

STRATEGIC GROWTH FRAMEWORK

Waterloo Corner and Bolivar Corridor

Reference document summarising the preliminary investigations completed to support orderly development across the Study Area. Information and direction outlined in this document is subject to regular change and evolution through detailed technical investigations. Please contact the City of Salisbury to confirm currency of information before use.

JULY 25, 2022
ENDORSED BY COUNCIL



HOLMES DYER

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Executive Summary

The City of Salisbury City Plan 2035 includes a critical action to develop a comprehensive 25-year Growth Framework for the land west of Port Wakefield Road. Over the last few years and, since the opening of the North South Motorway, Council has been fielding an increasing volume of enquiries from landowners and potential developers for rezoning and intensification of land uses in this study area. Across 2021, Council staff undertook a high-level planning exercise which identified 10 key planning areas for the entire area west of Port Wakefield Road to guide a set of complementary investigations for this western area of Council.

The City of Salisbury engaged Holmes Dyer Pty Ltd to produce the Strategic Growth Framework - Waterloo Corner and Bolivar Corridor (Strategic Growth Framework). Holmes Dyer has partnered with Greenhill Engineers and Cirqa Traffic Consultants to produce this Strategic Growth Framework, which specifically addresses Planning Area 1, 2 and part of Area 7, covering land from the Little Para River through to the Playford Council boundary of approximately 950 hectares. This land is currently zoned Rural, Open Space, Caravan and Tourist Park, Deferred Urban and Rural Horticulture and contains some 300-separate allotments.

The purpose of this Strategic Growth Framework is to:

- Present a fully informed, consolidated and coordinated growth framework to inform future Council decisions relating to infrastructure planning and funding and the orderly sequencing and management of Council and/or Proponent led Code Amendments.
- Take both a long term 30-year perspective on development potential and forward planning, within a flexible framework that can support existing or short-term development interest within a coordinated and orderly development pattern.
- Produce a framework that appreciates the regional context with a level of investigation and regional coordination to be used to directly inform the upcoming State Government's Regional Planning process.
- Promote and encourage economic growth and job creation for the City of Salisbury community.
- Identify infrastructure delivery mechanism options that could support an intensification of development while ensuring fair apportionment of costs between the landowners, developers, City of Salisbury, Adjacent Council's and State Government.

This Strategic Growth Framework has been developed informed and informed by key inputs, as set out in the chapters of this report including:

- Site Constraint Assessment, Economic and Demographic Profiling.
- Employment Land Market Review.
- Forecast Economic and Employment development and job targets, based on recommended highest and best land uses and associated zoning changes over the short, medium and long term to align with land supply demands.
- Land Capability Assessments, including service and traffic infrastructure.

- Consultation with key State Government Departments, Service and Infrastructure Providers.
- Engagement with all landowners within the study area to identify future development intent of individual owners to inform staging and precinct boundaries to support orderly delivery and coordination.
- Eco Industrial Park Case Study investigations.
- Analysis of different Infrastructure Delivery Mechanisms to identify solutions that Council could consider to support the significant infrastructure investment that will be required to support future growth.

The recommendation section of this report presents a consolidated Strategic Growth Framework Bolivar and Waterloo Corner that includes a Study Area wide Structure Plan and set of individual development precinct plans, recommendations relating to infrastructure agreements and components at a precinct level, zoning and Code Amendment priority and responsibility.

On evaluation of the State Government Land Supply Reports, there is currently an assumption in employment land modelling that large sections of the study area would remain in their current land use, with only the Deferred Urban sections assumed to be part of the future employment land supply. The Strategic Growth Framework Bolivar Waterloo Corner has identified a significant additional area of potential future land supply, that may be able to be brought online to meet future demand needs for the Adelaide Metropolitan Area, however the realisation of this opportunity would likely require State Government, Authorities, Council and Private Landowner investment to deliver the necessary infrastructure upgrades to support this development intensification. Once endorsed at a strategic level the Strategic Growth Framework Bolivar Waterloo Corner will inform the next iteration of the State Government Regional Planning and subsequent land supply report modelling. This opportunity has the potential to provide Salisbury with a mix of new land supply to meet the needs of their community and drive economic growth over 35 years.

The recommendations are written to provide Council and the landowners within this study area with a consolidated growth framework that can be used to inform regional planning and guide future development decisions, timing, responsibility and the further investigations that will be as part of any future Code Amendments. However, there are many factors impacting upon that demand prediction and, accordingly, the monitoring of demand levels should be undertaken by Council regularly as a means of informing the decision-making processes that will deliver the supply of land to the market, and flexibility should be built into the Strategic Growth Framework, to enable the City of Salisbury to pivot and respond to any new market demand or opportunities that may arise, with decisions on any individual site or development proposal able to be informed by the overall structure presented in this Strategic Growth Framework.

Terminology

The below definitions are summarised as part of the Strategic Growth Framework to provide clarity of terms used in the balance of the document to assist with interpretation and coordination of this framework with broader planning occurring across the balance of the land West of Port Wakefield Road.

Concept Plan – A statutory plan, that can be established as part of the Planning & Design Code via Code Amendment to give visual expression to a desired development outcome over time, that can be referenced in relevant zone policies and contained within Part 12 of the Code.

Infrastructure Sub-Areas – A granular set of Infrastructure Sub-Areas, across the Structure Plan that can be used for more detailed infrastructure planning and order of cost development as will be required for any future infrastructure agreement, typically drawn to reflect the stormwater infrastructure boundaries, considerate of land fall and catchments.

Planning Area – One of 10 Planning Areas identified by the City of Salisbury across all land holdings west of Port Wakefield Road in the Planning Areas and Opportunities Plan dated September 2022, identified with the plan provided as Figure 1.

Precinct Plans – A set of indicative precinct boundaries, that identify future Code Amendment responsibility and/or coordination that may be required to deliver orderly development that may involve multiple landowners. The final boundaries of the precincts may change, based on landowner interests and further technical investigations are provided.

Structure Plan – A land use plan prepared for the entire Strategic Growth Framework Bolivar and Waterloo Corner, identifying the key connections, including environmental, transport, land use and pedestrian networks. This plan includes consideration of connections to adjacent land holdings outside the Strategic Growth Framework – Bolivar and Waterloo Corner area.

Study Area - The total study area of the Strategic Growth Framework prepared by Holmes Dyer 2022, which included Planning Area 1, 2, 6 and part of Planning Area 7 as shown in Figure 2.

Transport Sub-Area – Transport Sub-Area boundaries that were created, based on the Yield Catchments in order to provide the inputs necessary into the Department for Infrastructure and Transport traffic model to inform future intersection and road upgrade requirements.

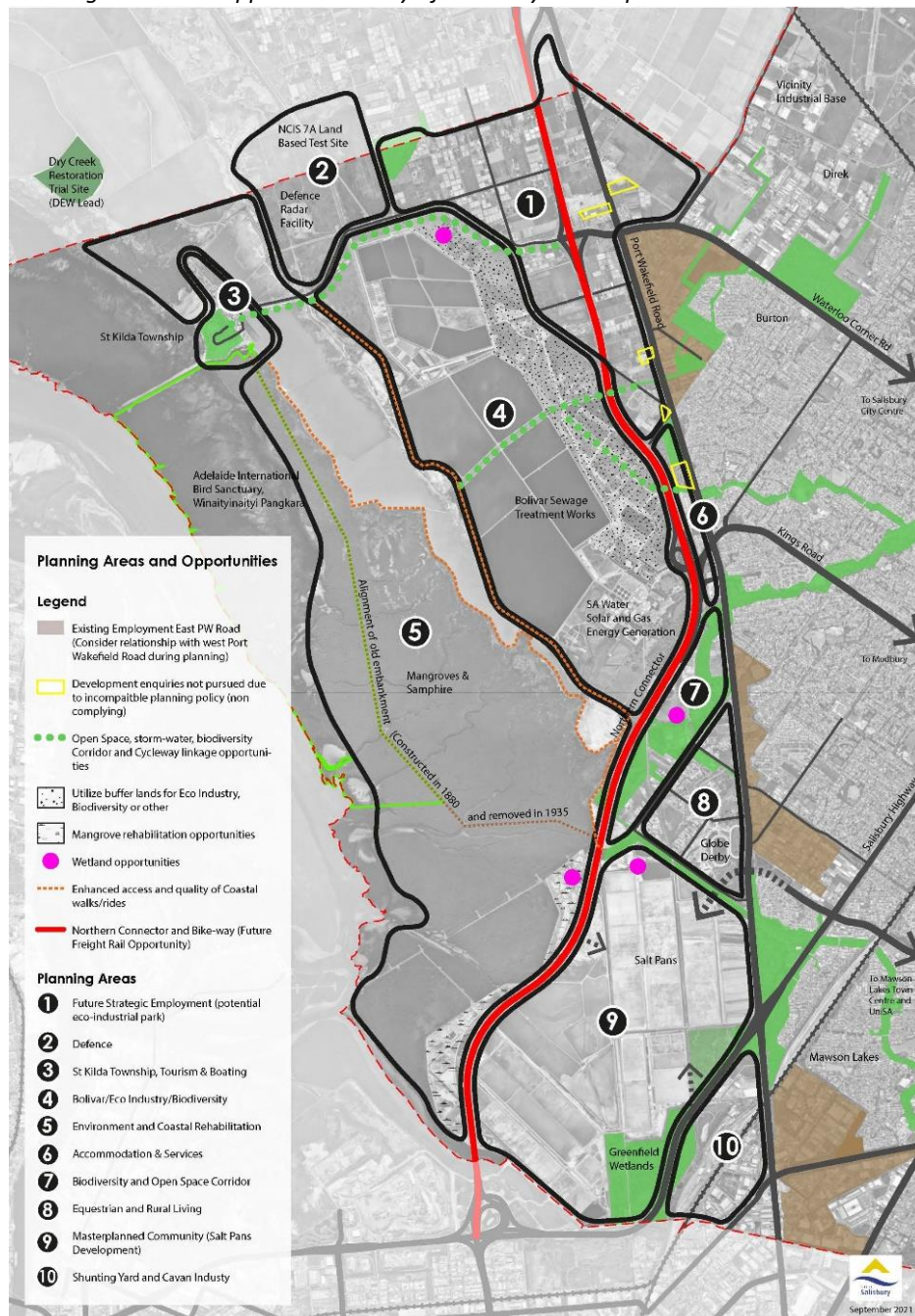
Yield Catchment – Four catchment areas within the Strategic Growth Framework Study Area. The catchment areas provide a potential development capacity yield for all developable land parcels (excluding recent developments), for the purpose of high-level infrastructure planning required by the service authorities.

1. Background

1.1. Project Context

The City of Salisbury City Plan 2035 has a critical action to open new economic growth and development opportunities in a coordinated manner for the land west of Port Wakefield Road. Across 2021, Council staff undertook a high-level planning exercise which identified 10 key planning areas for the area west of Port Wakefield Road as identified on Figure 1.

Figure 1. Planning Areas and Opportunities City of Salisbury Plan September 2021



The Strategic Growth Framework seeks to build on the high-level planning work already completed by the City of Salisbury to develop a structure plan at a precinct-by-precinct level for a priority target area of the overall planning area, being specifically:

- Planning Area 1 – Future Strategic Employment (potential for an eco-industrial park)
- Planning Area 2 - Defence
- Planning Area 6 – Accommodation and Services
- Part Planning Area 7 – Biodiversity and Open Space Corridor lands north of the Little Para River (sites fronting Port Wakefield Rd will be considered for employment)

The planning area covers a total land area in the order of 950 hectares and approximately 300 individual land parcels. The Study Area for the Strategic Growth Framework – Waterloo Corner and Bolivar Corridor is shown in Figure 2.

Figure 2. Strategic Growth Framework Investigation Scope Map – City of Salisbury September 2021



The City of Salisbury City Plan 2035 identifies the need for strategic planning of the area west of Port Wakefield Road in response to infrastructure and land use planning changes within and surrounding this land in recent years. Specifically, the following influences were identified by the City of Salisbury as part of the early project scoping:

- North South Motorway was completed in 2020 which created a major road bypass and change of traffic movement patterns on Port Wakefield Road.
- The Rural Aircraft Noise Development Plan Amendment (DPA) which previously sought to rezone the existing Rural zone at Diment Road to Industry was discontinued due in part to the infrastructure costs required to facilitate bringing this land to market.
- Increasing volumes of private sector enquiries to develop parcels within the study area for industry and commercial rather than horticultural uses due to the proximity to the North South Motorway and a perception of increased access options for land fronting Port Wakefield Road.
- Increasing enquiries from planning consultants on behalf of landowners in relation to rezoning multiple land parcels within the Study Area.
- Pressure for intensification of existing land uses with increasing unauthorised development of land in the area for non-horticultural uses
- Significant increase in sales and development activity within Edinburgh Parks and the Vicinity Industrial Base demonstrating the strength of the employment offer in northern Adelaide in the current economic climate in part because of the significant infrastructure investments in the North South Motorway.
- No immediate plans to develop the Dry Creek Salt Fields land which may have included commercial activities requiring alternate land offerings to be identified to meet this potential demand.
- Planning for the Globe Derby Park commercial development initiatives has commenced that will need to be coordinated with recommendations across the broader precinct.

1.2. Strategic Alignment

State Government

The Strategic Growth Framework will consider the direction as set out within the State Planning Policy and 30 Year Plan for Greater Adelaide volume of the Planning Strategy. The current 30 Year Plan for Greater Adelaide (2017) identifies the area west of Port Wakefield Road should provide for:

- Future urban growth area (unzoned) on the Dry Creek Salt Fields (Planning Area 9 outside the scope of the Strategic Growth Framework).
- Rural Living at Globe Derby (Planning Area 8 outside the scope of the Strategic Growth Framework)
- Future freight railway link along the Northern Connector Corridor (Traverses Planning Area 1, 6, 7 and 9 including land within the Strategic Growth Framework Scope.
- Terrestrial Nature Protection Area encompassing the mangrove and Barker Inlet (Planning Area 5 and 7 including land within the Strategic Growth Framework in respect to the bio-diversity corridors that connect to this significant State Protection Area.
- Ensure land use planning in and around the district aligns with projects for industry growth and revitalisation and anticipated by the Northern Economic Plan.

The State Government have announced the new Regional Plans will start being developed in 2022 and will replace the current 30 Year Plan for Greater Adelaide. At this stage it is unclear what the timing for metropolitan regional plan will be but likely they will be developed after areas outside metropolitan Adelaide, it is assumed based on the available information that the metropolitan Regional Plan is likely to be completed in 2023/24.

The Strategic Growth Framework will be a key input to the regional planning process. By proactively preparing the Strategic Growth Framework in 2022, Council will be able to inform the scoping and background investigation for the Greater Adelaide Planning Region. In addition, the precinct planning, technical investigations, infrastructure requirements and final land use recommendations can directly inform the precinct level recommendations within the Greater Adelaide Regional Plan and “streamline” future Code Amendments.

Local Government

- City Plan 2035, Council's Lead Strategic Plan identifies as a critical action for a Structure Plan across the land west of Port Wakefield Road to open new development opportunities, while preserving the existing character of Globe Derby and St Kilda. This Strategic Growth Framework forms a critical input to this Structure Plan for four of the key planning areas and how surrounding planning areas may need to interface and coordinate for open space and infrastructure corridors and connections.
- Bio-Diversity Corridors Action Plan – Produced by the City of Salisbury 2009, includes background information on the environmental and ecological corridors that run through the study area and unique environmental areas that require protection as part of future planning and development.
- Northern Connector Land Use and Transport Study (Draft) was prepared by infraPlan for the former Department of Planning, Transport & Infrastructure in 2016. This document was never finalised but is useful to the context of the Study Area providing background investigations that include some investigations relating to existing conditions, previous consultation, land use scenario modelling, industrial land supply and demand, land preparation requirements including some modelling and infrastructure analysis.

Much of this work is still relevant and was considered as part of the preparation of the Strategic Growth Framework. Noting that further detailed investigations relating to traffic, infrastructure servicing, environmental and land development suitability, will be required to support future Code Amendments, building on the work completed as part of the Strategic Growth Framework.

- Greater Edinburgh Parks and St Kilda Stormwater Management Plan – a joint study produced in 2020 between City of Salisbury and City of Playford relating to current and future stormwater management that includes parts of the northern section of the Study Area. This report has been considered by Greenhill as part of the Service Infrastructure investigations that have informed this Strategic Growth Framework as set out in Appendix 1.
- Economic Vision for City of Salisbury – Deloitte study dated 2019, contains a range of economic and demographic profiles for the Salisbury Employment Land Market, and identifies the criticality for forward planning for consistent and coordinated development for the land west of Port Wakefield Road, part of which is the subject of this Strategic Growth Framework to fill a void left by the discontinuation of the Northern Adelaide Economic Plan. Given the alignment of this recent work to the recommendations and approach adopted in the Strategic Growth Framework, the following section pulls out the key findings and implications of the Deloitte Study in the context of the Strategic Growth Framework

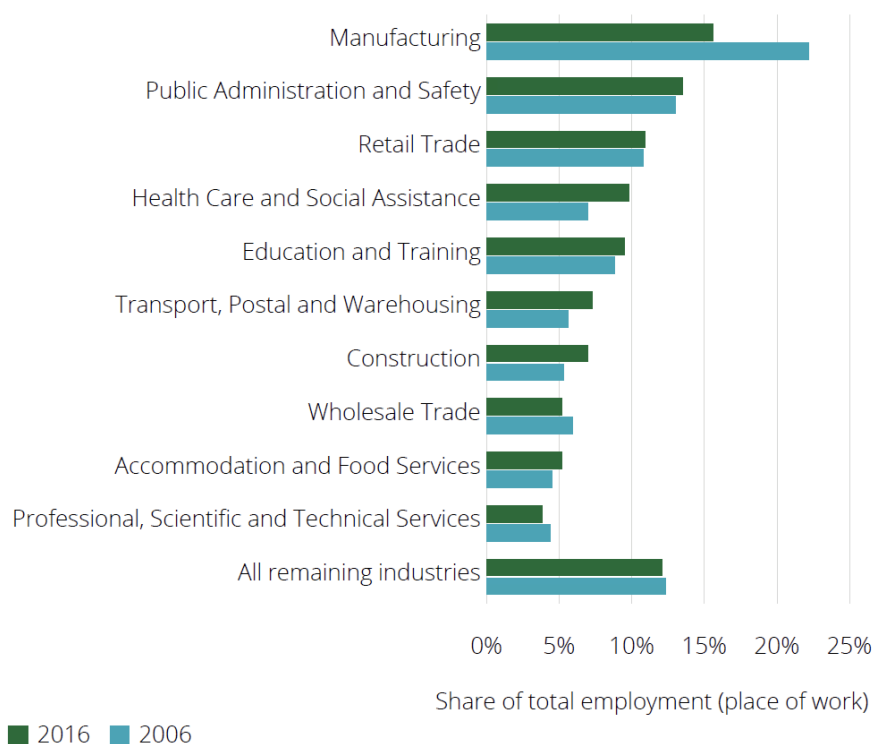
1.3. Economic Development Profile (Deloitte 2019)

1.3.1. Salisbury's Current Economic Market

Salisbury is the fourth largest regional economy, with its annual growth overtaking South Australia as a whole. A positive trend in gross regional product (GRP) has been associated with strong growth in workforce numbers. In 2017 Salisbury saw 66% of workforce aged residents with some form of employment.

Mirroring the changes that have been observed Australia wide, Salisbury's primary industries of employment have shifted from the traditional manufacturing roles to advanced manufacturing, requiring fewer but more skilled workers. A structural change observed in the decade between 2006-2016 also saw significant growth in defence related industries, construction, and logistics, reflecting Salisbury's competitive advantage in these industries.

