



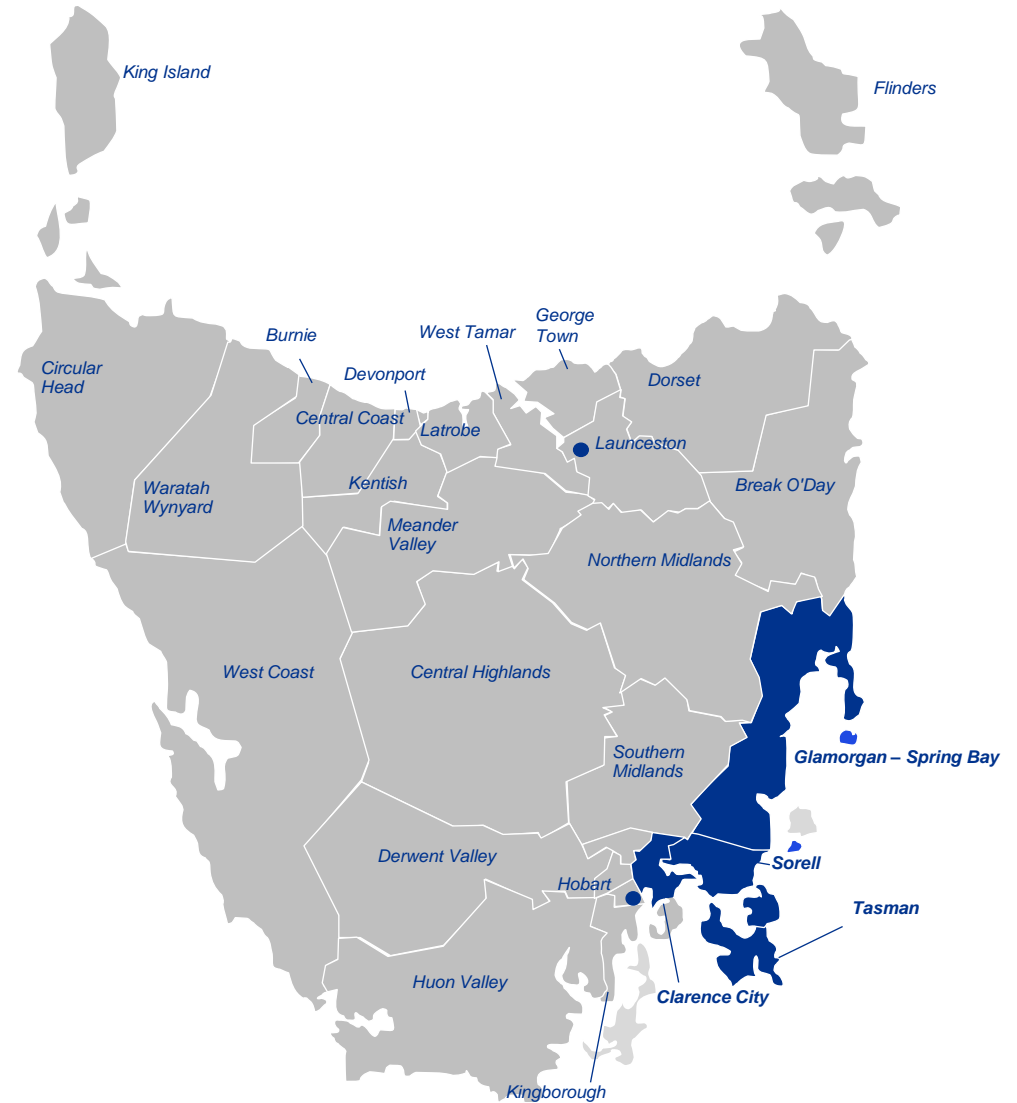
# South East Region Development Association (SERDA)

# Infrastructure Strategy

October 2024

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 SERDA Region

6.2% of Tasmania's land mass and 15.4% of Tasmania's population



01

# Introduction and summary



# Purpose and scope

The purpose of the project is to prepare an Infrastructure Strategy for the SERDA region, building on the original report in 2015 and the update in 2019.

## Scope



### Demographic Overview

Compile baseline demographic, visitor and industry data for the region covered by the SERDA councils. This provides a backdrop for the study to draw out insights such as, but not limited to, population growth or decline, industry expansion or decline, visitor forecasts and visitor destinations in the region.



### Business Project Pipeline

Compile the foreseeable projects and initiatives being proposed by businesses, developers, and investors over the next 5-10 years, which will have impacts on infrastructure in the SERDA region and in doing so, seek to understand several key metrics for these projects such as the status/timeline, estimated capital expenditure, jobs created (construction and ongoing operations) and potential increased visitor numbers.



### Government Project Pipeline

Compile the pipeline of projects and initiatives being proposed by Government, council and GBE's over the next 5-10 years, which will develop/provide enabling infrastructure to the region and in doing so seek to further understand several key metrics for these projects such as the status/timeline, estimated capital expenditure and jobs created (construction, ongoing operations).



### Pressure Points and Pathways

Seek to identify pressure points or tensions that may be at risk of emerging where there may be misalignment between projects and initiatives and the relevant supporting infrastructure and highlight the severity of those tensions. Additionally, provide a recommended pathway to address any emerging pressure points, identifying priorities, responsibilities and high-level estimates of the capital expenditure that may be required to respond to those pressure points where possible.

## Approach

### Design

This project differs from the earlier infrastructure studies for SERDA by drawing on the design and naming conventions used for project status etc. in the Infrastructure Tasmania pipeline. This SERDA study can therefore be seen as a scaled version of the Infrastructure Tasmania Pipeline with a focus on south-east Tasmania.

### Data collection

To develop a profile of the pipeline of projects in the SERDA region, each of the four councils in the region have completed a data table in Microsoft Excel. This was designed to capture the attributes of each project such as location, status, value, start date, completion date, barrier/constraints etc. These data tables have then been consolidated, analysed and presented using PowerBI.

### Research






In parallel to the collection of project data from the SERDA councils, some high-level desk-top research into the industry sectors and infrastructure enablers has been undertaken. This provides insights into key considerations, trends and plans, which could shape the supply and demand for infrastructure in the SERDA region.

### Report

The steps outlined above have led to this report. This presentation provides a succinct summary of the key insights gleaned from the previous steps. Since the SERDA region now has 'ownership' of the database of projects, this can be updated as required to provide regular snapshots of the state of infrastructure in the SERDA region.

# How has the SERDA region continued to evolve? (Section 2)

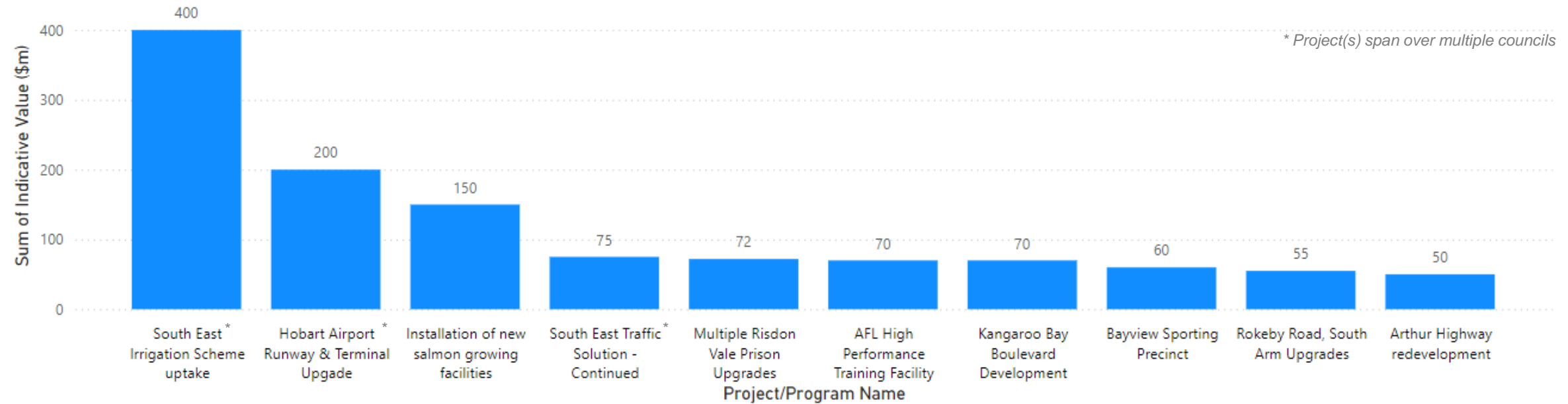
The SERDA region has continued to show ongoing growth across almost all of the key metrics considered in this study. That data points continue to indicate the SERDA region has the higher growth inner councils of Clarence and Sorell compared to the rural Tasman and Glamorgan Spring Bay councils. The Appendices include a broader profile of the economic landscape, along with a SWOT and PESTEL summary, which aim to provide further insights into contextual factors that may impact the SERDA region going forward.

Economic Metric	Summary Findings
 <b>Population Growth</b> ↑	<ul style="list-style-type: none"> <li>SERDAs total population growth projections are trending up, but the year-on-year growth across the region is slowing from an average of 0.85% in 2023 down to 0.67% by 2052.</li> </ul>
 <b>Industry Growth</b> ↑	<ul style="list-style-type: none"> <li>There has been growth across many industry sectors in the SERDA region.</li> <li>Health Care and Social Assistance has grown at an average rate of 33%, Education and Training at an average rate at 30%, Construction at an average rate at 57%, and Manufacturing at an average rate of 27%.</li> </ul>
 <b>Local Jobs</b> ↑	<ul style="list-style-type: none"> <li>Local jobs have increased by a total of 71.1% since 2003.</li> <li>Total local job were 17,465 in 2003 and have increased to 29,567 in 2022.</li> <li>On average the number of local jobs between 2002 and 2022 within the SERDA Region has been increasing by a rate of 2.83% per annum which is higher than Tasmania's average growth rate of 1.60% per annum.</li> </ul>
 <b>Building Approvals</b> →	<ul style="list-style-type: none"> <li>Building approvals in the region has trended slightly down since the growth and peak in 2020-21 by an estimated average of 11.6%.</li> <li>The number of houses built from previous year approvals had increased by approximately 2.81% from the previous year.</li> </ul>
 <b>GRP Growth</b> ↑	<ul style="list-style-type: none"> <li>Total GRP of the SERDA region has increased by \$1.7B since 2001, at an average of 3.0% P.A.</li> <li>This compares favourably to the Tasmanian average growth of 2.0% P.A.</li> </ul>

# What are the major initiatives within the region? (Section 3)

The SERDA of councils has a range of major projects in the pipeline. The top 10 alone sum to a capital value of \$1.20B

## Key Projects within the SERDA region



Clarence City Council		\$M	Sorell Council		\$M
Hobart Airport Runway and Terminal Upgrade		320.0	Ingham Processing Plant Expansion		40.5
Multiple Risdon Vale Prison Upgrades		72.0	Sorell School redevelopment		27.0
AFL High Performance Training Facility		70.0	Dodges Ferry School redevelopment		25.0
Tasman Council		\$M	Glamorgan – Spring Bay		\$M
Installation of new salmon growing facilities		150.0	Marina extension & Boatel 40-unit plan		30.0
Improvements to the Arthur & Tasman Highways such as overtaking turnouts etc.		50.0	Swan Irrigation Scheme roll out and uptake		18.9
Port Arthur Historic Site Water Treatment Plant, Reservoir and Distribution Network Upgrades		50.0	Tempus Aged Care Swansea		8.0

# Sector outlook summary (Section 4)

The key growth sectors in the SERDA region are mostly showing strong prospects for ongoing growth, although some weaknesses and threats exist.

Industry sector	% growth over last five years	Value of planned projects	Strengths and opportunities	Weaknesses and threats	Sector Outlook
Tourism & Hospitality	24.7%	\$125M	<ul style="list-style-type: none"> <li>✓ Forecast growth in visitors from 1.3M to 2M by 2030</li> <li>✓ Improved access to Tasmania through air and sea</li> <li>✓ Several significant developments in the pipeline</li> </ul>	<ul style="list-style-type: none"> <li>✗ Attracting and accommodating workers to the region and Tasmania more broadly</li> <li>✗ Cyclical tourism with seasonal and daily peaks</li> <li>✗ Attracting and accommodating workers in remote regions</li> </ul>	
Agriculture	22.2%	\$51M	<ul style="list-style-type: none"> <li>✓ Solid backbone of irrigation infrastructure</li> <li>✓ Drier climate and shift to higher yield products</li> <li>✓ Growth of agri-tourism including cellar doors for wineries</li> <li>✓ Tariff barriers being removed on wine exports to China</li> <li>✓ Climate change suits grapes for cooler climates</li> </ul>	<ul style="list-style-type: none"> <li>✗ Risks posed by climate change on water supply</li> <li>✗ Attracting and accommodating workers in remote regions</li> </ul>	
Aquaculture & Fisheries	23.5%	\$150M	<ul style="list-style-type: none"> <li>✓ Direct export capability from the airport to overseas destinations</li> <li>✓ Tariff barriers being removed on lobster exports to China</li> </ul>	<ul style="list-style-type: none"> <li>✗ Fairly static fisheries sector</li> <li>✗ Constraints on significant further growth of aquaculture</li> <li>✗ Attracting and accommodating workers in remote regions</li> </ul>	
Care sector	39.1%	\$30M	<ul style="list-style-type: none"> <li>✓ Increasing demand for aged and health care</li> <li>✓ New childcare developments in the pipeline</li> <li>✓ Demographics of South East point to increasing demand for both aged care and child care services</li> </ul>	<ul style="list-style-type: none"> <li>✗ Growing need for ageing cohorts and childcare</li> <li>✗ Ageing population in the more remote parts of the southeast</li> <li>✗ Increased demand for childcare/ after school care</li> <li>✗ School students travelling outside of region</li> <li>✗ Lack of affordable housing in the regions</li> <li>✗ Increasing need for health and allied care services</li> <li>✗ Public transport access and affordability</li> </ul>	
Manufacturing (plus transport & warehousing)	29.8%	\$20M	<ul style="list-style-type: none"> <li>✓ Good supply of land to support investment in the commercial precincts – Cambridge and the Airport</li> <li>✓ Favourable government posture to sector growth</li> </ul>	<ul style="list-style-type: none"> <li>✗ Competition from other regions and industrial estate for manufacturing e.g. Brighton, Kingston, Bell Bay</li> </ul>	
Circular Economy	22%	\$21M	<ul style="list-style-type: none"> <li>✓ Developments planned for B and C-Cell at Copping</li> <li>✓ Consensus government and community posture towards resource re-use</li> <li>✓ FOGO opportunity to service South East</li> </ul>	<ul style="list-style-type: none"> <li>✗ Generally slow uptake of Circular Economy initiatives in practice</li> </ul>	
Avg/Total	26.8% (average)	\$397M			

= Significant investment pipeline
  = Moderate investment pipeline
  = BAU investment pipeline

# Enabling infrastructure summary (Section 5)

In summary, the infrastructure enablers in the SERDA region are reporting varying levels of ongoing investment, which range from a significant pipeline of works through to more of a business-as-usual outlook.

Enabler	Value of planned projects	Strengths and opportunities	Weaknesses and threats	Investment Outlook
Airport	\$320M	<ul style="list-style-type: none"> <li>✓ Major investment in the precinct starting with airport runway strengthening is the start of major investment in the Master Plan</li> </ul>	<ul style="list-style-type: none"> <li>✗ Risks of other surrounding enabling infrastructure not keeping pace with investment at the airport</li> </ul>	
Roads & Transport	\$260M	<ul style="list-style-type: none"> <li>✓ Continuation of Southeast Traffic Solution</li> <li>✓ Planning underway for Mornington and South Arm Highways</li> <li>✓ All new projects potentially 50% State, 50% Federal/Council funded</li> </ul>	<ul style="list-style-type: none"> <li>✗ Risk that roads and transport infrastructure not geared to take on additional population increases in the next 10-year period.</li> </ul>	
Land and housing	\$140M	<ul style="list-style-type: none"> <li>✓ A significant pipeline of new housing at Clarence Plains, Midway Point, Sorell East (Mt Garrett) and Droughty Point* (*not yet in database)</li> </ul>	<ul style="list-style-type: none"> <li>✗ Affordability within the rental and home buyers' market continues to decrease</li> <li>✗ High materials costs and shortage of skilled trades</li> </ul>	
Recreation	\$228M	<ul style="list-style-type: none"> <li>✓ Bayview Recreational Precinct Development</li> <li>✓ Increase in female participation</li> <li>✓ Pembroke Park Expansion</li> <li>✓ AFL High Performance Training Facility</li> <li>✓ New golf courses coming online– Seven Mile and Five Mile beach</li> </ul>	<ul style="list-style-type: none"> <li>✗ Need to fund capital renewal and maintenance on new recreational infrastructure</li> </ul>	
Irrigation	\$436M	<ul style="list-style-type: none"> <li>✓ Greater Hobart Irrigation Scheme now formed to consolidate separate schemes</li> <li>✓ Potential Tas Irrigation expansion</li> </ul>	<ul style="list-style-type: none"> <li>✗ Global warming and drought risks, though partially mitigated by schemes</li> <li>✗ Irrigation expansion not yet adequately supported by potential irrigators</li> <li>✗ \$140M grant application to Federal Government has not succeeded</li> </ul>	
Water and Wastewater	\$81M	<ul style="list-style-type: none"> <li>✓ BAU investment to augment systems as required</li> </ul>	<ul style="list-style-type: none"> <li>✗ Seasonal challenges remain serving the influx of visitors and owners of shacks – e.g. Port Arthur and tourist towns on the east coast</li> <li>✗ Legislation does not support compulsory connection</li> <li>✗ Slowed implementation of the Penna Sewerage Strategy, risking residential development and environmental protection.</li> </ul>	



= Significant investment pipeline



= Moderate investment pipeline

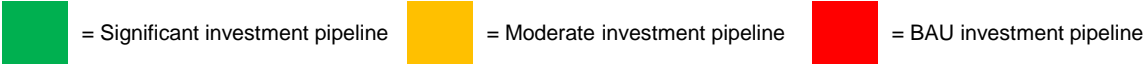


= BAU investment pipeline



# Enabling infrastructure summary (Section 5)

In summary, the infrastructure enablers in the SERDA region are reporting varying levels of ongoing investment, which range from a significant pipeline of works through to more of a business-as-usual outlook.

Enabler	Value of planned projects	Strengths and opportunities	Weaknesses and threats	Investment Outlook
Health	\$4M	<ul style="list-style-type: none"> <li>✓ Ongoing government investment in health infrastructure in southern Tasmania – Royal Hobart Hospital and a Master Plan for a focus on Mental Health at St Johns Park</li> <li>✓ Federal Government funding committed to Headspace Youth Mental Health facility in Clarence</li> </ul>	<ul style="list-style-type: none"> <li>✗ Staffing shortages and retention of skilled staff falling short of demand requirements</li> <li>✗ Limited health infrastructure investment in the SERDA region</li> <li>✗ Shortage of General Practitioners in remote areas</li> <li>✗ Lack of aged care facilities on the east coast per head of population</li> </ul>	
Education & Childcare	\$156M	<ul style="list-style-type: none"> <li>✓ Strong investment in early childhood education infrastructure</li> <li>✓ Catholic education expansion into Sorell in the longer term</li> <li>✓ TasTAFE Centre of Excellence now at Warrane</li> <li>✓ Jobs Hub training facility for local Uni and TAFE training</li> </ul>	<ul style="list-style-type: none"> <li>✗ Broader challenges with student retention, literacy and numeracy remain</li> <li>✗ Broader challenges with attracting and retaining teachers remain</li> </ul>	
Energy	\$0	<ul style="list-style-type: none"> <li>✓ BAU investment to augment existing energy supply as required</li> <li>✓ Global shift to renewable energy with Tasmania well poised</li> <li>✓ TasNetworks confirm ability to connect Sorell East to network</li> </ul>	<ul style="list-style-type: none"> <li>✗ Energy price increases and shortages impacted by global warming</li> </ul>	
Digital	\$30M	<ul style="list-style-type: none"> <li>✓ Some ongoing upgrades in black spots in remote areas</li> <li>✓ State Government Digital Strategy now in place</li> </ul>	<ul style="list-style-type: none"> <li>✗ Digital divide in some lower socio-economic communities still needs to be addressed</li> </ul>	
<b>TOTAL</b>	<b>\$1.65B</b>			

# Focus areas for the SERDA region (Section 6) (1/3)

The analysis of the sector and enabler infrastructure pipelines and pressure points leads to a series of focus areas for the SERDA Councils.

