional workforce development to enhance the skills base of existing populations, and attract new workers to complement the existing (and strengthening) capabilities of these existing populations.

Regional Development South Australia's Growing our Regional Workforce Summary provides an important starting point for addressing the skills requirement of regional economies to unlock sustained productivity growth in regional South Australia. Taking up its five key recommendations will go a long way to achieving this productivity growth and securing the future of the regional (and state) economy.



Daniel Willson
Director
Deloitte Access Economics

Regional South Australia Overview

Governments, Industry and Communities are faced with both incredible opportunities and significant challenges following covid, bushfires, drought, flood and plague.

The lack of an available and skilled workforce is severely impacting businesses, both seasonally and permanently. The reasons for this are complex and intertwined, and as we grapple with strategies to enable long term solutions, short term solutions to bring in Pacific Island workers safely and amendments to migration visas and arrangements are critical to keep Regional South Australia moving.

The RDSA network is independent, bipartisan and perfectly placed to provide specific place-based intelligence, and coordinate across all three levels of Governments to create a clear strategic vision for Regional South Australia, and practically deliver outcomes.

Significant resources have been committed already by Governments to create: Infrastructure Australia's 2021 Australian Infrastructure Plan; the South Australian Government has delivered its Regional Development Strategy, Growth State Agenda with 9 sector plans clearly articulated, and the SA Regional Visitor Strategy. At the same time every Local Government Area is constantly evolving and prioritising its place based needs.

The RDA network has continued to focus on assisting to attract new projects to the region with Significant investment is continuing to be sought and embedded in projects across regional South Australia. There has been an increase of **$8.55B** which equates to an incredible **30.7%** in the RDSA Investment Pipeline over the last 12 months, which will positively impact both construction and ongoing jobs.

With this work completed comes the opportunity to align practically and with appropriate resourcing to deliver the actions required within regions. Investment in infrastructure needs to be coordinated effectively across all three levels of Government, and with private industry suppliers and partners, with both a place based lens and a helicopter view of the priorities that will best serve regional South Australia as a whole.

Statistics



Population
508,713



# of Businesses
45,563



Pipeline Project Total Value
$36.35B

GRP
$27.7B

# of Jobs
204,939





COVID-19 impact

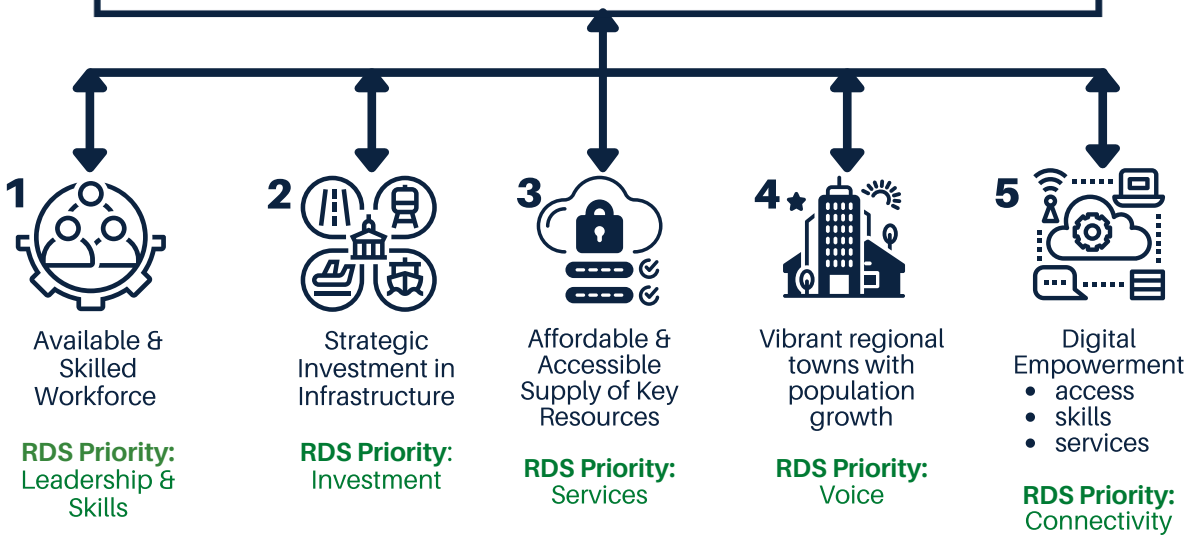
1.5% decrease

0.8% decrease

Strategic Alignment



RDSA Priorities



IMPLEMENTATION

RDSA will support the development of an implementation plan to make all three levels of Government's visions a reality.