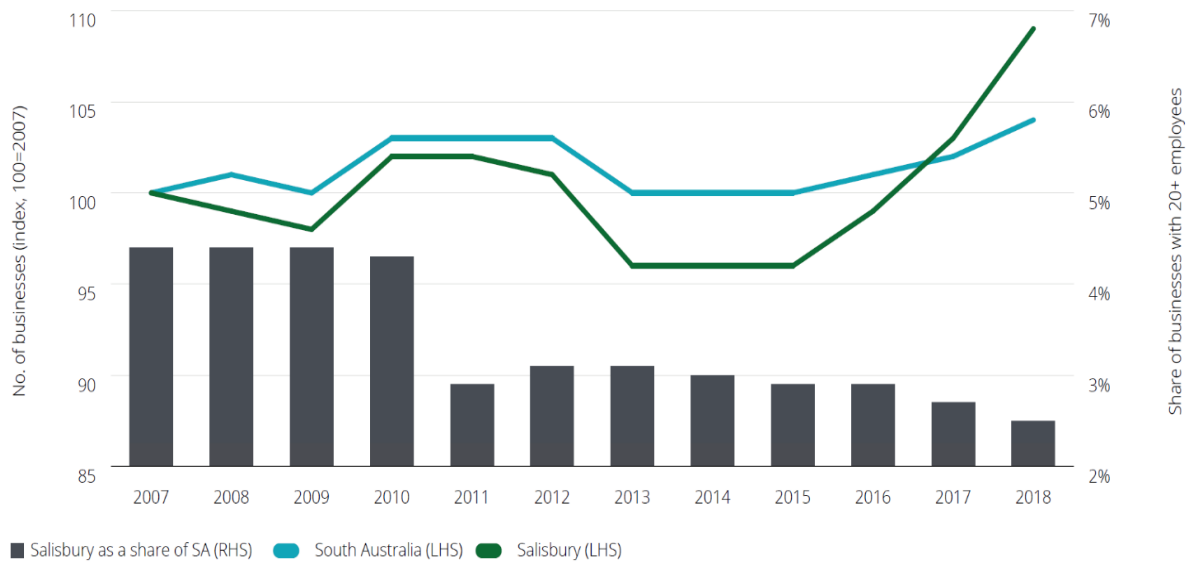
Table 1. Industry composition of the Salisbury economy, 2006 and 2016



Source: ABS, Deloitte Access Economics

Salisbury has seen a loss in larger employers, following the move away from traditional manufacturing. Conversely, smaller and single owner-operator businesses have fuelled majority of the business formulation, increasing at an average annual rate of 3.3%. This has placed downwards pressure on local employment opportunities for Salisbury residents. Despite this, 36% of residents are still employed within the LGA and travel to work via car. The Salisbury economy also relies heavily on neighbouring LGAs such as Tea Tree Gully and Port Adelaide Enfield for employment opportunities. Likewise, Salisbury draws on skilled workers from the surrounding areas to fill job positions.

Table 2. Count of businesses (indexed) – Salisbury and South Australia, 2007 to 2018

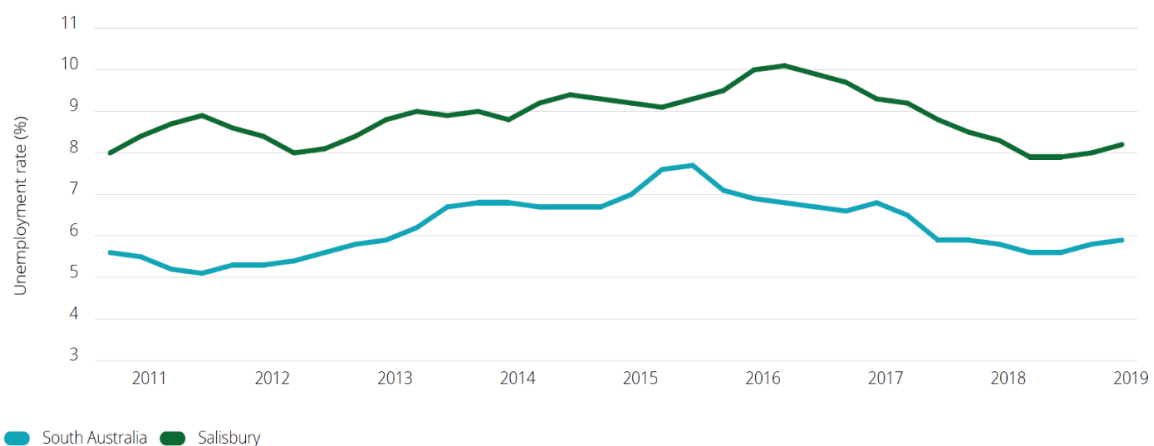


Source: ABS, Deloitte Access Economics

1.3.2 Disadvantage Measures

Notwithstanding the economic strengths that Salisbury has experienced in recent years, there are still considerable challenges faced by residents, as demonstrated across a variety of measures of disadvantage experienced within the community. Comparatively, Salisbury has a higher proportion of residents receiving government benefits, particularly benefits associated with disability and labour market marginalisation than that of South Australia. The Local Government Area is placed in the second worst decile for disadvantage in the SEIFA Index, however with higher levels of severity located in small and specific pockets of the population. This disadvantage rate is accompanied by a higher-than-average unemployment rate of approximately 2%.

Table 3. Unemployment rate – Salisbury and South Australia, 2010 to 2019

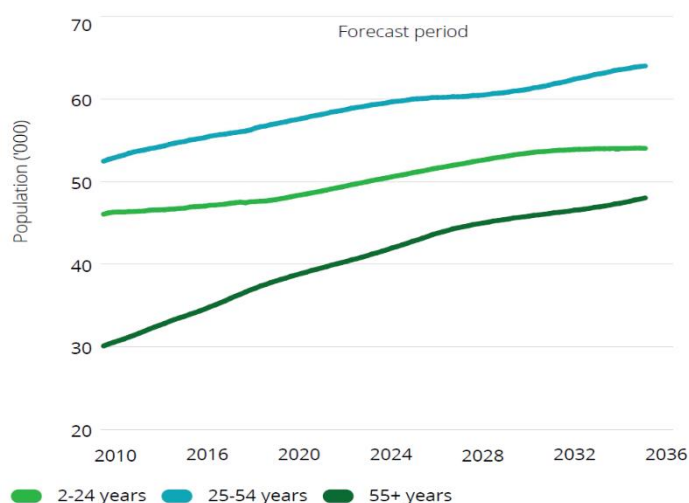


Source: ABS, Deloitte Access Economics

1.3.3 Disadvantage Measures

Salisbury's population is anticipated to grow at a greater rate than the rest of South Australia (0.86% per annum). The population is set to reach 166,000 people by 2036. In addition to a total growth in population, Salisbury is set to experience a shift in population distribution. Currently a relatively youthful population, with an average age of 37 years, the LGA also has a culturally diverse population with first generation migrants accounting for 31%.

Table 4. Population size by age demographic – Salisbury, 2010 to 2036



Source: ABS, Deloitte Access Economics

1.3.4 Education and Skills

Underpinning a productive and high value add economy is skill workers and education. Currently Salisbury residents have relatively low rates of post-school education attainment, particularly at the university level. Without significant change, relatively low educational outcomes will continue, effecting employment opportunities for residents. Remarkably, the LGA has a high demand for professional, managerial and technician and trades operations despite the relatively poor socioeconomic and employment outcomes amongst residents.

Table 5. Education attainment (highest level) by place of work – Salisbury, 2016



Source: ABS, Deloitte Access Economics

1.3.5 Key Findings Relevant to the Strategic Growth Framework

The Deloitte Report (2019) identified a set of opportunities and future outcomes that would strengthen Salisbury's economic market and increase the number and quality of jobs for the community. These actions identified sought to generate prosperity for the Salisbury community, key opportunities included:

- Leveraging Salisbury's existing endowments and strategic assets
- Grow Salisbury's existing industry base by ensuring that Salisbury's investment attraction plan targets industries and activities that complement and intensify existing activities in the region.
- Create commercial spin-offs from the defence industry by striking a Memorandum of Understanding between key defence stakeholders.
- Develop a 30 Year Development Plan to prepare for the future development of the area west of Port Wakefield Road.

Leveraging Salisbury's existing endowments and strategic assets is Salisbury's existing industry base, and locational advantage to grow the City's business activity and create job opportunities. Advanced manufacturing, food processing, product manufacturing, transportation, warehousing, distribution, and logistics were identified as industries with a strong basis for future growth. These industries rely on high quality, fast and convenient road access and have a strong link with the defence industry and have potential to facilitate cross pollination and skill and resource sharing.

The current availability of underdeveloped land to the west of Salisbury was acknowledged by Deloitte as an attractive location for large scale commercial and industrial development due to its strategic location along the key road infrastructure of the North South Motorway. Due to this recent investment by State Government land use planning and zoning changes, to support the highest and best use of this land should be considered as a required outcome of a renewed investment attraction plan, to support varying industry uses and more intensive activities.

Salisbury has several distinctive precincts, where economic and employment activities cluster. Private sector precincts are areas zoned for commercial and industrial process and located around key infrastructure and transport corridors. Similarly, informal industry clusters are business ecosystems that have organically formed due to the benefit of co-location. The opportunities for action to strengthen Salisbury's connectivity is greatly related to the promotion of and investment in precincts that support like or compatible businesses that was considered in the development of the Strategic Growth Framework and associated recommendations.

The Holmes Dyer review of the Deloitte 2019, *Economic Vision for the City of Salisbury* has confirmed that this report provides robust demographic and employment statistics that demonstrate a growing appetite for employment generating industry and business development. The Strategic Growth Framework has been aligned to this reports outcomes and actions, particularly in relation to the expansion of business clusters and the unlocking of land potential in preparation for future industry.

2. Site Analysis

The following section sets out the various information that forms up a site analysis of the study area as a basis for understanding opportunities and constraints of the land to inform the Strategic Growth Framework.

2.1. Site Photo Survey by Planning Area



Photo 1 – Planning Area 7 City of Salisbury Soil Transfer Site view looking west across North South Motorway.



Photo 2 – Planning Area 7 City of Salisbury Soil Transfer Site view looking east across Little Para River Corridor.



Photo 3 – Planning Area 6 Existing pull-over space to land north of Highway 1 Caravan Park view looking North.



Photo 4 – Planning Area 6 Existing pull-over space to land north Highway 1 Caravan Park view looking South



Photo 5 – Planning Area 1 – Rural Land uses off Summer Road



Photo 6 – Planning Area 1 -Existing employment land uses occurring on Summer Road



Photo 7 – Planning Area 1 Existing Flood Way to Summer Road



Photo 8 – Planning Area 1 Existing Rural Residential Housing on Summer Road with Flood Warnings



Photo 9 – Planning Area 1 Undo Road and Port Wakefield Road Intersection looking east.



Photo 10– Planning Area 1 Existing Horticultural Land Uses on Undo Road, with road infrastructure no kerb /gutter



Photo 11 – Planning Area 1 – View of Dunn Road and example of existing infrastructure provision



Photo 12 – Planning Area 1 -View of existing Horticultural activities at Davey Road



Photo 13 – Planning Area 1 Calvengrove Road, with existing Horticultural Activities



Photo 14 – Planning Area 1 Mill Road with existing Horticultural Activities



Photo 15 – Planning Area 1 Open Space Zone near South Go Kart Club



Photo 16 – Planning Area 1 Robinson Road turn around looking over Port Wakefield Road



Photo 17 – Planning Area 1 – Informal Road Corridors off St Kilda Road in Horticultural Land



Photo 18 – Planning Area 12 -Defence Signal Facility under construction on left and Coleman Road Waste site on right.

2.2. Topography and Soils

The land within the study area is almost flat, generally grading down from east to west towards the coast at a gradient of approximately 0.3% - 0.5%. This means the whole area is well suited to large industrial and commercial footprints but also means that gravity-based services (stormwater and sewerage) are more problematic, requiring larger pipes or drains and possibly reliant upon pumping in some instances to overcome the lack of fall. Sites and roads are likely to require some filling to enable minimum gradients to be achieved for new roads and gravity pipe systems, refer to Figure 3: Topography

The western edge of the site (in the Department of Defence land) located within Planning Area 2, is only about 2m above sea level and is therefore at risk of sea level rise and storm surges. Beyond the Defence land, elevation is typically around 6 – 10m above sea level and therefore at lower risk. The second low point is the western reaches of the Little Para River and adjacent land at around 4m above sea level. As a result, the raising of land levels around future building footprints may be necessary in the areas of lowest elevation.

Due to the low-lying nature of the topography, proximity to the coast and high-water table, all land within the Study Area west of Port Wakefield Road, will likely hit ground water during trenching especially during high tide. This water table level may also impact on the width and depth of open swales and the associated land area that may be required to deliver a suitable stormwater infrastructure to service an intensification of development.

The land contained within the study area has two main physiography zones. The first is the coastal plain which contains dural formations, estuarine areas, mangrove swamps, samphire flats and the older dune formations. The second zone is the Lower Alluvial Plan, which contains the outwash fans of the Little Para River and is characterised by fertile red brown earths.

A review of publicly available soil information suggest that the underlying soils would likely comprise the following:

- Hard loamy sand over red clay
- Loam over poorly structured red clay
- Calcareous, gradational clay loam
- Estuarine Marine Sediments (EMS) layered sediments of mixed marine and river origin-sands, silts clays and organic deposits

The investigations undertaken to inform the site analysis contained within this Strategic Growth Framework has not included a detailed assessment of environmental or geotechnical conditions within the Study Area. Environmental and geotechnical investigations will be required to understand any constraints upon future development that may be associated with the underlying soils; including identification of topsoil depth, groundwater level, areas of unstable soils, uncontrolled fill, extent of calcrete and strength of underlying subgrade (CBR testing) for pavement design purposes.

Figure 3. Topography



2.3. Vegetation

Most of the study area has been cleared of its original remnant vegetation. Some areas of remnant vegetation remain, most notably along the alignment of the Little Para River corridor, refer to Figure 4: Vegetation.

There are two existing biodiversity corridors that traverse the Study Area; the Little Para River Corridor and the Helps Road Drain Corridor, although little vegetation is evident along the Helps Road Drain that traverses land.

The Little Para River Corridor connects through all of Salisbury, west of Port Wakefield Road the corridor flows through a series of constructed wetlands prior to traversing the samphire flats and mangroves to the sea. There is known areas of remnant vegetation downstream of Port Wakefield Road, that is protected under the Native Vegetation Act 1991 (SA), contained within the existing Open Space Zone.

The Helps Road Drain Corridor is an engineered drainage system that travels from Edinburgh North through the RAAF Base land, across the suburbs of Direk, Burton and Waterloo Corner before entering the SA Water Bolivar Treatment Plant. The drain is punctuated by several artificial constructed wetlands east of Port Wakefield Road, with no native remnant vegetation within the drain corridor. In 2016, the Australian Government Department of Defence commenced detailed environmental investigations to identify the nature and extent of per and poly-fluoroalkyl substances (PFAS) in the vicinity of the RAAF Edinburgh Base. PFAS monitoring sites extend along the Helps Road Drain, connecting wetlands and into the Study Area along this corridor.

While outside the study area, the Strategic Growth Framework has an adjacency to the sensitive Coastal Mangrove and Samphire biodiversity corridor that extends along the coast of the planning area that will be a consideration in the design of infrastructure and open space corridors.

Outside the identified biodiversity corridors there are distinct areas of vegetation evident east of the North – South Motorway alignment from south of Hodgson Road to Summer Road. Buffer planting is also evident along the site's interface within the Bolivar Treatment Works as part of the buffer established and maintained by SA Water. Vegetation west of the Highway One Caravan & Tourist Park has biodiversity value and should be retained. The study area also contains areas of orchard and vine and some plantings associated with homesteads or boundary plantings. Overall vegetation coverage is low and has limited implications for future development. Encouragement of additional planting in association with new development, road upgrades incorporating street tree plantings, additional vegetation around stormwater infrastructure, open space corridors and within detention basins and biofiltration basins is warranted.

The investigations undertaken to inform the site analysis for the Strategic Growth Framework has not included detailed vegetation studies to identify any national or state protected flora under the EPBC Act 1999 or National Parks and Wildlife Act 1972. It is considered unlikely that any national protected flora would be located within the study area, given that the known plant species in Salisbury rated as Vulnerable under this legislation is the Bead Samphire that would occur along the salt scalds in Planning Area 3,5 and 9 outside the scope of the Strategic Growth Framework.

Figure 4. Vegetation



2.4. Hydrology / Stormwater

The Waterloo Corner and Bolivar Corridor Growth Area lies within two surface water catchments, these being the Little Para River and the Smith & Adams Creeks. The Little Para Catchment component is located at the southern extremity of the Study Area, generally south of Bolivar Road. The component within the Smith & Adams Creeks catchment extends north from Bolivar Road across the remained of the Study Area. This catchment is split by a series of minor ridges and as such numerous natural outlets exist for water to enter the Barker Inlet / Gulf St Vincent.

The Bolivar Wastewater Treatment Plant (WWTP) Lagoons, now require stormwater from this dispersed catchment to be funnelled through limited, specific drainage pathways that traverse the SA Water land holdings. As such, all newly generated stormwater runoff from future development within the Study Area will be required to direct stormwater to these existing drainage pathways and limit their discharge such that the capacity of these outfalls is not exceeded.

Generally, there are seen to be three available discharge / drainage pathways for the Study Area the subject of this Strategic Growth Framework, as detailed in the Greenhill Preliminary Service Infrastructure Report provided in Appendix 1.

- The Little Para River
- Helps Road Drain Corridor - 'The Gap'
- The St Kilda Road Channel (partially constructed in late 2018)

The Little Para River and existing drains to the south of the study area will need augmentation and supplementation to handle the intensification of development within the study area and will be expected to convey flows from upstream outside of the study area. Control of upstream flows to predevelopment levels should be a key objective for Council. Stormwater detention is likely to be required at points immediately upstream of the culvert crossings to Port Wakefield Road and to the North South Motorway to control the extent of flows.

The capacity of the stormwater outflow known as 'The Gap', being the Helps Road Drain Outflow that connects between SA Water treatment ponds is limited and, hence, management of flows through this outfall will be critical.

The St Kilda Road Channel is seen to extend from the North South Motorway / Waterloo Corner Interchange, northwest around the northern Bolivar WWTP Lagoons. It connects into the Bolivar stormwater drainage system, which discharges via the two existing Bolivar Outfall Channel syphons, one located within the SA Water site and the second just north of Symes Road.

The Greater Edinburgh Parks and St Kilda Catchment, Stormwater Management Plan (May 2020), suggested that new syphon(s) be constructed under the Bolivar Outfall Channel, thereby discharging stormwater to the Barker Inlet between the Ridley Salt Ponds. The cost of a new syphon may be prohibitive expensive and discharging

stormwater into the Bolivar Outfall directly may be a more cost-effective option. However, this option requires further technical investigation as well as consultation with SA Water.

Due to the low-lying landform, minimal grades and ground water as identified in Section 2.2 combined with the identified constraints on the existing capacity of the stormwater outfalls to support the intensification of development, a Stormwater Management Plan should be developed for the Strategic Growth Framework Study Area to inform detailed stormwater infrastructure, timing, responsibility and cost considerations.

The opportunity exists to establish a series of stormwater catchment areas which can operate relatively independently and thereby share responsibility for the delivery of outcomes for the benefit of those catchments. These are discussed later in the Greenhill Preliminary Service Infrastructure Report. Council could take overall responsibility for delivery and management of these systems, but with funding contributions and land commitments to underpin the networks.

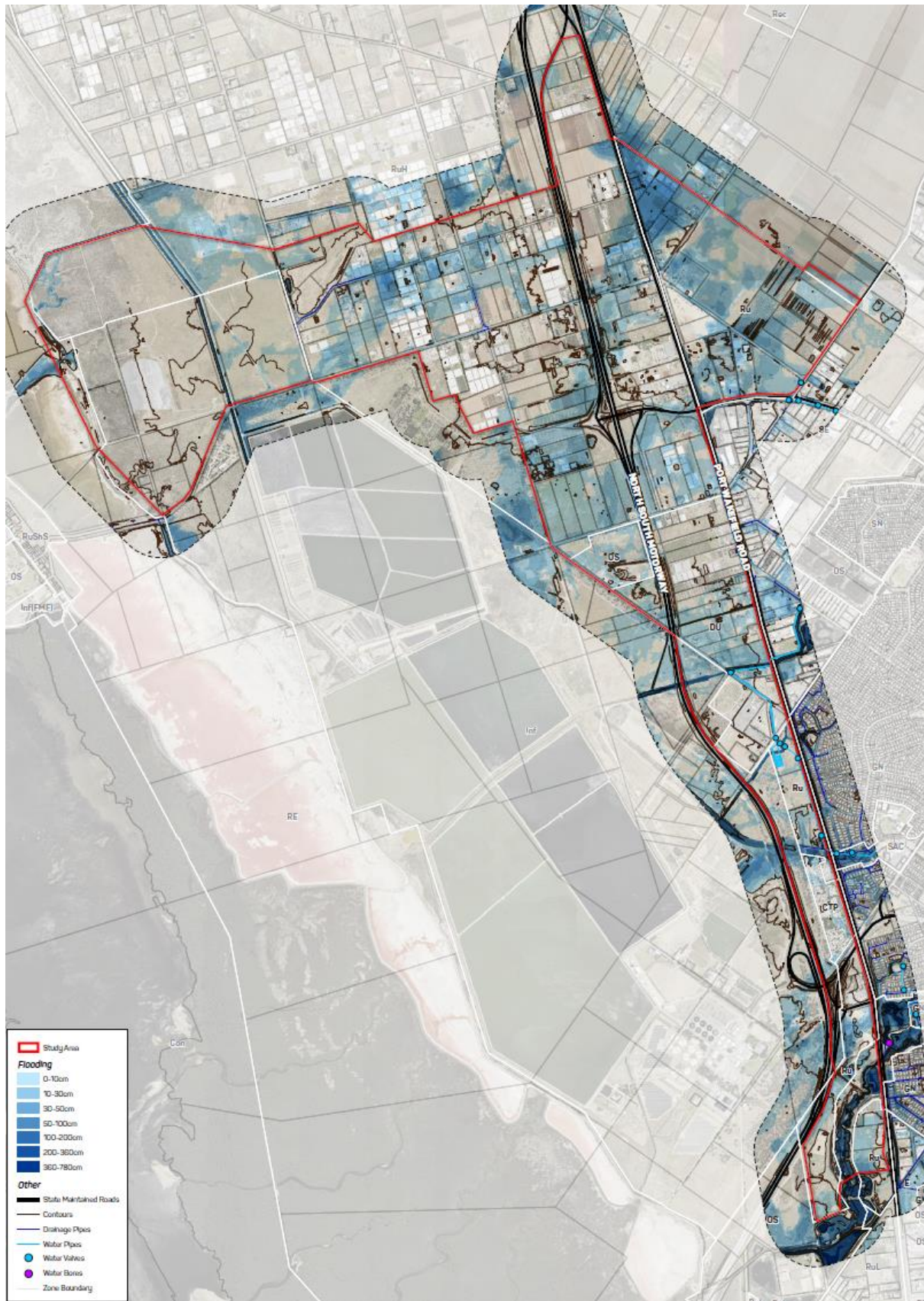
A further opportunity given the City of Salisbury industry leading approach to the management, treatment and reuse of stormwater could be for a larger network of wetlands and swales, in substitution to large underground pipes and on-site detention be created, with infrastructure contributions potentially received from developers via a stormwater contribution model. This could facilitate an expansion of the existing capacity of the Salisbury Water business and a contribution to innovative and industry leading green initiatives but would need to be subject to further detailed feasibility by the City of Salisbury and may only be applicable to select precincts across the broader Study Area.