Enabler	Focus areas for SERDA	Priority
<b>Airport</b>	<ol style="list-style-type: none"> <li>1. Continue to work constructively with the Hobart Airport through the planning and execution of its 2020 Master Development Plan*</li> <li>2. Advocate for work to be done to provide a fully formed and future proof freight transport corridor to link the Brighton Industrial Estate and surrounding regions such as the Jordan River Valley, with the Hobart Airport.*</li> <li>3. Work with industry in the SERDA region to optimise the tourism and freight potential from the Airport's investment to enable Code E aircraft to take direct flights to/ from Asian markets.</li> <li>4. Develop strategies to attract resident workers to the South East to support the growth in jobs at the Hobart Airport precinct.</li> <li>5. Continue to advance initiatives that support the State's broader industry focus on growing its Antarctic support capability.</li> </ol>	<b>HIGH</b>
<b>Roads and transport</b>	<ol style="list-style-type: none"> <li>1. Understand the impacts of the Airport's Master Plan ambitions on transport infrastructure beyond the airport precinct*</li> <li>2. Advocate for investment in a freight route from Brighton to the expanded freight handling and direct flights being planned at the Hobart Airport.*</li> <li>3. Continue to press for the implementation of the remaining projects that will complete the South East Traffic Solution as a matter of priority*.</li> <li>4. Invest in other local passive transport infrastructure to accommodate the growth in demand for electric bikes/ scooters and pedestrians.*</li> <li>5. Continue to advance planning and design for infrastructure/ services to increase public transportation utilisation – bus lanes, park and ride, shelters, kerb and guttering etc. (including service affordability) as required to ease demand on road infrastructure.</li> <li>6. Continue to make upgrades to key visitor touring routes – Richmond, Great Eastern Drive and Arthur Highway</li> </ol>	<b>HIGH</b>
<b>Land and housing</b>	<ol style="list-style-type: none"> <li>1. Optimise housing supply on land that will become available at Droughty Point in Clarence with the extension of Oceania Drive from Tranmere to Rokeby, while having regard to other impacts of 2,500 homes over 30 years*</li> <li>2. Optimise housing supply and develop essential transport infrastructure throughout Clarence Plains, while having regard to other impacts of that precinct being home to 20,000 people over the next 10-15 years years*</li> <li>3. Optimise housing supply on land that will become available at Sorell East (Mt Garrett), noting that impacts on other services will form part of the overall master plan and structure planning processes.</li> <li>4. Work constructively with Housing Tasmania to provide land for social and affordable housing in the SERDA region*</li> <li>5. Conduct constructive dialogue with State Government and other urban councils to developed a shared understanding of the need to balance peri-urban growth and economic sustainability with broader regional needs to maximise infill development</li> <li>6. Develop innovative responses to the rise of AirBnB and the loss of short and longer-term rental accommodation for employees in the south east</li> <li>7. Develop a clear regional appreciation of the impact of key residential and commercial land releases and associated developments in the south east, having regard to any constraints imposed by the Southern Tasmanian Regional Land Use Strategy. most notably:             <ol style="list-style-type: none"> <li>i. Land that has become available at Sorell with the development of the Sorell By-Pass</li> <li>ii. Land that will become available with highest and best alternative uses given to Clarence Plains and Rokeby/ Droughty Point.</li> </ol> </li> </ol>	<b>HIGH</b>

# Focus areas for the SERDA region (Section 6) (2/3)

Enabler	Focus areas for SERDA	Priority
<b>Recreation</b>	<ol style="list-style-type: none"> <li>1. Maximise the opportunities presented to the SERDA region by the development of golf course infrastructure at Seven Mile Beach*</li> <li>2. Continue to develop national parks and related public infrastructure to support growing visitor and retiree demands in townships, including, but not limited to:               <ol style="list-style-type: none"> <li>i. Ongoing investment in the national parks, especially in those pressure points of Freycinet/ Coles Bay, Triabunna/ Maria Island and the Tasman Peninsula</li> <li>ii. Improved streetscapes, gardens, tree plantings, foot paths etc. to be more appealing to visitors</li> <li>iii. Contemporary visitor information and services at Triabunna, Swansea, Bicheno, Freycinet and other popular visitor destinations, having regard to the high cost of operating traditional Visitor Information Centres</li> <li>iv. Upgrades/ replacements of jetties, boat ramps etc. and improved supporting amenities such as parking, toilet facilities, fish cleaning areas, in collaboration with MAST</li> <li>v. Ongoing investment in public amenities, toilets, baby changing facilities etc. with funding support as required from Federal and State Governments</li> <li>vi. Improved and more coordinated/ cohesive visitor and roads signage</li> </ol> </li> <li>3. Coordinate the objectives and plans of Sorell and Clarence in relation to proposals for regional sporting facilities at Pembroke Park, Bayview, Geilston Bay and Seven Mile Beach</li> <li>4. Develop a regional strategy to address the emerging risks of climate change on drought and coastal erosion affected areas and coast (low lying) areas in the South East</li> <li>5. Continue to advance the case for development of the Wielangta MTB Project.</li> </ol>	<b>HIGH</b>
<b>Irrigation</b>	<ol style="list-style-type: none"> <li>1. Develop priority responses to the growing risks of drought as part of a holistic response to the impact of climate change in the South East and add support for development of new water supply and infrastructure in key areas</li> <li>2. Continue to add regional support for the full separation of Tas Irrigation from its reliance on TasWater water supply and infrastructure</li> </ol>	<b>HIGH</b>
<b>Health</b>	<ol style="list-style-type: none"> <li>1. Continue to advocate for, and develop expanded community infrastructure to support the increasing demands for aged and disability support services, health care and childcare in the South East Region</li> </ol>	<b>HIGH</b>
<b>Education and childcare</b>	<ol style="list-style-type: none"> <li>1. Look to grow the provision of childcare in the high growth and younger populated areas of the SERDA region – Sorell, Clarence Plains*</li> <li>2. Continue to promote investment in education infrastructure including local study hub facilities and teaching capability to attract more students to pursue their K-12 education in the South East</li> <li>3. Forecast short, medium, and long-term enrolments to ensure these are matched to long-term school infrastructure programs</li> </ol>	<b>HIGH</b>

# Focus areas for the SERDA region (Section 6) (3/3)

Enabler	Focus areas for SERDA	Priority
Water	<ol style="list-style-type: none"> <li>1. Continue to press for TasWater to take over the Port Arthur Historic Site Water and Sewerage Scheme and bring forward investment to improve the capacity of the services</li> <li>2. Continue to influence TasWater to explore wastewater re-use schemes to support agriculture in the south east</li> </ol>	MEDIUM
Wastewater	<ol style="list-style-type: none"> <li>1. Advance the Penna Sewerage Strategy, which would consolidate Sorell, Seven Mile Beach and Midway Point treatment plants to secure residential and industrial growth at Cambridge and Sorell.</li> <li>2. Continue to influence TasWater to prioritise investment in water and sewerage schemes in regional towns that are coming under increasing pressure from growth and increased visitors demands (visitor accommodation and other day use demands)</li> </ol>	MEDIUM
Energy	<ol style="list-style-type: none"> <li>1. Look to develop and facilitate the development of low emission energy infrastructure to support the growth of solar, battery and hydrogen*</li> <li>2. Maintain ongoing upgrades to the southeast region's energy supply to align with the forecast growth in demand by residents and visitors to the region</li> <li>3. Advocate for priority investment on the Tasman and Forestier Peninsulas to secure energy supply</li> </ol>	MEDIUM
Digital	<ol style="list-style-type: none"> <li>1. Continue to advocate for ongoing improvements to the South East Region's digital and communications infrastructure in order to address weak/ slow internet connectivity and the remaining black spots that exist, in light of the growing attraction for people to live and work remotely, and the heightening connectivity expectations of visitors</li> </ol>	MEDIUM

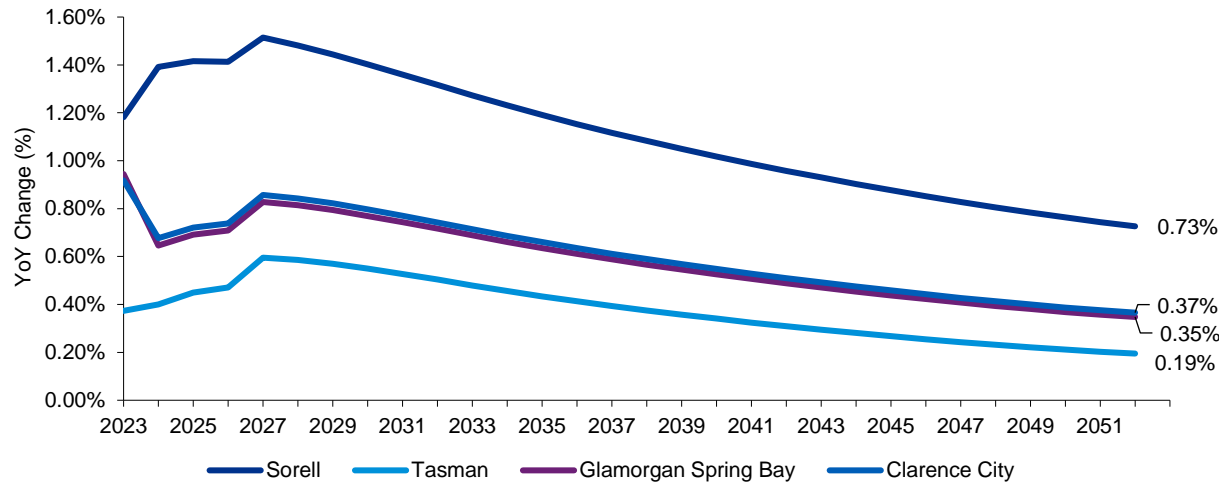
02

How has the  
region continued  
to evolve?



# Population Projections

SERDA Year on Year Population Change (Projection)



The median age in Tasmania is older than the rest of Australia, at an age of 41.8 in 2022, compared to Australia's 38.5.

The age demographic across the SERDA councils (weighted based on population in each respective council) is older than the Tasmanian overall age demographic.

Whilst the age profiles of Clarence and Sorell are similar to the Tasmanian median, the higher median age of Tasman (average of 61.4) and Glamorgan-Spring Bay (average of 59.3) increases the overall SERDA age profile despite making up a smaller proportion of the overall population.

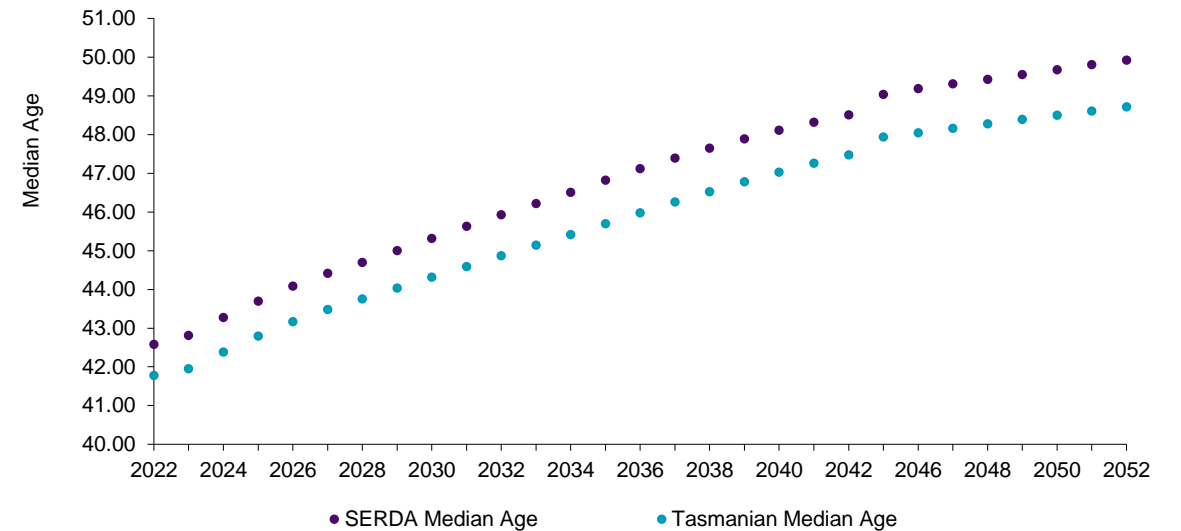
The SERDA region is projected to remain older across the 20-year forecasted period when compared to the median age of Tasmania as a whole. The median age of SERDA residents is expected to grow 12.6% up to 50 years old while the state of Tasmania's median age is forecast to grow at a faster rate of 15.7% from 2022 to 2052 up to 48 years old.

With the SERDA region broken into the council areas, the year-on-year population changes are projecting strong short term population growth, but are expected to slow down across Sorell, Tasman, Glamorgan-Spring Bay, and Clarence City areas from 2023 to 2052

The Clarence City, Glamorgan-Spring Bay, and Tasman councils are projected to experience the lowest year-on-year population growth post 2028. By 2052 there is an estimated 0.37%, 0.35% and 0.19% increase to each council respectively.

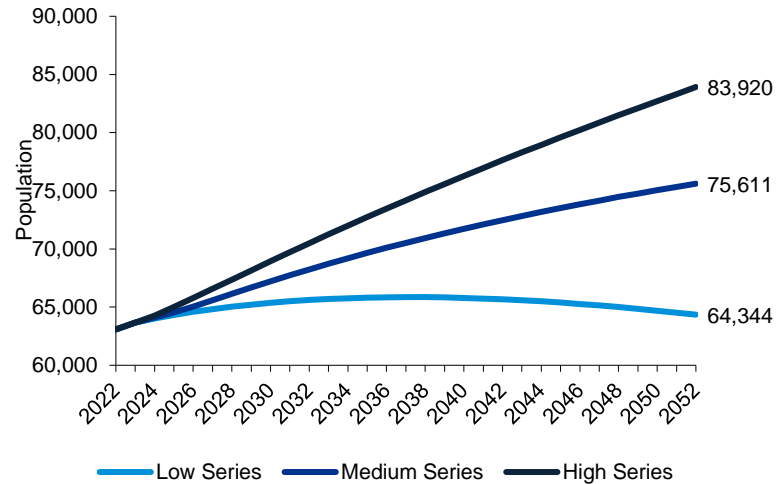
The population growth in the Sorell council area is expected to slow down from 2028 but remain in a growth state of 0.73 by 2052.

Median Age Projections

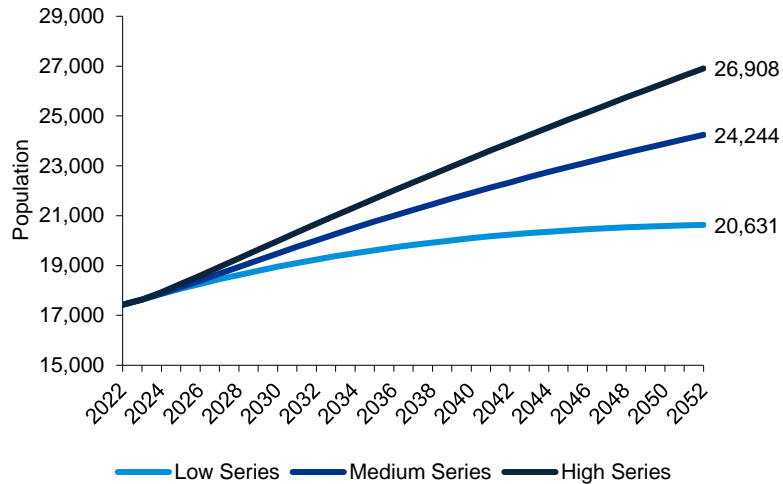


# Population Projections

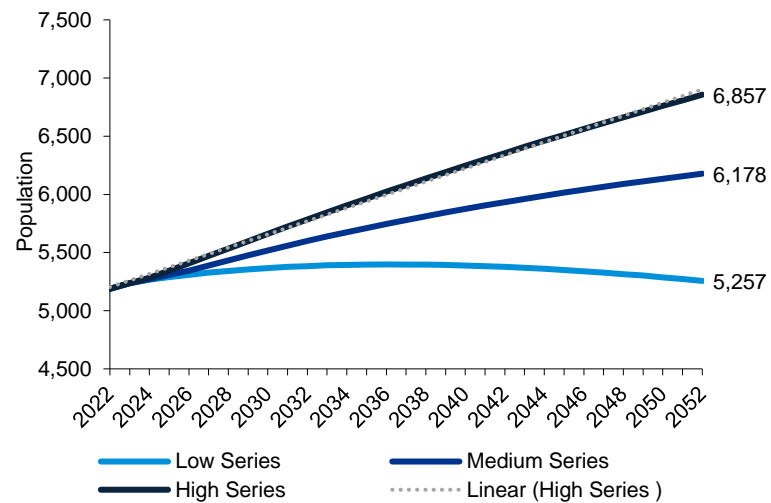
**Clarence City**



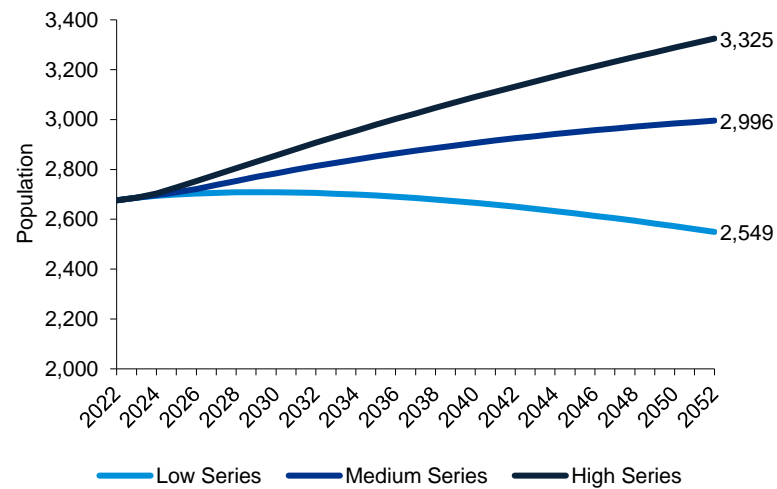
**Sorell**



**Glamorgan - Spring Bay**



**Tasman**



The projections for the councils are split between three scenarios, Low, Medium, and High Series, where they respectively represent the worst, most likely, and best cases for predicted population growth. The Medium Series data was used in the analysis below.

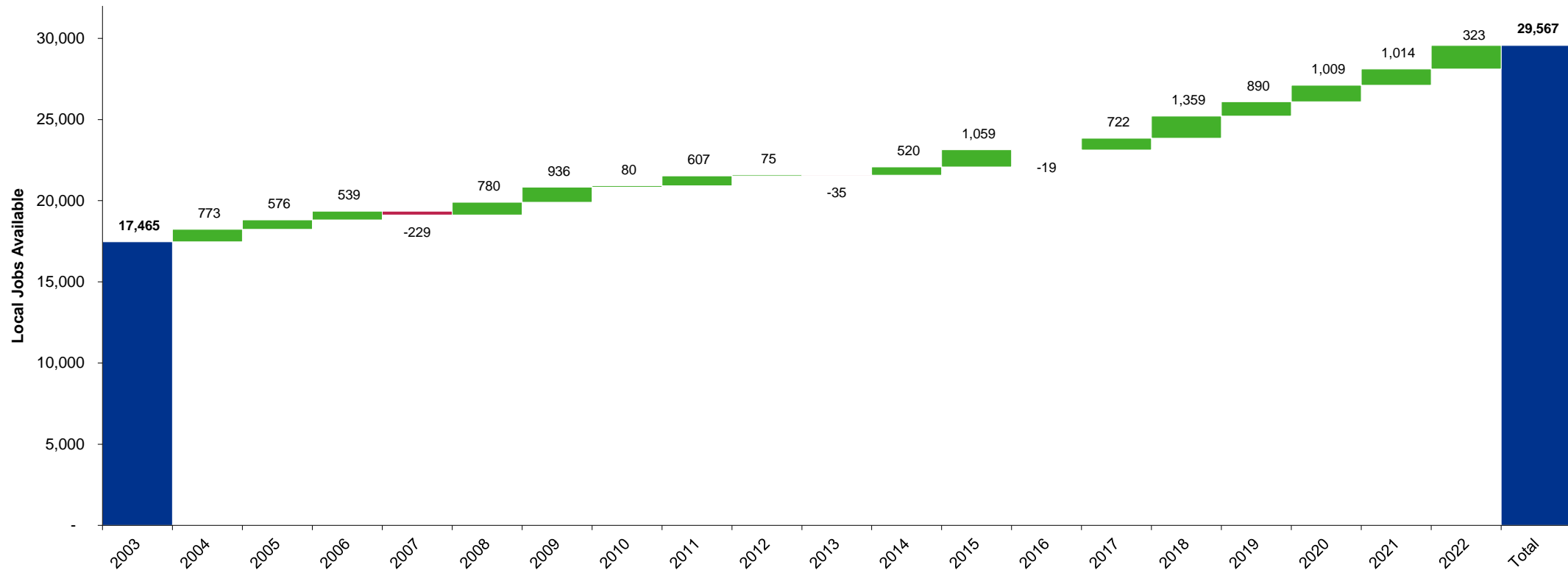
Clarence City and Sorell council areas are forecast to experience positive year on year population growth at an average increase of 0.61% and 1.11% respectively between 2022 and 2052. The councils are forecast to reach populations of 75,611 and 24,244 by 2052 from their actual population as of 2023 of 63,363 for Clarence City and 17,635 for Sorell.

Glamorgan-Spring Bay (GSB) and Tasman Councils are forecast to experience population growth with averaging around 0.58% and 0.38% respectively, from 2022 to 2052. Both councils are forecast to hit populations of 6,178 for GSB, and 2,996 for Tasman by 2052.

The total SERDA population of 89,221 as of 2023 is forecast to increase by an estimated 0.67% average year on year growth rate and projected to reach a total population of 109,028 by 2052.

# Local Jobs

Across the SERDA region the number of local jobs has increased alongside the growth of the local industries.



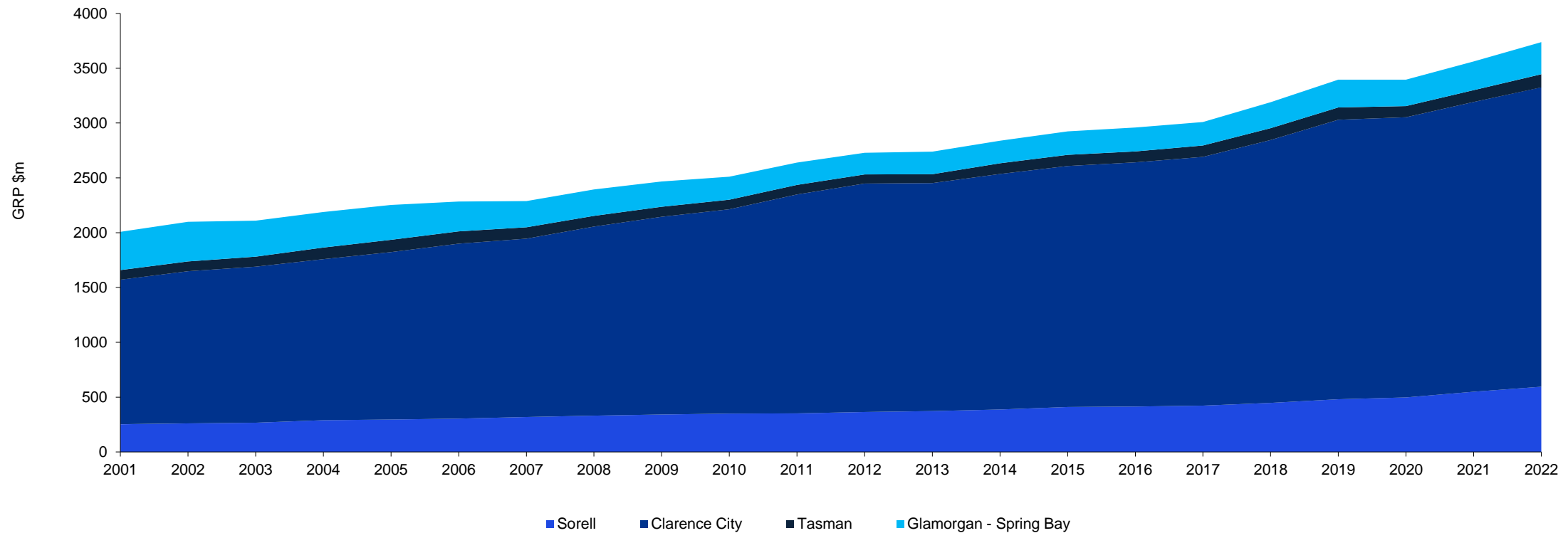
.idCommunity, <<https://economy.id.com.au/tasmania/local-jobs>>

Between 2003 and 2017, the number of local jobs within the SERDA catchment increased by 59.07%. However, there were slight declines in 2007, 2014, and 2017. After 2017, job growth accelerated, with an estimated 5,317 new jobs created since 2018. By 2022, the total number of jobs across the SERDA catchment had reached 29,567—representing an increase of 12,102 jobs since 2003.