A **REGIONAL DEAL** for the entirety of regional South Australia could provide a single vehicle for the three levels of Government, RDAs, Industry and Community to leverage the work completed to date, the genuine collaboration, and the recognition of the importance to deliver both prioritised place-based and cross regional infrastructure needs and economic growth solutions.

RDSA Recently Delivered Projects

Each RDA within the South Australian network provides integral support within each of their regions, and in collaboration across and irrespective of borders.

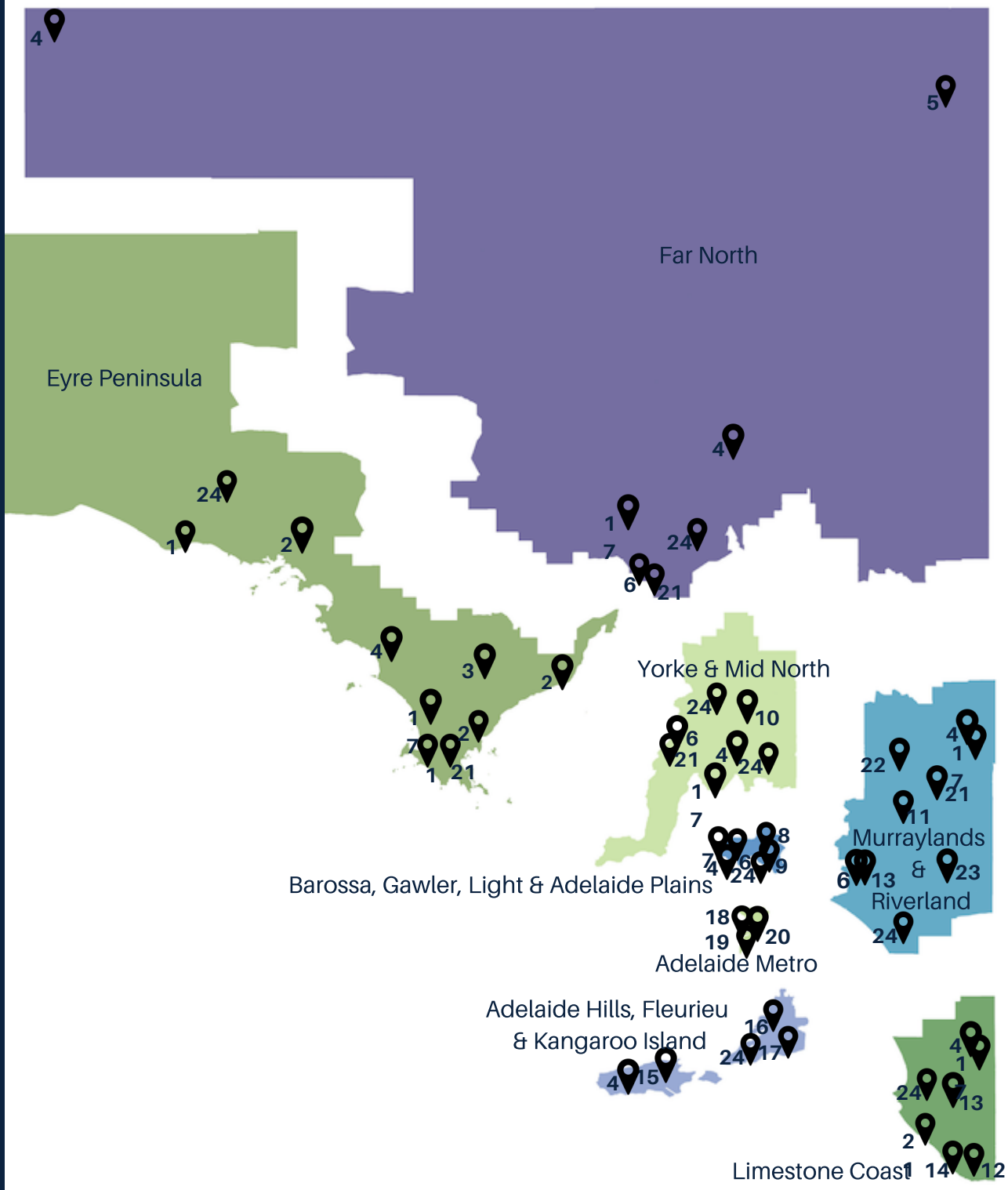
RDA project involvement can start from the seeding of the idea, through to bringing required stakeholders together, helping to remove barriers, assisting with much needed funding, and anywhere in between, and, it is always to provide practical and place based expertise. The RDA's enable billions of dollars of investment, which in turn creates significant jobs both at construction stage and ongoing.