Flood risk in the Study Area is significant, as identified in Figure 6, which identifies areas of inundation during the 1% Annual Exceedance Probability (AEP) rainfall event., however the flood mapping predates the construction of the North South Motorway, which has altered the local topography and stormwater pathways. The flood mapping should be updated to reflect this substantive change to the stormwater pathways, this updated flood mapping will subsequently inform flood overlays and development responses that may be required as part of any future Code Amendment.

Figure 5. Hydrology



Figure 6. Flood Risk Inundation Mapping, prior to construction of the North South Motorway



2.5. Site Contamination

Two sites within the study area have known contaminated land, these being land immediately north of the Little Para River where it crosses Port Wakefield Road and the former landfill site off Coleman Road. The Coleman Road landfill closed in 1997 and ongoing management of the site is required relating to groundwater monitoring, minimisation of landfill gas emissions and improvement of on-site drainage to protect the groundwater system and increasing the cap coverage to the landfill which has an ongoing capital cost to Council. Opportunities for alternate use of this site, to harness energy from the methane extraction or other form of eco-industrial outcome could be explored by Council as part of the Strategic Growth Framework, with consideration of any vegetation buffers that may be required to existing or future intended land uses on the immediate adjacent sites.

There are several EPA licenced facilities located throughout the study area including petrol station sites and various agricultural and industrial activities, these sites are identified on Figure 7.

In 2016, the Australian Government Department of Defence commenced detailed environmental investigations to identify the nature and extent of per and poly-fluoroalkyl substances (PFAS) in the vicinity of the RAAF Edinburgh Base. PFAS monitoring sites extend along the Helps Road Drain, connecting wetlands and into the Study Area along this drainage corridor. The Department of Defence have a PFAS Management Area Plan that informs the activities they are required to undertake to manage, monitor and reduce the risks of PFAS exposure. The land within the study area, east of Port Wakefield Road and north of Waterloo Corner Road, are within the management area that has several ground water and surface water sample locations. As this is an ongoing situation being monitored by the Department of Defence, the impact (if any) of any proposed land use changes will need to be monitored based on the most current information available at the time.

The investigations undertaken to inform the site analysis for the Strategic Growth Framework has not included detailed site contamination investigations. Under the *Planning, Development and Infrastructure Act 2016*, the planning system is required to assess and manage risks posed by known or potential site contamination to enable the safe development and use of land. A more comprehensive set of investigations will likely be required as part of a future Code Amendment that could include the following investigations:

- Landfill risk assessment for any rezonings within 500m of the Coleman Landfill site, or area as required by the relevant auditor.
- Investigation of interface issues relating to noise, odour, dust, chemical spray, drift and identify any necessary buffers or separation distances
- Undertaking a desktop site history analysis for possible contaminating activities on the land proposed for rezoning, subject to the outcomes site contamination investigations, prepared by an environmental consultant in accordance with the *National Environment Protection (Assessment of Site Contamination) Measure 1999*.
- Ground water contamination analysis

Figure 7. Site Contamination & EPA Licensed Facilities



2.6. European and Aboriginal Heritage

2.6.1. European Heritage

There are no identified sites of European Heritage within the Study Area.

2.6.2. Aboriginal Heritage

The study area is located within the traditional lands of the Kurna with the Aboriginal Heritage Act 1988 (Act) protects all Aboriginal sites within South Australia. A search of the Aboriginal Affairs and Reconciliation Division, Department of the Premier and Cabinet was undertaken for the Study Area. The search identified one archaeological and two burial sites within the Study Area. While not formally registered, AARD also identified that there is a further burial site discovered in 2019 and a repatriation burial site near Waterloo Corner which are protected under the Act.

AARD will not provide details of the individual titles of land for the registered sites, however an indicative location has been included on the attached Figure 8, with a further register search by individual titles proposed to be included in any future Code Amendment required.

The Adelaide Plains area of Salisbury is recorded as offering a diverse range of high resource habitats to the Kurna including open grasslands, densely wooded alluvial wetlands and watercourses. This environment combined with the proximity to the coast and river corridors suggests that there is potential for further unknown aboriginal heritage sites to be discovered within land contained within the study area. AARD advised that due to the significant number of Aboriginal ancestral remains in the Northern Suburbs, it would be reasonable to consider that the extent of discoveries indicates a high risk that further evidence of Aboriginal occupation of the area could be discovered under the disturbed topsoil through project delivery within the Study Area.

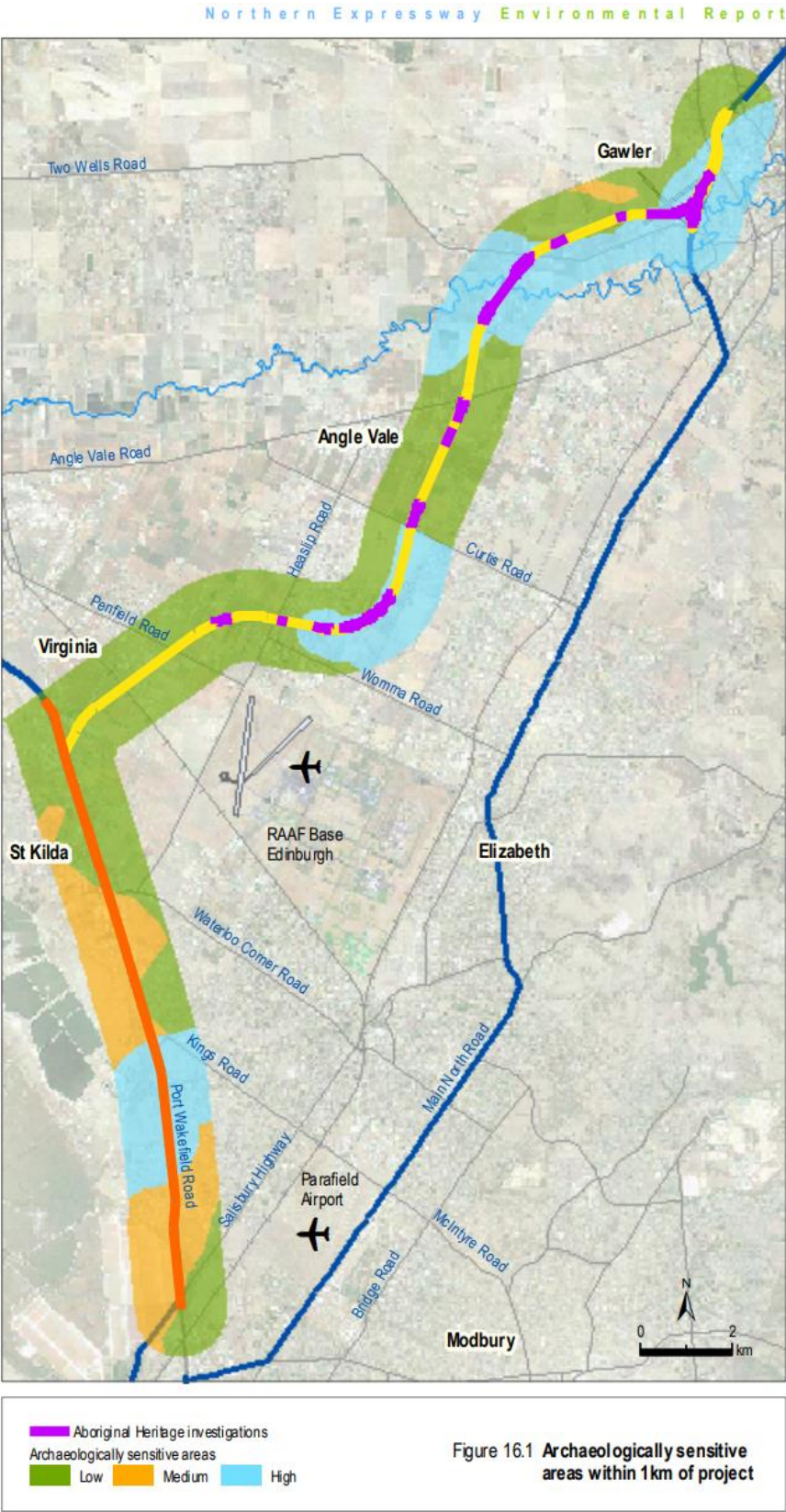
The Department of Transport as part of the Northern Expressway Environmental Report understood cultural mapping 1 km either side of Port Wakefield Road which demonstrates areas of high and medium sensitivity within the study area, as demonstrated on their sensitive area map provided as Figure 9.

Given the history of cultural discoveries in Salisbury and the river corridors and landforms that exist across this area, it is recommended that a Cultural Heritage Assessment be undertaken as part of any proposed Code Amendment or major infrastructure works involving significant excavations that would extend below the existing disturbed surfaces, with cultural heritage inductions included as part of any public works contract. This Cultural Heritage Assessment will involve engagement with the *Kurna Yerta Aboriginal Corporation (KYAC)* and any other local Aboriginal Groups, organisations or traditional owners that may be identified by the cultural heritage advisor as having an interest in lands within the Study Area.

Figure 8. *Aboriginal Affairs and Reconciliation Division Register Search Results*



Figure 9. Archaeological Sensitive Areas within 1km of Port Wakefield Road, Department of Transport Northern Expressway Environmental Report



2.7. Service Infrastructure

Parts of the Study Area are well served by service infrastructure, notably the area south of Waterloo Corner Road and land extending along Port Wakefield Road. The planning areas north of Waterloo Corner Road and particularly lands west of the North South Motorway are generally poorly served by service infrastructure and can anticipate the need for significant augmentation of capacity through to total network construction to support any significant intensification of development or land use change.

The implication for development is that it is critical that a logical progression of development from south to north and from east to west occur. Where landowners are prepared to fund required infrastructure, sequencing of development becomes less critical, assuming that a clear understanding of all infrastructure upgrade requirements is known for negotiation with the landowners.

Greenhill Engineers undertook detailed “*before you dig*” investigations, discussions with planning representatives in the service authority organisations and have compiled a preliminary service investigation report included within Appendix 1. A summary of the findings by service infrastructure type is presented below.

2.7.1. Sewer

SA Water have an extensive gravity sewer system to the south-east of the Growth Area, generally to the east of Port Wakefield Road and south of Waterloo Corner. The Bolivar Sewage Treatment Works is located to the west and south-west of the Growth Area, which incorporates the plant itself, pumping mains and wastewater treatment lagoons.

To the north of Waterloo Corner, and generally to the west of Port Wakefield Road, there is very little existing SA water sewer infrastructure.

An assessment by SA Water is underway, to investigate and to provide further information relating to the future servicing of the Study Area contained within this Strategic Growth Framework to identify areas of constraint or where upgrades are required. However, due to the complexity of this assessment it is anticipated it will take several months to complete and once available will form a future chapter to the Strategic Growth Framework to inform future Code Amendments and infrastructure timing, coordination and prioritisation. In addition, SA Water are also currently completing master planning works as part of SA Water’s Regulatory Determination 2024, which in part includes the Waterloo Corner and Bolivar Planning Areas.

Due to the scale and anticipated timing of development it is anticipated SA Water will address development through individual site investigations as parcels of land within the Strategic Growth Area proceed to development and/or Code Amendment in the immediate short term. Once the outcomes of the above studies are available a more strategic planning approach will be able to be undertaken.

2.7.2. Potable Water

Potable water is available to service the Strategic Growth Area by SA Water, generally via mains located within Port Wakefield Road and Waterloo Corner Road.

An assessment by SA Water is underway, to investigate and to provide further information relating to the future servicing of the Study Area contained within this Strategic Growth Framework to identify areas of constraint or where upgrades are required. However, due to the complexity of this assessment it is anticipated it will take several months to complete and once available will form a future chapter to the Strategic Growth Framework to inform future Code Amendments and infrastructure timing, coordination and prioritisation, . In addition, SA Water are also currently completing master planning works as part of SA Water's Regulatory Determination 2024, which in part includes the Waterloo Corner and Bolivar Planning Areas.

Due to the scale and anticipated timing of development it is anticipated SA Water will address development through individual site investigations as parcels of land within the Strategic Growth Area proceed to development and/or Code Amendment in the immediate short term. Once the outcomes of the above studies are available a more strategic planning approach will be able to be undertaken.

2.7.3. Recycled Water

Several recycled / reclaimed water mains are located from the Bolivar WWTP site, connecting to the north of the Study Area. These mains are connected to the Bolivar treatment works and the Virginia Pipeline Scheme (VPS). SA Water have advised that there may be an option for mains extensions off the Bolivar Treatment Plant infrastructure. However, to the north of the Growth Area, the VPS network is currently at full allocation.

In addition to the SA Water recycled water network, Salisbury Water operate a recycled water network managed by the City of Salisbury as a separate business unit. Salisbury Water infrastructure within the Study Area includes:

- Within the study area at Jobson Road, Salisbury Water own and operate a bore extraction site and have land holdings that may be surplus to the requirements of the Salisbury Water operations that could be explored for alternative development.
- A 150mm diameter PVC distribution main which extends from the Burton Wetlands at Burton Road, through to the reserve at Liberator Drive on the eastern side of Port Wakefield Road.
- A 180mm diameter distribution main located at the intersection of Waterloo Corner Road and Heaslip Road.
- A recycled water system is located on the eastern side of Port Wakefield Road opposite Hodgson Road located in the reserve at Walpole Road reserve and wetlands. This system feeds recycled water to the Willowbrook Reserve approximately 200m to the north of Walpole Road wetlands.
- The City of Salisbury operates a bore at the Little Para River Linear Park on the eastern side of Port Wakefield Road.

Further discussion with SA Water and/or Salisbury Water would be required by developers or landowners to explore the opportunity for recycled water for a future development. If reserves are provided as part of future

development, which include water quality treatment systems such as wetlands, then there may be the opportunity to store water for reuse for irrigation of open space or industry or for Salisbury to incorporate these holding wetlands into the existing Salisbury Water network operations.

The Norther Adelaide Irrigation Scheme (NAIS) network is in proximity, there may be an opportunity to provide recycled water via this network. However, further assessment of this option will need to be undertaken relating to feasibility versus the broader benefit to Salisbury Water of extending their network to service the area with the associated ongoing potential to charge for the supply of recycled water through the Salisbury Water Business Unit.

2.7.4. Groundwater Wells

There are a significant number of ground water wells within the Study Area. Existing ground water wells are managed by the Government of South Australia's Department for Environment and Water. Information on existing bores has been obtained from the WaterConnect, groundwater database, with the bore map locations included within the Greenhill Preliminary Service Infrastructure Report within Appendix 1.

Future development may need to consider removal of existing bores or there may be the potential to retain existing wells if accompanied with a suitable licence for use of the water. Further discussions with the Department for Environment and Water would be required to confirm the potential for use of ground water.

2.7.5. Electrical Supply

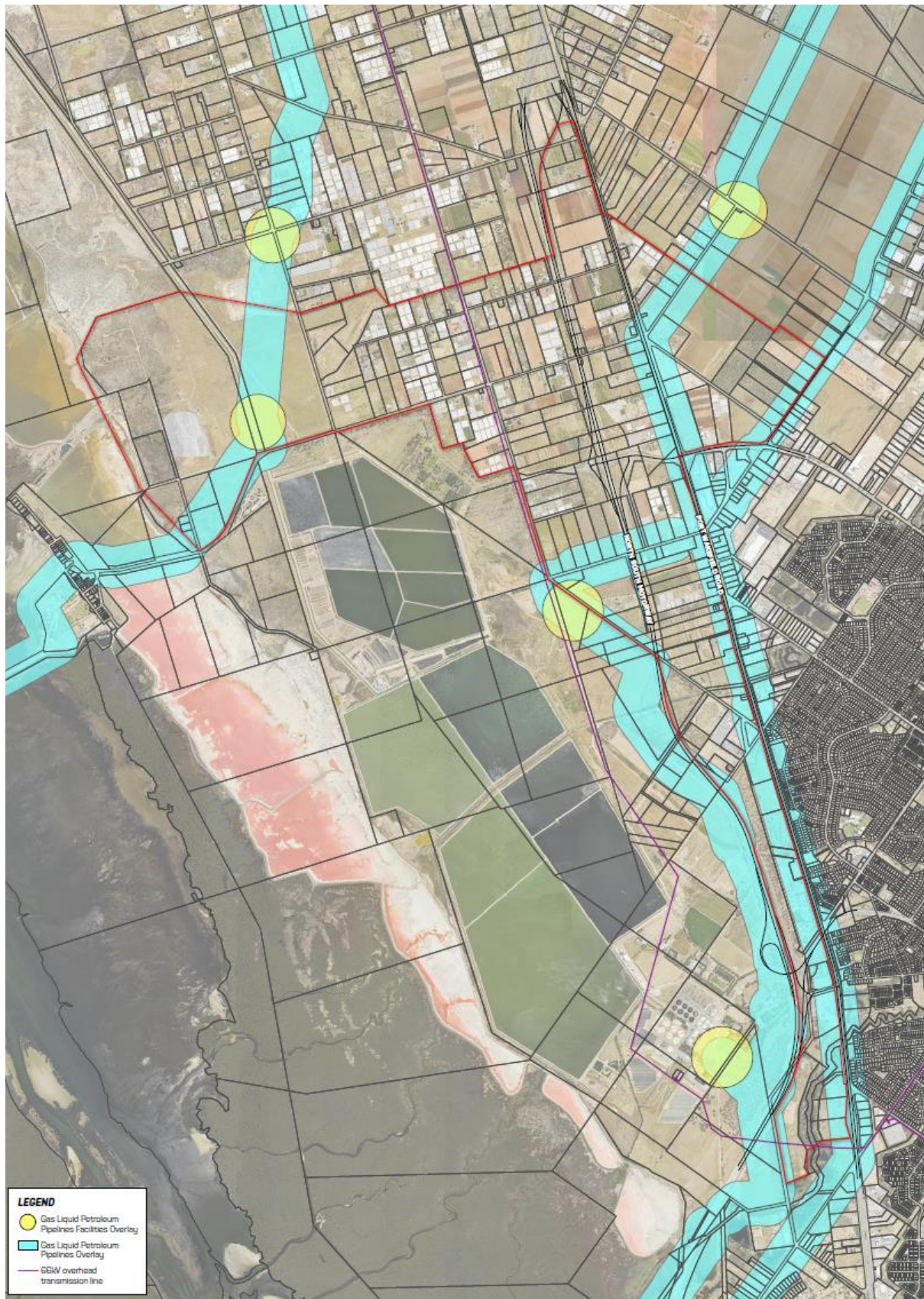
Both SAPN and ElectraNet were contacted, with regards to providing feedback to inform the sequencing of development within the Study Area. At the time of writing, only SAPN have responded; however, it is understood that ElectraNet are still progressing a review of their infrastructure that will be provided to the City of Salisbury separately, to inform future planning within the study area. A 66KV High Voltage above ground power line dissects part of Planning Area 4 along Supple Road, which would require minimum safety clearances to the nearest conductor at maximum swing of the power lines, typically 5.5 metres to the nearest structure or as required by the Office of the Technical Regulator in the location identified in Figure 10.