# Headline GRP

Headline Gross Regional product has been steadily growing at a rate of 3.0% p.a.

## Headline GRP - SERDA region



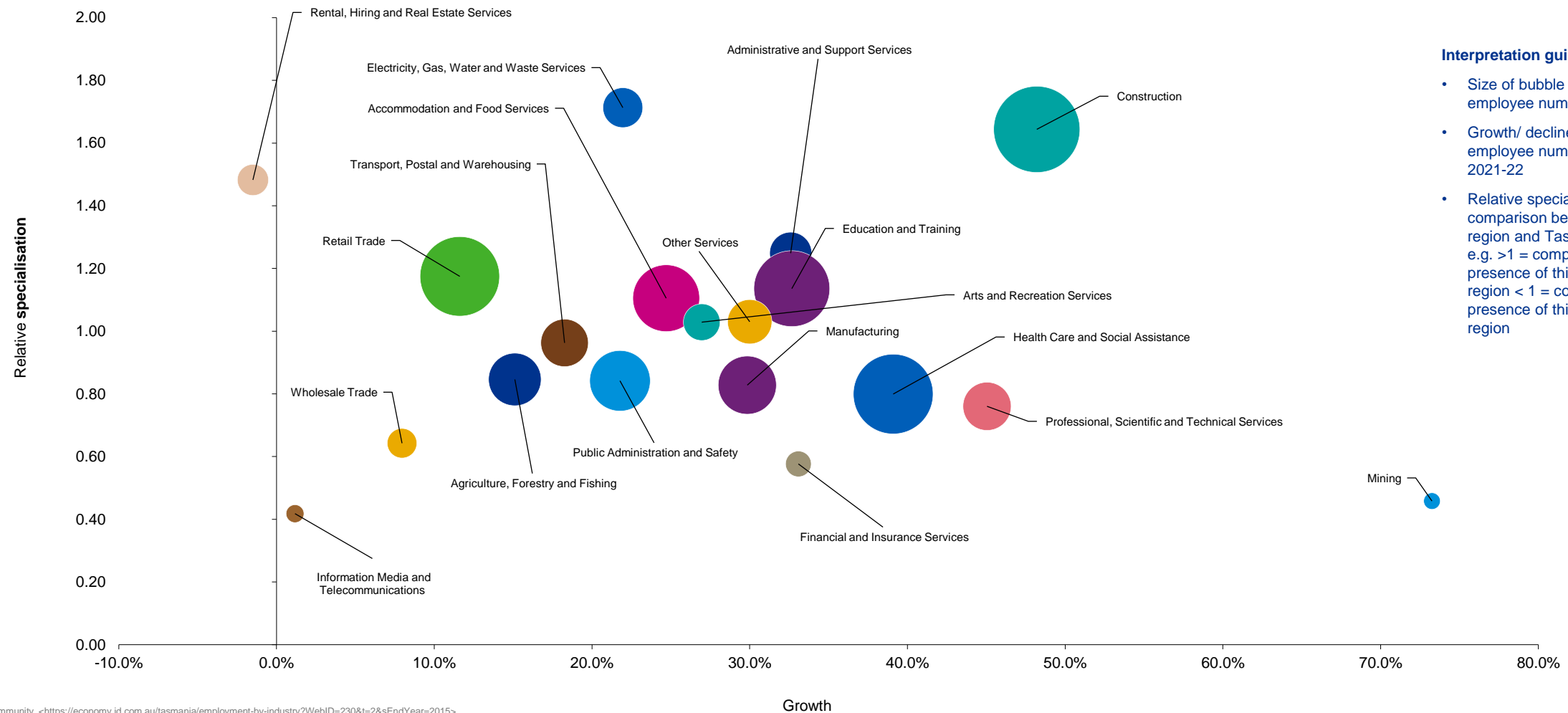
.idCommunity, <<https://economy.id.com.au/tasmania/gross-regional-product>>

The Gross Regional Product (GRP) of the SERDA region has been steadily growing at a rate of 3.0% per annum from 2001 compared to the state's overall year on year GRP growth at an average of 2.0% per annum. From 2001 to 2022 the overall GRP had grown \$1.73 billion, where the local GRP of Sorell had grown 135%, Clarence City 107%, Tasman 35%. Glamorgan-Spring Bay's GRP had decreased by 15.8%.

# SERDA Industry Growth

In terms of the more significant sectors in the SERDA region, Construction (48.2%), and Professional, Scientific and Technical Services (45.0%) industries have seen the largest growth in the five-year period, whereas only Rental, Hiring and Real Estate services has experienced a market decline of -1.50%.

SERDA : Industry Growth Share Matrix FY14-15 to FY21 - FY22



### Interpretation guide

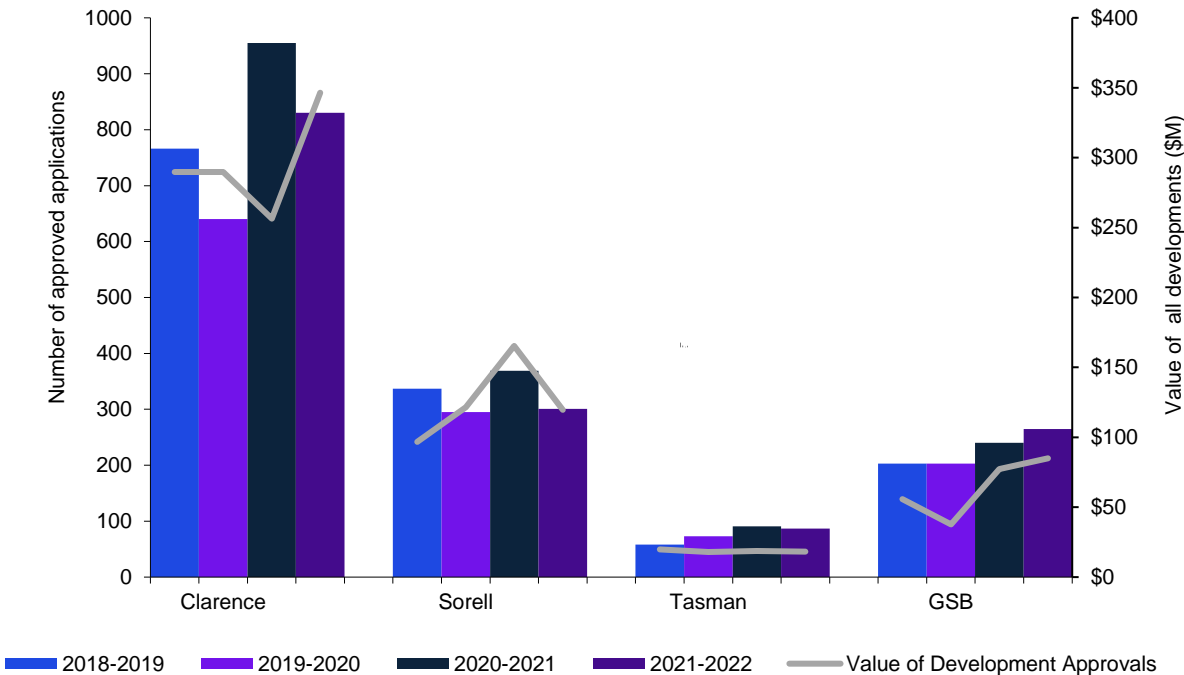
- Size of bubble is a function of employee numbers in the sector
- Growth/ decline is the movement in employee numbers from 2014-15 to 2021-22
- Relative specialisation is the comparison between the SERDA region and Tasmanian sector average e.g. >1 = comparatively greater presence of this sector in the SERDA region < 1 = comparatively smaller presence of this sector in the SERDA region



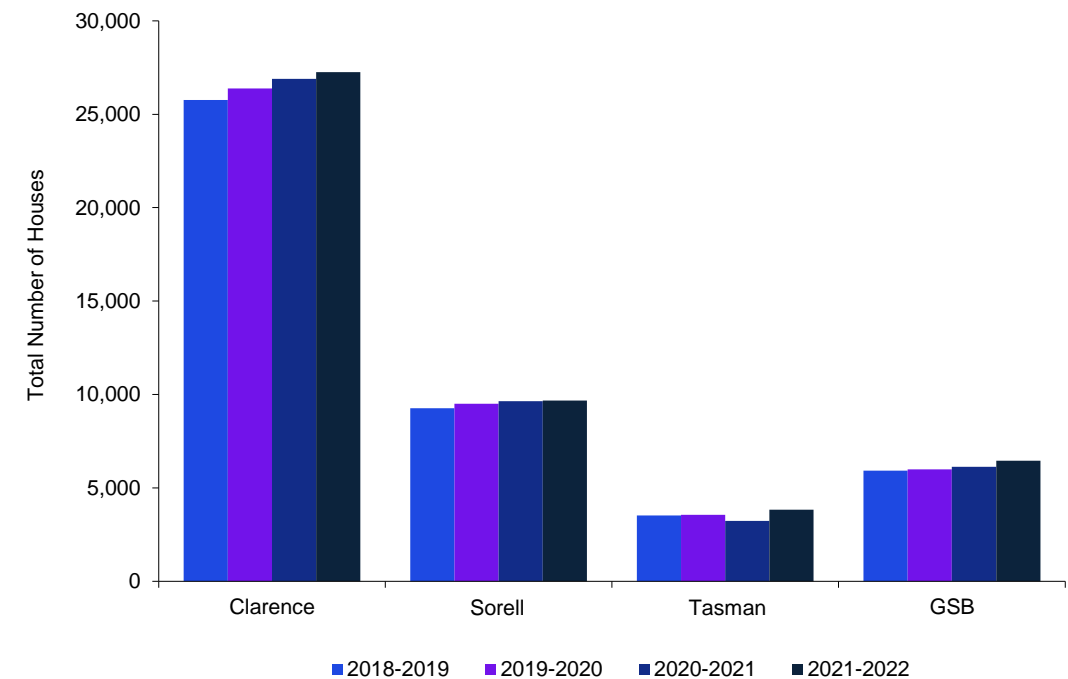
# Building Approvals and Housing Numbers

Clarence has had the strongest growth of building approvals and total houses growth of the four councils, followed by Sorell.

SERDA Councils Building Approvals



Total Number of Houses across LGAs



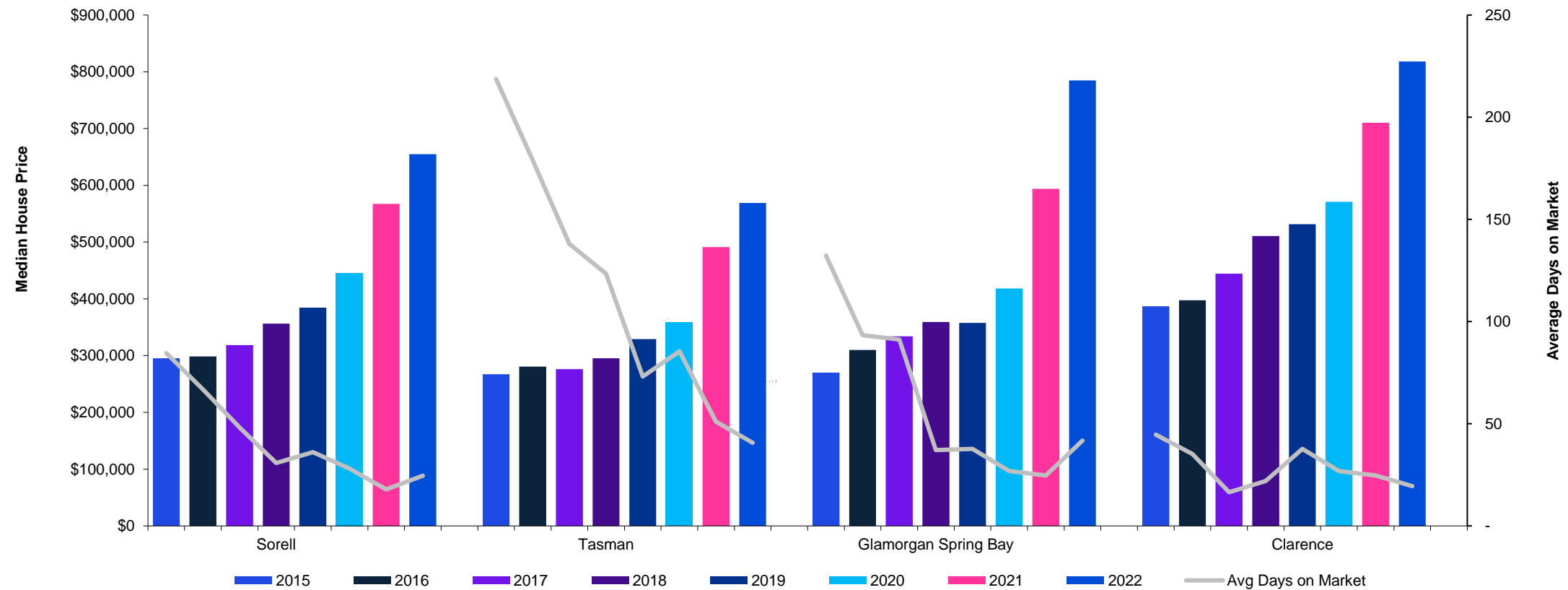
Council CDC workbooks

The trends in number of building approvals for each council remain similar to previous years, but there is a general increase in the value of development approvals, and the number of approved applications. Clarence remains as the council with the highest number of building approvals as well as maintaining the highest value of all developments at around \$346 million, while the Tasman council remains as having the least amount of building approvals and total development value.

The number of houses continues to grow across each of the councils. Clarence City continues to have the highest number of houses with 27,252 individual dwellings in 2021-2022. Tasman and GSB councils continue to have the least number of dwellings at 3,826 and 6,461 dwellings respectively in 2022.

# Median Price of Houses Sold by Region

The median house price has trended up across all the SERDA councils and average days on the market for sales has trended down.



.REIT, <<https://reit.com.au/Market-Facts/Suburb-Reports>>

Across the four council areas there has been an average \$401,770 (234%) increase in median house prices.  
 Notably, throughout the years the average days on the market has decreased from an average of 120 days to 31 days on the market: houses for sale are listed for shorter periods.  
 This is indicative of a higher demand for houses across the SERDA catchment.

03

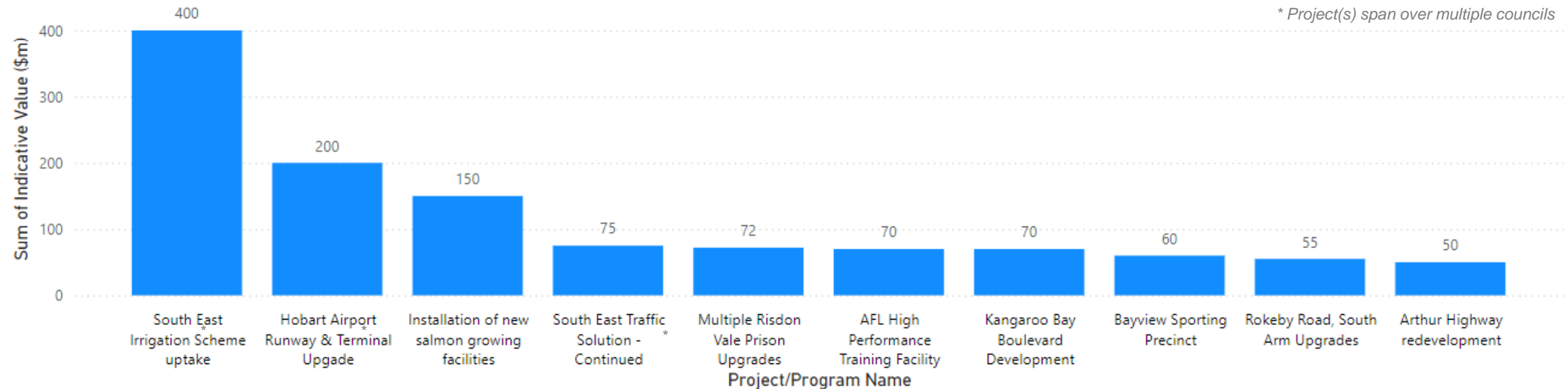
What are the major infrastructure initiatives across the region?

# Major initiatives

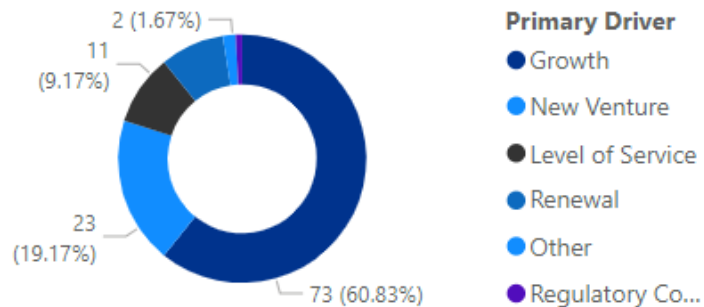
The SERDA region is set to benefit from several 'game changer' investments, of which around 61% are categorised as growth initiatives and 35% are in the Commenced phase. Combined, these sum to around \$1.20B. Those projects that are most significant in dollar terms include the following:

- The South East Irrigation Scheme Uptake (\$400M), the Hobart Airport Runway & Terminal Upgrades (\$200M), and the Installation of new salmon growing facilities (\$150M) are major developments occurring (or planned/designed) in the SERDA region that have impacts far beyond the immediate region.
- The Bayview Sporting Precinct (\$60M) are set to transform the Clarence Plains precinct.

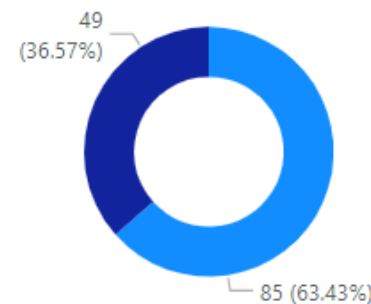
## Key Projects within the SERDA region



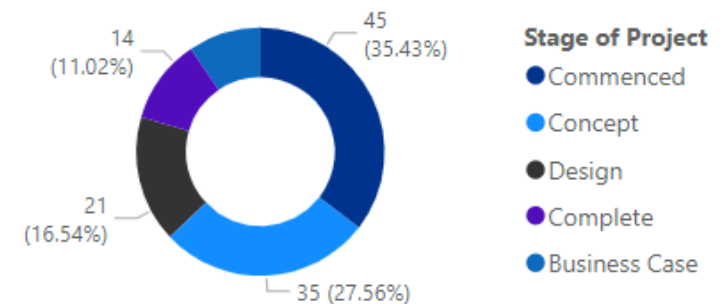
## Primary Drivers



## Primary Drivers



## Stage of Project



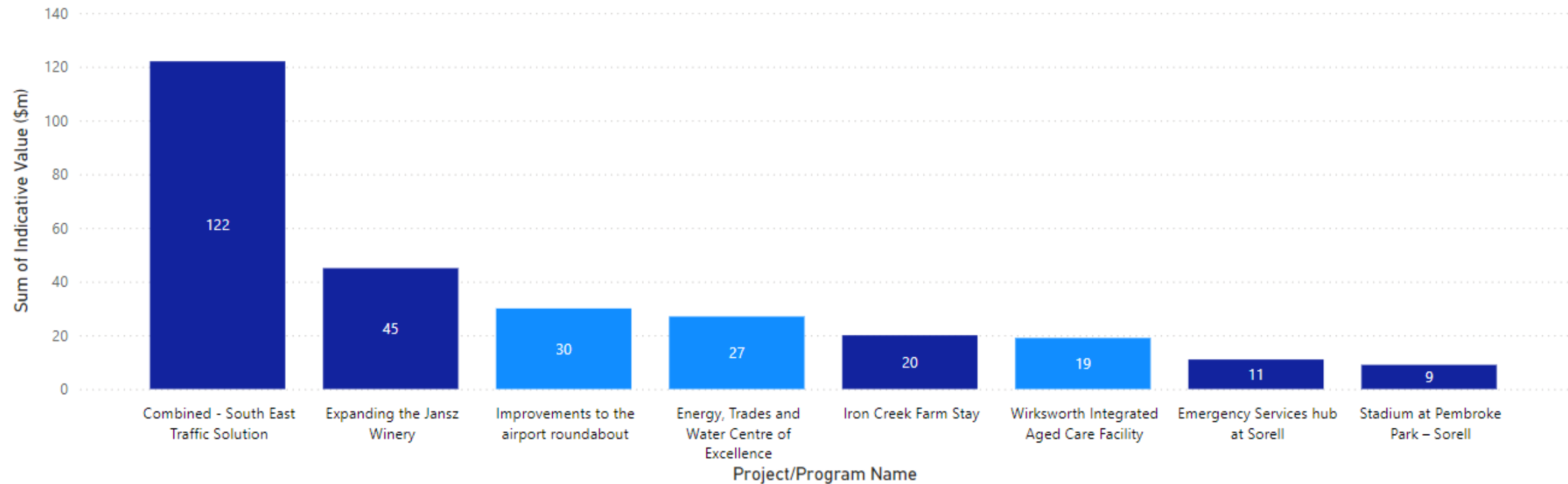
# Completed initiatives

The SERDA region has seen several major infrastructure initiatives completed since the 2020 update. Out of the 119 projects 12 have been recorded as complete, with a combined project value of \$285M. Notable projects delivered are as follows:

- The South East Traffic Solution has been significantly progressed. The Hobart Airport Interchange has been replaced with updated infrastructure and now includes an overpass and other road works that increase traffic flow efficiency and safety. The Sorell by-pass has also been completed. Further works are in the pipeline to complete the South East Traffic Solution in its entirety.
- The delivery of the Wirksworth Aged care facility includes 16 high-care and 24 general-care residential rooms as well as 10 independent living units for the aged population. This is alleviating some pressure on the demand for more aged care facilities within the region.
- Completion of the Iron Creek Farm Stay, which now offers the local, interstate and international tourists an agriculturally based hotel, restaurant and events destination.