Businesses, large and small, are provided tailored and individual support throughout their lifecycle to assist as required from establishment, through growth, and in times of hardship.

Since the last Blueprint was published in September 2020, the list is endless of those that RDA have engaged with and supported, these are just a snapshot of some of a few key outcomes in each region.

1. **Space** - Koonibba Test Range + Whalers Way Orbital Launch Complex
2. **Energy** - ElectraNet Eyre Peninsula Link + Micro-Grids + Eyre Gateway Hydrogen Project
3. Australian Radioactive Waste Agency
4. Telecommunications Connectivity
5. Strezlecki Track - sealing
6. **Regional University Hubs** -placed in Murray Bridge, Nuriootpa, Pt Pirie & Port Augusta
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. Access to Capital
18. Regional Blueprint - Statewide strategic priorities and activities
19. Annual RDA SA Summit
20. Regional Workforce Coordination & Collaboration Project & Regional Work SA
21. Investment Attraction
22. Agri Food Tourism Development Projects
23. Experts in Residence
24. Strategic Regional Plans

Map of Projects by Region



Regional Profiles

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

- PIRSA Regional Workforce Coordinators
- South Australian Tourism Commission
- LGA's
- Local Councils
- Key Industry Groups
- Community Leaders
- Indigenous Communities

A snapshot of both their region and the strategic plan priorities are captured in the following pages.





ADELAIDE

RDA Adelaide as a capital city RDA, plays a unique role to assist economic development across regional South Australia, and support our 7 x regional RDA counterparts to achieve this. Our mandate has moved from working within the metropolitan region to instead all our efforts being focussed outwardly to directly assist regional South Australia.

We will aim to achieve this in a number of ways, which will include: advocating on behalf of the regions to all three levels of government, industry associations, business and key stakeholders; promoting the achievements of the SA RDA network; facilitating connections to deliver benefits to the regions; creating and delivering the RDSA Annual Summit; evolving and delivering key strategic documents for the RDA SA network; and leading or supporting any other project that will add value.

We will also seek to leverage our positive relationships with the other RDA Capital City RDAs to seek cross border opportunities for the greater benefit of both regional South Australia and Australia as a whole, where it makes sense to do so.