SAPN have advised that 'The Waterloo Corner and Bolivar Corridor Growth Area' is supplied by four sub-stations; at Direk, Paralowie, Parafield Gardens and Cavan. The corridor is currently being serviced by an existing 11 kV high voltage network. However, the study area is located at the far extent of the substation areas, which results in network constraints due to end of line voltage drop. The existing feeder network therefore will require extension and 'strengthening' to supply any significant additional load because of the intensification of development or zoning changes for employment lands within the study area.

Due to the scale and anticipated timing of development it is anticipated SAPN will address development through individual site investigations as parcels of land within the Strategic Growth Area proceed to development and/or Code Amendment in the immediate short term. Once the outcomes of the above studies are available a more strategic planning approach will be able to be undertaken.

The cost of new electricity infrastructure that is provided by development may be rebated by SAPN if it will benefit other uses, which would be determined at the time of application by SAPN. It should be assumed in any road network planning that any new electrical infrastructure installed within the study area would be installed as an underground electrical reticulation and lighting scheme as part of a common services trench along with telecommunications and gas services as required, in line with standard delivery of new infrastructure. Existing above ground infrastructure would not be undergrounded unless funded by the development and/or Council to realise improvements in amenity and/or land development capacity.

Figure 10. Major Gas Pipelines and Electricity Transmission Lines



2.7.6. Gas Supply

The study area is traversed by several high pressure liquified gas pipelines including the Port Campbell to Adelaide SEAGas Pipeline and high voltage transmission lines. These facilities are unlikely to impact most commercial and industrial development that may be proposed other than along the direct alignments and easements required to support this infrastructure. The gas pipelines, in particular, give rise to restrictions on activities that deliver high population densities and vulnerable populations (e.g., aged care, childcare, schools etc) in close proximity and will require the preparation of Safety Management Studies to establish appropriate safety requirements. Notification requirements to the licensee are typically required within 560 / 585m of the pipelines which are identified on Figure 10: Major Gas Pipelines and Electricity Transmission Lines.

Consideration of Epic Energy and SEAGAS mains will need to be made when considering the type of development proposed within proximity to distribution mains and the provision of new infrastructure that may cross the existing distribution mains.

It is anticipated that a gas network may be extended to service the Growth Area. Further information is required to be provided by AGN/APA to confirm the requirements for gas networks to service the Growth Area. Due to the scale and anticipated timing of development it is anticipated that AGN / APA will address development through individual site investigation as parcels of land within the Growth Area proceed to development. New gas infrastructure for the growth areas is assumed to be installed as an underground scheme as part of a common services trench along with electrical and telecommunications services as required.

2.7.7. Telecommunication Supply

There is existing Telstra / NBN infrastructure within Port Wakefield, St Kilda and Robinson Roads. Both Telstra and NBN Co, were contacted, with regards to their providing feedback to inform the outcomes of this Strategic Growth Framework.

Telstra advised that they were unable to provide further advice and to refer to Telstra Infracore Network Integrity Section for retention, protection or relocation of existing Telstra infrastructure, if required.

NBN Co. have advised that generally they have access to sufficient network duct capacity via the Telstra Network to service any intensification or new development that may be deliver within the study area.

Any development that would occur west of Port Wakefield Road would be required to install new NBN pit and pipe infrastructure to connect to the existing network. It is also an expectation of NBN that as part of any new road creation, within the Growth Area, an NBN pit and pipe installation would be incorporated as part of the overall services to ensure continuity of service pathways.

It is anticipated that a telecommunications network may be extended to service the Growth Area. Further information is required to be provided by NBN Co. or other service providers to confirm the requirements for telecommunications networks to service the Growth Area. Due to the scale and anticipated timing of development it is anticipated telecommunication providers will address development through individual site investigation as parcels of land within the Growth Area proceed to development.

New telecommunications infrastructure for the growth areas is assumed to be installed as an underground scheme as part of a common services trench along with electrical and gas services as required.

2.8 Transport Infrastructure

The Study Area is traversed by two major north-south transport routes of strategic importance, these being the North South Motorway which provides continuous expressway conditions from South Road, Thebarton to its connection to Port Wakefield Road and the Sturt Highway via Northern Expressway and Port Wakefield Road which connects with Main North Road at Gepps Cross and to the National Highway One route north of Adelaide. Both roads are very important freight links for existing and future development.

Major east-west connections include Waterloo Corner Road, which connects to Robinson Road and then St Kilda Road to the west and Heaslip Road to the northeast, as well as to Port Wakefield Road and the North South Motorway, and Bolivar Road which also connects to Port Wakefield Road and the North South Motorway. These routes provide important connectivity to both industrial areas (especially Edinburgh) and to the large residential population to the east. Figure 11: identifies the major road networks, pedestrian / cycle routes and existing public transport routes within and adjacent to the study area.

While the North South Motorway provides for the movement of large volumes of traffic, it has effectively dissected the Study Area and only provides for connectivity to the west via Waterloo Corner Road. All other east west roads have been truncated. Therefore, while the Study Area provides employment land that is positioned to capitalise on access to these key transport linkages to Port Adelaide, Edinburgh Airbase, the Intermodals at Dry Creek and Penfield and to intrastate and interstate markets, it is nevertheless constrained in terms of local access to individual sites and will require a new internal connecting road network and new access options to Port Wakefield Road, in terms of signalised right hand turns and / or U-Turn opportunities to access south towards the Adelaide CBD.

The existing local and collector roads have been delivered to service a low intensity rural horticultural land use, which typically provides a road corridor without kerb and gutter, footpaths, streetlights and other street infrastructure and verges that are more typical within more intensely developed neighbourhoods. The changes to the local collector road to St Kilda because of the truncations from the North South Motorway has changed traffic patterns and introduced corner intersections that are not lit. Further the collector road network required to support the Strategic Growth Framework needs to be agreed, and the necessary road widening to deliver the full infrastructure road corridor preserved, either through land acquisition or at a minimum requiring a building setback that preserves this potential into the future for early site delivery. This need will need to be considered as part of any future Code Amendment and an appropriate policy position adopted to ensure the required road corridors are created.

The Study Area is not directly serviced by rail, albeit connectivity to intermodal freight services is good. The Study Area, as well as future residential areas to the south (the Salt Pans) and to the north (Riverlea) could be connected to the suburban rail network via a new alignment off the main Gawler Line at Dry Creek. While this may be highly problematic, the time to preserve a long-term future rail corridor is at the strategic planning stage, which is occurring now, and Council should advocate to State Government for this forward planning as part of the North South Motorway land holdings to preserve this long-term corridor.

Public transport options in the Study Area are limited and future demand for public transport to service workers within industrial and commercial development is only likely to be modest. However, should higher intensity activities emerge, then a review of public transport services may be warranted and or consideration of additional public transport corridors connecting east/west specifically in the northern section of the Study Area, that could include reservation of an east/west future transport corridor connecting Salisbury City Centre via Waterloo Corner Road through to St Kilda.

Several walking / cycling connections exist within the Study Area, notably along the North South Motorway corridor and a major east-west connection to St Kilda which should be strengthened as part of this strategic planning exercise.

Figure 11. Transport (Vehicle, Bus Route and Cycling Networks)



2.9. Existing Zoning

Under the Planning & Design Code, the Study Area currently contains the following zones as identified on Figure 12:

- Rural Zone
- Rural Horticulture Zone
- Open Space Zone
- Deferred Urban Zone
- Infrastructure Zone
- Caravan and Tourist Park Zone

Two of the existing zones are appropriate for the long term intended use, notably the Infrastructure Zone which is applied to the SA Water Wastewater Treatment Plant and parts of the North South Motorway and the Caravan and Tourist Park Zone which applies to the existing Highway One Caravan and Tourist Park.

The findings of this Strategic Growth Framework indicate that much of the balance of existing zones within the Study Area will not be appropriate for a future intensification of land-uses and will require comprehensive rezoning at some point in the future.

The Rural and Rural Horticulture Zones are intended for primary production. This zone is not intended to support any form of industrial and commercial development or other forms of urban development, except where the development is ancillary or in direct support of the predominant horticultural activities. There has been increasing demand and enquiries for employment land and examples of unapproved industrial and warehousing activities occurring within the horticultural zone.

The Open Space Zone is intended for passive recreation, open space use and protection of important biodiversity corridors. This zone while appropriate for the biodiversity and open space corridors likely to be required through the Study Area, is not considered to be suitable for the ongoing support and expansion of the 'noisy recreation' activities that are occurring on Driver Road, and a Recreation Zone, with the opportunity for increased commercial activities in conjunction with Recreation Use may be better suited to capture the locational opportunities of this recreation site and current operation by the Southern Go Kart Club and Gun Club.

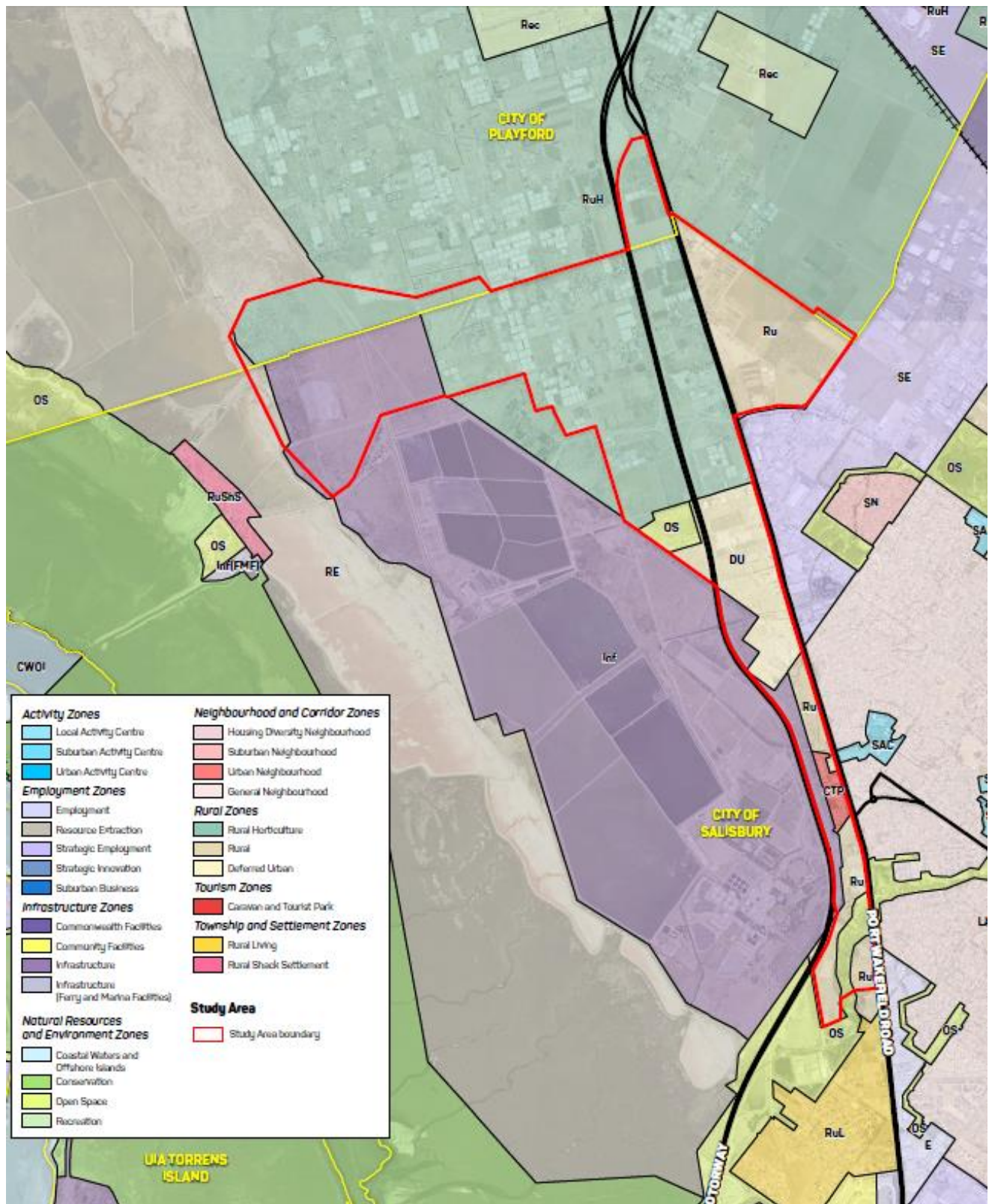
The Deferred Urban Zone is a holding zone, pending determination of a suitable land use outcome and release timing. This Strategic Growth Framework has identified that this land is ideally positioned and service for use for a range of employment lands into the future. Substantial development pressure in the form of applications and Code Amendment requests has already occurred within the Deferred Urban Zone, demonstrating that the market is seeking direction of the future zoning for this land to secure investment.

The analysis undertaken as part of the development of this Strategic Growth Framework has clearly demonstrated that the market considers the parts of the land within the study area should support a more intense or varied form of development to capture the locational advantages for employment and commercial land within proximity

of the Adelaide CBD and inner Northern Suburbs. Demonstrating this current market demand, is the number of Proponent-led Code Amendment proposals in the system or being formulated at the present time that have been identified through the engagement and investigations undertaken by the City of Salisbury prior to and as part of the development of this Strategic Growth Framework.

Consequently, this Strategic Growth Framework will provide Council with the necessary strategic background to provide clear direction to the State Government and the private sector regarding its intentions relating to development type within the Study Area in the short, medium and long term and thus provide a framework to influence and/or direct these rezoning initiatives to provide a coordinated and staged approach where the necessary infrastructure can be delivered to support the growth in a planned manner.

Figure 12. Zoning



2.10. Land Use

In general alignment with the current zoning, described in Section 2.9, the existing land uses within the Study Area are mapped in Figure 13 and involve:

- A combination of agricultural and horticultural activities in the north and west, including extensive glasshouse construction,
- Open space associated with the Little Para River and the stormwater drains and the buffers to the North South Motorway,
- Recreational activities, notably shooting and go-karting west of the North South Motorway,
- Defence facilities off St Kilda Road / Coleman Road to the west and,
- A range of commercial and industrial activities, interspersed with vacant and agricultural land along Port Wakefield Road, including petrol filling stations, motels, retailing, storage, transport depots and small scaled service and manufacturing,
- A small number of dwellings, typically associated with the agricultural land or on larger rural residential allotments.

Notable land uses outside the Study Area, but potentially influencing activities within the area, include the buffer to the SA Water Treatment Plan (and the plant itself) and extensive industry east of Port Wakefield Road and along Waterloo Corner Road, many of which include noise generating activities such as Concrete Batching and Wrecking Yards, that would likely impact on the form of land use and level of sensitivity proposed for the northeast section of Planning Area 4.

Port Wakefield Road and the North South Motorway generate considerable noise and odours and have consequences for the need to avoid sensitive future land uses near those roads as part of future strategic planning.

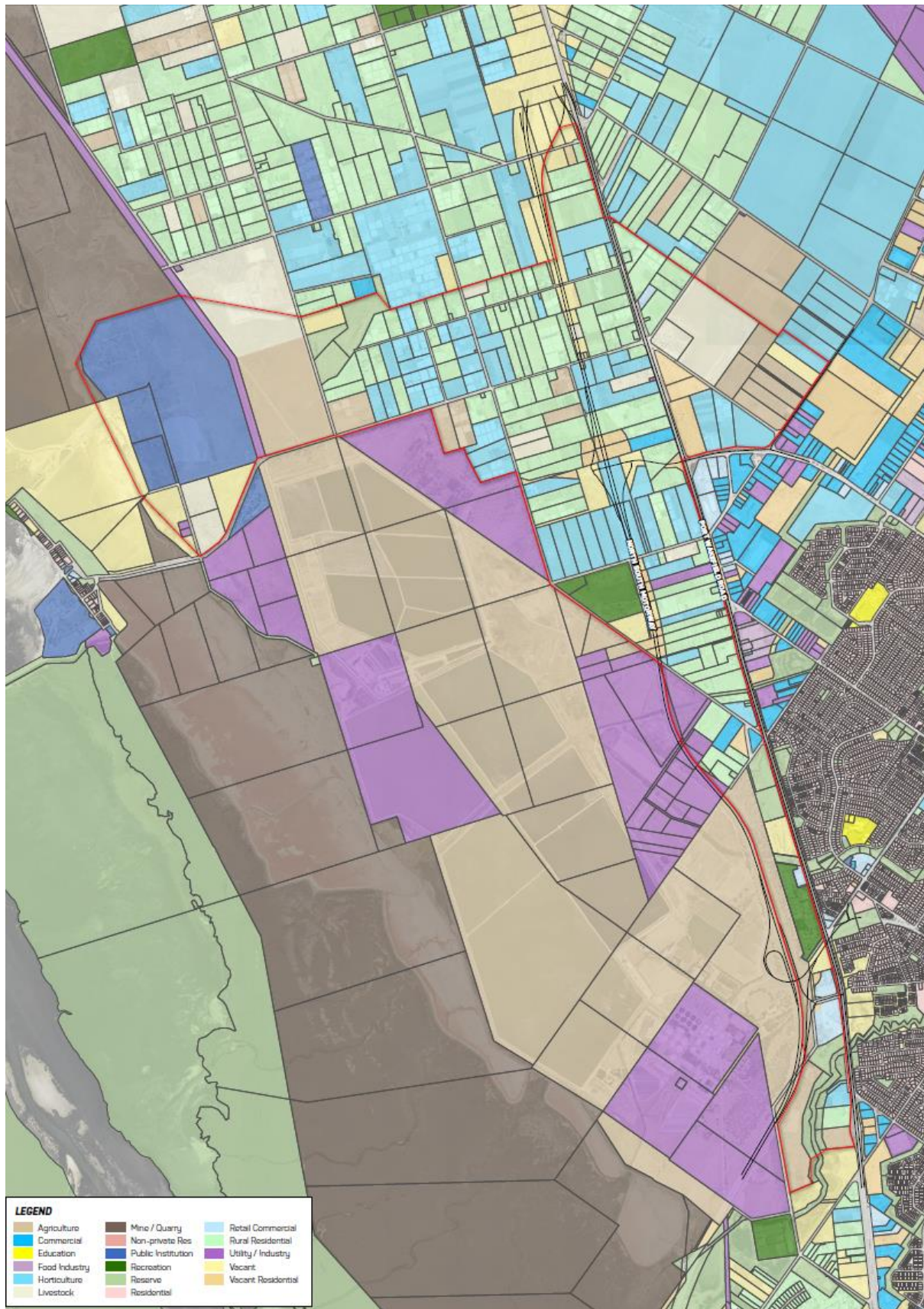
The buffers to the SA Water Treatment Plan provide opportunities for landscaping, vegetation, stormwater detention and channels and pedestrian / cycle corridors, all subject to SA Water agreement to the positioning of those facilities on their land and require early consultation with SA Water to inform the final alignment of these critical corridors as part of the adopted Strategic Growth Framework.

The existing shooting club and go-karts are also major noise producers that require separation from sensitive receivers and could provide opportunities for a further intensification of this form of recreational activity that can be difficult to locate within proximity of urban areas.

Having regard to the foregoing, most of the Study Area is suitable for industrial, commercial and other non-sensitive employment land uses. The only area of the study area that may be suitable for more sensitive land uses, would be the area north of Waterloo Corner and west of the North South Motorway, which is characterised by horticultural uses, that have not been diluted by employment activities and the configuration could support reasonable separation for any possible future sensitive land uses. A staged approach to rezoning of this Study

Area could propose to protect this area from any creep from employment activities, such as to protect a future decision in the medium to long term for the highest and best use of this land, either for further employment land or for a more sensitive land use such as residential. This decision does not need to be made in the short term if the existing land use is reinforced and protected.