## Key Projects within the SERDA region

LGA ● Clarence City ● Sorell



Tasmanian Government Transport Services, <[https://www.transport.tas.gov.au/roadworks/Recently\\_completed\\_road\\_projects/south\\_completed\\_road\\_projects/hobart\\_airport\\_interchange](https://www.transport.tas.gov.au/roadworks/Recently_completed_road_projects/south_completed_road_projects/hobart_airport_interchange)>  
Premier of Tasmania, <[https://www.premier.tas.gov.au/site\\_resources\\_2015/additional\\_releases/first-of-a-kind-development-improves-housing-security-for-older-Tasmanians](https://www.premier.tas.gov.au/site_resources_2015/additional_releases/first-of-a-kind-development-improves-housing-security-for-older-Tasmanians)>

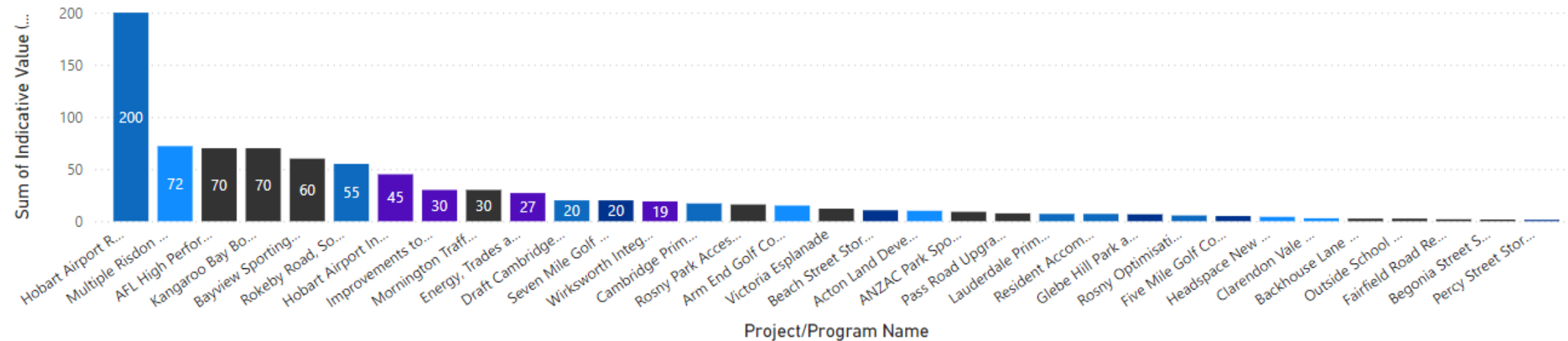


# Clarence City Council

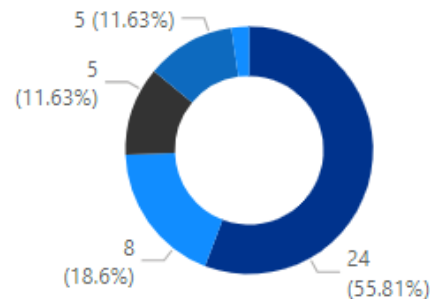
- Total CAPEX of approximately \$912 million including the Hobart Airport Runway & Terminal Upgrade 'Game Changer.'
- Clarence City Council has many projects of \$10M plus, particularly in the road and bridge enabler class. There is also a few smaller sized projects under \$10M. Some projects have been or will be proposed by the Clarence City Council with a total of 8 projects/ programs.
- The infrastructure enabler class is a large driver of projects in the region (87.5%)
- The primary drivers for projects in the region are growth opportunities (55.8%) and new venture projects (18.6%).
- 25.0% of the projects have commenced and 64.6% are in earlier stages, excluding completed projects which include the Hobart Airport Interchange, Wirksworth Integrated Aged Care Facility, Cambridge bypass, and improvements to the Airport Roundabout.

## Key Projects within Clarence City Council

Stage of Project ● Business Case ● Commenced ● Complete ● Concept ● Design



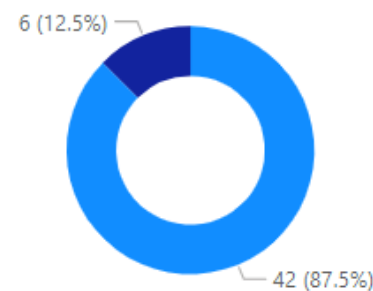
## Primary Drivers



**Primary Driver**

- Growth
- New Venture
- Level of Service
- Renewal
- Other

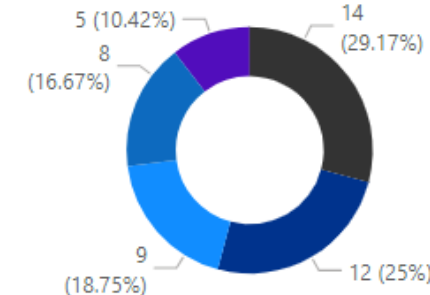
## Primary Drivers



**Sector Focus Area...**

- Infrastructure E...
- Sector Focus Ar...

## Stage of Project



**Stage of Project**

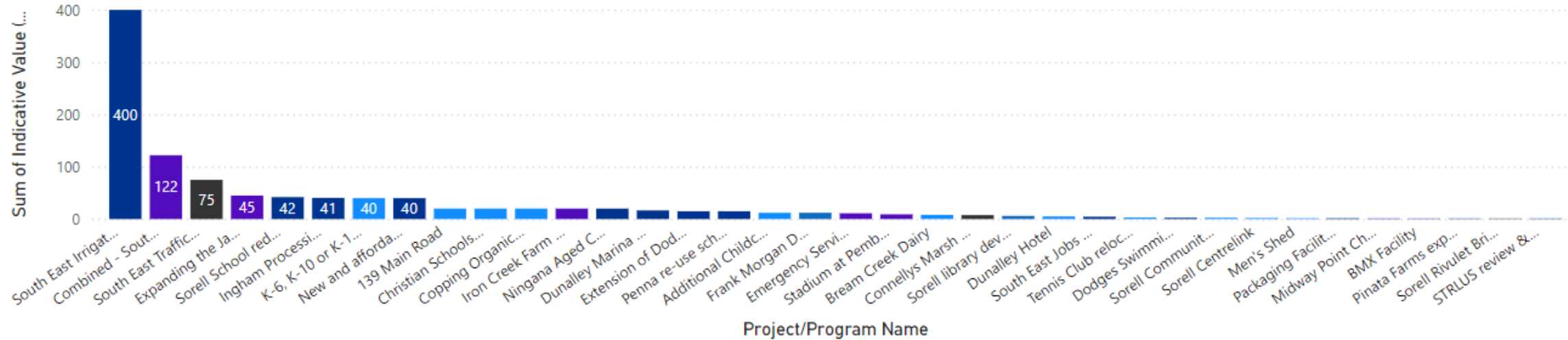
- Design
- Commenced
- Concept
- Business Case
- Complete

# Sorell Council

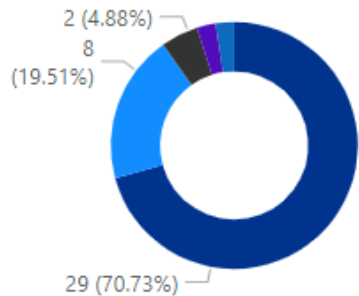
- Total CAPEX of approximately \$1.12 billion, including the \$400M of the South East Irrigation Scheme Uptake 'Game Changer'.
- Sorell Council has a large number of middle to small scale projects of \$10M to \$20M, particularly in the recreation and education enabler classes with several projects over \$40M. Three of the projects have been or will be proposed by the Sorell Council followed by the Department of State Growth with 2 projects.
- The Infrastructure enabler class is a large driver of projects in the region (61.9%)
- The primary drivers for projects in the region are growth opportunities (70.7%) and new venture projects (19.5%).
- Almost half of the projects have commenced (40.5%) and the balance are in earlier stages excluding 21.4% of completed projects which include, the completed portion of the South East Traffic Solution, Jansz winery expansion, Stadium at Pembroke, etc.

## Key Projects within Sorell Council

Stage of Project ● Business Case ● Commenced ● Complete ● Concept ● Design



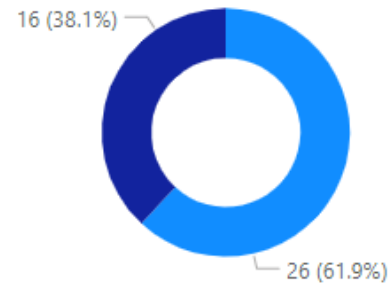
## Primary Drivers



### Primary Driver

- Growth
- New Venture
- Level of Service
- Regulatory Co...
- Renewal

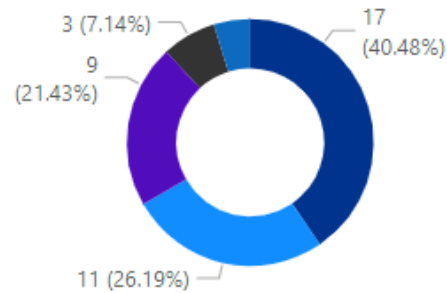
## Primary Drivers



### Sector Focus Area...

- Infrastructure E...
- Sector Focus Ar...

## Stage of Project



### Stage of Project

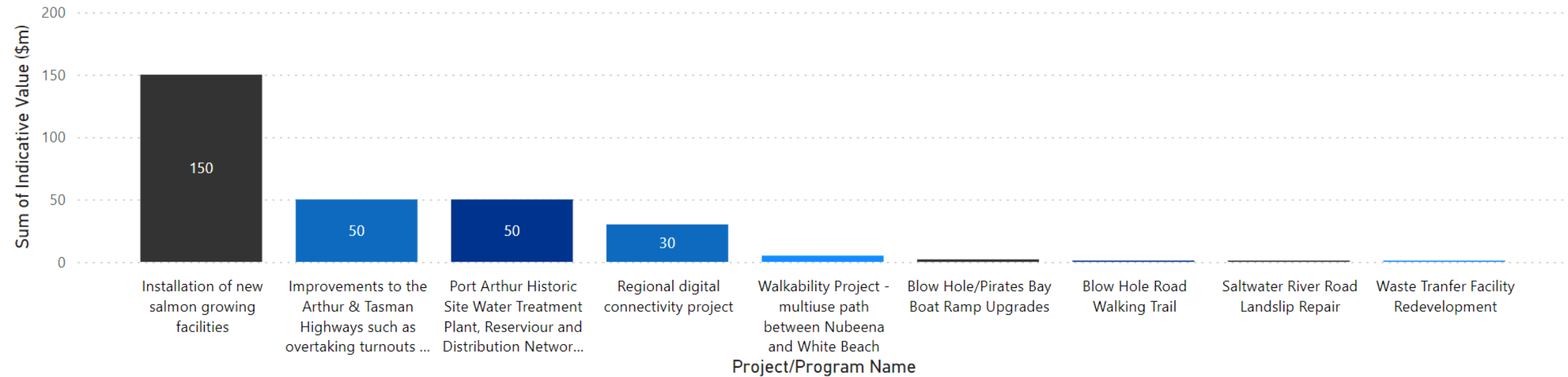
- Commenced
- Concept
- Complete
- Design
- Business Case

# Tasman Council

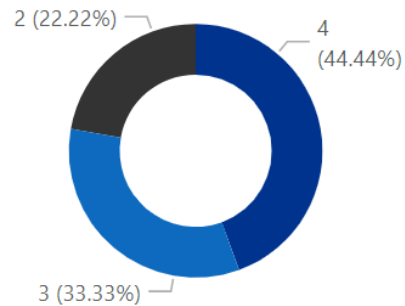
- Total CAPEX of approximately \$290M, including the \$150M Installation of new Salmon Growing Facilities 'Game Changer'.
- Tasman Council has most of their projects within the large scale of above \$30M or small scale of \$5M and below, particularly in the road and bridge enabler class. Most of the projects have been or will be proposed by the Tasman Council and there is a total of 5 projects being undertaken.
- Sector focus areas are the largest driver of the region (55.6%)
- The primary drivers for projects in the region are growth opportunities (44.4%) and renewal projects (33.3%).
- The majority of the projects are in various stages prior to commencement (77.8%).

## Key Projects within Tasman Council

Stage of Project ● Business Case ● Commenced ● Concept ● Design

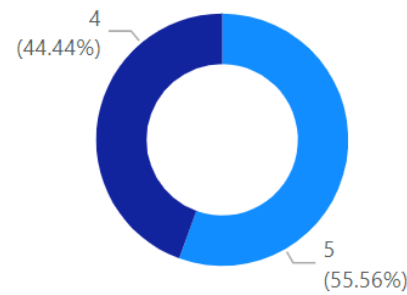


## Primary Drivers



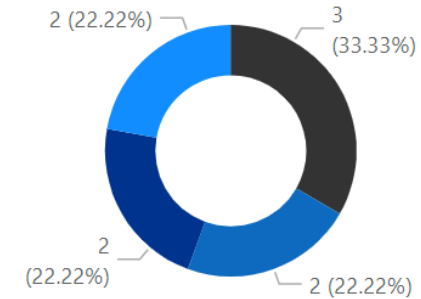
**Primary Driver**  
 ● Growth  
 ● Renewal  
 ● Level of Service

## Primary Drivers



**Sector Focus Area...**  
 ● Infrastructure E...  
 ● Sector Focus Ar...

## Stage of Project



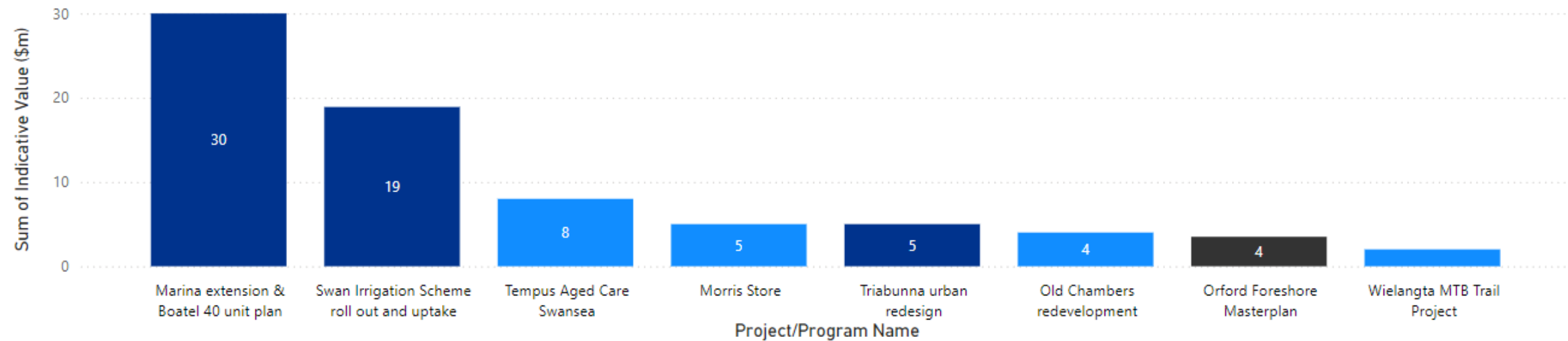
**Stage of Project**  
 ● Design  
 ● Business Case  
 ● Commenced  
 ● Concept

# Glamorgan – Spring Bay Council

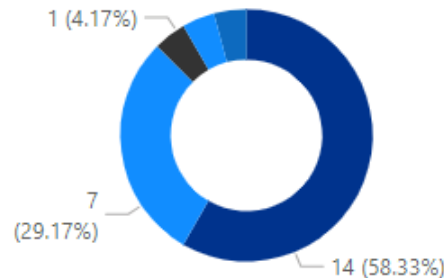
- Total CAPEX of approximately \$77 million total.
- Glamorgan – Spring Bay Council has most of their projects ranging from the small to medium scale, particularly in the recreation enabler class.
- Sector focus areas are the larger driver of infrastructure development in the region (58.3%)
- The primary drivers for projects in the region are growth opportunities (58.3%) and new venture projects (29.2%).
- Over half of the projects have commenced (54.2%) and the balance are in concept stage.

## Key Projects within Glamorgan-Spring Bay Council

Stage of Project ● Commenced ● Concept ● Design



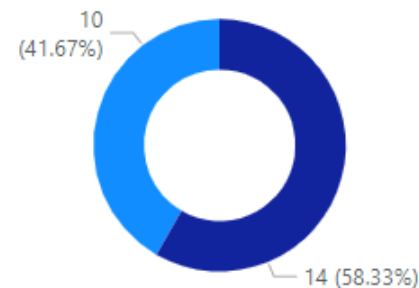
## Primary Drivers



**Primary Driver**

- Growth
- New Venture
- Level of Service
- Other
- Renewal

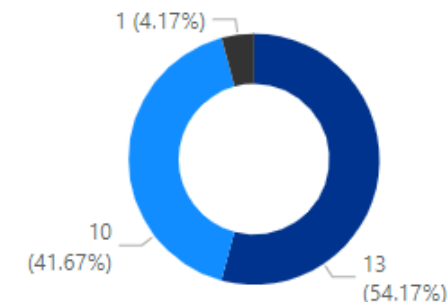
## Primary Drivers



**Sector Focus Area...**

- Sector Focus Ar...
- Infrastructure E...

## Stage of Project



**Stage of Project**


- Commenced
- Concept
- Design

04


What's the  
pipeline and  
outlook for the  
industry sectors?

# Sector infrastructure pipeline

Over the next 2-5 years, businesses in the SERDA growth sectors are set to invest approximately \$397M.



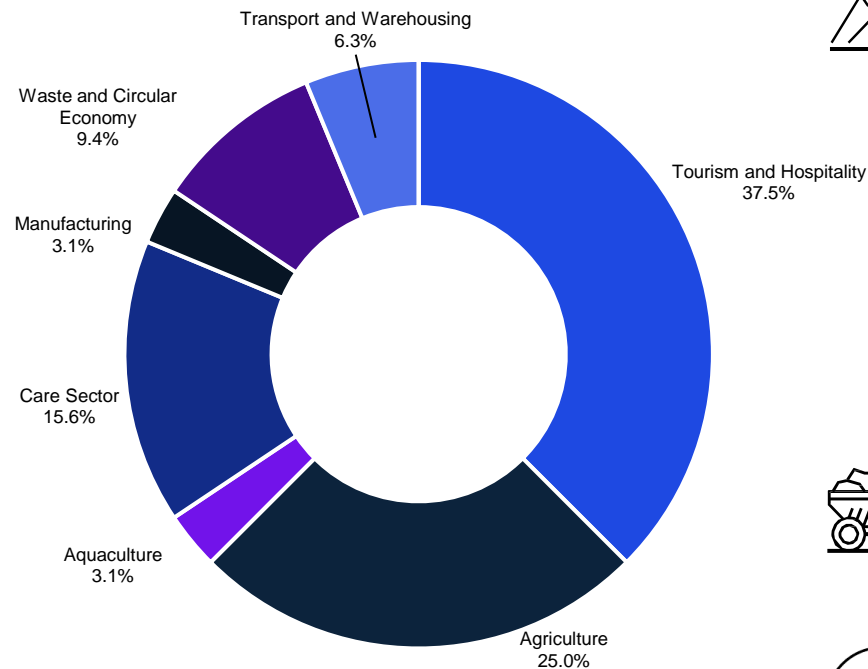
Agriculture	\$M
Ingham Processing Plant Expansion	40.5
Bream Creek Dairy	8.0
Packaging Farms Expansion	1.5
Pinata Farms Expansion	1.0
<b>TOTAL</b>	<b>\$51.0M</b>



Care Sector	\$M
Ningana Aged Care Sorell	20.0
Tempus Aged Care Swansea	8.0
Sorell Centrelink	2.0
<b>TOTAL</b>	<b>\$30.0m</b>



Aquaculture	\$M
Installation of New Salmon Growing Facilities	150.0
<b>TOTAL</b>	<b>\$150.0M</b>




Tourism and Hospitality	\$M
Rosny Hill Accommodation Development	50.0
Marina Extension & Boatel 40-Unit Plan	30.0
Dunalley Marina and Visitor Accommodation	16.5
Connellys Marsh – Multi Use Tourism Concept	7.5
Dunalley Hotel	5.0
Morris Store	5.0
Old Chambers Redevelopment	4.0
Orford Foreshore Masterplan	3.5
Blow Hole/Pirates Bay Boat Ramp Upgrades	2.0
Blow Hole Road Walking Trail	1.0
<b>TOTAL</b>	<b>\$124.5M</b>



Manufacturing (and Warehousing)	\$M
139 Main Road, Sorell	20.0
<b>TOTAL</b>	<b>\$20.0M</b>



Waste and Circular Economy	\$M
Copping Organics and FOGO	20.0
Waste Transfer Facility Redevelopment	1.0
<b>TOTAL</b>	<b>\$21.0M</b>

# Sector outlook headlines

**\$125M**  
Planned Projects  
Indicative Value

**24.7%**  
Percentage sector  
growth over 5 years

**2,418**  
Total Jobs in SERDA

**8.2%**  
% of total jobs in  
SERDA

## Tourism and Hospitality

### Broader contextual factors

- Tourism Tasmania’s 2030 strategy aims to grow visitor numbers from 1.5 million to 2 million at a compound annual growth rate of 3.5%. The strategy is to increase length of stay and spending (yield) rather than a focus on growing visitor numbers. The coming capacity of the airport to take Code E flights will further open access to Asian markets.
- The Interstate spend is projected to grow, with an estimated increase of more than 75%, reaching over \$1.4 billion by 2030.
- Cruise ship visits to Tasmania continue to increase with an expected 270,000 passengers and 117,000 crew set to visit Tasmanian ports in the 2023/2024 season. Across the state, 83 visits are scheduled for Hobart, 39 visits for Burnie and 23 for Port Arthur.
- Climate change, drought, fire and coastal inundation will be high priorities for councils and critical to the tourism sector as the councils begin to initiate *Tasmania’s Climate Change Action Plan 2023-25*.
- A substantial increase in visitor expenditure is projected, with expectations of expenditure doubling to over \$5 billion to the sector and hence, Tasmania’s economy by the year 2030.
- Two new Spirit of Tasmania ships are to arrive in 2024 and 2025, increasing the total visitor capacity by 1,800 visitors per ship. This will provide a 40-45% increase in capacity for tourists and freight.

### In the SERDA region

- Major visitor attractions in the South East Region include Port Arthur (320,600 annual visitors in 2022-23), The Coal Mines Historic Site (17,500 visitors) the Three Capes Walk (15,000 annual visitors), Maria Island (12,000 annual visitors) Freycinet (300,000 annual visitors) and Richmond (355,000 visitors to December 2023).