Population 1,261,609

# of Businesses 107,763

GRP $82.32B

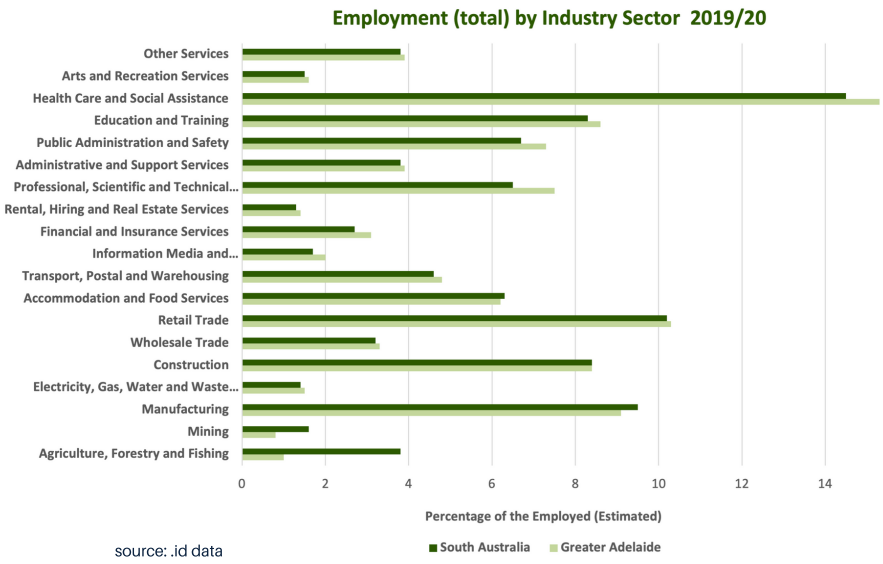
# of Jobs 632,816

COVID-19 impact

0.7% decrease

0.4% decrease

Jobs by Industry Sector



source: .id data

Priorities

1. Enabling an available and skilled regional workforce
2. Advocacy for regional South Australia
3. Creating a strategy & recommendations for place based resourcing needs
4. Creating an RDSA shared data capture and platform strategy
5. Delivering the RDSA Annual Summit
6. Explore the opportunity to enable a regional deal for regional South Australia



ADELAIDE HILLS, FLEURIEU & KI

Population 132,206

# of Businesses 11,636

GRP $5.36B

# of Jobs 41,558

COVID-19 impact

1.5% decrease

3.0% decrease

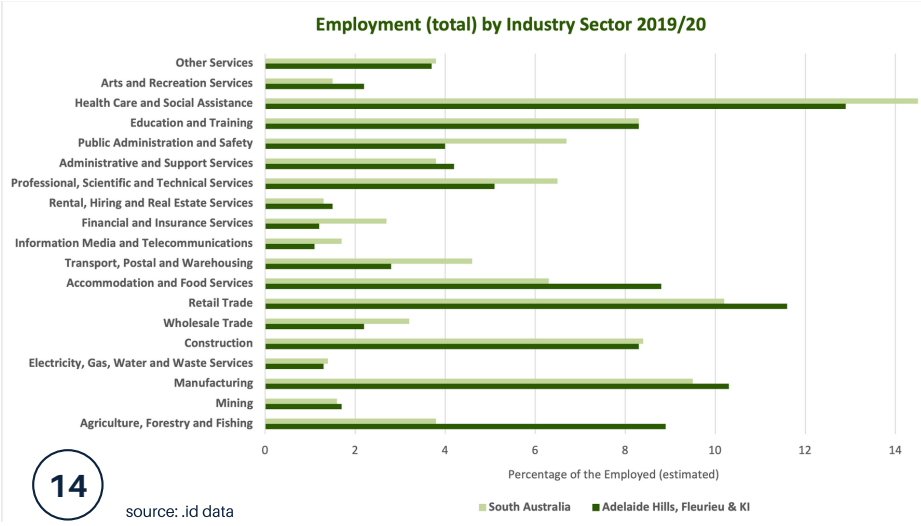
Pipeline Project Total Value **$2.2B**

RDA Adelaide Hills, Fleurieu & Kangaroo Island covers a diverse region east and south of Adelaide encompassing peri-urban as well as remote areas. The region is highly valued in terms of liveability and for years has experienced population growth higher than that of the state as a whole.

The region contributes over $5 billion in economic activity for South Australia with primary industries and tourism being key contributors. Its economy is diverse with the majority of employment being shared across five industry sectors. With diversity comes resilience which has been abundantly demonstrated since the overlapping economic shocks of drought, bushfires and COVID-19.