Figure 13. Land Use



2.11. Capital Value to Site Value Ratio

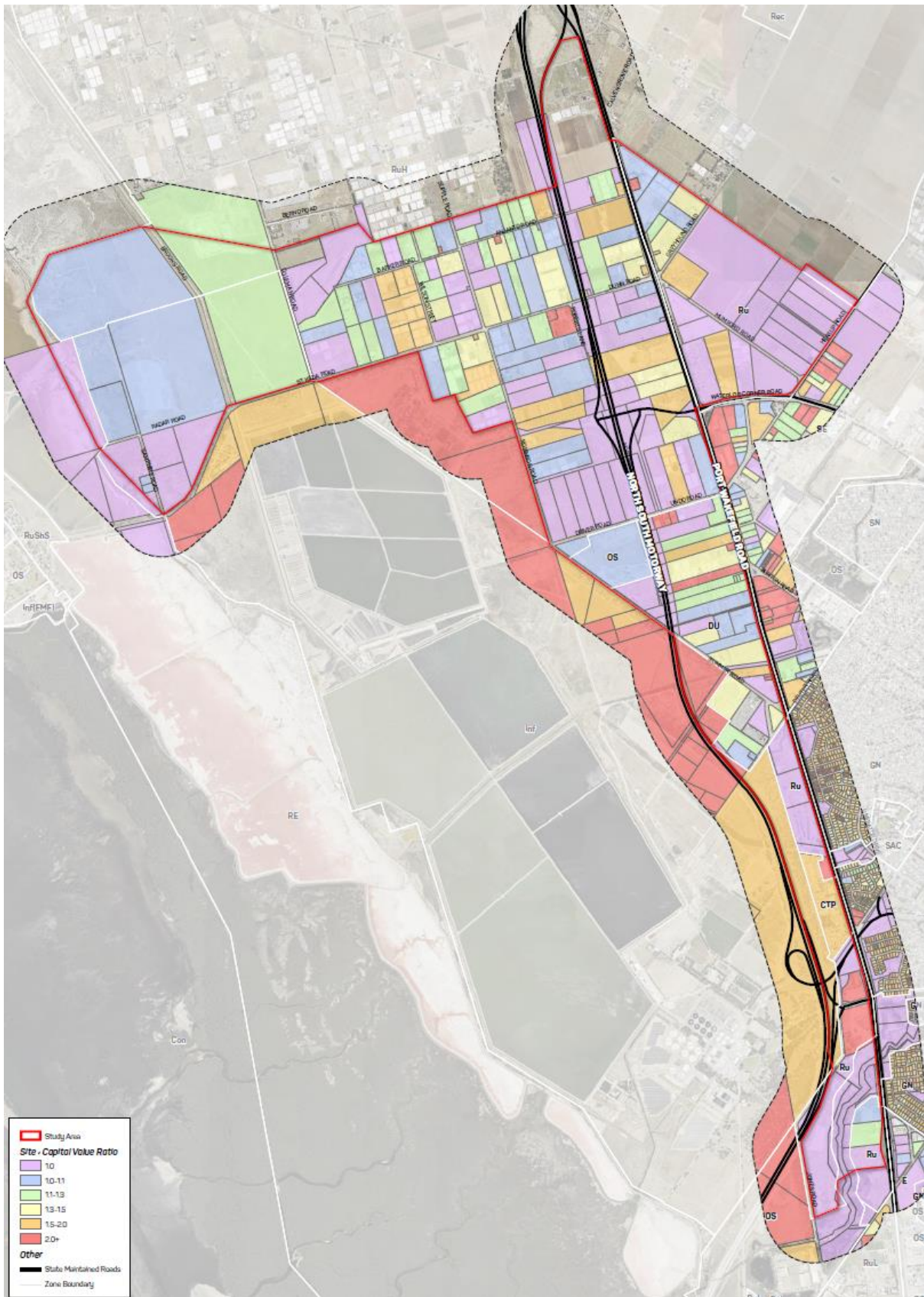
The capital value to site value ratio identifies the value of improvements on individual land parcels relative to the unimproved value of the site. Where the value is low (approaching 1.0), there are no (or little) improvements of value on the site and therefore are, at least theoretically, a greater likelihood of being redeveloped.

The following plan presented in Figure 14 identifies large areas of unimproved land in the following locations:

- Vacant land west of the Little Para River;
- Vacant land south of Jobson Road, along Port Wakefield Road;
- The area between Port Wakefield Road, Heaslip Road, the Council boundary and Greyhound Road; and
- A scattering of properties east and west of the North South Motorway.

The highest Capital Value to Site Value Ratios are typically, though not exclusively, associated with the improved land parcels near Port Wakefield Road, small residential properties, the Caravan Park and a selection of agricultural / horticultural properties with extensive glasshouses where the landowner's investment in their land may identify that further redevelopment in the short term may be unlikely.

Figure 14. Capital Site Value Ratios

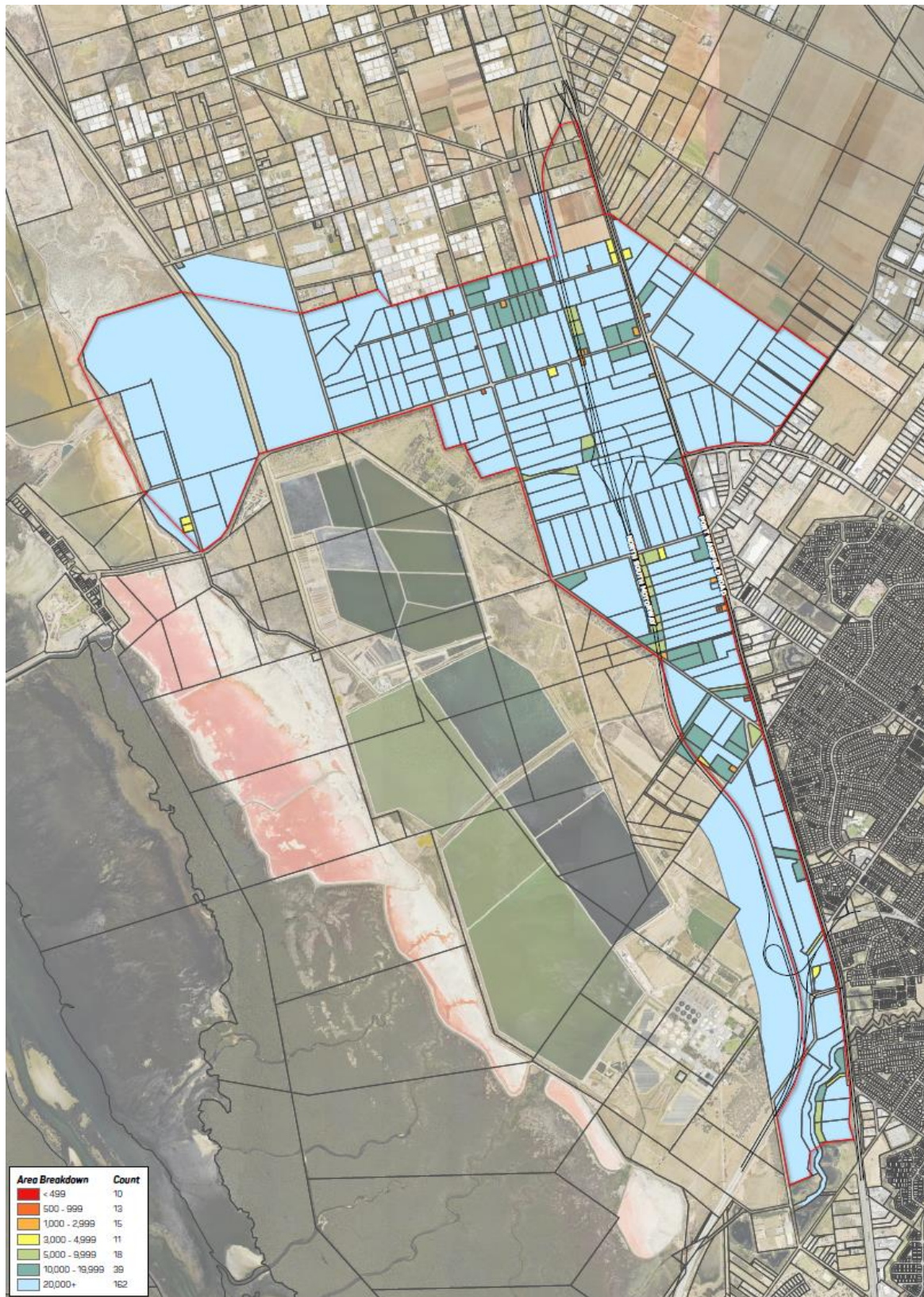


2.12. Property Size

The vast majority of the Study Area comprises lots greater than 2 hectares in area, with many approaching 4 hectares. This existing property size provides sites suitable for large scale commercial or industrial development or the propensity for subdivision into smaller parcels as part of a comprehensive redevelopment, to support a transition to a more intense employment land use.

The long narrow nature of many allotments and the undesirability of creating a series of narrow cul-de-sac to serve these properties lends strong weight to the need for comprehensive planning of a new public road network that facilitates consolidated access to existing roads rather than individual road access to every allotment, which is a key consideration of the recommendations section of this Strategic Growth Framework

Figure 15. Property Size



2.13. Commercial Exposure

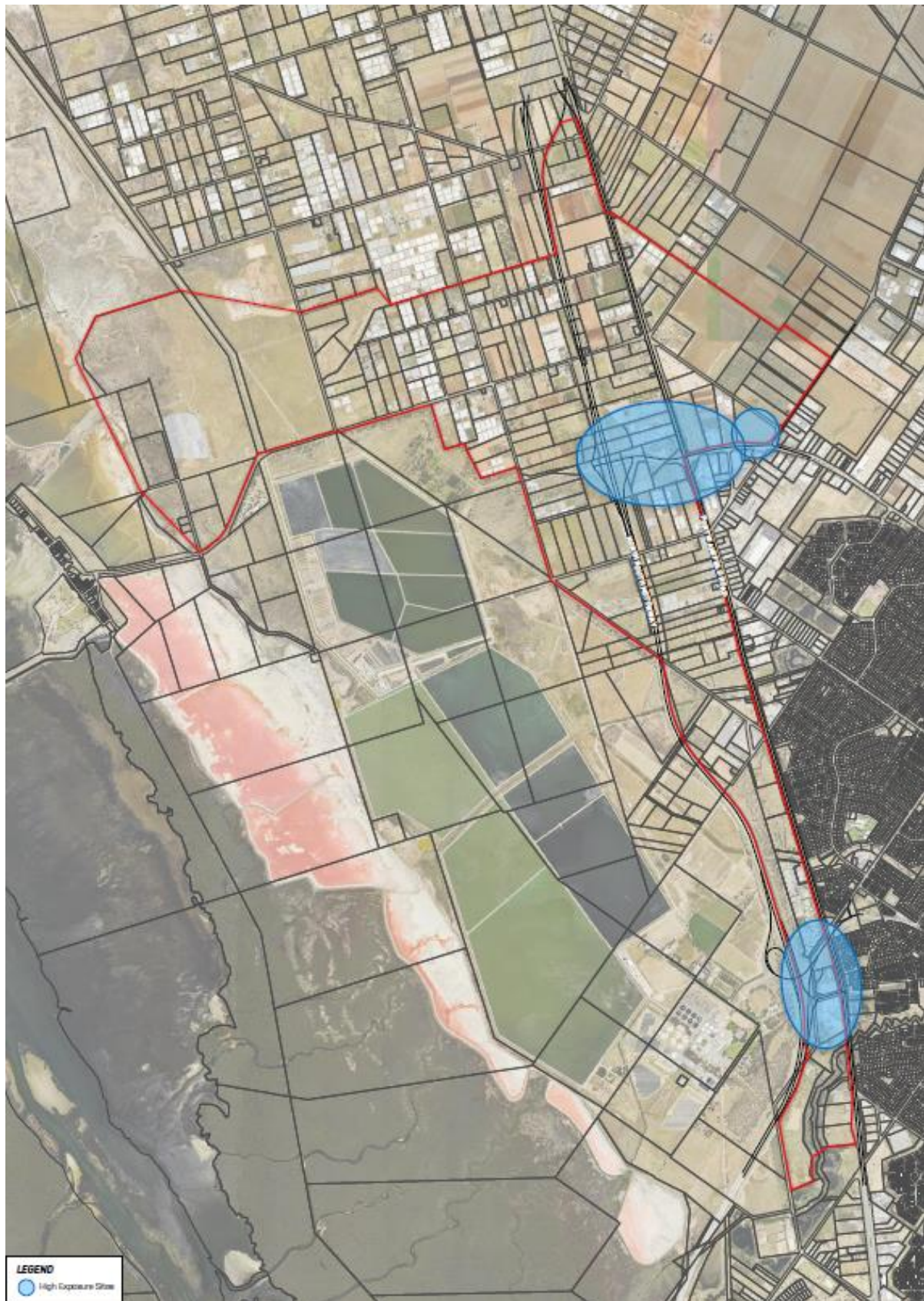
Many properties within the Study Area have strong visual exposure to the high traffic volumes along the North South Motorway and Port Wakefield Road. Heaslip Road, Waterloo Corner Road and Bolivar Road also provide good exposure but to lower volumes of traffic.

High visual exposures, combined with high accessibility to the major network occur at the following intersections:

- North South Motorway – Waterloo Corner Road
- North South Motorway – Bolivar Road – Hodgson Road – Port Wakefield Road; and
- Waterloo Corner Road – Heaslip Road.

These locations provide increased potential for higher intensity commercial development reliant upon good exposure and accessibility, identified in the following figure.

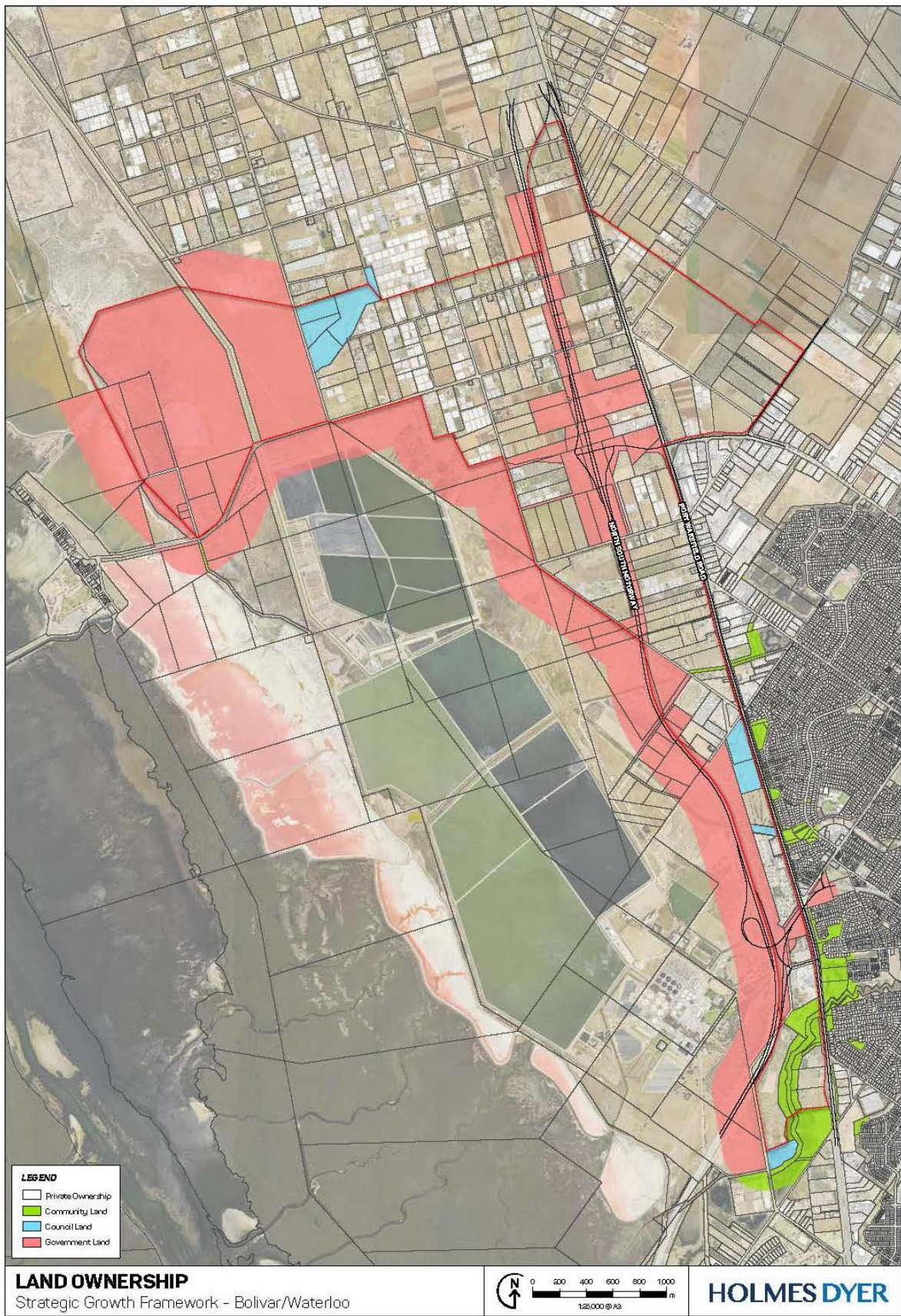
Figure 16. Commercial Exposure



2.14. Land Ownership

An analysis of land ownership at a high level has been undertaken over the Study Area. As a result of the recent construction of the North South Motorway that effectively dissected a number land parcels and road corridors along the length of the study area which with the compulsory acquisition process that has been undertaken by the Department of Transport there are a significant number of part parcels within Government Ownership. The land ownership mapping has also identified Council owned land, including any Council land that has a community land classification which places some limitations on development.

Figure 17. Land Ownership Plan



3. Metropolitan Adelaide Employment Land Market

To inform the highest and best use of land, timing and staging of land use proposed within the Strategic Growth Framework, Holmes Dyer have undertaken a comprehensive review of the employment land market, at a regional level, with key findings as they relate to the recommendations within the Strategic Growth Framework set out in the following section.

3.1. Economic and Market Overview

Adelaide and South Australian markets in all property sectors have traditionally operated on a low growth but low volatility basis, providing for predictability in investment activities. Growth levels have been impeded by relatively low population growth rates and, particularly the net out migration of young professional workers to the Eastern States (albeit, that population has continued to grow and has accelerated in recent years.) Higher yields have tended to offset the lower capital growth rates.

Emerging from a period of uncertainty because of the COVID19 pandemic, many sectors have undergone a rapid shift in business activity due in part to rising costs and changes to consumer behaviour. Retail most notably experienced a sharp move away from bricks and mortar at the beginning of 2020, as purchasing trends increasingly shifted online. In an industrial context traditional manufacturing sectors in Adelaide have shrunk over the last few years, however a surge in logistics, technology and value add based industries for local manufacture has seen a peak in industrial land sales and leasing rates, following a nationwide trend. The *Colliers 2022 Industrial Investment Review* shows a re-weighting of capital towards the industrial and logistics industry with groups looking to capitalise on geographically constrained markets near densely populated areas. This is a locational advantage characteristic that the land west of Port Wakefield Road is closely aligned with.

There are several Federal or State Government initiatives expected to stimulate economic activity in Adelaide, within the industrial sector, these include:

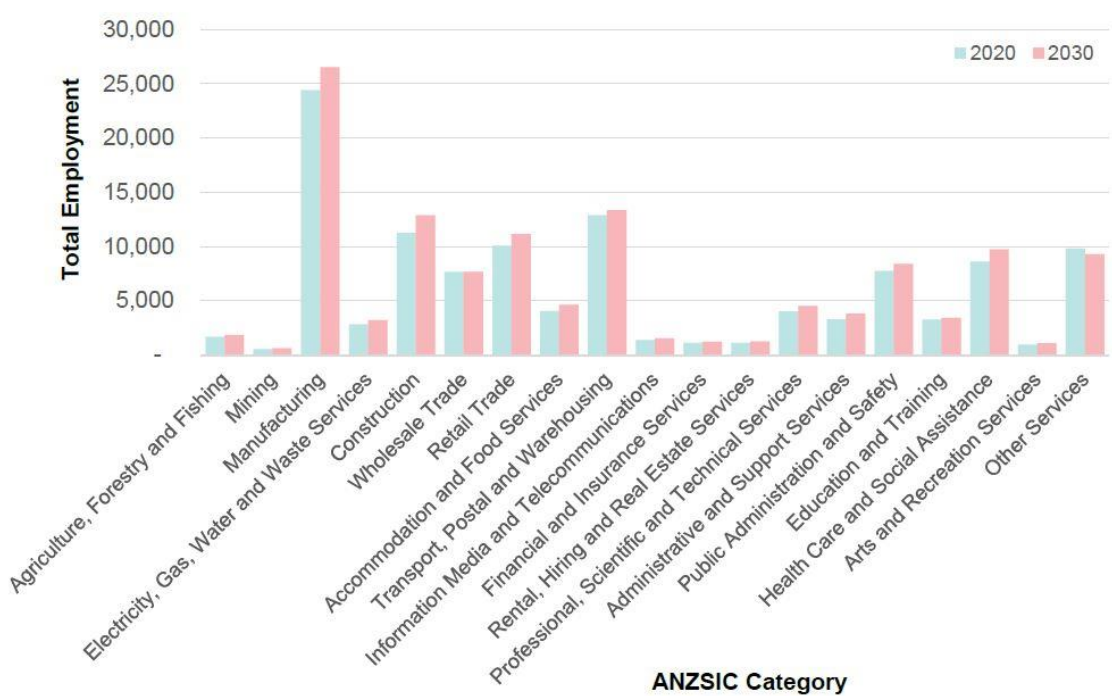
- The submarine and ship building programs, creating opportunities for professional services, construction, precision manufacturing and supply chain support activities,
- The establishment of the Australian Space Agency with potential for professional, research and technology services,
- the Adelaide City Deal, with a review of the implementation plan due in 2022 which is intended to grow Adelaide's innovation economy and promote population growth,
- The medical sector and the renewable energy sector represent further growth opportunities.