## Project Pipeline

Rosny Hill Accommodation Development	50.0
Marina Extension & Boatel 40-Unit Plan	30.0
Dunalley Marina and Visitor Accommodation	16.5
Connellys Marsh – Multi Use Tourism Concept	7.5
Dunalley Hotel	5.0
Morris Store	5.0
Orford Foreshore Masterplan	3.5
Old Chambers Redevelopment	4.0
Blow Hole/Pirates Bay Boat Ramp Upgrades	2.0
Blow Hole Road Walking Trail	1.0
<b>TOTAL</b>	<b>\$124.5M</b>

### Implications for SERDA’s Infrastructure

1. Tourism will continue to be a major driver of demand for infrastructure in the SERDA region, especially roads, water/wastewater and accommodation during the peak season.
2. Major touring routes such as the Arthur Highway to the Tasman Peninsula (including Port Arthur) and the Great Eastern Drive (to Orford and beyond) will come under increasing pressure with more vehicle movements. State government funding support remains essential to progressing this enabling infrastructure.
3. Local water and wastewater schemes at Port Arthur and in townships up the east coast will be further challenged as tourists and shack owners converge.

Spirit of Tasmania, <[https://www.spiritoftasmania.com.au/media/801875/sot\\_media\\_kit\\_april\\_2023.pdf](https://www.spiritoftasmania.com.au/media/801875/sot_media_kit_april_2023.pdf)>  
 Tasmanian Government Department of State Growth, <[https://recfit.tas.gov.au/\\_data/assets/pdf\\_file/0011/439634/Tasmanias\\_Climate\\_Change\\_Action\\_Plan\\_2023-25\\_Accessible.pdf](https://recfit.tas.gov.au/_data/assets/pdf_file/0011/439634/Tasmanias_Climate_Change_Action_Plan_2023-25_Accessible.pdf)>  
 Tasmanian Government Department of Treasury and Finance, <<https://www.treasury.tas.gov.au/Documents/2023-24-Tasmanian-Budget-Overview-Booklet.pdf>>  
 Tourism Tasmania, <<https://www.tourismtasmania.com.au/siteassets/documents/2030-visitor-economy-strategy/2030-Visitor-Economy-Strategy-Fact-Sheet.pdf>>



# Sector outlook headlines

**\$51M**  
Planned Projects  
Indicative Value

**22.2%**  
Percentage sector  
growth over 5 years

**853**  
Total Jobs in SERDA

**3.0%**  
% of total jobs in  
SERDA

## Agriculture

### Broader contextual factors

- Climate change is now having a real impact and causing some east coast farmers to change from their former established products to new, more drought tolerant produce suited to warmer conditions.
- Wine grapes are more susceptible to climate change risk than other forms of agriculture and as Tasmania's climate becomes more temperate, the changes can significantly impact grape harvest yields, as well as the quality and quantity of Tasmanian wine.
- The Tasmanian Government has planned to upgrade the key freight link between Hobart, Northern Tasmania, and Northwest Tasmania.
- Tasmanian agriculture is on track to achieve a farm gate value of \$10 billion per year by 2050.

### In the SERDA region

- In 2022, the SERDA region produced over 1/3 of Tasmania's wine production. In 2022, Tasmania produced 12,548 tonnes of wine, where the Coal River Valley and East Coast wine regions produced an estimated 21.7% and 12.8% of the total Tasmanian wine production.
- 51% of Glamorgan-Spring Bay's greenhouse emissions are from agricultural sources.
- Ingham's was provided with a \$11 million grant from the Federal Government to upgrade its poultry facilities at Sorell. Through the grant and further investments, the plant will invest in essential upgrades to improve the sustainability and efficiency of the plant.

## Project Pipeline

Ingham Processing Plant Expansion	40.5
Bream Creek Dairy	8.0
Packaging Farms Expansion	1.5
Pinata Farms Expansion	1.0
<b>TOTAL</b>	<b>\$51.0M</b>



ABC, <<https://www.abc.net.au/listen/programs/tas-country-hour/tia-relocation/12714396>>



Tasmanian Times, <<https://tasmaniantimes.com/2020/05/white-paper-competitiveness-of-tasmanian-agriculture-for-2050/>>

### Implications for SERDA's Infrastructure

1. The impacts of the warming climate will change the composition, efficiency and profitability of crop production in Tasmania, and the South-East Region.
2. Farmers will be exposed to more extreme weather conditions including droughts and bushfires, introducing further challenges to maintaining the success of agriculture in the region. Tasmanian Farms are expected to see the largest decrease in income as sales from wool, sheep and beef have not changed from prior years, while inflation increases.
3. These climate change challenges underscore the importance of irrigation infrastructure to the agricultural sector across the SERDA region.

Australian Government Department of Agriculture, Fisheries and Forestry, <<https://www.agriculture.gov.au/abares/products/insights/snapshot-of-australian-agricultural-workforce>>

Financial Review, <<https://www.afr.com/life-and-luxury/food-and-wine/four-top-wines-from-australia-s-hottest-cool-climate-region-20221214-p5c6bk>>

Snapshot, <<https://snapshotclimate.com.au/locality/australia/tasmania/glamorganspring-bay/>>

Tasmanian Government Department of Treasury and Finance, <<https://www.treasury.tas.gov.au/Documents/2023-24-Tasmanian-Budget-Overview-Booklet.pdf>>

Tasmanian Government Department of State Growth, <[https://www.transport.tas.gov.au/roadworks/current\\_projects/northernroadprojects/llawarra\\_Road\\_Upgrade\\_Longford\\_Roundabout\\_to\\_Bishopsbourne\\_Road#:~:text=About%20the%20project,airports%2C%20and%20other%20transport%20hubs](https://www.transport.tas.gov.au/roadworks/current_projects/northernroadprojects/llawarra_Road_Upgrade_Longford_Roundabout_to_Bishopsbourne_Road#:~:text=About%20the%20project,airports%2C%20and%20other%20transport%20hubs)>

Tasmanian Government Premier of Tasmania, <[https://www.premier.tas.gov.au/site\\_resources/2015/additional\\_releases/strong-agriculture-sector-exceeds-\\$3.5-billion](https://www.premier.tas.gov.au/site_resources/2015/additional_releases/strong-agriculture-sector-exceeds-$3.5-billion)>

Tasmanian Government Department of Agriculture, Fisheries and Forestry, <<https://www.agriculture.gov.au/abares/research-topics/surveys/livestock>>

# Sector outlook headlines

**\$150M**

Planned Projects  
Indicative Value

**23.5%**

Percentage sector  
growth over 5 years

**389**

Total Jobs in SERDA

**1.4%**

% of total jobs in  
SERDA

## Aquaculture and fisheries

### Broader contextual factors

- Tasmania's salmon industry contributed \$770 million to the state in 2022. Over the past five years, its export contributions are on track to exceed \$1 billion. A joint initiative between the industry and government aims to expand this to \$2 billion by 2030.
- The industry accounts for around 5,100 full time equivalent jobs, many in rural communities such as Huon Valley, Latrobe, Tasman and West Coast areas.
- The two main challenges facing the industry are expanding production to meet increasing demand and the increasing costs to produce salmon in Tasmania.
- The scale fish sector (calamari, wrasse and banded morwong) is stable with no foreseeable change to quotas. These fisheries generated around \$6.3 million for local Tasmanian communities in 2020 to 2021.
- A statewide \$1.25 million oyster sensor network to future-proof the industry has been launched and with most of the sensors deployed, this initiative plans to provide the wider industry with real-time remote monitoring capabilities.
- In the medium term (2023–24 to 2027–28), there is a projected annual decline of 0.7% in the real value of fisheries and aquaculture Gross Value of Production (GVP). This decline is primarily attributed to a slowdown in the growth of both export and domestic demand for seafood.
- \$850,000 will be invested in the new Tasmanian Salmon Industry Plan to implement key initiatives and provide an enduring framework that articulates long term priorities and supports businesses and the community.

## Project Pipeline

Installation of New Salmon Growing Facilities

150.0

**TOTAL \$150.0M**



Billund Aquaculture, <<https://www.billundaquaculture.com/tassals-rookwood-2-billunds-first-hatchery-to-use-full-flow-ozone-treatment/>>

### Implications for SERDA's Infrastructure

1. Climate change may affect the suitability of Tasmanian waters for effective aquaculture through temperature and habitat changes, notable in the population declines of southern rock lobsters among other species.
2. There are increasing concerns about the environmental impact of offshore salmon fisheries in the region with discussions of moving these onshore. This process would be disruptive to business operation and very expensive.
3. The projected decrease in the real value of fisheries raises some concerns for the future of the industry and may limit investment and innovation in aquaculture moving forward.

Department of Treasury, accessed 21/11/2023, <<https://www.treasury.tas.gov.au/Documents/2023-24-Tasmanian-Budget-Overview-Booklet.pdf>>

Pulse Hobart, accessed 20/11/2023, <<https://pulsehobart.com.au/news/tasmanian-salmon-industry-drives-tasmanias-regional-economy/>>

Department of Natural Resources and Environment, accessed 20/11/2023, <<https://nre.tas.gov.au/Documents/Tasmanian%20Salmon%20Industry%20Plan%202023.pdf>>

Department of Natural Resources and Environment, accessed 20/11/2023, <<https://nre.tas.gov.au/Documents/How%20We%20Got%20Here%20-%20the%20development%20of%20the%20Tasmanian%20Salmon%20Industry%20Plan%202023.pdf>>

Premier of Tasmania, accessed 20/11/2023, <[https://www.premier.tas.gov.au/site\\_resources\\_2015/additional\\_releases/sensor-network-benefits-oyster-industry-](https://www.premier.tas.gov.au/site_resources_2015/additional_releases/sensor-network-benefits-oyster-industry-)>

University of Tasmania, accessed 21/11/2023, <<https://www.imas.utas.edu.au/news/news-items/the-value-and-challenges-of-tasmanias-scalefish-fishery>>

University of Tasmania, accessed 15/12/2023, <<https://www.imas.utas.edu.au/research/fisheries-and-aquaculture/projects/projects/climate-change-marine-resource-impacts-and-adaptation#:~:text=Climate%20change%20is%20expected%20to%20have%20a%20significant%20impact%20on,potentially%20declining%20in%20the%20south.>>>

# Sector outlook headlines

**\$30M**  
Planned Projects  
Indicative Value

**39.1%**  
Percentage sector  
growth over 5 years

**3,451**  
Total Jobs in SERDA

**11.7%**  
% of total jobs in  
SERDA

## Care Sector

### Broader contextual factors

- There is a growing trend towards aging at home, but the SERDA region still faces a shortage of available aged care packages to meet the rising demand. With only six state-run Residential Aged Care Services facilities across Tasmania, the need for aged care services continues to increase.
- The client base for the Care Sector in the southeast is growing, mainly in the older demographic but also in younger families moving into the region. Access to transport is a major problem for residents of the South East Region, especially for those on lower incomes. The growing demand for community support services means more appropriately trained staff are needed. Pay rates for these positions are low and the work is challenging, so attracting quality workers to fill these positions presents issues to the industry.
- All major regions across Tasmania are expected to experience a notable rise in the population of individuals aged 70 and above between 2020 and 2040.
- As the older population in Tasmania continues to grow, projections of hospital utilisation trends indicate a substantial increase in demand for public hospitals over the next two decades.
- In 2021/22, the Care Sector across Tasmania stands as the largest employer, offering 45,886 local jobs, showcasing its significant economic contribution to the region.
- \$14 million is promised to continue the \$28 million construction of six new Child and Family Learning Centres, with East Tamar open, construction well advanced in Waratah-Wynyard and West Ulverstone and Sorell, Kingborough and Glenorchy expected to be complete by the end of next year.

## Project Pipeline

Ningana Aged Care Sorell	20.0
Tempus Aged Care Swansea	8.0
Sorell Centrelink	2.0
<b>TOTAL</b>	<b>\$30.0m</b>



Department of Health, <<https://www.health.tas.gov.au/health-topics/ageing-and-aged-care>>



Department of Health, <<https://www.health.tas.gov.au/sites/default/files/2022-12/Advancing%20Tasmania%27s%20Health%20-%20December%202022.pdf>>

### Implications for SERDA's Infrastructure

1. The sector is struggling for skilled staff and retaining those staff, limiting the region's ability to provide sufficient services in the care sector, especially in aged care.
2. The region's ageing population is likely to put pressure on existing infrastructure as there aren't enough facilities or hospitals to meet increasing demand.
3. Access to transport is limited in the region, especially to those groups likely to require care services. This jeopardises high-risk individuals' ability to access these services within the region.

Tasmanian Government Department of Treasury and Finance, <<https://www.treasury.tas.gov.au/Documents/2023-24-Tasmanian-Budget-Overview-Booklet.pdf>>  
 Tasmanian Government Department of Health, <<https://www.health.tas.gov.au/health-topics/ageing-and-aged-care/accessing-ageing-and-aged-care-services/residential-aged-care-services>>  
 Economy.id, <<https://economy.id.com.au/tasmania/employment-by-industry>>  
 Tasmanian Government Department of Health, <[https://www.health.tas.gov.au/sites/default/files/2022-06/Drivers%20of%20Tasmania%27s%20Future%20Population%20Health%20Needs\\_0.pdf](https://www.health.tas.gov.au/sites/default/files/2022-06/Drivers%20of%20Tasmania%27s%20Future%20Population%20Health%20Needs_0.pdf)>  
 Tasmanian Government Department of Health, <<https://www.health.tas.gov.au/sites/default/files/2023-03/Long-Term%20Plan%20for%20Healthcare%20in%20Tasmania%202040%20Exposure%20Draft%20March%202023.pdf>>  
 Tasmanian Government Department of Health, <<https://www.health.tas.gov.au/health-topics/ageing-and-aged-care/accessing-ageing-and-aged-care-services/residential-aged-care-services>>



# Sector outlook headlines

**\$20M**

Planned Projects  
Indicative Value

**29.8%**

Percentage sector  
growth over 5 years

**1,836**

Total Jobs in SERDA

**6.5%**

% of total jobs in  
SERDA

## Manufacturing, Transport & Warehousing

### Broader contextual factors

- In October of 2022, the beginning stages of developing a Workforce Development Plan for the advanced manufacturing sector started. The plan will address a range of related issues such as skill availability, development and shifting needs of the growing sector.
- The release of the Tasmanian Advanced Manufacturing Action Plan 2024 (TAMAP2024) there is a tangible plan to increase Tasmania's capabilities and their workers skillsets to grow the Advanced Manufacturing industry within Tasmania.
- Within TAMAP2024 it specifies the need and intent to establish an Industry Capability network (ICN) within Tasmania, to enable the industry to grow and install reliable streams of work and materials to Tasmanian based manufacturing companies.
- There is now an Advanced Manufacturing Skills 2 Manufacturing Program designed to support Tasmanian-based advanced manufacturing that allows employees to undertake non-accredited training activities through grants.
- Tasmania has a range of industrial estates, of which Bell Bay, Brighton and Western Junction have emerged as the focus areas for manufacturing due to their proximity to transport – road, rail air and sea.

### In the SERDA Region

- SERDA has the Cambridge and Mornington Industrial Estates, which attract more of a warehousing and light industrial group of businesses.
- The Cambridge Industrial Estate Development Plan, approved by the Tasmanian Planning Commission in 2014 facilitated the ongoing expansion of the estate to be the third largest in Tasmania.

## Project Pipeline

*No data available*



Tasmanian Government Department of State Growth, <[https://www.stategrowth.tas.gov.au/\\_data/assets/pdf\\_file/0011/136568/Tasmanian\\_Advanced\\_Manufacturing\\_Action\\_Plan\\_for\\_web.pdf](https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0011/136568/Tasmanian_Advanced_Manufacturing_Action_Plan_for_web.pdf)>

### Implications for SERDA's Infrastructure

1. Manufacturing, especially advanced manufacturing, is a small sector of Tasmanian industry. Hence, this area has been challenged to secure sufficient funding, which has limited its ability to grow as an industry in the state.
2. Due to the scope of manufacturing in Tasmania, and in SERDA, the attraction of highly skilled workers is challenging and inhibits the development of the industry.
3. There may be scope to grow the manufacturing sector in the SERDA region in line with the state's advanced manufacturing ambitions. Cambridge may be the focus of that growth. Sorell is not currently well served with an industrial precinct to retain jobs in that region.

# Sector outlook headlines

**\$21M**  
Planned Projects  
Indicative Value

**22.0%**  
Percentage sector  
growth over 5 years

**861**  
Total Jobs in SERDA

**3.0%**  
% of total jobs in  
SERDA

## Waste and Circular Economy

### Broader contextual factors

- The Tasmanian Government has set targets to be achieved prior to 2025, which include the use of 100 per cent reusable, recyclable or compostable packaging, 70 per cent of plastic packaging being recycled or composted and 50 per cent of average recycled content included in packaging.
- In early 2024 the Tasmanian Government has an initiative to establish a Circular Economy Innovation Network to build a network of commercial and community innovators in the circular waste process and to devise solutions.
- An estimated \$15 million investment is set to increase the capacity to recycle and recover plastics, organic waste, and end of life tyres.
- A Charitable Recycler initiative has been set up from the 11<sup>th</sup> of February 2023, allowing individuals or groups to donate goods to achieve social outcomes.
- In the last 12 months the state has produced roughly 1,007,444 tonnes of waste, where only 52% of the waste had been recovered for recycling.
- The total organic waste produced in the last 12 months has been estimated at 223,835 tonnes, while 88% of the waste was recovered.
- Mixed materials accounts for around 67.35% of landfill.

### In the SERDA region

- The proposed Copping Regional Organics Facility (CROF) will service the members councils, commercial, industrial, and agricultural sectors, in terms of processing Food Organics and Garden Organics (FOGO), will be a significant development in the SERDA region.
- The C-Cell remains a live opportunity to deal with Antarctic waste.

## Project Pipeline

Copping Organics and FOGO	20.0
Waste Transfer Facility Redevelopment	1.0
<b>TOTAL</b>	<b>\$21.0M</b>



City of Hobart, <<https://www.hobartcity.com.au/Council/News-publications-and-announcements/Latest-news/recycling-banks>>



ABC News, <<https://www.abc.net.au/news/2018-09-18/hazardous-waste-dump-opens-in-southern-tasmania/10257974>>

### Implications for SERDA's Infrastructure

1. Although waste management infrastructure at Copping is under ongoing development, continued population growth in the SERDA region and in the regions of the SWS owner councils will add to the need to embrace more circular economy initiatives. The closure of the Hobart and Glenorchy tips in coming years adds to the importance these endeavours.
2. As the region develops, including the development of new subdivisions in Midway Point Clarence Plains and Rokeyby/ Drought point, the contribution of the building and demolition industry to the volume of waste is likely to further increase, further challenging waste management systems and underscoring the need to find ways to re-use these materials in innovative ways.

Tasmanian Government Tasmanian Waste and Resource Recovery Board, <[https://www.stategrowth.tas.gov.au/\\_data/assets/pdf\\_file/0011/136568/Tasmanian\\_Advanced\\_Manufacturing\\_Action\\_Plan\\_for\\_web.pdf](https://www.stategrowth.tas.gov.au/_data/assets/pdf_file/0011/136568/Tasmanian_Advanced_Manufacturing_Action_Plan_for_web.pdf)>  
 Tasmanian Government Department of State Growth, <[https://www.stategrowth.tas.gov.au/ocg/investment\\_opportunities/sector\\_opportunities/circular\\_economy](https://www.stategrowth.tas.gov.au/ocg/investment_opportunities/sector_opportunities/circular_economy)>  
 Tasmanian Government Tasmanian Waste and Resource Recovery Board, <<https://wrr.tas.gov.au/Documents/Draft%20Waste%20Strategy%202022%20-%20final.pdf>>

05

What's the  
pipelines and  
outlook for the  
infrastructure  
enablers

# Enabling infrastructure pipeline

Over the next 2-5 years, the SERDA region will see investment in enabling infrastructure projects of approximately \$1.65B.