Challenges include advocating for enabling infrastructure developments to keep pace with growth and opportunity across the region, and the management of the impacts of population growth particularly around Mount Barker. Opportunities abound right across the region in supply-chain development, new business models, innovative approaches to increasing housing, development of new attractions, enabling of private investment, retention of youth in the more rural LGA's, improvement in industry resilience, and growth in tertiary education.

Jobs by Industry Sector



source: .id data

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



BAROSSA, GAWLER, LIGHT & ADELAIDE PLAINS

The Barossa Gawler Light Adelaide Plains region lies some 80 km to the north of Adelaide, well connected to Port of Adelaide and Adelaide International Airport by the Northern Connector and Expressway. Wine and associated industries account for nearly 40 % 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.

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, also complementary to core industries and population growth and there is demand for a new hospital.

The region offers an outstanding liveability proposition with high amenity and facilities to offer extensive choice in lifestyle. There are strong population growth trends and significant land provided for housing supply. However there is a shortage of rental properties. Investment trends indicate strong confidence in tourism and wine into the future.

Population 74,905

# of Businesses 5,710

GRP $3.5B

# of Jobs 27,821

COVID-19 impact

1.7% decrease

0.7% increase

Pipeline Project Total Value **$2.2B**

Priorities

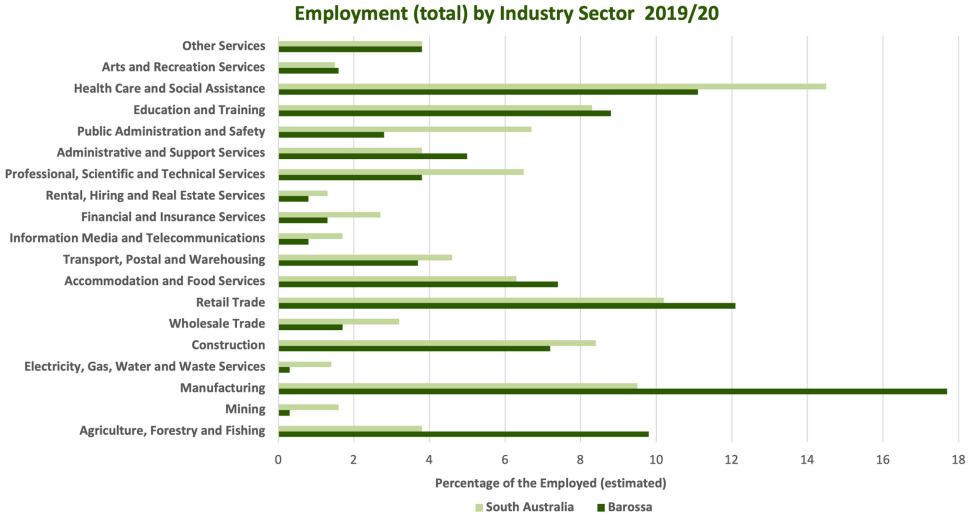
1 Water Infrastructure

2 Brand & Destination

3 Value Creation & Sustainability in:

- a Wine, Food & Tourism
- b Creative Economy
- c Health & Allied Health
- d Equine industries

Jobs by Industry Sector



source: .id data

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.