3.2. Industrial and Economic Trends

For several years there has been a clear shift occurring away from Australia's traditional forms of industrial industries including manufacturing and low-productivity primary activities towards advanced manufacturing and

knowledge intensive activities which have contributed to the sustained productivity gains that characterise Adelaide’s economic development over the last decade. Rapid growth in technology and e-commerce has reshaped the demand for industrial real estate in Adelaide. The South Australia Land Supply Report, 2021 is the most current data available that forecasts the likely trend in employment by industry out to 2030, by Australian New Zealand Standard Industrial Classification (ANZSIC). The key forecast tables have been reproduced below, that demonstrates the forecast increase in manufacturing, construction, retail trade, transport and warehousing activities.

Figure 18. Employment by Industry 2020 – 2030



Source: Land Supply Report, 2021

Logistics, transportation, and warehousing require large storage locations to hold, process and distribute greater quantities of products. Smaller allotment sizes provide co-location opportunities for supporting operators that realise benefit from shared infrastructure. Salisbury has a significant supply of well-located future employment land, much of which is contained within Bolivar and Waterloo Corridor the subject of this Strategic Growth Framework that could provide traditional warehousing, last mile hub, retail processing and storage locations capitalising on Salisbury’s locational advantage with access to major transport infrastructure.

The widespread scarcity of well serviced and well located commercial and industrial real estate paired with tight vacancy rates has driven up land values and rental rates in Adelaide, with nationwide industrial rental values at their highest rate in 25 years, according to reports by JLL (Industrial Market Overview, 2022).

The evolution of traditional manufacturing estates is the development of eco industrial parks. In Australia cluster based eco industrial parks are being considered by government bodies as tools to achieving competitive and sustainable economic development. Industrial parks simultaneously support various industrial and commercial activities by providing centralised infrastructure, capitalising on the co-location of businesses and operations. Industrial parks are often blends of various typologies such as technology, innovation, research, higher education, manufacturing, transport and industrial processes. The potential for creation of an eco-industrial park, was identified by the City of Salisbury as a specific area of interest within the study area. As a result, a specific chapter on this opportunity is included within this framework, within the following Section 4 -Eco-Industrial Park (EIP).

Industrial demand in Metropolitan Adelaide is strongly influenced by locational and site characteristics, namely:

- Access to superior transport connectivity, particularly road transport
- Large site availability and economies of scale
- Vacant land that can support development of new, custom premises providing operational optimisation
- Flat land
- Land Affordability
- Service infrastructure capacities and cost-effective augmentation charges
- 24/7 operation capability
- Agglomeration of vertically linked industries and 'like' industries
- Avoidance of conflict with non-industrial activities that may impact on operational efficiency.

3.3. Adelaide Industrial Property Market

The Strategic Growth Framework Bolivar and Waterloo Corner Study Area is located primarily within the Inner North Market (*City of Port Adelaide (part), City of Salisbury, City of Tea Tree Gully*) with the part of the study area land falling within the City of Playford considered part of the Outer North Market (*City of Playford (part), Town of Gawler, Barossa Council (part) and Adelaide Plains (part)*).

The Inner North Market and Adelaide West Market (*City of Charles Sturt, City of Port Adelaide Enfield (part) and City of West Torrens*) are widely recognised as the primary industrial markets of metropolitan Adelaide. The following table summarises average land costs, rents and yields for each of the major industrial markets in metropolitan Adelaide, as of March 2020. This is the most current report available at the time of writing. While sales values and rentals may have increased since then, but the percentage difference between different market locations would be expected to be maintained.

Table 6. Land Costs, Rents and Yields for Major Industrial Markets

Metric	Locations					
	Adelaide West	Inner North	Outer North	LeFevre Peninsula	Inner South	Outer South
Land						
Avg <5,000 sqm	\$433/m2	\$233/m2	\$81/m2	\$110/m2	\$383/m2	\$98/m2
Avg 1-5 ha	\$270/m2	\$145/m2	\$61/m2	\$83/m2	\$253/m2	\$60/m2
Rents						
Avg Prime	\$122/m2	\$97/m2	\$71/m2	\$100/m2	\$115/m2	\$75/m2
Avg Secondary	\$77/m2	\$70/m2	\$48/m2	\$70/m2	\$75/m2	\$50/m2
Yields						
Avg Prime	6.50% - 7.25%	6.50% - 7.25%	7.50% - 8.25%	7.00% - 8.00%	6.75% - 7.50%	7.75% - 8.75%
Avg Secondary	8.00% - 8.50%	7.75% - 8.75%	8.75% - 9.75%	8.75% - 9.75%	8.00% - 9.00%	9.00% - 10.00%

Source: Knight Frank, Adelaide Industrial Market Report, 2020

The Outer North market delivers the greatest potential for future floorspace growth, due to the significant volume of greenfield industrial land and deferred industrial land that could be bought to market through rezoning across Greater Edinburgh Parks. This Outer Northern land would be especially suited for large scale logistics facilities, with direct Expressway access to the Port and to the railway freight yards (at Dry Creek) and the intermodal at Penfield.

The land within the Strategic Growth Framework represents a significant opportunity to bring new employment land supply to market within the Inner North. However, given the extent of employment land within the Outer North, there is an opportunity for the City of Salisbury to consider the 'highest and best use' of land within the study area that could, if interfaces can be appropriately managed, include consideration of alternate land uses.

3.4. Industrial Land Demand and Supply

In terms of the overall theoretical supply of employment land identified within the Land Supply Report, there is ample land for anticipated demands and growth of Metropolitan Adelaide over the next twenty years. However, as one introduces the potential constraints on that land including, but not limited to:

- Land ownership pattern that is not always conducive to optimising development yields,
- The withholding of land parcels from the market by individuals who have alternative land use intentions,
- The domino effect that may have on constraining access to adjacent land parcels, the lack of availability of key trunk infrastructure, notably stormwater and road access,
- The need to reserve space for future infrastructure
- The need for buffers to be created to more sensitive land uses or activities that may interface,

These factors result in this theoretical land supply being reduced to a smaller practical land supply. It is a widely held industry view that around twice the area required for a particular land use should be zoned for that purpose to make suitable allowance for all the constraints acting upon the release and development of that land.

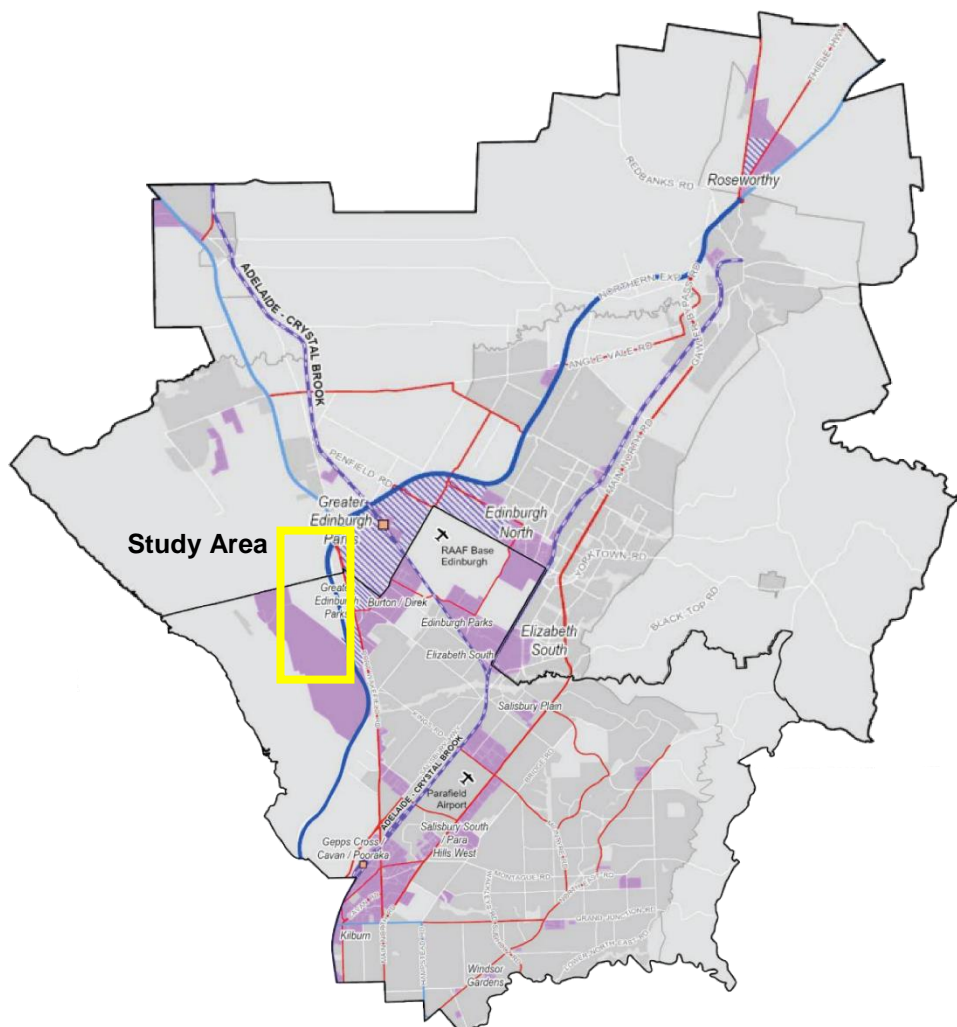
The need for additional land is exacerbated by any imposition imposed by either the developer or because of the adopted zoning, that may constrain development of this land for a specific market segment purpose. For example, Technology Park at Mawson Lakes being delivered by Renewal SA has a strict employment land target market limited to innovative, high technology organisations. Within the Adelaide market, there are only limited companies that meet these criteria and as such the timeframes for delivery of this land to market typically extend out from more open employment land areas without these constraints. In the case of the Strategic Growth Framework Bolivar Waterloo Corner, there is a potential for Council to consider the business case to specifically differentiate and limit sites for a specific type of use, timing for rezoning as part of considering the highest and best use of the land to return job growth and economic benefit to the Salisbury Community across the next 10-20 years. Some market segments that Council could consider may include:

- Defence related industry focus

- Noise generating and risk-taking recreation activities, building on established recreation activities within the Open Space Zone that could expand to attract complementary commercial components
- An Eco-industry Park
- Further, the zoning and precinct planning that is adopted as part of the Strategic Growth Framework could support the attraction of employment clustering of activities, such as:
 - Offices, knowledge workers, high commercial content activities and support services
 - Transport, warehousing, distribution, logistics
 - Service trade premises, petrol filling stations
 - Showrooms, quasi-retail activities, bulky goods
 - Open yards, storage areas

Similarly, land supply should be monitored to ensure that demand is being met and that prices are not rising because of a scarcity factor and that blockages in the supply chain are being identified and rectified expeditiously.

Figure 19. *Outer and Inner Northern Employment Lands Supply from Land Supply Report 2020*



On evaluation of the State Government Land Supply Reports, there is currently an assumption in employment land modelling that large sections of the study area would remain in their current land use, with only the Deferred Urban sections assumed to be part of the future employment land supply. The Strategic Growth Framework Bolivar Waterloo Corner has identified a significant additional area of potential future land supply, that may be able to be bought online to meet future demand needs for the Adelaide Metropolitan Area, however the realisation of this opportunity would likely require State Government, Authorities, Council and Private Landowner investment to deliver the necessary infrastructure upgrades to support this development intensification. Once endorsed at a strategic level the Strategic Growth Framework Bolivar Waterloo Corner will inform the next iteration of the State Government Regional Planning and subsequent land supply report modelling. This opportunity has the potential to provide Salisbury with a mix of new land supply to meet the needs of their community and drive economic growth over 35 years.

There are many factors impacting upon that demand prediction and, accordingly, the monitoring of demand levels should be undertaken by Council regularly as a means of informing the decision-making processes that will deliver the supply of land to the market, and flexibility should be built into the Strategic Growth Framework, to enable the City of Salisbury to pivot and respond to any new market demand or opportunities that may arise, with decisions on any individual site or development proposal able to be informed by the overall structure presented in this Strategic Growth Framework.

3.5. Analysis of Trends and Prediction of Demand

To predict the demand for employment land and as a result the staging, timing and total years of supply for the land identified within the Strategic Growth Framework, Holmes Dyer have analysed the commercial and business property sale data and vacant land sale data dating back to 2008 up until January 2022 for the turnover and value of property in the Inner and Outer Northern Markets of Adelaide. The Outer Northern Market has been included in this analysis as it is considered to form the available land supply market, noting that the locational advantages of Salisbury with its proximity to the Adelaide CBD and Port Adelaide, major workforce markets and transport infrastructure would likely make this land more attractive and as such be consumed at a faster rate, subject to land pricing, land sizing, development cost and configuration. However, this investment decision would be ultimately informed by the individual business needs and timing for rezonings of employment land in the outer north.

The combined inner and outer northern markets have seen a total of 197 properties sold within the last 15-year period with generally an even turnover of commercial and business properties compared to vacant land. The following tables summaries sales activity over the period 2008-2022 (January) for the following sectors, separated by year of sale and size of land parcel:

- Improved land sales (commercial and business sales)
- Activity within Edinburgh Parks, Vicinity and Greater Edinburgh Parks
- Significant individual site sales

Data includes commercial, industry and business sales across both vacant and improved between the years 2008 to January 2022. For this analysis, commercial activity that includes retail trade, sales within residential zoned locations or retail shopping locations have been removed. Holmes Dyer have excluded sales that do not appear to have occurred through standard commercial negotiation, for example non-monetary transactions or sales with a value of less than \$10,000 and therefore would not be market representative of real land value however, there remain disparities in the values of some land and improved land property transactions.

Table 7. Salisbury and Playford Commercial and Industrial Sales by Year 2008 – 2022

Commercial and Industrial Sales in Salisbury and Playford 2008 - 2022 (Jan) by Year			
Year	Count	Median Land Size (m ²)	Median Sale Price
2008	46	2,131	\$594,644
2009	46	2,866	\$437,000
2010	52	1,758	\$657,250
2011	62	1,821	\$403,750
2012	52	1,598	\$605,000
2013	73	2,887	\$632,500
2014	73	2,503	\$621,500
2015	94	2,010	\$592,000
2016	109	2,143	\$623,333
2017	102	2,126	\$591,750
2018	115	2,665	\$660,000
2019	133	2,655	\$660,000
2020	133	3,673	\$570,000
2021	197	2,941	\$730,000
2022 (Jan)	9	2,000	\$1,050,000
Total	1297	2,330	\$623,333

Source: CoreLogic, 2022

The above analysis has confirmed that the commercial and industrial sales have been relatively consistent in median land size and sale price; however, the total number of sales has increased over the last 5 years.

To better understand if this sales growth trends has occurred equally across the Inner and Outer North or can be identified to a specific Local Government Area, the data has been split in the following tables to break out the commercial and industrial sales in the City of Salisbury and then the City of Playford.

Table 8. Commercial and Industrial Sales in Salisbury 2008 – 2022 (Jan) by Year

Commercial and Industrial Sales in Salisbury 2008 - 2022 (Jan) by Year			
Year	Count	Median Land Size (m ²)	Median Sale Price
2008	34	2,186	\$665,000
2009	38	3,383	\$467,500
2010	40	1,803	\$676,000
2011	47	2,002	\$505,000
2012	35	2,999	\$600,000
2013	47	2,424	\$648,000
2014	51	2,628	\$825,000
2015	67	2,518	\$750,000
2016	78	2,271	\$800,000
2017	71	2,350	\$715,000
2018	87	2,717	\$675,000
2019	103	2,717	\$675,000
2020	104	4,440	\$629,750
2021	148	2,985	\$880,000
2022 (Jan)	6	1,822	\$1,295,344
Total	957	2,503	\$700,000

Source: CoreLogic, 2022

Table 9. Commercial and Industrial Sales in Playford 2008 – 2022 (Jan) by Year

Commercial and Industrial Sales in Playford 2008 - 2022 (Jan) by Year			
Year	Count	Median Land Size (m ²)	Median Sale Price
2008	12	2,041	\$366,000
2009	8	1,923	\$252,500
2010	12	1,621	\$241,227
2011	15	1,700	\$253,275
2012	17	300	\$907,500
2013	26	3,164	\$553,750
2014	22	1,820	\$336,450
2015	27	1,522	\$287,500
2016	31	2,000	\$340,000
2017	31	1,780	\$375,000
2018	28	2,076	\$590,000
2019	30	3,572	\$770,000
2020	29	1,683	\$770,000
2021	49	2,453	\$435,000
2022 (Jan)	3	2,000	\$450,000
Total	340	1,905	\$387,500

Source: CoreLogic, 2022

The comparison between the sales in Salisbury and Playford indicate that there has been strong growth in commercial and industrial sales activity in Salisbury since 2019 with a notable lift in median sale price in recent years. Median land sizes have remained relatively constant peaking in 2020 at 4,440m². Salisbury has recorded more commercial and industrial sales during this period and consistently larger sites at higher values than sales recorded in the City of Playford.

Holmes Dyer have further broken down the available data to separate out the sales across this 15-year period that have occurred within the Strategic Growth Framework Study Area, as outlined within the following Table 10

Table 10. Commercial and Industrial Sales in Study Area 2008 – 2022 (Jan) by Year

Commercial and Industrial Sales in Strategic Growth Framework Study Area 2008 - 2022 (Jan) by Year			
Year	Count	Median Land Size (m ²)	Median Sale Price
2008	3	10,190	\$400,000
2009	1	12,140	\$100,000
2010	3	39,500	\$650,000
2011	4	33,640	\$1,150,000
2012	2	1,397	\$240,000
2013	4	17,115	\$263,500
2014	4	22,165	\$462,500
2015	6	30,415	\$530,000
2016	6	11,450	\$487,500
2017	7	26,200	\$525,000
2018	8	29,040	\$432,500
2019	7	20,230	\$461,000
2020	5	28,300	\$460,000
2021	9	20,230	\$700,000
2022 (Jan)	-	-	-
Total	69	20,590	\$487,000

Source: CoreLogic, 2022

This study area, which covers a total area of 950 hectares has seen 69 commercial and industrial sales. The sales vary greatly in median land size and median sale price with this fluctuation created by the low sale count. Typical lot sizes are around 2-3 hectares with little subdivision occurring which would be a result of the current zoning provisions and land use patterns. Significant amounts of vacant land along the North-South Motorway and Port Wakefield Road and landowner and future developers speculating on the locational advantages of this land and potential for alternate zoning to support an intensification of development has contributed to the sale of large areas of land in the Study Area. This analysis demonstrates that there is continued turnover of property in the identified study area, within the current zoning configurations which would be expected to significantly increase once a future strategic direction and zoning framework is put in place by the City of Salisbury to provide increase investment certainty for potential developers and current landowners.

Holmes Dyer has also considered the land size for commercial and industrial sales across both the Local Government Area (LGA) of Salisbury and Playford which identified a positive skewed distribution, meaning that majority of sales across the 15-year period were within the middle or lower quartile or low range of the spread of land size values., reflected on the three different tables below.