## Road, Bridge & Transport

	\$M
South East Traffic Solution (remaining)	75.0
Rokeyby Road, South Arm Upgrades	55.0
Improvements to Arthur & Tasman Highways	50.0
Mornington Traffic Solution	30.0
Rosny Park Access Ramp	16.0
Victoria Esplanade	12.0
Pass Road Upgrades	7.5
Glebe Hill Park and Ride	6.6
Backhouse Lane Road Upgrade	2.5
Fairfield Road Reconstruction & Stormwater Upgrade	1.8
Begonia Street Sealing & Traffic Calming	1.6
Sorell Rivulet Bridge Remediation	1.0
Saltwater River Road Landslip Repair	1.0

**TOTAL \$260.0M**



## Recreation

	\$M
AFL High Performance Training Facility	70.0
Bayview Sporting Precinct	60.0
Seven Mile and Five Mile Beach Golf Courses	25.0
Draft Cambridge Oval Master Plan	20.0
Arm End Golf Course	15.0
ANZAC Park Sports Pavilion	9.0
Walkability Project	5.0
Tennis Club Relocation to Pembroke Park	3.0
Clarendon Vale Oval Community Sport Pavilion	2.8
Dodges Swimming Pool	2.5
Sorell Community Cultural Precinct	2.5
Wielangta MTB Trail Project	2.0
Men's Shed	1.5

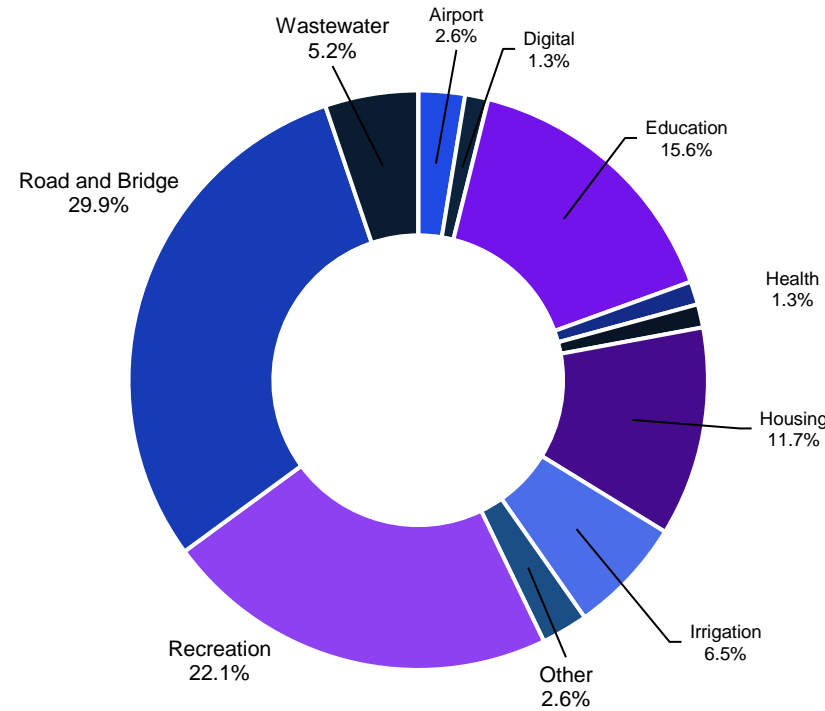
**TOTAL \$228.3M**



## Airport

	\$M
Hobart Airport Runway & Terminal Upgrade	320.0

**TOTAL \$320M**



## Water & Wastewater

	\$M
Port Arthur Historic Site Water Treatment	50.0
Penna re-use Scheme Upgrade	15.0
Beach Street Storm Water Upgrade	10.5
Rosny Optimisation	5.5

**TOTAL \$81.0M**



## Education & Childcare

	\$M
K-12 Catholic School in Sorell	40.0
Sorell State School redevelopment	27.5
Christian Schools Tasmania	20.0
Cambridge Primary School Redevelopment	17.0
Extension of Dodges Ferry Primary School	25.0
Additional Childcare Facilities	12.0
Lauderdale Primary School Redevelopment	7.0
South East Jobs Hub	4.5
Outside School hours Care & Family Day Care	2.5

**TOTAL \$155.5 M**



## Land and Housing

	\$M
Kangaroo Bay Boulevard	70.0
New and Affordable Housing in Sorell	40.0
Frank Morgan Development	12.0
Acton Land Development	10.0
Clarence Resident Accommodation	7.0
STRLUS Review & Eastern Growth Corridor	1.0

**TOTAL \$140.0M**



## Irrigation

	\$M
South East Irrigation Scheme Uptake	400.0
Swan Irrigation Scheme roll out and uptake	18.9
Interim Solution to untie Tas Irrigation from TasWater	16.0

**TOTAL \$435.0M**



## Digital

	\$M
Regional Digital Connectivity Project	30.0

**TOTAL \$30.0M**



## Health

	\$M
Headspace Youth Mental Health Facility	4.2

**TOTAL \$4.2M**



# Hobart Airport

## Key points

### Broader contextual factors

- Since 1998, the number of passengers using the Airport has grown from 900,000 to 2.8 million passengers in FY2020. This growth supports the Tasmanian economy in key sectors including tourism, business, freight and research. In terms of economic impact, in FY2018 Hobart Airport provided a direct economic contribution of \$145 million to the Tasmanian economy.
- The airport's contribution to the Tasmanian Economy is projected to increase to \$412 million by 2042.
- Forecasts indicate growth in the number of passengers using the airport, with expectations to rise from 2.8 million in 2020 to 5.5 million by 2042. Notably, 350 million of these passengers will originate from direct international flights into Tasmania.
- Looking forward, the Airport is in a significant phase of growth. By 2042, it is forecast that more than 5.5 million passengers will pass through the Airport, 350,000 of which will be from direct international destinations.
- In 2018, prior to the COVID-19 pandemic, there was an average of 7,200 vehicle trips made to and from the Hobart airport daily. Of these, the majority related to travelling passengers, while 400 daily vehicle trips (out of 700 employees in total) and around 150 trips related to freight and logistics. By 2030, it is estimated there will be a total of 42,000 daily trips generated by the Hobart Airport and nearly 80,000 by 2042.
- Antarctic flights are projected to increase from 100 to around 600 movements per year from 2021 to 2042.

### In the SERDA region

- The Hobart Airport Master Plan projects the creation of 3,500 jobs by 2042, providing employment opportunities for residents of the SERDA region without necessitating significant travel.
- Further expansion including upgrades to the existing terminal facility to accommodate domestic and international passenger growth and the internal road network planned to be implemented by 2030.

## Project Pipeline

Hobart Airport Runway & Terminal Upgrade

320.0

**TOTAL \$320.0M**



Airports Terminal, <<https://airportterminal.com/jetstar-airways/jetstar-airways-hba-terminal-hobart-international-airport/>>



Hobart Airport Tasmania, <[https://hobartairport.com.au/wp-content/uploads/2023/05/26042023\\_Hobart-Airport-Master-Plan-2022-Final-compressed.pdf](https://hobartairport.com.au/wp-content/uploads/2023/05/26042023_Hobart-Airport-Master-Plan-2022-Final-compressed.pdf)>



Tasmanian Polar Network, <<https://tasmanianpolanetwork.com.au/members/hobart-international-airport/>>

# Roads and Transport

## Key points

### Broader contextual factors

- The budget for Tasmanian infrastructure has increased to \$5.6 billion for 2022-23 as the State Government is prioritising infrastructure investment. \$2.7 billion of the budget is allocated to roads and bridges projects, and \$27.8 million for other infrastructure.
- A \$20 million Federal commitment builds on the Tasmanian Government's \$19 million investment in the Derwent Ferry service in the 2022-23 State Budget. Lindisfarne has been mooted as one of three possible next sites for the expanded service.
- The Federal and State Governments are progressing \$130M of expenditure to make improvements to the Tasman Bridge. This will improve pedestrian amenity and aim to ease some congestion with new lane management infrastructure.

### In the SERDA Region

- The Southeast Traffic Solution commits at least \$45M to a range of infrastructure initiatives. Concerns that these measures will get commuters to the same queue at the Tasman Bridge faster and not offer material savings to commuter times.
- In relation to the Tasman Highway Corridor Strategy 92% of survey respondents have never used public transport on the corridor, but 64% said they would start using public transport if the infrastructure was upgraded.
- The government aims to deliver a \$55 million four-lane upgrade of the South Arm Highway (between Pass Road and Oakdowns), including a bypass of the Rokeby commercial area. Stage 3 will ultimately extend to Acton Road.
- The Department of State Growth has started work on South Arm Road south of Sandford, between School Road and Cremorne Avenue. These works are being completed as part of the Tasmanian Government's Freight Capacity Upgrade Program, jointly funded by the Australian and Tasmanian governments.
- The Department of State Growth is investigating safety and congestion improvements for the Mornington Roundabout. The study aims to develop potential solutions to improve safety and traffic flow through the Mornington Roundabout and connecting streets.
- The State Government has committed \$47 million towards the \$131.3 million series of projects to upgrade the Great Eastern Drive (Tasman Highway).

## Project Pipeline

South East Traffic Solution (remaining)	75.0
Rokeby Road, South Arm Upgrades	55.0
Improvements to Arthur & Tasman Highways	50.0
Mornington Traffic Solution	30.0
Rosny Park Access Ramp	16.0
Victoria Esplanade	12.0
Pass Road Upgrades	7.5
Glebe Hill park and Ride	6.6
Backhouse Lane Road Upgrade	2.5
Fairfield Road Reconstruction & Stormwater Upgrade	1.8
Begonia Street Sealing & Traffic Calming	1.6
Sorell Rivulet Bridge Remediation	1.0
Saltwater River Road Landslip Repair	1.0
<b>TOTAL</b>	<b>\$260M</b>



Tasmanian Government Transport Services, <[https://www.transport.tas.gov.au/roadworks/current\\_projects/south\\_road\\_projects/south\\_east\\_traffic\\_solution](https://www.transport.tas.gov.au/roadworks/current_projects/south_road_projects/south_east_traffic_solution)>



Tasmanian Government Transport Services, <[https://www.transport.tas.gov.au/roadworks/current\\_projects/south\\_road\\_projects/rokeby\\_idor\\_planning\\_study\\_old](https://www.transport.tas.gov.au/roadworks/current_projects/south_road_projects/rokeby_idor_planning_study_old)>



# Land and housing

## Key points

### Broader contextual factors

- The Tasmanian government has a target of 10,000 new social and affordable housing units by 2032, but in the meantime, the priority housing waiting list has continued to grow and hit 4,617 this year with an average waiting period of 55.6 weeks. This investment is based on an estimated budget of \$1.5 billion.
- Homes Tasmania has delivered 2,878 social and affordable homes as of September 2023, with 860 new social housing, supported and crisis accommodation projects planned for the near future.
- Tasmania continues the trend of having the least affordable rental market compared to the other states, and while there was a 41% increase in the total advertised properties the rental affordability declined.
- Rental prices are rising by up to 10 times faster than income support payments, subsequently increasing the number of children growing up homeless.

### In the SERDA region

- The Clarence Council has received 502 Occupancy Permit Forms from private sector building surveyors in the 2023 year to date. It has issued 34 planning permits for subdivisions in the past two years Master Plans are now approved by Council for Droughty Point (2,500 dwellings over 30 years).
- Clarence City Council has approved a Droughty Point/Rokeby Peninsula master plan for the construction of 2,500 homes at Droughty Point. This is a \$1.5 billion in development over 30 years. This project is moving into Structure Planning.
- The Sorell Council has approved 130 new dwellings for construction in 2023 with an average of 155 dwellings approved per year for the past five years. The Southern Beaches area is attractive to retirees and families to take advantage of the beach lifestyle. The Dodges Ferry Primary School has enrolled 80 new kinder students in each of the past three years, taking their total enrolments to well over 550 students.
- Centacare Evolve Housing intends to build around 400 to 500 social, affordable and privately-owned residential units on 63 hectares of land purchased by the Catholic Archdiocese of Hobart at Sorell, adjacent to the new Sorell by-pass.

## Project Pipeline

Kangaroo Bay Boulevard	70.0
New and Affordable Housing in Sorell	40.0
Frank Morgan Development	12.0
Acton Land Development	10.0
Clarence Resident Accommodation	7.0
STRLUS Review & Eastern Growth Corridor	1.0
<b>TOTAL</b>	<b>\$140.0M</b>



ABC News, <<https://www.abc.net.au/news/2018-04-10/tasmanian-governments-affordable-housing-initiative/9636396>> Clarence Plains Master Plan, <<https://www.yoursay.ccc.tas.gov.au/clarence-plains-master-plan>>

# Recreation

## Key points

### Broader contextual factors

- The Tasmanian Basketball team (The Jack Jumpers) has had a major impact on participation in that sport across Tasmania.
- The emerging prospect of a Tasmanian AFL Team coming to fruition is increasing with a licence now on offer subject to completion of a stadium. A high-performance facility in Clarence is looking possible subject to engineering and community polling outcomes.
- Women's participation in sports once reserved for males has grown exponentially. Sports such as soccer, cricket and football has seen a rise in female participation due to the factors such as Australia's hosting of the Soccer World Cup and the achievements of the Matildas. The AFLW has grown in prominence and the Australian Women's Cricket Team has been the best women's team in the world rankings for many years.
- \$400,000 has been awarded to Basketball Tasmania to increase basketball participation.

### In the SERDA region

- New golf course developments at Arms End, Seven Mile Beach and Five Mile Beach will be a significant attractor of tourists to the SERDA region
- There is a long list of current and planned parks related community infrastructure in the pipeline, which is aiming to address the pressure points at parks in key destinations in the southeast, especially Coles Bay, Triabunna (Maria Island) and in the Tasman area, driven by the Three Capes Walk.
- The Clarence Council has invested in new tracks at the Meehan Range Mountain Bike Park to cater for both young and old, as well as beginner and experienced cyclists.
- Clarence Council has been developing a master plan for the Bayview Secondary College Sports Precinct at Rokeby.
- Sorell Council has continued to invest in the South East Sports Complex at Pembroke Park. The latest addition to the park is a BMX track, with works completed in December 2023.
- The Wielangta MTB Trail is a key project in the SERDA region, to augment Tasmania's existing stock of world-class MTB facilities.

## Project Pipeline

AFL High Performance Training Facility	70.0
Bayview Sporting Precinct	60.0
Seven Mile and Five Mile Beach Golf Courses	25.0
Draft Cambridge Oval Master Plan	20.0
Arm End Golf Course	15.0
ANZAC Park Sports Pavilion	9.0
Walkability Project	5.0
Tennis Club Relocation to Pembroke Park	3.0
Clarendon Vale Oval Community Sport Pavilion	2.8
Dodges Swimming Pool	2.5
Sorell Community Cultural Precinct	2.5
Wielangta MTB Trail Project	2.0
Men's Shed	1.5
<b>TOTAL</b>	<b>\$228.3M</b>



Your Say Clarence, <<https://www.yoursay.ccc.tas.gov.au/bayview-secondary-college-sports-precinct-master-plan>>



Crater + Mogford, <<https://www.golfstrategies.com.au/arm-end>>



# Irrigation

## Key points

### Broader contextual factors

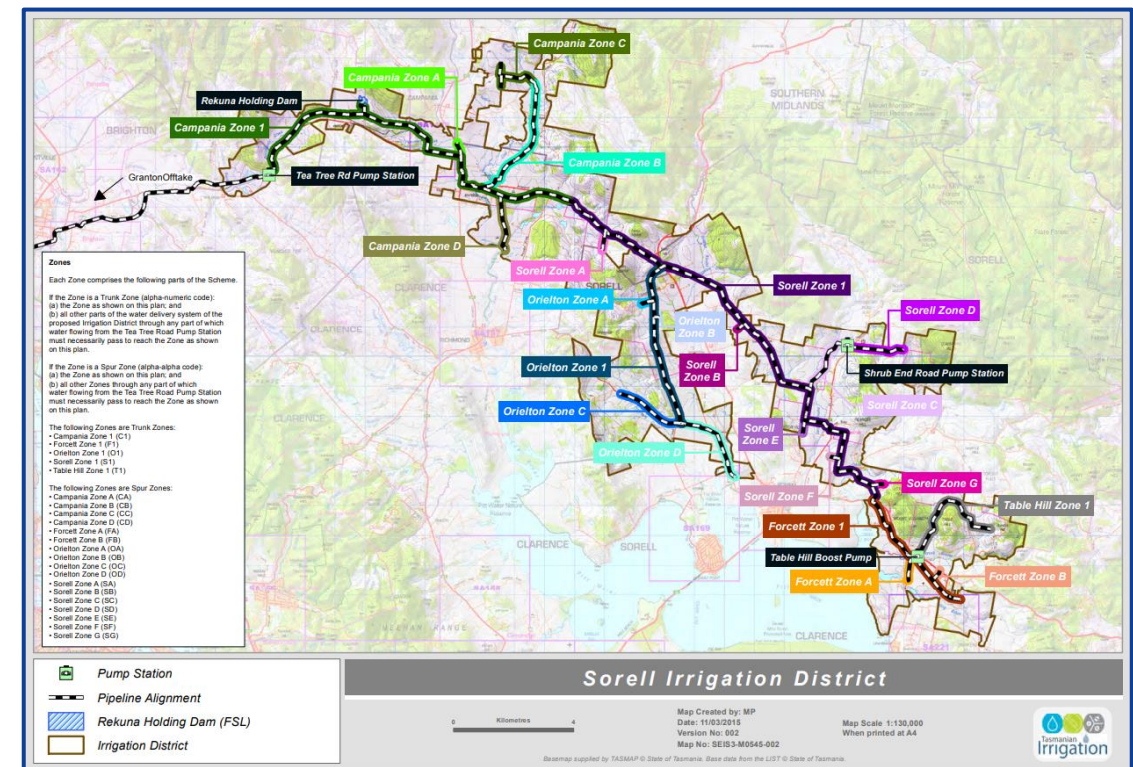
- The Greater South East Irrigation Scheme, previously known as the South East Integration Project, is a very exciting Tranche Three project designed to improve reliability and provide additional high-surety irrigation water to both existing and new irrigators. The scheme comprises 206 KMs of pipeline and has two pump stations. It services an estimated 446 irrigators.
- The Greater South East Irrigation Scheme is being designed to secure a reliable water source, integrate the existing South East Stages One, Two and Three schemes, and service existing and additional demand around Gretna, Jordan River Valley, Kempton, Brighton, Richmond, Dulcot, Cambridge, Colebrook, Campania, Tea Tree, Orielton, Pawleena, Penna, Sorell, Forcett, Elderslie and Broadmarsh.
- The existing schemes lack the capacity to cater for continued growth, are further impacted by the ongoing availability issues and increased costs for current treated, non-potable water supply. The proposed scheme will increase reliability of supply and support significant growth to one of the driest areas in the State. Principal primary production focus is cherries, apples, salad vegetables, wine grapes, stone fruit, lucerne, walnuts and olives.

### In the SERDA region

- Of those areas, the SERDA region brings in Richmond, Dulcot, Cambridge, Colebrook, Campania, Tea Tree, Orielton, Pawleena, Penna, Sorell and Forcett, which accounts for an estimated 11 out of the total 446 on the total scheme.
- The Swan Valley Scheme has been affected by the dry climate and low water supply. The Melrose Dam has not been able to be filled meaning only 5% of users allocations could be supplied

## Project Pipeline

South East Irrigation Scheme Uptake	400.0
Swan Irrigation Scheme roll out and uptake	18.9
Interim Solution to untie Tas Irrigation from TasWater	16.0
<b>TOTAL</b>	<b>\$434.9M</b>



Tasmania Irrigation, <https://www.tasmanianirrigation.com.au/source-assets/Images/Scheme\_overview\_SEIS3\_2017-18.pdf>

# Water and wastewater

## Key points

### Broader contextual factors

- Tasmania has achieved a 100 per cent microbiological compliant and 99 per cent chemically compliant drinking water rate for the previous two years, enhancing the health and safety of Tasmanian communities.
- TasWater provides over 900 jobs throughout the state, which is set to grow with demand, population and developments state-wide.
- Tasmanian water bills are consistently lower than equivalents in mainland Australian states.
- Extreme weather events resulting from Climate Change are likely to apply pressure to the water management systems and processes in the state, specifically drought conditions raise concerns from graziers and crop farmers.
- Tasmania's relatively small and low-density population means that significant infrastructure is required to provide water and wastewater services, making rapid growth of the sector in response to increasing populations challenging.
- The Bryn Estyn Water Treatment Plant (WTP) is Greater Hobart's primary source of drinking water, providing around 60 per cent of the water supplied to customers in the Hobart, Glenorchy, Clarence, Brighton, Derwent Valley, Kingborough, Sorell and the Southern Midlands municipalities. With a budget of \$243.9 million, the upgrade at Bryn Estyn is the largest capital works project in TasWater's history.

### In the SERDA region

- Due to the agricultural nature of much of the land in the region, water management in the event of drought conditions may cause decreases in crop productivity in the region.
- TasWater is increasing its emergency storage capacity at several sewage pump stations (SPS) and installing some new sewage pipeline mains in Sorell and Midway Point. These upgrades will reduce the likelihood of sewer overflow during wet weather events and power outages.

## Project Pipeline

Port Arthur Historic Site Water Treatment	50.0
Penna re-use Scheme Upgrade	15.0
Beach Street Storm Water Upgrade	10.5
Rosny Optimisation	5.5
<b>TOTAL</b>	<b>\$81.0M</b>



TasWater, <<https://www.taswater.com.au/news/taswater-news-and-media/news-articles/new-sewage-treatment-plant-unveiled-at-Longford>>



TasWater, <<https://www.taswater.com.au/customers/businesses/recycled-water>>



# Education infrastructure

## Key points

### Broader contextual factors

- Attracting and retaining students to attend schools in the region and continuing through to year 12 and beyond has remained a challenge.
- \$37.7 million is to be invested into education initiatives across Tasmania in 2025-2026.
- Understaffing in Tasmanian public schools is very high, where 20% of schools reported being unable to fill vacancies in 2021, and 80% of schools have reported being unable to find enough relief teachers to maintain classes when teachers are sick.
- Currently there is a shortage of student support where, there is only 1 psychologist for every 900 students, and 1 social worker for every 800 students. The time on a waitlist for at-risk students to access a psychologist is 140 days.
- It has been calculated that at least 2,202 students with disability do not get diagnosed, and subsequently aren't getting the support they need at school.
- 155 teachers had resigned in the 12 months leading to March 2023, an estimated 35% increase in resignations from the previous year.
- Earlier in 2023 a group of hackers had released 16,000 Tasmanian education department documents onto the dark web, sparking a need for tighter cyber security in the education infrastructure.

### In the SERDA region

- Department of Treasury has committed \$8.5 million towards the \$22 million upgrade of Sorell School. The school is co-located with the South East Trade Training Centre, which was a vital asset to deliver trade training to students seeking a trade related career pathway. However, this is no longer used for this purpose, since managed by DECYP.
- The Catholic Archdiocese of Hobart recently purchased 63 hectares of land at Sorell, adjacent to the new Sorell by-pass, with a view to building a school, a church, and social and affordable housing. Building on the site was unlikely to commence before 2026.
- TasTAFE has established a Water and Energy Trades Centre of Excellence to training and use state-of-the-art technology that is aligned to industry. Its is the southern-based home for plumbing, gas, refrigeration, air-conditioning and electrotechnology training.

## Project Pipeline

Sorell State School redevelopment	27.5
K-12 Catholic School in Sorell	40.0
Extension of Dodges Ferry Primary School	25.0
Christian Schools Tasmania	20.0
Cambridge Primary School Redevelopment	17.0
Additional Childcare Facilities	12.0
Lauderdale Primary School Redevelopment	7.0
South East Jobs Hub	4.5
Outside School hours Care & Family Day Care	2.5
<b>TOTAL</b>	<b>\$155.5M</b>



Tasmanian Government Education International, <<https://study.tas.gov.au/study/government-schools>>



Tasmanian Government DECYP, <<https://www.decyp.tas.gov.au/about-us/our-department/department-of-education-values/>>



# Health infrastructure

## Key points

### Broader contextual factors

- Over the next decade the Tasmanian Government plans to invest \$11.2 billion into the health industry across Tasmania.
- In southern Tasmania, a draft Masterplan for St Johns Park Health and Wellbeing Precinct was released in May 2023 and the final masterplan is set to release in late 2024. Currently the masterplan sets out to describe what will be targeted and how they will revitalise the precinct for future demand.
- \$170.3 million has been allocated to the Royal Hobart Hospital for the continued redevelopment of the ED, new ICU and purpose-built pharmacy.

### In the SERDA region

- In the SERDA region, the Clarence GP Super Clinic is a private billing practice to provide healthcare to the local community. The medical centre is co-located with the Clarence Integrated Care Centre to provide access to services including physiotherapy, mental health, child health and parenting, drug and alcohol services.
- The Federal Government has committed \$4.2m to Headspace for a new facility in Clarence. This will deliver tailored and holistic mental health support to those aged between 12 to 25 years.