Population 57,730

# of Businesses 5,315

GRP $3.53B

# of Jobs 26,036

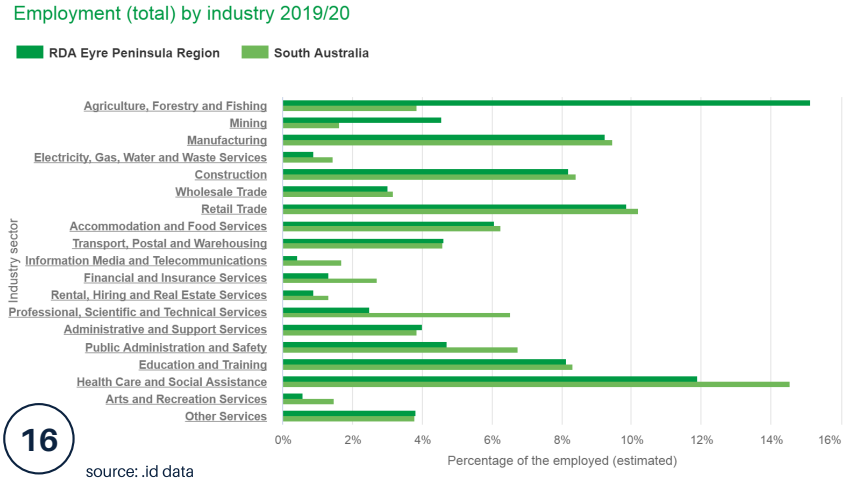
COVID-19 impact

no change

5.1% decrease

Pipeline Project Total Value **$11B**

Jobs by Industry Sector



source: .id data

Priorities

1. Having access to an available and skilled regional workforce by addressing: housing availability, employment readiness pathways, in region workforce resources; increasing business HR capacity & capability; and migration program reform.
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.



FAR NORTH

Regional Development Australia (RDA) Far North cover the vast northern areas of the state, 799,850 square kilometres of rugged beauty rich in natural assets, resilient communities, innovative businesses and diverse industry base.

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

The region has seen some very positive outcomes over the last couple of years with several major projects working their way through the system, an active small business environment, new educational facilities / offerings, significant infrastructure announcements, and a raft of other new opportunities to assist the region's growth.

Population 26,365

# of Businesses 1,257

GRP $3.26B

# of Jobs 14,693

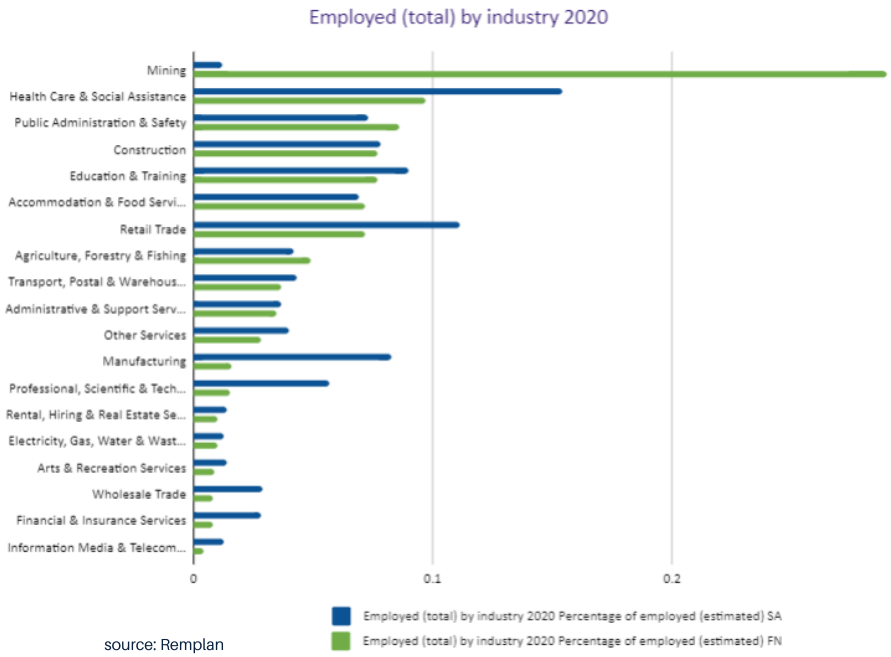
COVID-19 impact

↑ 3.37% increase

↑ 0.36% increase

Pipeline Project Total Value **$6.59B**

Jobs by Industry Sector



source: Remplan

Priorities

1. Connectivity: advancing telecommunications connectivity and access across the region.
2. Unlocking transport and access solutions: advocating for improvements to key access corridors to open South Australia to industry, tourism, and business.
3. Private investment: support private investment by local and regional businesses, and attraction of new industries and businesses addressing market gaps
4. Collaboration: support collaboration with other key stakeholders, including RDA Committees across SA and Australia to share ideas and grow local knowledge.
5. Tertiary Education: Support the Community Owned Tertiary Education Centre (COTEC) initiative and other initiatives which seek to enable regional access to tertiary education.
6. Population: support projects/initiatives which assist in positioning the region for new residents to live, work and play.
7. Decentralisation: support the movement of government and industry offices to the region



LIMESTONE COAST

The Limestone Coast Growth Strategy set a path to deliver $700 million 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.