Table 11. Commercial and Industrial Sales in Salisbury and Playford 2009 – 2022 (Jan) by Land Size

Commercial and Industrial Sales in Salisbury and Playford 2008 - 2022 (Jan) by Land Size			
Land Size Categories (m ²)	Count	Median Land Size (m ²)	Median Sale Price
<1999	569	699	\$335,000
2000 - 4999	346	3,016	\$728,750
5000 - 9999	132	6,634	\$1,003,250
10,000 - 19,999	107	13,000	\$1,579,600
20,000 +	143	35,270	\$2,105,263
Total	1297	2,330	\$623,333

Source: CoreLogic, 2022

Table 12. Commercial and Industrial Sales in Salisbury 2008 – 2022 (Jan) by Land Size

Commercial and Industrial Sales in Salisbury 2008 - 2022 (Jan) by Land Size			
Land Size Categories (m ²)	Count	Median Land Size (m ²)	Median Sale Price
<1999	392	535	\$385,000
2000 - 4999	271	3,005	\$780,000
5000 - 9999	118	6,579	\$1,008,250
10,000 - 19,999	79	12,830	\$1,716,000
20,000 +	97	32,060	\$3,025,000
Total	957	2,503	\$700,000

Source: CoreLogic, 2022

Table 13. Commercial and Industrial Sales in Playford 2009 – 2022 (Jan) by Land Size

Commercial and Industrial Sales in Playford 2008 - 2022 (Jan) by Land Size			
Land Size Categories (m2)	Count	Median Land Size (m2)	Median Sale Price
<1999	177	965	\$269,000
2000 - 4999	75	3,026	\$550,000
5000 - 9999	14	6,807	\$942,387
10,000 - 19,999	28	13,500	\$818,500
20,000 +	46	40,490	\$1,105,750
Total	340	1,905	\$387,500

Source: CoreLogic, 2022

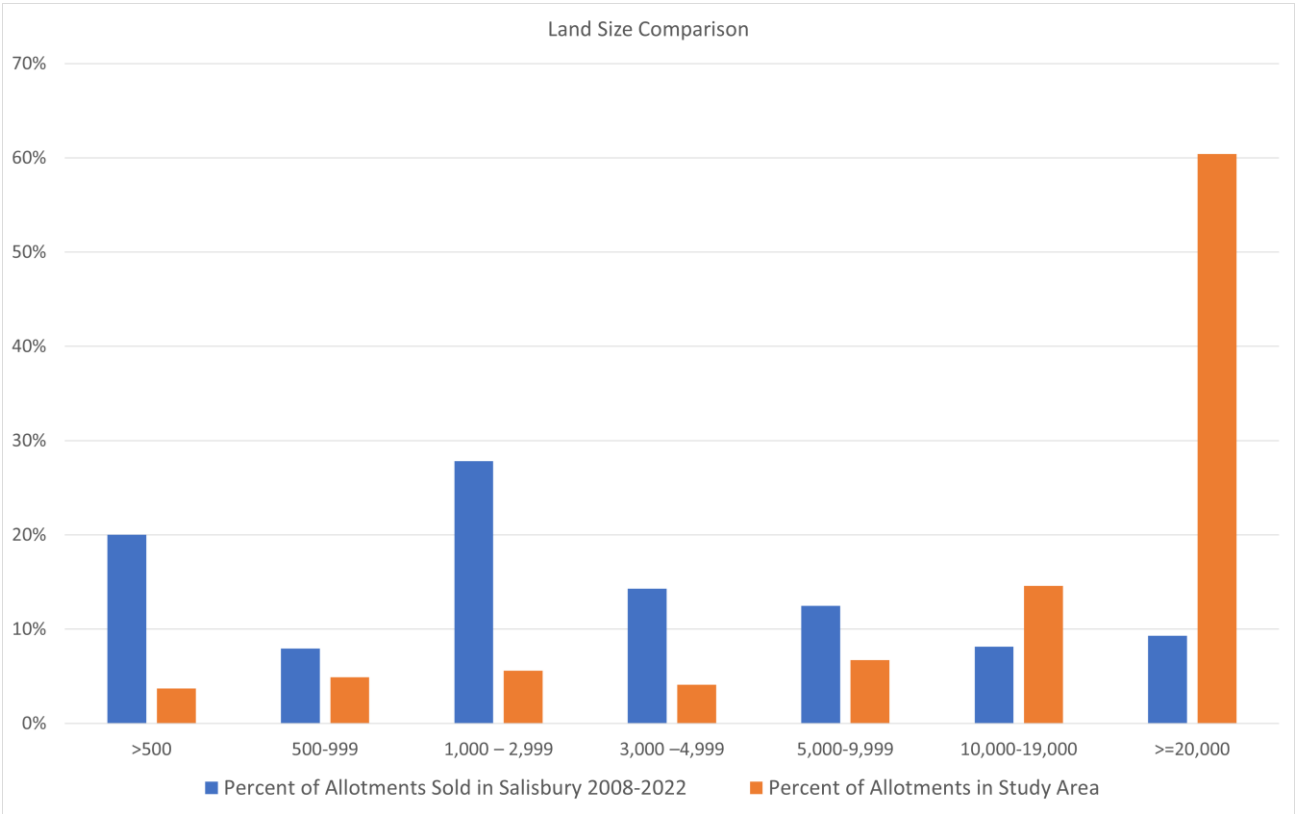
This finding is similar for both LGAs when looked at exclusively which show most sales being on lots of less than 5000m2. The median sale price per square metre from commercial and industrial sales across both City of Salisbury and City of Playford was \$268/per sqm when you divide the Median Sales Price with the Median Land Size. This figure is notably higher than the \$253/per sqm in the Inner North and \$86/ per sqm for the Outer North as quoted by Knight Frank in their 2020 Adelaide Industrial Market report presented in Table 6 of this report. This variation may be due to the inclusion of commercial sales during 2020 and 2021 which saw an increase in total sale numbers retaining a high median sale price.

This analysis identifies that the City of Salisbury saw a large proportion of sales on land parcels less than 5000m2 in size, accounting for 70% of all commercial and industrial sales during the period of 2008 to January 2022. Over 10% of sales were for lots greater than 2 hectares in area. Sales greater than 2 hectares accounted for significantly more land than the combined land size of all sales under 2 hectares.

Current market demand, from analysing the sales data over the last 15 years, identified demand for both large and smaller sites to accommodate the diversity of commercial and industrial uses and activities. Therefore, the provision ongoing as part of any zoning change within the Strategic Growth Framework to deliver a mix of land sizes will be necessary to meet market demand. The locality of the study area, along key transportation routes and within rural horticulture and infrastructure zoned areas saw significantly more sales of sites 20,000m2 or greater, potentially suitable for warehousing and distribution centres. The analysis of the same figures for the City of Playford demonstrate significantly lower transaction volumes and sales relative to Salisbury but a similar cross-section of allotment sizes is apparent.

The figure below provides a comparison between the size of commercial and industrial allotments sold in the whole of Salisbury and that transacted in the study area over the period 2008-2022.

Figure 20. Land Size Comparison between City of Salisbury and Study Area



Source: CoreLogic, 2022

Not surprisingly, improved employment land in Salisbury has been subdivided into smaller lots than currently exist in the study area. The number of larger allotments in the study area provides opportunities for a future intensification of activity in the study area through increased subdivision support while the existing large allotments will provide the ability for the study area to attract the larger scale developments requiring larger landholdings.

3.6. Demand Forecast in the Study Area

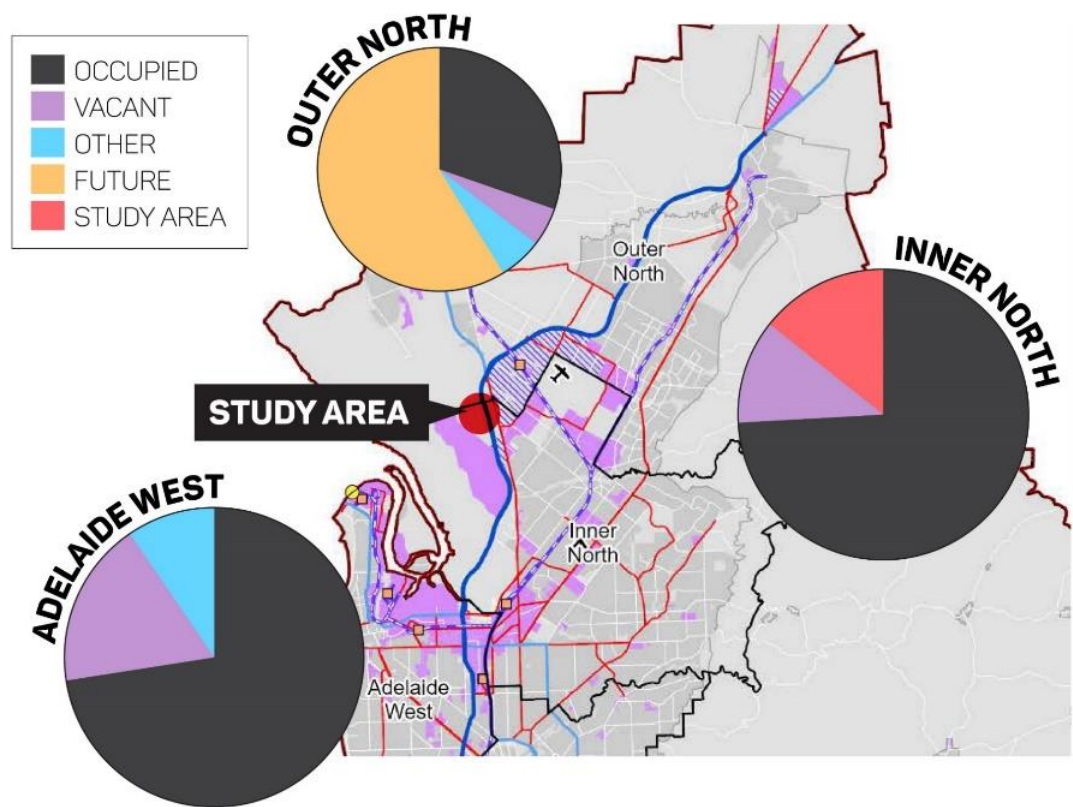
In the last 5 years, 76 hectares of land within the study area for the Strategic Growth Framework has seen by development applications or development enquiries. This enquiry can be extrapolated to represent a likely ongoing demand for approximately 15 gross hectares per annum of employment land within the study area could be conservatively forecast.

The total study area covers an area of 950 hectares of land, if you exclude transport corridors, open space, the caravan & tourist park zone and those individual sites with existing commercial improvements i.e., petrol stations and major commercial buildings approximately 508 hectares of potential developable land could be available for

rezoning for employment/commercial land use. Using the estimated annual demand within this area of the City of Salisbury of 15 hectares per annum, this would equate to a land supply of 34 . However, the impact of a one-off major development could change this timing equation as a major development could act as an anchor attractor to bring forward further commercial and industrial businesses and encourage the take up of land in the City of Salisbury and potentially broader inner and outer north market dependent on the type of major business.

Also of note is that the transaction of vacant commercial and industrial land in Salisbury over the period 2008-2022 (January) as evidenced by CoreLogic, has averaged around 18 ha per annum but with a significant upsurge in 2020 (22ha) and 2021 (38ha), noting that 18 ha of net land could require up to 30 hectares of gross land to allow for roads, stormwater, open space and infrastructure delivery to serve the resulted allotments. Counterbalancing this demand is the potential for new (and less expensive) employment land supply in future Strategic Employment land in areas to the north of the study area within the City of Playford that will likely be bought to the market across a similar period to the Strategic Growth Framework Bolivar and Waterloo Corner. The following figure highlights the scale of the unused Strategic Employment land in the Outer North, refer to the orange colour in the below pinwheels.

Figure 21. Regional Context, Employment Land



Source: Holmes Dyer, 2022

Holmes Dyer also consider it likely that following the adoption of the Strategic Growth Framework and any associated Code Amendments to rezone the land there would be initial surge in applications and development

activity reflecting the pent-up demand currently constrained by the existing restrictive zoning. There is a high degree of confidence that this surge would likely occur, given the existing level of speculative investment and proponent led Code Amendments that Council is seeing, with the market already identifying the significant locational advantages that this land provides.

Additionally, as the availability of existing employment zoned land holdings in other areas of Salisbury is expended, this should focus greater attention and development within the study area in the latter timeframe of the Strategic Growth Framework, which is considered as part of the staging and prioritisation of the recommendations section of the Strategic Growth Framework

Having regard to the above analysis for the purpose of informing the staging and forecast timeframes for the potential land available within the Strategic Growth Framework forgoing matters, we anticipate a take up rate of 15-25 ha/pa and a development timeline of between 20-35 years.

3.7. Economic & Market Review Key Findings to inform the Strategic Growth Framework

The industrial market overview and analysis set out in Section 3.0 highlights the following key points:

- The market is cyclical and has traditionally demonstrates long periods of low demand and low growth interspersed with periods of high demand and rapid price growth, with one of these cycles of increased demand being experienced across the last five years.
- The market is currently in strong upswing with a lack of supply of market ready industrial and commercial and being widely reported.
- Current market statistics show a demand for mixed allotment sizes with 70% of commercial and industrial sales in Salisbury on lots less than 5000m² and 10% for lots greater than 2 hectares.
- Transport, storage and logistic facilities have been strong performers since the advent of Covid 19, albeit this growth was already emerging prior to the Pandemic driven by online shopping, which are well suited to the highly accessible land located within the Study Area given the transport infrastructure that is available to service this precinct.
- Other sectors including Defence and related support activities are particularly pertinent to the Study Area and could represent an opportunity for the City of Salisbury to use the Strategic Growth Framework to promote a defence cluster as part of the existing federal investment.
- There are many large-scale future land supply opportunities in the Outer North. These sites do not have the same commercial locational advantages of the Study Area but do provide some key advantages including lower land prices, larger consolidated landholdings and direct access to an intermodal facility and to an airbase.
- There are a range of factors which limit the supply of land to the market, and which suggest more rather than less land should be suitably zoned for future use.

- Multiple land ownerships and the need to deliver key infrastructure to render land developable are potentially limiting factors in the take up of opportunities in the Study Area.

4.0 Eco-Industrial Park (EIP)

In the early investigations into the Planning Areas west of Port Wakefield Road undertaken by the City of Salisbury in 2021, the potential opportunities for an Eco-Industrial Park were included in the consideration. This specific land configuration has been researched as part of the Strategic Growth Framework, to review relevant case studies, Council's role and other considerations to inform a future decision about the inclusion and ideal position of land holdings within the Strategic Growth Framework, the outcomes of the Holmes Dyer research is captured in the following section.

4.1 EIP Background

In September 2020, Business SA Independent Chamber of Commerce and Industry South Australia released their 9-point Plan to Skyrocket SA setting out their economic development initiatives for the South Australian economy as it transitions out of the impacts from the Covid-19 pandemic.

Of specific relevance to the City of Salisbury Strategic Growth Framework was key recommendation 5:

Key Recommendation 5 – Kickstarting the development of a holistic eco-industrial park

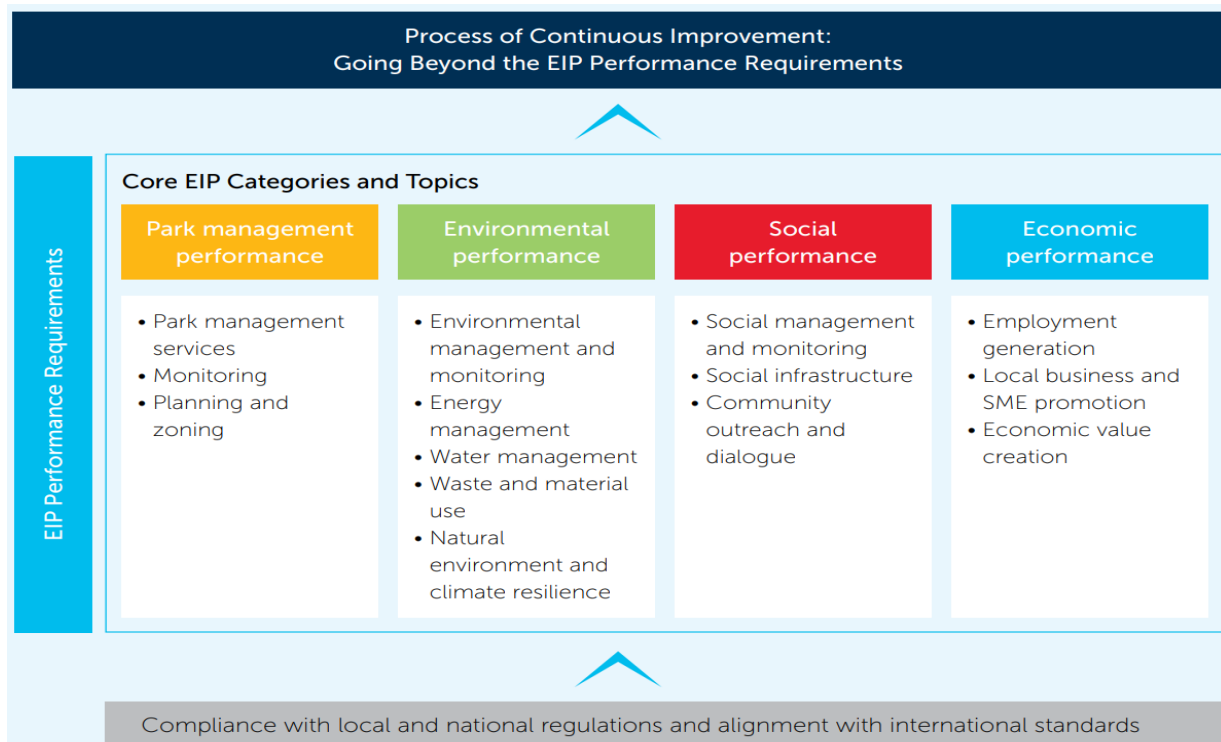
Kickstart the development of a comprehensive low carbon/low emissions and circular economy business/industrial park to enable local and interstate/international businesses an option to meet all aspects of their sustainability needs

Within this advocacy document, Business SA is calling on the State Government to consider supporting the development of a holistic low emissions industrial park to showcase South Australia as the most environmentally and technologically advanced state in Australia.

The concept of an Eco-Industrial Park typically incorporates environmental and technologically advanced industries that are significantly advanced to differentiate the business offer in the market. These differentiating factors typically include locations that can provide access to renewable energy, recycled water, green hydrogen, best-practice standards in energy-efficient building design and co-location of activities that have an identified industrial symbiosis / circular economy relationship.

In December 2017, the World Bank Group, United Nations Development Organization (UNIDO) developed a joint international framework on EIP which defines a set of minimum parameters for parks to meet this definition by demonstrating performance across four main categories as represented in the framework below

Figure 22. Overall Framework for Performance Requirements for Eco-Industrial Parks



Source: - World Bank Group 2017.

This report provides key performance indicators and benchmarks that could be adopted against each category to ensure a proposed eco-industrial park meets the minimum expected criteria. These standards could be used as a starting position for a local context review of the minimum standards that should be part of a future eco-industrial park within the specific context that it is proposed.

While aspirational, the Business SA advocacy for a showcase eco-industrial park identifies that the identified site must be grounded in sound economic principles, profitable for all parties and in this respect, specified the symbiosis of tenants that can create this environment will be critical. Business SA identifies two different forms for a potential showcase EIP;

- The minimum requirements are embedded into a new industrial zone that sits over the identified precinct or;
- A suitable existing zone is supplemented by specific encumbrance or design principles as part of a separate development/infrastructure agreement.

4.2 EIP Case Studies

Australian examples delivered to date have focused primarily on environmental initiatives, the following case studies are considered the most relevant to the potential opportunities within the City of Salisbury.

Dandenong LOGIS EIP (Vic)



Photo 1 - Logis Eco-Industrial Park Source GLBA

Partnership: Private Public Partnership with Melbourne Water

Site Size: 154 hectares of redeveloped employment land over the former Southern Waste Treatment Plant.

Attributes: Recycled water, rainwater tanks, solar hot water, sustainability design guidelines for development. Initial development included the remediation of the highly contaminated site former Southern Water Treatment Plant. Retail, commercial, and large format supermarket space available for rent and purchase, ranging from 170m² to 930m²

Diverse mix of current occupiers includes Ashfords pre-eminent financial and business advisory firm, Bolton Clarke independent living service provider and Mercury Marine motor manufacturing.

Distance: 30km to CBD or 35 minutes by Train from Dandenong Railway Station

Steel River Eco Industrial Estate (NSW)



Partnership: BHP and Baulderstone Hornibrook Pty Ltd.

Site Size: 104 hectares of industrial land, adjacent the Pacific Highway

Attributes: 28MW, two-hour battery system for energy storage, Remediation Action Plan, Environmental Impact Statement, enforceable guidelines in respect to contaminant management for leasers, eco-industrial services trench for the reuse of waste products, water quality ponds.

Sites at the Eco Estate range from 4,000m² to 17,000 m², current occupiers include CSIRO Energy Research Centre and ALS Environmental Services Laboratory

Distance: 7km from Newcastle CBD approximately 20-minute car journey.

Sydney Business Park Marsden Park (NSW)



Photo 2 - Sydney Business Park, 2020

Site Size: 255-hectare campus style Business Park is the largest employment area in North Western Sydney

Attributes: Incorporates 27 hectares of high-quality landscaped parks and recreational facilities, playgrounds and picnic areas for public use as well as processes of rainwater harvesting, solar farms and implementing ongoing sustainability initiatives.

Sydney Business Park has established the Marsden Park Local Employment & Education Initiative to coordinate a range of employment and educational support opportunities in and around the Marsden Park area

The site offers colocation of business needs, adaptable working spaces with tenancies available from 166 sqm to 1459 sqm. Major tenancies at the park include ASICS, IKEA, Costco, Coles, Bunnings Wearhouse and ALDI.

Distance: Sydney Business Park is 38km from Sydney CBD or a 35–45-minute drive by car on the M7.

Quarry at Greystanes Dexux (NSW)



Photo 3- UDIA NSW 2020

Site Size: 340,000 sqm fully leased estate

Attributes: The site employs rooftop solar PV panels, achieving energy and operational cost savings through renewables, rainwater harvesting from rooftops combined with high water efficient fixtures in bathrooms and irrigation and translucent roofs and wall sheeting for improved natural daylight linked to smart lighting.

Tenancies at the site include Beaumont Tiles, Orora, Coco Republic, Bunnings Trade, Toshiba, HelloFresh and Symbion.