## Project Pipeline

Headspace Youth Mental Health Facility

4.2

**TOTAL \$4.2M**



University of Tasmania, <<https://www.menzies.utas.edu.au/research/research-centres/data-linkage-unit>>



Tasmanian Government Department of Health, <<https://www.health.tas.gov.au/professionals>>



Sigtel Group, <<https://sigtelgroup.com.au/portfolio/royal-hobart-hospital/>>

# Energy and digital

## Key points

### Energy

- Energy costs for residential & small businesses has increased by 9.51% since July 2023. In previous years Tasmania has been an energy exporter to the mainland however, during 2022-23 the industry has begun to import power to meet current demand.
- \$58 million has been dedicated to the early works for the Tarraleah power station as part of the Battery of the Nation project. The Marinus Link project set to begin in 2025, would provide Tasmania with up to \$1.B in economic stimulus and generating 1,400 jobs between construction and operation.
- ReNu Energy has a proposal before the EPA to construct and operate a 5 MW green hydrogen production facility and associated infrastructure on land adjacent to the Brighton Transport Hub. The hydrogen will be captured and stored as a gas and made available for vehicle re-fueling as well as industrial customers.(1)
- More than 21% of Australian homes have solar PV systems on their roofs and solar PV is the fastest growing generation type in Australia.
- Government of Tasmania Digital Ready Program, contributing \$1.5 million across businesses and individuals to promote digital literacy and skills.
- The potential for energy generation from Food Organics and Garden Organics at Copping is not currently in the project pipeline but is under consideration.
- TasNetworks advise that there are no constraints on servicing Mt Garrett.

### Digital - Broader contextual factors

- The Tasmanian Government has committed to digitally transforming their services and offerings to the public with plans to adopt a cloud first policy within their own systems.
- Tasmania has lower levels of digital literacy when compared to other states, and while digital literacy is increasing the Department of State Growth is working alongside industry partners, Libraries Tasmania, other Government Agencies and communities to develop targeted initiatives to increase the capabilities for lower income households.
- The NBN connection of fibre to the home continues to roll-out across Tasmania, bringing high speed and reliability homes and businesses across Tasmania.

TasNetworks towards 2030 report <<https://www.tasnetworks.com.au/config/getattachment/d513d14-eca2-4848-9020-4651df59bebdtasnetworks-towards-2030.pdf>>

Premier of Tasmania, <[https://www.premier.tas.gov.au/\\_data/assets/pdf\\_file/0020/136244/02\\_Budget\\_and\\_Economy.pdf](https://www.premier.tas.gov.au/_data/assets/pdf_file/0020/136244/02_Budget_and_Economy.pdf)>

EPA Tasmania, <[https://epa.tas.gov.au/business-industry/assessment/proposals-assessed-by-the-epa/renew-energy-limited-\(countrywide-hydrogen\)-hydrogen-hub-brighton](https://epa.tas.gov.au/business-industry/assessment/proposals-assessed-by-the-epa/renew-energy-limited-(countrywide-hydrogen)-hydrogen-hub-brighton)>

Tasmanian Government Our Digital Future, <[https://www.dpac.tas.gov.au/\\_data/assets/pdf\\_file/0022/116680/Tasmanian\\_Government\\_Cloud\\_Policy\\_V2.pdf](https://www.dpac.tas.gov.au/_data/assets/pdf_file/0022/116680/Tasmanian_Government_Cloud_Policy_V2.pdf)>

Tasmanian Government Our Digital Future, <<https://www.digital.tas.gov.au/our-digital-community>>

## Project Pipeline

Regional Digital Connectivity Project

30.0

**TOTAL \$30.0M**



Renew Economy, <<https://reneweconomy.com.au/massive-tasmania-wind-farm-approved-on-condition-it-shuts-down-for-five-months-a-year/>>



ABC News, <<https://www.abc.net.au/news/2023-09-03/marinus-link-undersea-cable-costs-renegotiated/102808504>>

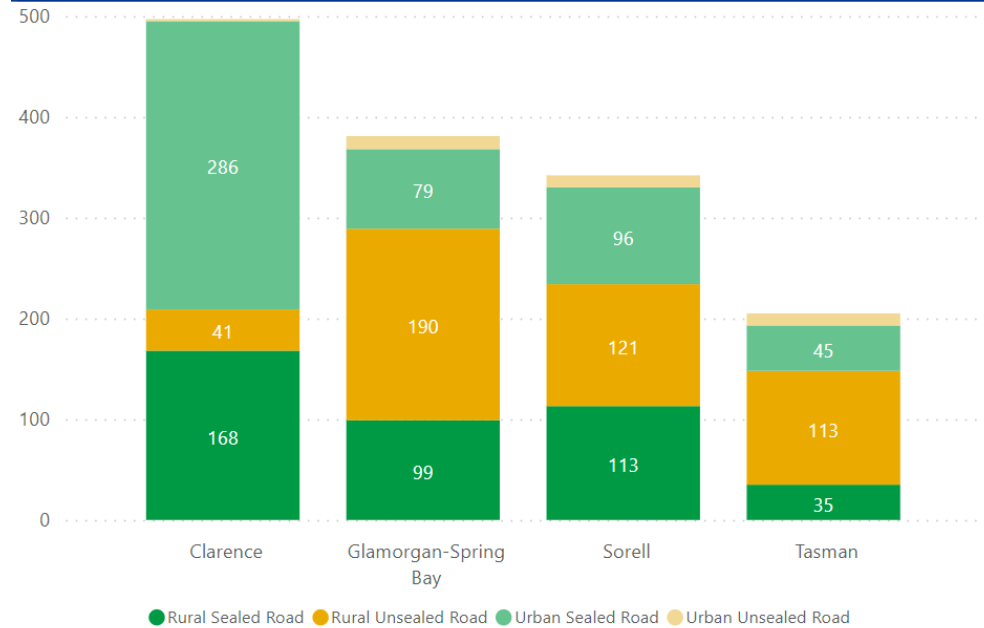


The Conversation, <<https://theconversation.com/the-legacy-of-lake-pedder-how-the-worlds-first-green-party-was-born-in-tasmania-50-years-ago-178546>>

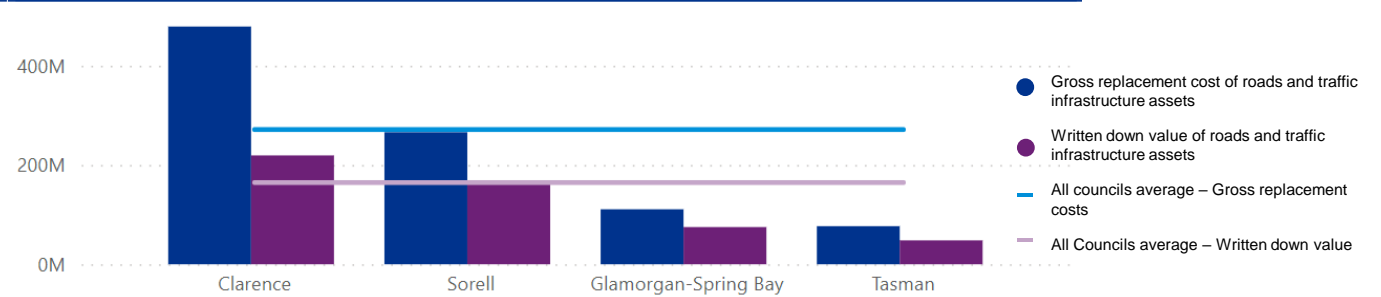
# The profile of the SERDA's Councils infrastructure

The SERDA Councils are the owners of significant sums of infrastructure. This includes an estimated 1,386 kms of road assets (valued at \$510M), stormwater and drainage assets (valued at \$218M) and a range of other assets (parks, gardens, halls etc.) (valued at \$105M).

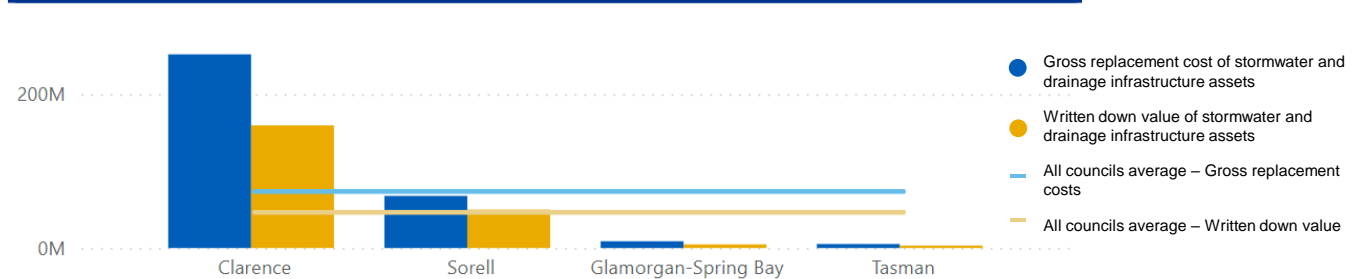
Council Road (Km) by Category (sealed, unsealed, rural, urban)



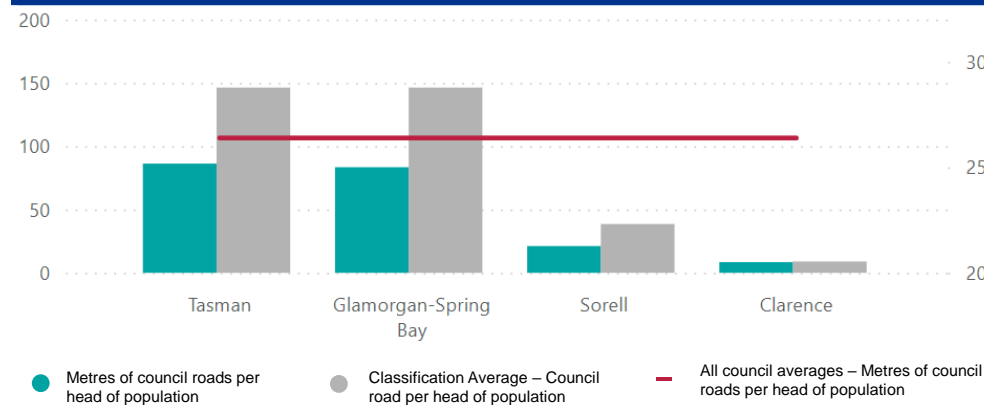
Gross Replacement and Written-down Value – Roads and Traffic Infrastructure (\$)



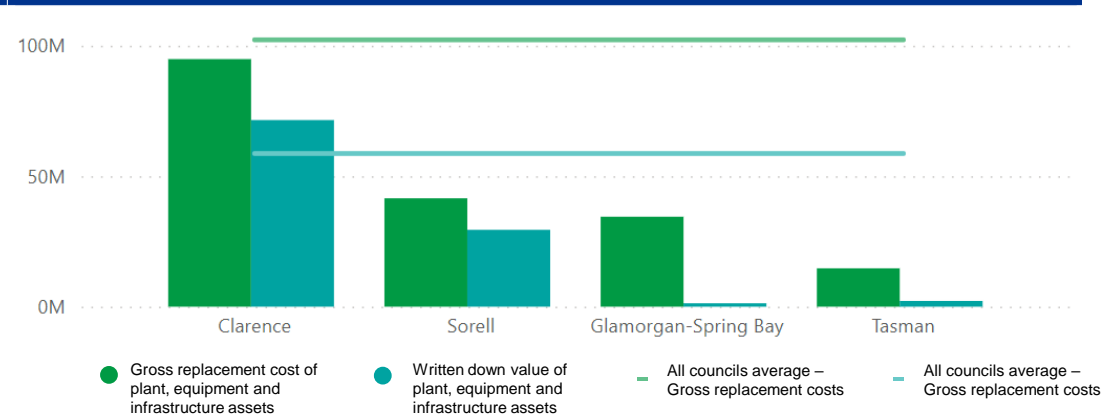
Gross Replacement and Written-down Value – Stormwater and Drainage (\$)



Council Roads (metres) per Head of Population



Gross Replacement and Written-down Value – Other Infrastructure Assets (\$)



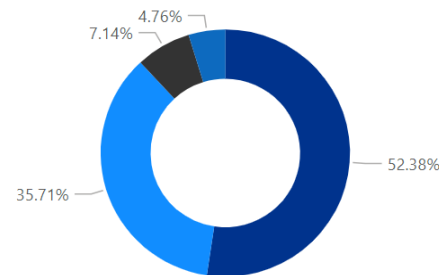
06

What are the  
infrastructure  
development  
priorities?

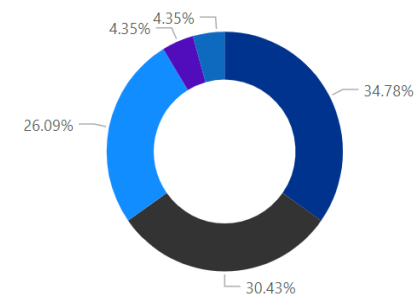
# Infrastructure development constraints

The SERDA Councils have provided insights into the various constraints that could be impeding or slowing the infrastructure development ambitions of the growth sectors and enabler providers.

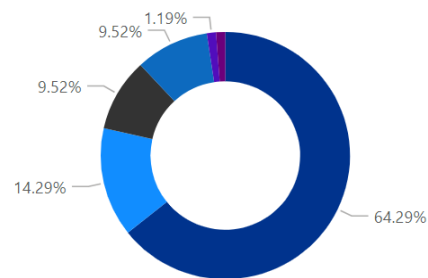
Primary Drivers of the Sector Areas



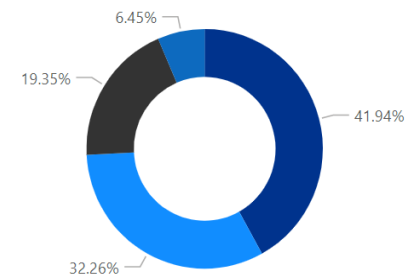
Primary Constraints of the Sector Areas



Primary Drivers of the Infrastructure Enablers



Primary Constraints of the Infrastructure Enablers



**Primary Driver**

- Growth
- New Venture
- Level of Service
- Renewal
- Other
- Regulatory Compliance

**Primary Constraint**

- Funding
- Other
- Approval
- Labour
- Project Management Capacity

The SERDA Councils have provided insights into the primary drivers for the projects and the constraints that are impacting their progress. The results have been collated into the pie charts above.

The main driver for the inception of projects within the SERDA region is growth encompassing 52.4% of sector areas and 64.3% of the infrastructure enablers. Also notable is that 35.7% of total sector area projects have been identified as new ventures, which points to the provision of new services to the communities across the SERDA region.

With both growth and new ventures identified as the primary drivers of many projects, the data suggests that the main constraints to projects are a lack of available funding and securing project approvals, across both industry sectors and infrastructure enablers. A lack of funding comprised 34.8% and 41.9% of the sector areas and infrastructure enablers, respectively. The number of projects constrained by the approval process are more prevalent within the infrastructure enablers consisting of 32.3% of projects and only 26.1% within the industry sectors.

Growth and new venture projects both within the government and private sectors require extensive levels of project planning, funding and skilled workforce to deliver the projects. These are emerging as barriers or constraints to the project delivery of some projects in the SERDA region.



# Key pain points and focus areas for the SERDA region

In summary, this study shines a spotlight on areas where the infrastructure enablers and the industry sectors are fully aligned, partially aligned or not aligned. Areas of non-alignment emerge as barriers to regional and industry development. Mapping the intersection of enabling infrastructure with the needs of the industry sectors in the region, as below, illustrates the focus areas for SERDA's infrastructure strategy.

Enablers	Sector Focus Areas for SERDA					
	Tourism and Hospitality	Agriculture	Aquaculture	Care Sector	Manufacturing	Waste and Circular Economy
Airport	Red	Green	Green	Grey	Green	Light Blue
Roads & Transport	Red	Red	Yellow	Light Blue	Light Blue	Yellow
Housing and Land	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Recreation	Yellow	Light Blue	Light Blue	Light Blue	Grey	Grey
Irrigation	Grey	Green	Grey	Grey	Grey	Grey
Wastewater	Yellow	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Water	Yellow	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Health	Light Blue	Light Blue	Light Blue	Red	Grey	Grey
Education	Light Blue	Light Blue	Light Blue	Green	Light Blue	Light Blue
Energy and Digital	Green	Yellow	Yellow	Light Blue	Light Blue	Green

= Critical to sectors & making progress to develop enabling infrastructure
  = Important to sectors & under moderate pressure to develop enabling infrastructure
  = Critical to sectors & under high pressure to develop enabling infrastructure
  = Relevant to sector and lower pressure to develop enabling infrastructure
  = Less relevant to sector/enabler

# Key pressure points and focus areas for SERDA

The Southeast Region's strengths are largely unchanged, but some weaknesses remain... The Southeast Region offers an abundance of opportunities, but some of the threats remain real and can impact on the region's ability to maximise those opportunities... these are the focus areas for SERDA...

Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Airport	<ul style="list-style-type: none"> <li>✓ The 2023 Master Development Plan provides a structured infrastructure investment program over coming years, which aims to put in place infrastructure that will support:               <ul style="list-style-type: none"> <li>▪ Capacity to land Code E aircraft than can open Asian markets with direct flights</li> <li>▪ The projected growth in passenger movements</li> <li>▪ Additional freight handling capacity</li> <li>▪ Expanded Antarctic operations</li> <li>▪ Additional commercial and retail development*</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✗ Additional activity through the airport will add to transport pressures to both the southeast and to the city of Hobart*</li> <li>✗ Risks of other surrounding enabling infrastructure not keeping pace with investment at the airport</li> <li>✗ Some community unrest regarding aircraft noise impact.</li> </ul>	<ol style="list-style-type: none"> <li>1. Continue to work constructively with the Hobart Airport through the planning and execution of its 2020 Master Development Plan*</li> <li>2. Continue to work constructively with the airport's adjoining landowners through the development of the Hobart International Business Park (Casimaty owned land)*</li> <li>3. Advocate for work to be done to provide a fully formed and future proof freight transport corridor to link the Brighton Industrial Estate and surrounding regions such as the Jordan River Valley, with the Hobart Airport.*</li> <li>4. Develop strategies to attract resident workers to the South East to support the growth in jobs at the Hobart Airport precinct.</li> <li>5. Continue to advance initiatives that support the State's broader industry focus on growing its Antarctic support capability.</li> </ol>	<b>HIGH</b>

\* = added or revised since previous studies



# Key pressure points and focus areas for SERDA

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Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Roads & Bridges	<ul style="list-style-type: none"> <li>✓ Southeast Traffic Solution is now well advanced with further works in the pipeline to expand causeway and bridge capacity from the airport to Sorell*</li> <li>✓ \$130M investment in Tasman Bridge upgrades is now confirmed to ease congestion for motorists and attract more pedestrians*</li> <li>✓ Works completed on Richmond Road and Cambridge by-pass</li> <li>✓ Sorell park and ride service and public toilet facility now operational</li> <li>✓ Midway Point Park &amp; Ride out to tender</li> </ul>	<ul style="list-style-type: none"> <li>✗ Risk that roads and transport infrastructure not geared to take on additional population and visitor number increases in the next 10-year period.</li> <li>✗ Responses to improved roads for support tourism (e.g. Arthurs Highway and Great Eastern Drive have been ad-hoc and need to be underpinned by a broader strategy that considers factors such as signage, arrows, pullovers, overtaking etc. Some perceive that overtaking lanes mainly benefit locals by allowing them to bypass slower moving visitors.</li> <li>✗ Tasman Highway, especially Swansea to Bicheno needs ongoing improvements</li> <li>✗ Bus lane from Mornington to Tasman Bridge requires investment</li> <li>✗ Ongoing investment in roads infrastructure to support commercial freight is required</li> </ul>	<ol style="list-style-type: none"> <li>1. Understand the impacts of the Airport's Master Plan ambitions on transport infrastructure beyond the airport precinct.*</li> <li>2. Understand the impacts of the Hobart International Business Park (HIBS) (Casimaty owned land) on transport and other infrastructure beyond the airport precinct.*</li> <li>3. Advocate for investment in a freight route from Brighton to Cambridge, due to the expanded freight handling and direct flights being planned at the Hobart Airport.*</li> <li>4. Continue to press for the implementation of the remaining projects that will complete the South East Traffic Solution as a matter of priority*.</li> <li>5. Invest in other local passive transport infrastructure to accommodate the growth in demand for electric bikes/ scooters and pedestrians.*</li> <li>6. Continue to press for investment in traffic solutions on the South Arm Highway at Mornington and Shoreline arising from major new residential developments at Droughty Point and Clarence Plains.</li> <li>7. Continue to advance planning and design for infrastructure/ services to increase public transportation utilisation – bus lanes, park and ride, shelters, kerb and guttering etc. (including service affordability) as required to ease demand on road infrastructure.</li> <li>8. Continue to make upgrades to key visitor touring routes – Richmond, Great Eastern Drive and Arthur Highway</li> </ol>	HIGH

\* = added or revised since previous studies

# Key pressure points and focus areas for SERDA

The Southeast region's strengths are largely unchanged, but some weaknesses remain...The Southeast region offers an abundance of opportunities, but some of the threats remain real and can impact on the region's ability to maximise those opportunities...these are the focus areas for SERDA...

Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Land and Housing	<ul style="list-style-type: none"> <li>✓ A significant pipeline of new housing at:               <ul style="list-style-type: none"> <li>■ Clarence Plains</li> <li>■ Midway Point</li> <li>■ Sorell</li> <li>■ Sorell East, and</li> <li>■ Droughty Point* (*not yet in database)*</li> </ul> </li> <li>✓ Rising home values and increasing demand for housing in the more affordable precincts in the SERDA region is increasing the equity of existing homeowners*</li> <li>✓ Signs that rising interest rate of the last 18 months may have peaked</li> </ul>	<ul style="list-style-type: none"> <li>✗ Affordability within the rental and home buyers' market continues to decrease*</li> <li>✗ High materials costs and shortage of skilled trades remains post the COVID-19 pandemic*</li> <li>✗ Substantial new subdivisions in the SERDA region may add to transport pressures to both the southeast and to the city of Hobart*</li> <li>✗ The rise of AirBnB has impacted on housing supply in the more remote locations and driven up the cost of the limited longer term rental options</li> </ul>	<ol style="list-style-type: none"> <li>1. Optimise housing supply on land that will become available at Droughty Point in Clarence with the extension of Oceania Drive from Tranmere to Rokeby, while having regard to other impacts of 2,500 homes over 30 years*</li> <li>2. Optimise housing supply and develop essential transport infrastructure throughout Clarence Plains, while having regard to other impacts of that precinct being home to 20,000 people over the next 10-15 years years*</li> <li>3. Work constructively with Housing Tasmania to provide land for social and affordable housing in the SERDA region*</li> <li>4. Conduct constructive dialogue with State Government and other urban councils to developed a shared understanding of the need to balance peri-urban growth and economic sustainability with broader regional needs to maximise infill development</li> <li>5. Develop innovative responses to the rise of AirBnB and the loss of short and longer term rental accommodation for employees in the south east</li> <li>6. Develop a clear regional appreciation of the impact of key residential and commercial land releases and associated developments in the south east, having regard to any constraints imposed by the Southern Tasmanian Regional Land Use Strategy. most notably:               <ol style="list-style-type: none"> <li>i. Land that has become available at Sorell with the development of the Sorell By-Pass</li> <li>ii. Land that will become available with highest and best alternative uses given to Clarence Plains and Rokeby/ Droughty Point.</li> <li>iii. Need to plan for long term growth area east of the Sorell Bypass</li> </ol> </li> </ol>	HIGH

\* = added or revised since previous studies

# Key pressure points and focus areas for SERDA

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Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Recreation	<ul style="list-style-type: none"> <li>✓ Increases in female participation in sports once reserved for males, notably cricket, soccer and AFLW*</li> <li>✓ Golf course developments at Arm End and Seven Mile Beach*</li> <li>✓ Prospects for a golf development to become a reality at Orford*</li> <li>✓ Bayview Recreational Precinct Development</li> <li>✓ Wielangta MTB project proposal</li> <li>✓ Several other recreational developments in the pipeline*</li> </ul>	<ul style="list-style-type: none"> <li>✗ Marinas and maritime activity, pontoons and safe harborages are all key economic infrastructure projects on the East Coast, but there has been a lack of marine investment in these facilities e.g. Swansea's local economy is suffering as boat and shack owners are no longer visiting the town and spending money, instead preferring to go north</li> <li>✗ Further investment needed in parks and amenities to support growth in population, visitors and growing sports participation for women</li> <li>✗ Support services, such as transport, are not integrated with new developments.</li> </ul>	<ol style="list-style-type: none"> <li>1. Maximise the opportunities presented by the development of golf course infrastructure in the SERDA region*</li> <li>2. Continue to develop national parks and related public infrastructure to support growing visitor and retiree demands in townships, including, but not limited to:               <ol style="list-style-type: none"> <li>i. Ongoing investment in the national parks, especially in those pressure points of Freycinet/ Coles Bay, Triabunna/ Maria Island and the Tasman Peninsula</li> <li>ii. Improved streetscapes, gardens, tree plantings, foot paths etc. to be more appealing to visitors</li> <li>iii. Contemporary visitor information and services at Triabunna, Swansea, Bicheno, Freycinet and other popular visitor destinations, having regard to the high cost of operating traditional Visitor Information Centres</li> <li>iv. Upgrades/ replacements of jetties, boat ramps etc. and improved supporting amenities such as parking, toilet facilities, fish cleaning areas, in collaboration with MAST</li> <li>v. Ongoing investment in public amenities, toilets, baby changing facilities etc. with funding support as required from Federal and State Governments</li> <li>vi. Improved and more coordinated/ cohesive visitor and roads signage</li> </ol> </li> <li>3. Coordinate the objectives and plans of Sorell and Clarence in relation to proposals for regional sporting facilities at Pembroke Park, Bayview and Geilston Bay.</li> <li>4. Develop a regional strategy to address the emerging risks of climate change on drought affected and coastal (low lying) areas in the South East</li> <li>5. Continue to advance the development of the Wielangta MTB Project</li> </ol>	<b>MEDIUM</b>

\* = added or revised since previous studies

# Key pressure points and focus areas for SERDA

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Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Irrigation	<ul style="list-style-type: none"> <li>✓ Advances made on the integrated SE Scheme, and Southern Midlands Schemes*</li> <li>✓ Considerable investments made in the Southeast Scheme and the Swan Valley Scheme but signs of additional demand still needing to be met</li> <li>✓ Growing pressure for TasIrrigation and TasWater to separately source water</li> </ul>	<ul style="list-style-type: none"> <li>✗ Commitment from users to achieve the feasibility threshold</li> <li>✗ Climate change and increase in extreme weather events (e.g. drought) impact on scheme demand and supply*</li> </ul>	<ol style="list-style-type: none"> <li>1. Develop priority responses to the growing risks of drought as part of a holistic response to the impact of climate change in the South East and add support for development of new water supply and infrastructure in key areas</li> <li>2. Continue to add regional support for the full separation of Tas Irrigation from its reliance on TasWater water supply and infrastructure</li> </ol>	<b>MEDIUM</b>
Wastewater	<ul style="list-style-type: none"> <li>✓ BAU investment to augment systems as required</li> <li>✓ Capacity planning for long-term growth i.e EGC</li> </ul>	<ul style="list-style-type: none"> <li>✗ Tasman &amp; Port Arthur Scheme to be augmented and potentially taken over by TasWater is a priority</li> <li>✗ A solution for Coles Bay water and sewerage is a priority</li> <li>✗ Long-term risks to Southern Beach's suburbs</li> </ul>	<ol style="list-style-type: none"> <li>1. Continue to press for TasWater to take over the Port Arthur Historic Site Water and Sewerage Scheme and bring forward investment to improve the capacity of the services</li> <li>2. Continue to influence TasWater to explore wastewater re-use schemes to support agriculture in the south east</li> <li>3. Continue to bring forward the Penna Sewerage Strategy implementation to secure environmental protections and growth opportunities</li> </ol>	<b>MEDIUM</b>
Water	<ul style="list-style-type: none"> <li>✓ BAU investment to augment systems as required</li> </ul>	<ul style="list-style-type: none"> <li>✗ Water supply to GSB region needs security in light of dryer climate and reduced water flows</li> </ul>	<ol style="list-style-type: none"> <li>1. Continue to influence TasWater to prioritise investment in water and sewerage schemes in regional towns that are coming under increasing pressure from growth and increased visitors demands (visitor accommodation and other day use demands)</li> </ol>	<b>MEDIUM</b>

\* = added or revised since previous studies

# Key pressure points and focus areas for SERDA

The Southeast Region's strengths are largely unchanged, but some weaknesses remain...The Southeast Region offers an abundance of opportunities, but some of the threats remain real and can impact on the region's ability to maximise those opportunities... these are the focus areas for SERDA...

Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Health	<ul style="list-style-type: none"> <li>✓ GP practice in Glamorgan-Spring Bay now transferred from council responsibility to a private sector provider*</li> </ul>	<ul style="list-style-type: none"> <li>✗ Staffing shortages and retention of skilled staff falling short of demand requirements*</li> <li>✗ Limited health infrastructure investment in the SERDA region*</li> <li>✗ Shortage of General Practitioners in remote areas*</li> <li>✗ Projected increase in age profile, particularly in more remote areas, increases demand for services, while supply is falling*</li> </ul>	<ol style="list-style-type: none"> <li>1. Continue to advocate for, and develop expanded community infrastructure to support the increasing demands for aged and disability support services, health care and child care in the South East Region</li> <li>2. Expansion of the Sorell Health Centre to meet demands from continued population growth</li> </ol>	<b>HIGH</b>
Education and childcare	<ul style="list-style-type: none"> <li>✓ Catholic education system has purchased land adjacent to new Sorell by-pass to develop a new K-12 school*</li> <li>✓ Investment at Bayview College in Rokeby*</li> <li>✓ Investment in Sorell High School now completed*</li> <li>✓ Major developments at both Cambridge and Lauderdale Primary Schools by the State -\$15M and \$6.5M</li> <li>✓ A Development Application has been lodged for a new Childcare Centre at Glebe Hill.</li> <li>✓ Capacity for growth at Sorell School</li> </ul>	<ul style="list-style-type: none"> <li>✗ Broader challenges with student retention, literacy and numeracy remain*</li> <li>✗ Broader challenges with attracting and retaining teachers remain*</li> <li>✗ Broader challenges attracting and retaining childcare workers*</li> <li>✗ High cost of childcare relative to wages</li> </ul>	<ol style="list-style-type: none"> <li>1. Look to grow the provision of childcare in the high growth and younger populated areas of the SERDA region – Sorell, Clarence Plains*</li> <li>2. Continue to promote investment in education infrastructure and teaching capability to attract more students to pursue their K-12 education the South East</li> <li>3. Support for the Catholic K-12 school at Sorell to serve the wider SERDA area</li> </ol>	<b>HIGH</b>

\* = added or revised since previous studies



# Key pressure points and focus areas for SERDA

The Southeast Region's strengths are largely unchanged, but some weaknesses remain...The Southeast Region offers an abundance of opportunities, but some of the threats remain real and can impact on the region's ability to maximise those opportunities...these are the focus areas for SERDA...

Enabler	Strengths and opportunities	Weaknesses and threats	Focus areas for SERDA	Priority
Energy	<ul style="list-style-type: none"> <li>✓ SERDA will need to increasingly invest in EV infrastructure to cater for the growing demand for electric vehicles*</li> <li>✓ SERDA can leverage the lessons to be learnt from Nu-Energy establishing a hydrogen*</li> <li>✓ BAU investment to augment existing energy supply as required to keep up with the growing population</li> </ul>	<ul style="list-style-type: none"> <li>✗ Some risk to energy supply in the more remote regions during emergency events remains a high order risk</li> <li>✗ Expected increase in the number of electric vehicles from 4,000 now to 30,000 by 2030, according to the Tasmanian Automotive Chamber of Commerce</li> </ul>	<ol style="list-style-type: none"> <li>1. Look to develop and facilitate the development of low emission energy infrastructure, such as fast charging outlets, to support the growth of solar, battery and hydrogen*</li> <li>2. Maintain ongoing upgrades to the southeast region's energy supply to align with the forecast growth in demand by residents and visitors to the region</li> <li>3. Advocate for priority investment on the Tasman and Forestier Peninsulas to shore up energy supply</li> </ol>	<b>MEDIUM</b>
Digital	<ul style="list-style-type: none"> <li>✓ Tasmanian State Government has developed a Digital Strategy and is making inroads to address the digital divide*</li> <li>✓ Some ongoing upgrades in black spots in remote areas</li> </ul>	<ul style="list-style-type: none"> <li>✗ Ongoing risks to communications especially in remote areas</li> <li>✗ Some heightened risks of communications failure during emergency events, in light of forecast period of dry weather</li> </ul>	<ol style="list-style-type: none"> <li>1. Continue to advocate for ongoing improvements to the South East Region's digital and communications infrastructure in order to address weak/ slow internet connectivity and the remaining black spots that exist, in light of the growing attraction for people to live and work remotely, and the heightening connectivity expectations of visitors</li> </ol>	<b>LOW</b>

\* = added or revised since previous studies

# Appendices

# A1. Abbreviations

<b>COP28</b>	28 <sup>th</sup> meeting of the Conference of the Parties
<b>FOGO</b>	Food Organics Garden Organics
<b>GRP</b>	Gross Regional Product
<b>LGA</b>	Local Government Area
<b>LGAT</b>	Local Government Association Tasmania
<b>PESTEL</b>	Political, Economic, Social, Technological, Environmental, Legal
<b>SERDA</b>	South East Region Development Association
<b>STCA</b>	Southern Tasmanian Councils Association
<b>STRLUS</b>	Southern Tasmanian Regional Land Use Strategy
<b>SWOT</b>	Strengths, weaknesses, opportunities and threats

# A2. SERDA PESTEL (1/2)

The Southeast Region's infrastructure pipeline outlook is likely to be affected by a range of external factors. These generally point to a period where SERDA may need to curb its aspirations for significant levels of new infrastructure and instead focus on more modest ambitions that renew and augment existing community infrastructure and protect communities from social and environmental challenges.

## Political

1. Adoption of a 35 seat lower house and the outcomes of the March 2024 Tasmanian election presents some uncertainties in terms of a minority Liberal government and ongoing stability.
  2. Future of Local Review process was concluded in Q1 of 2024. Clarence will remain in its current form. The review recommends consideration be given to structural reform of Sorell, Glamorgan-Spring Bay and Tasman. The councils of Sorell and Glamorgan-Spring Bay have shown some appetite to further discuss structural change. Tasman is keen to remain in its current form.
  3. The Federal Government's released its Migration Strategy, which aims to reduce the 2022/23 net migrant intake of 510,000 to Australia. This aims to ease some pressure created on housing but reduces the capacity of migration policy to ease skill shortages.
- **SERDA has an opportunity to strengthen its profile as a coalition of councils, willing to work together for a broader region beyond council boundaries.**

## Economic

1. Stage 3 tax cuts legislated to take effective from July 2024 may provide some stimulus to both local and visitor spending in the region.
  2. The nation has a significant budget of net debt, accumulated due to the COVID-19 stimulus package. The Labor Government has critically assessed the prior government's infrastructure pipeline commitments.
  3. Trade tensions with China, have been easing and the wine industry has been the latest beneficiary. The wine tariffs were part of a range of trade restrictions applied to Australian products in 2020, affecting \$20 billion worth of Australian exports of coal, copper, sugar, cotton, red meat, barley, wine, seafood, timber, and hay.
  4. The latest Infrastructure Australia Report has found there is a shortage of around 230,000 workers (target is 405,000 and actual is 177,000) in Australia to deliver the nation's major infrastructure projects.
- **Securing Federal funding for new major infrastructure projects will be more challenging going forward when the State and Federal Government split will be on 50/50 basis.**
- **Wine and seafood sectors in SERDA should benefit from improved trading conditions with China.**

## Social

1. Challenges presented to the community through cost-of-living pressures are having impacts on the mental health and well-being of some members of the communities. More than 40% of Tasmanians being under the national average income, In the SERDA region, Sorell, Clarence, Tasman, and Glamorgan-Spring Bay have 62%, 56%, 75%, and 69% respectively of their population earning below the national average (in 2021), where any large expense can result in an immediate time of crisis for someone who is vulnerable. Service providers such as Hobart City Mission, Anglicare and the Salvation Army are reporting an increase to 1 in 10 Tasmanian's now seeking support.
  2. Tasmania's regional populations are ageing, and many are facing the closure of local GP practices. The health of residents in several regions has been affected by these closures, the declining profitability of GP practices, and an ageing GP workforce. While some Medicare changes have been introduced to improve margins and increase bulk billing, remote area GPs may still be at risk, which poses concerns for SERDA.
  3. The Federal Government is set to release a Housing and Homelessness Strategy in 2024. This is expected to outline initiatives to address the rising rates of homeless across Australia.
- **SERDA will need to have the provision of health, housing and other social infrastructure as a priority in the short to medium term.**

# A2. SERDA PESTEL (2/2)

The Southeast Region's infrastructure pipeline outlook is likely to be affected by a range of external factors. These generally point to a period where SERDA may need to curb its aspirations for significant levels of new infrastructure and instead focus on more modest ambitions that renew and augment existing community infrastructure and protect communities from social and environmental challenges.

## Technological

1. Cyber security risks have grown exponentially since the 2015 study, and this is now a key risk for all businesses – large and small – which requires investment.
2. AI has become a reality that is now accessible by all and capable of changing the ways the sectors and enablers design and develop their infrastructure.
3. The Statewide Wif-Fi Access Program (SWAP) will be expanded to include more areas such as public hospitals, community health centres and libraries. The new zones will be rolled out in early 2024 to add to the existing coverage in public schools and 76 libraries. The roll out is part of the Tasmanian government's Digital Future Strategy.
4. The widespread acceptance and adoption of Artificial Intelligence since ChatGPT was launched in late 2022 presents opportunities and risks.
  - **SERDA will keep abreast of the impact of new technologies on the way and their impacts on the key growth sectors and enablers operate in the region.**
  - **High speed communications infrastructure with blanket coverage across the region will be a high priority to address the 'digital divide' for local communities and to attract and retain businesses and service the needs of visitors**

## Environmental

1. Global warming and the need to reach COP28 ambitions has become more acute. COP28 has concluded with a first-time acknowledgement of the need to move away from fossil fuels, a first promise to reduce methane emissions, operationalisation and capitalisation of the loss and damage fund, and an agreement on a framework for the global goal on adaptation. The increased risk of natural events such as drought, flood and fire has implications on infrastructure capacity and industry investment. (eg water access on East Coast, Coal River irrigation and flood mitigation)
2. Recreation and commercial fishing is being affected by reductions in bag limits and catch quotas to ensure the sustainability of the fisheries. This may lessen demand on the sector's infrastructure requirements.
3. Extensive coastlines across all four Councils are exposed to climate change.
4. Increased community and government expectations for circular economy and improved waste management and recovery.
  - **SERDA will need to invest in new energy opportunities (EV and hydrogen).**
  - **The SERDA region will need to invest in measures to protect communities and be able to respond to emergencies that arise.**

## Legal

1. The STCA has recently commissioned a review of STRLUS. This review may maintain existing urban growth boundaries or find in favour of the current boundary being extended to enable development in greenfield areas such as Sorell. The Droughty Point urban growth boundary has been extended.
2. This would make those areas more attractive for housing and would also place high demands on the enabling infrastructure.
  - **SERDA will need to ensure its voice is heard as part of the review of STRLUS.**



# A3. SERDA SWOT

The Southeast Region’s strengths are largely unchanged, but some weaknesses remain...The Southeast Region offers an abundance of opportunities, but some of the threats remain real and can impact on the region’s ability to maximise those opportunities...

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<p><b>Strengths...what SERDA is endowed with</b></p> <ol style="list-style-type: none"> <li>1. Transport improvements well underway through Southeast Traffic Solution*</li> <li>2. Hobart Airport is a hub and driver for regional development with a new Master Plan that will generate significant economic activity*</li> <li>3. Natural scenic assets – Freycinet, 3 Capes</li> <li>4. Built tourism assets – Port Arthur, Richmond</li> <li>5. Abundant, clean water resources for aquaculture</li> <li>6. Industrial/ light manufacturing growth and capacity at Cambridge and Mornington*</li> <li>7. Roads are generally in reasonable condition</li> <li>8. Coastlines, boat ramps and jetties have been subject to ongoing upgrades by MAST</li> <li>9. Water supply/ irrigation for agriculture is coming into in place*</li> <li>10. Climate for higher yielding products – e.g. viticulture, berries, apricots and further expansion of viticulture through the Coal River and Taman Peninsula*</li> </ol>	<p><b>Weaknesses...what you were/ are missing</b></p> <ol style="list-style-type: none"> <li>1. Freight transport routes including connection between Brighton and Cambridge*</li> <li>2. Limited public transport options from Sorell and linkage to other regional areas</li> <li>3. Communication black spots in Glamorgan Spring Bay, Sorell, on the Tasman Peninsula and no NBN to Cambridge</li> <li>4. Need for water and sewerage to service growth at Sorell</li> <li>5. Water and sewerage to southern beaches not planned for the foreseeable future</li> <li>6. Cambridge Primary at 125% capacity and others with surplus capacity</li> <li>7. Lack of jobs in the Southeast Region that keep people and economic activity in the region*</li> <li>8. Lack of some social supports that residents in a growing peri-urban could expect to be in place*</li> </ol>	<p><b>Opportunities...what could be leveraged?</b></p> <ol style="list-style-type: none"> <li>1. Expansion of agriculture supported by the Greater South East Irrigation Scheme and the Swan Valley Scheme (pending water supply availability).</li> <li>2. Expansion of aquaculture, supported by the marine farming environment, along with upgrades to the airport.</li> <li>3. Strong and growing tourism to the region with significant agri-tourism potential.</li> <li>4. Economic benefits of significant infrastructure projects in the region.</li> <li>5. Flow on productivity and investment potential from digital connectivity upgrades.</li> <li>6. Antarctic related opportunities - tourism, research support etc. flowing from Hobart International Airport extensions/ improvements</li> <li>7. Various marina and jetty developments down the coast- coastal cruising including the newly proposed Dunalley Marina*</li> <li>8. Catholic School K-12 on land now purchased for future development and extension of MacKillop to Year 12*</li> <li>9. The SERDA Jobs Hub has pioneered this model in Tasmania and can continue to provide local jobs for employers in the region</li> </ol>	<p><b>Key threats...what could hold you back?</b></p> <ol style="list-style-type: none"> <li>1. Improved traffic flow at risk of not being optimized by Tasman Bridge and western shore traffic issues*</li> <li>2. Southeast is not currently a State level priority – has equal status with other regions</li> <li>3. Planning schemes could limit sub-division of agricultural land into commercially viable agricultural lots and support future residential and commercial growth</li> <li>4. Climate change impacting water supply and escalating the risk of drought and fires</li> <li>5. Cyclical tourism – still peaks and troughs</li> <li>6. Potential conflicts between aquaculture expansion and the environment</li> <li>7. TasWater funding for strategic projects –focus on asset renewal/ maintenance</li> <li>8. Planning scheme delays impacting on potential residential development through STRLUS review and LPS process*</li> <li>9. Availability of funding from State for major road works – focus on asset renewal/ maintenance*</li> <li>10. Disconnected and/ or uncertain strategic land use planning across government</li> </ol>

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- TasNetworks towards 2030 report <<https://www.tasnetworks.com.au/config/getattachment/d513fd14-eca2-4848-9020-4651df59bebd/tasnetworks-towards-2030.pdf>>
- Tasmanian Government Our Digital Future, <[https://www.dpac.tas.gov.au/\\_\\_data/assets/pdf\\_file/0022/116680/Tasmanian\\_Government\\_Cloud\\_Policy\\_V2.pdf](https://www.dpac.tas.gov.au/__data/assets/pdf_file/0022/116680/Tasmanian_Government_Cloud_Policy_V2.pdf)>
- Tasmanian Government Our Digital Future, <<https://www.digital.tas.gov.au/our-digital-community>>

# A5. Data definitions

Data type	Definition
<b>1. Project Stage</b>	<b>A distinct phase within the lifecycle of a project</b>
Concept	An idea, plan or intention regarding a project or program
Design	The planning and structuring phase of a project
Business Case	The justification of a proposed project or program
Commenced	Refers to when a project or program is underway
Complete	When the intended outcome(s) of a project or program has been delivered
<b>2. Primary Drivers</b>	<b>A key factor for the development of the project or program</b>
New Venture	The diversification of a region's offerings
Renewal	A project that is revitalising an existing infrastructure or asset
Level of Service	Upgrading an existing service line within the region
Growth	Increasing the availability of an existing service or industry
Maintenance	Projects relating to the maintenance of services or infrastructure assets
Regulatory Compliance	Projects aiming to meet current regulations or policies
<b>3. Primary Constraints</b>	<b>Key factor for the hindrance of the project or program</b>
Accommodation	A lack of employee accommodation
Approval	Issues receiving approval for a project development
Funding	Unable to acquire or allocate appropriate amount of funding
Labour	A lack of access to a skilled workforce
Materials	Insufficient access to necessary supplies and materials
Project Management Capacity	Limitations of skilled managerial oversight
<b>4. Other</b>	<b>Used across different categories and is used as a catchall term for when a category does not have an option for the input.</b>