COVID-19 and its unpredictable nature continues to present significant challenges for business. Most businesses in the Limestone Coast are small, 85% either self-employ or employ one to four people. They have limited resources and capacity to navigate the stresses and restrictions of COVID, overlayed on the normal challenges of operating a small business. This has resulted in some failures and closures - although not as many as would have occurred without government support programs.

With an export led economy particularly reliant on agriculture, forestry, fishing, and viticulture the region is susceptible to the impacts of global disruption such as 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. Recovery will relate to the length of time over which the pandemic continues and the enduring competitiveness of the region's agricultural foundations.

Population 67,365

# of Businesses 7,553

GRP $3.83B

# of Jobs 32,301

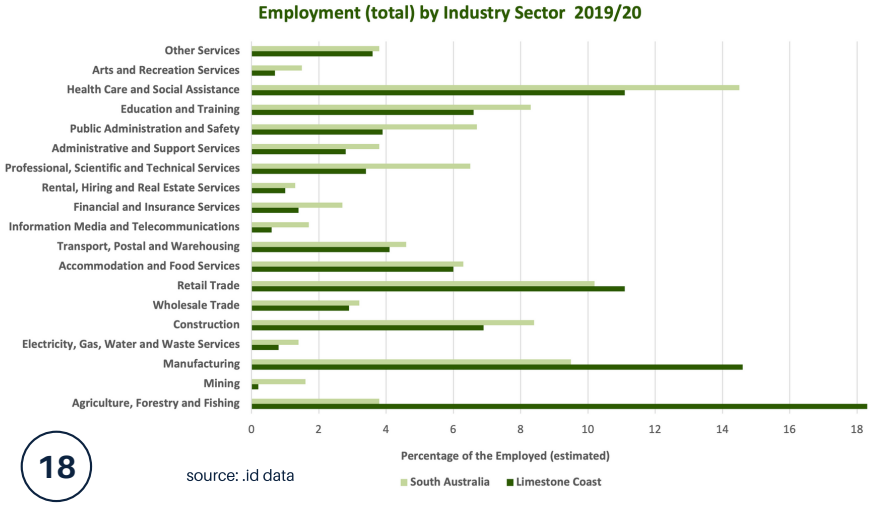
COVID-19 impact

4.7% decrease

2.4% decrease

Pipeline Project Total Value **$2.67B**

Jobs by Industry Sector



source: .id data

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

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.

Our region has done well in managing the impacts of COVID-19 and disruptions to international markets. Many parts of the region's economy are feeding into each other in very different ways than prior to COVID-19, for example, domestic workforce is now playing an increasingly important role in creating demand for regional accommodation. RDAMR continue to identify ground-level opportunities, such as meeting individual business performance and workforce needs, as well as working with governments and industry to redesign regional ecosystems, such as improving pre-employment support and assisting regional businesses to improve their employer of choice status.

Population 73,094

# of Businesses 6,551

GRP $4.14B

# of Jobs 31,807

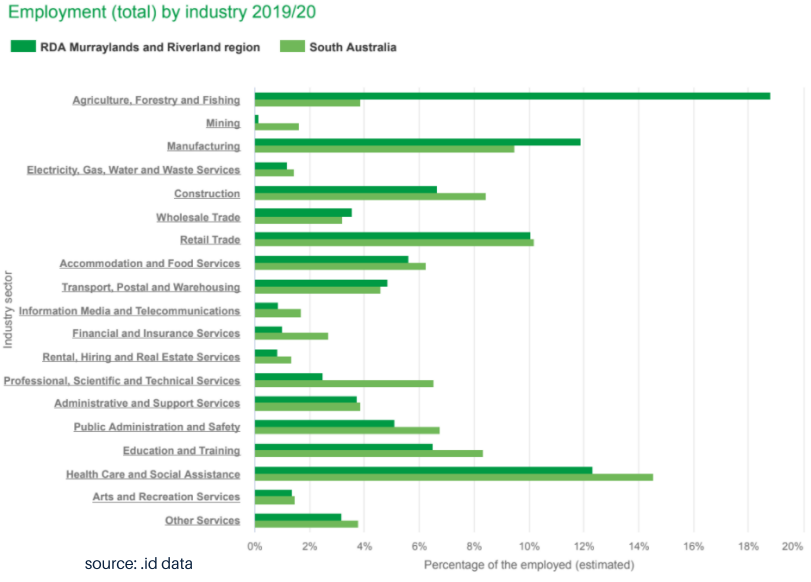
COVID-19 impact

4.8% decrease

2.0% decrease

Pipeline Project Total Value **$2.09B**

Jobs by Industry Sector



source: .id data

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



YORKE & MID NORTH

Population 77,048

# of Businesses 7,551

GRP $4.09B

# of Jobs 30,684

COVID-19 impact

0.2% increase

0.2% decrease

Pipeline Project Total Value **$9.6B**

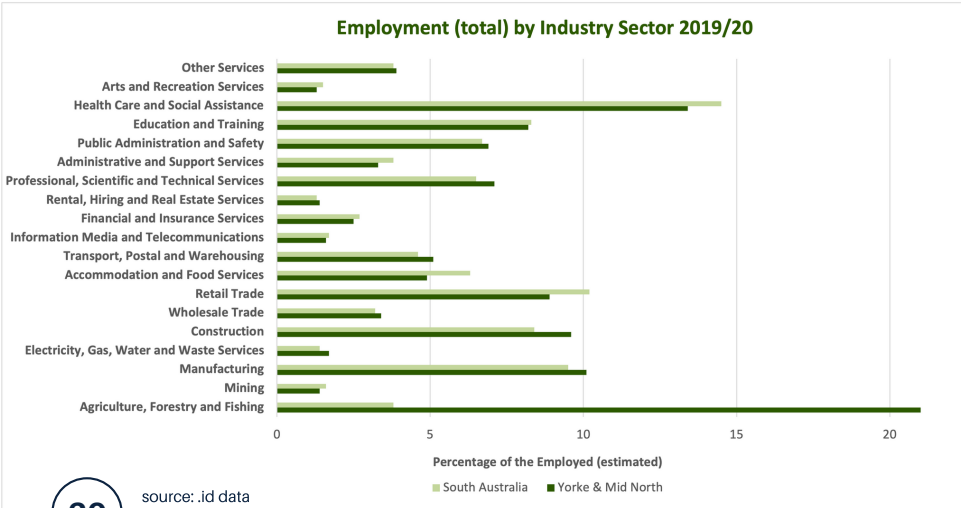
The RDA Yorke and Mid North Board are focused on the region coming out of the Covid-19 crisis stronger than before. The delivery of our Recovery Plan in conjunction with business and industry is stronger and more energised, our lifestyle is better and there is greater diversity of businesses which are ready to embrace the opportunities as they arise.

We have seen 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.

As we emerge from significant economic and wellbeing impacts from prolonged drought, the reliability of our high rainfall areas is increasing the opportunity for value-adding and sovereign capability resulting in increased investment enquiries.

One challenge faces us all- the availability of a workforce. A challenge that is wicked, complex and will require us all to work together to resolve.

Jobs by Industry Sector



source: .id data

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:

a Great Infrastructure and Technology;

b Economy Built on value adding and innovation.

c People with skills to get the job done.



Stakeholders

This high level blue print is developed with the onging 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.



RDSA Contacts

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