Distance: 26 km from Sydney CBD or a 45-minute drive along the M

Tonsley Innovation District (SA)



Photo 4 - Renewal SA 2021

Partnership: Renewal SA

Site Size: 61-hectare site located on the former Mitsubishi Motors Plant

Attributes: 6-star Green Star Communities Project, completion of project will include 20,000 solar panels providing 6MW power to onsite businesses, solar garage for electric vehicles, adaptive reuse of buildings, on-site rain gardens, use of recycled water from the Oaklands Wetland, District Energy Scheme.

Freehold land allotments from 1,000m² to 10,000m²

Industry partners include Tafe SA, Flinders University, Siemens, Signostics and Zen Energy

Distance: 10km from Adelaide CBD or an 18-minute drive

Mitchell Enviro Industrial Estate (QLD)



Photo 5- Google Earth, 2022

Partnership: Mitchell Builders

Site Size: 42,000m² in Queensland's Yatala Industrial Precinct

Attributes: Onsite sewage treatment and water collection and storage via wetland and underground tanks (4 megaliter dam), utilises passive solar principles and natural ventilation, thermal wall technology, allocating a substantial area of land for communal green space.

Sites within the estate range from 400m² to 4,000m² with tenants including Anika Products, Yatala Environmental Solutions, Solar Green and Eco-kinetics.

Distance: 40km from Brisbane CBD and 45km from Gold Coast CBD or an approximately 40-minute drive.

Kalundborg Eco Industrial Park (Denmark)



Photo 6 - Symbiosis Centre, 2014

Partnership: Partnership and industrial network between 13 private and public companies located in Kalundborg

Attributes: Kalundborg Eco Industrial Park follow the symbiosis model where companies work together across sectors to share excess energy and resources in including water, materials and waste products. DONG energy power plant located in Kalundborg converts municipal solid waste from the surrounding businesses and other sources into biofuel that powers the surrounding region.

The site includes enterprises such as an oil refinery, insulin-producing plant, factories making enzymes for use in bioenergy to textiles and the largest sewage treatment plant in northern Europe.

Distance: Located just outside Kalundborg town centre (3km) or 100km from Copenhagen

4.3 City of Salisbury – EIP Locational Advantages

No specific site is identified in the Business SA Advocacy Document for the proposed showcase EIP; however, a few proximity opportunities were identified relating to Gillman and Adelaide Airport. These two sites were identified due to their proximity to industry, Stormwater Harvesting/Re-use Schemes, Wastewater treatment plants and critical logistic transport infrastructure.

These locational advantages can be demonstrated by land within the City of Salisbury Strategic Growth Framework due to the proximity to SA Water Waste Treatment Plan, existing Salisbury Water Recycled Water Network and Infrastructure and critical logistics by road, rail, and air.

Proximity to Defence could also have advantages in the areas of research, technology, and precision manufacturing, which, in turn, are activities likely to be attached to an eco-industrial business park.

Facilities that serve a more intensive and sophisticated workforce, such as retailing, banking, café, bars, accommodation, and business services are a desirable adjacent to an eco-industrial business park. Main road frontages and key intersections have a potential to provide this support infrastructure and, while currently limited in the City of Salisbury Strategic Growth Framework, several locations lend themselves to the development of these services.

4.4 Barriers

The barriers to attracting an eco-industrial park within the Strategic Growth Framework Waterloo/Bolivar Road area of Salisbury would be considered to include:

- Regulatory barriers relating to a lack of suitable policies to encourage EIP development
- Competitive disadvantage because of initial set-up cost to achieve agreed performance requirements, if the business model does not make competitive sense from initiation
- High upfront capital costs with extended returns on investment limit the depth of the market and require a specific alignment of business operations, to realise a competitive advantage even with these upfront costs
- Potential requirement for financial support/subsidies to deliver the required infrastructure
- Risks around new infrastructure technology and delivery approaches that are outside the current regulatory environment, requiring duplicated service provision of both an innovative infrastructure delivery scheme and a 'typical' infrastructure servicing backup redundancy
- Clarity on ongoing maintenance and management of the eco-industrial park
- Lack of business capabilities, understanding and skills.

As a result of these challenge, EIP development is typically underpinned by State Government or key agencies with a broader remit than commercial profit. Council involvement and investment could be sufficient to attract private sector investment in the initiative.

4.5 Council's Role

The role the City of Salisbury might play would be determined by their attitude towards risk and reward and levels of funding the Council is prepared to contribute towards infrastructure. It will also be determined by access to suitable land holdings via purchase or agreement with existing landowners.

Essentially, there is a spectrum of involvement from low risk/low reward to high risk/high reward (where reward might be measured in development outcomes rather than pure return on investment). The options for Council could therefore include the following range of involvement;

- Broker: where Council provides encouragement and momentum for key investors, landowners and Government to deliver the EIP.
- De-risker: where Council undertakes rezoning, delivers key enabling roads and stormwater infrastructure and/or offers rate holidays or other benefits in return for private investment in the EIP, secured by Deeds/Agreements.
- Landowner: where Council offers its own land and potentially acquires additional land with the specific intention of taking an EIP proposal to the market for private sector delivery, which is secured by Deeds/Agreements.

- Developer: where Council either in partnership or alone, assembles the site, zones the land, delivers the infrastructure and sells the product to the market with suitable caveats on the performance of purchasers.

These options reflect the impact on investment decision making of relatively low land values associated with industrial land in this locality, the higher costs associated with delivering an EIP relative to a traditional industrial subdivision and the plethora of supply alternatives for industrial land consumers in the north and, thus, the anticipated need to incentivise developers/investors to contemplate establishment of an EIP.

The suggested actions to advance Council's consideration of the position it would seek to take in the delivery of an EIP are outlined as follows:

- Identification of State or Council held land that could form a nucleus for the establishment of an EIP;
- Detailed investigation of required infrastructure upgrades in preferred EIP locations and their overlap with other required infrastructure initiatives;
- Investigate the attractiveness of linking rezonings that generate a real uplift in value with agreements to develop an EIP, thereby providing an incentive for private sector involvement (for example, colocation with Activity Centre rezoning);
- Development of a business case to call attention to the benefits and rewards of an EIP while addressing management of the inherent risks;
- Approach State and Federal Governments regarding potential involvement and/or grant funding for specific works;
- Approach key commercial and industrial players and fund managers to establish whether there is an interest in establishing an EIP and what, if any, inducements would be required to attract their investment in such a project;
- Consider the role Salisbury Water might play in the delivery of stormwater outcomes in the area which can stimulate surrounding development.

5.0 Study Area Economic and Employment Forecasts

Based upon assumptions regarding development staging, likely land take-up and type of land use, the following development timeframe, floorspace construction and workforce numbers were developed. This information was used by Holmes Dyer and the subconsultant team Greenhill and Cirqa to inform preliminary engagement with service authorities and infrastructure upgrade assumptions that are used in the recommendations section.

Based on Holmes Dyer estimates for conservative demand for about 14-15 gross hectares per annum for the take-up of land within the study area, this is assumed to be split across four yield catchments within the study area defined by Holmes Dyer for the purpose of this strategic planning as per Figure 23

Table 14. Forecast Activity – Timeframe for Development Activity in Study Area

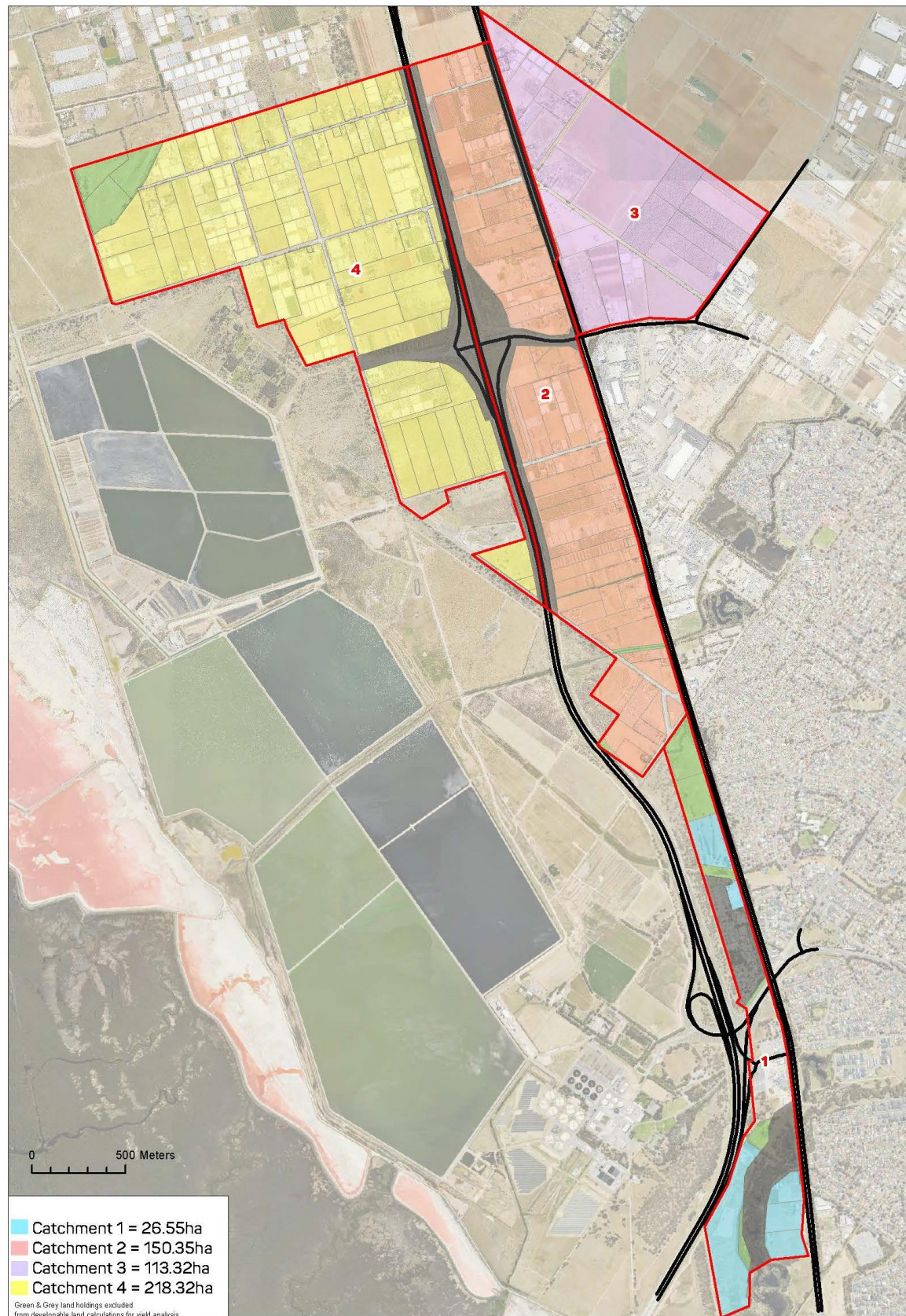
Total Activity					
Catchment	Development Timeframe (years)	Development Area (ha)	Developable Area (ha)	Floorspace (m2)	Workforce (pax)
1	1 – 5	26.6ha	16.0ha	48,000m2	400
2	1 – 15	150.4ha	90.2ha	270,000m2	2,235
3	10 – 20	113.3ha	68.0ha	204,000m2	1,685
4	20 – 35	218.3ha	131.0ha	393,000m2	2,395
Total	1-35	508.6 ha	305.2 ha	915,000m2	6715

Source: Holmes Dyer, 2022

When reading the above table, the following key assumptions needs to be considered:

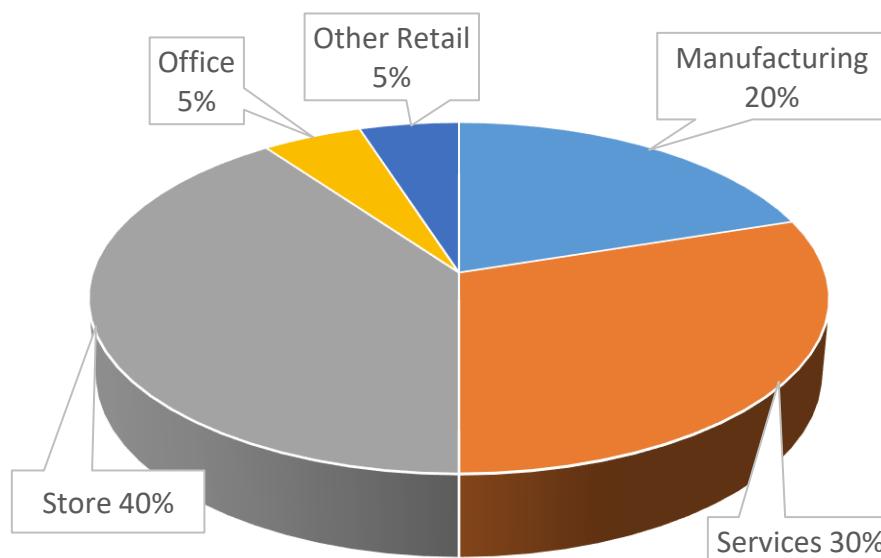
- Development Timeframe: Holmes Dyer conservative prediction of the market take up rate, as outlined within Section 3.6 of this report.
- Development Areas: Study area available after allowing for existing development and major road infrastructure and buffers are removed, as outlined within Section 3.6 of this report.
- Development Area: Assume 40% of gross area required for roads, stormwater, open space and infrastructure (consistent with existing employment development within the surrounding areas)
- Floorspace: Assume 30% site coverage of individual allotments (consistent with Vicinity and Edinburgh Park Estates)
- Workforce: Based on workforce numbers per square metre generated by the Perth and Peel Land Use and Employment Survey, Department of Planning, Lands and Heritage and the Western Australian Planning Commission, 2017

Figure 23. Yield Catchment Plan developed by Holmes Dyer for Strategic Growth Framework Forecasts



Accordingly, the projected floorspace mix predicted by Holmes Dyer, having regard to the composition of similar precincts, is summarised in the following figure.

Figure 24. Projected Floorspace Typology



Source: Holmes Dyer, 2022

The above figure uses five floor space typology groups, identified by the Perth and Peel Land Use and Employment Survey, each typology assumes the below interpretation and distribution of employment land uses taken from the Western Australian Planning Land Use Category (PLUC) provided for clarity and comparison to the South Australian System. Unfortunately, there is no similar tool or data set available in South Australia that supports a similar analysis.

Manufacturing – This category includes land use activities involving the manufacture, processing and fabrication of all general goods. Both the scale and associated environmental impact of these activities separate them from other land use categories.

Store – Any land use activity which involves the storage, warehousing or wholesaling of goods usually conducted from large structures, or involving large bulky goods, but does not include activities that attract the general retail trade activities.

Service –This category includes service industries offering a range of services. The scale and environmental impact of such activities require their separation from other land uses. These services could include film processing, cleaning, motor vehicle and other repair services and other servicing activities, including some construction activities.

Office – Administrative, clerical, professional and medical offices are activities which do not necessarily require the land area/floor space or exposure of other land uses. Although office require building and parking facilities, these needs are quite distinct from those of commercial uses and service industries.

Other Retail – Many of these activities are not normally accommodated in a shopping centre. By virtue of their scale and special nature the goods of these activities separate them from the general the standard activity centre shop/retail category such as car sales yard or carpet showroom.

Using the above information Holmes Dyer have forecast a projected annual average development activity by each catchment, assuming that development would be occurring in all catchments at the same time. Council may choose to defer a decision on rezoning within one of the catchment areas given the long-term timelines, to protect a future decision to secure the highest and best use of this land. A high-level prioritisation and assumption have been made by Holmes Dyer with Catchment 3 and 4 times to enter the market in the latter years of the 30-year study. However, it is anticipated that these timelines would adjust based on future investigations and the level of interest for an intensification of development by landowners, that would adjust timing of the below, but the overall floor space and workforce assumptions will likely remain valid unless a significant change to the forecast land-use is adopted.

Table 15. Projected Annual Average Development Activity in Study Area by Yield Catchment

Annual Activity in Study by Precinct					
Yield Catchment	Years of Development (years)	Average Broad hectare land Requirements	Average Net Area of Lots Developed (ha)	Average Area of Floorspace (m ²)	Workforce (pax)
1	1 – 5 (2023 – 2028)	5.3 ha	3.2ha	9,600m ²	80
2	1 – 15 (2023 – 2038)	10.0 ha	6.0ha	18,000m ²	150
3	10 – 20 (2033 – 2043)	11.3 ha	6.8ha	20,400m ²	170
4	20 – 35 (2043 – 2058)	14.6 ha	8.7ha	39,300m ²	160
All Catchments	1 – 35 (2023 – 2058)	14.5 ha	8.7ha	26,160m ²	190

Source: Holmes Dyer, 2022

Table 16. Projected Floorspace Typology from employment land benchmarking

Projected Floorspace Typology and Workforce for Study Area		
	Floorspace Typology (m ²)	Workforce (pax)
Manufacturing 20%	183,000	965
Service 30%	254,850	1855
Store 40%	405,300	940
Office 5%	35,925	1715
Retail 5%	35,925	1240
Total	915,000	6715

Source: Holmes Dyer, 2022

Based upon assumptions and analysis outlined above, the development of the study area is forecast to deliver approximately, over a delivery timeline of 35 years.

- 915,000m² of employment floorspace
- 6715 employees (FTEs)

Holmes Dyer note that the amount of floorspace and number of employees achieved could increase subject to the level of intensity of activity delivered over the subject land determined by subsequent Code Amendments and technical investigations and the investment decisions of the market.

6.0 Infrastructure Funding Options and Mechanisms

6.1 Policy Context

Intensification or new development activity in Greenfields locations, such as that within the Strategic Growth Framework Study Area typically require the expansion of a range of infrastructure to serve that development, notably, stormwater, roads, water, sewer, power and telecommunications.

Specifically for the study area, the need for substantial stormwater infrastructure investment in the locality given the standards of existing service provision, while the progressive intensification of activity in the wider area will lead to the need for road infrastructure improvements, including Department for Infrastructure and Transport road upgrades (especially intersections) and local Council roads, while increased capacity and an expanded network of water, sewer, power, telecommunications and possibly gas services will also be required.

Over the past decade, new urban release areas have been increasingly encumbered with financial obligations to deliver a fair share of the cost of this infrastructure. In the case of water, sewer and power, this typically involves the developer negotiating directly to pay for the infrastructure required to serve that land and, where a new development tips the demand for infrastructure to require new approach mains or other external headworks, the subject developer is typically responsible for that cost (in addition to internal distribution and connection costs). In some circumstances, augmentation charges have been set by the infrastructure provider for these external headworks requirements so that the cost is distributed among all beneficiaries, not just the first developer. This is a preferred arrangement but does not currently exist in respect of the land under investigation, nor are the infrastructure providers required to provide an augmentation option.

Telecommunication infrastructure typically involves a cost per lot basis which does not penalise individual developers.

Gas is typically delivered at no cost to the developer by the infrastructure provider, but subject to the provider's business case confirming that future returns will justify the initial spend.

The consequence of this is that infrastructure funding mechanisms are likely to be required to deliver shared stormwater and road solutions and that a cooperative approach to negotiation of shared outcomes for water, sewer and power within the study area will be highly desirable.

6.2 Infrastructure Funding and Delivery Mechanisms

There are several mechanisms available to fund and deliver infrastructure to support new development. These include:

- Execution of an Infrastructure Deed between relevant parties which guarantees the funding and delivery of nominated infrastructure.
- Implementation of an Infrastructure Scheme under the PDI Act. This could be a Basic Infrastructure Scheme or a General Infrastructure Scheme.

- Establishment of a Precinct Authority and Precinct under the Urban Renewal Act to raise funds and deliver infrastructure.
- Establishment of a separate rate to fund infrastructure.
- Negotiations with the applicants at Development Application stage, with reliance placed upon the policies within the Code and clearly defined infrastructure requirements captured within a Concept Plan within the Code.
- Direct funding or contributions by Council, State and/or Federal Government via works program, grants funding or similar.

Each of these mechanisms are discussed further below

6.2.1 Infrastructure Deeds

Infrastructure Deeds are legal agreements between the parties to the agreement (typically landowners, Council and sometimes State Government) which seek to facilitate the delivery of common or shared infrastructure, and which typically seek to define:

- The geographic extent of the Deed;
- The landowners captured by the Deed;
- The nature of the interventions required to be delivered;
- The estimated cost of those interventions;
- The timing of delivery of those interventions or the development trigger points (e.g., number of allotments or hectares of land delivered);
- The proportional responsibility of parties for the funding of that infrastructure;
- The manner in which the intervention will be procured, including the opportunity for funding contributions and/or in-kind delivery of the infrastructure;
- The need or otherwise for appointment of an Infrastructure Coordinator;
- The ultimate ownership of the completed infrastructure works;
- The timing of payment of the ascribed financial contributions; and
- Various operational and administrative matters.

Infrastructure Deeds are typically secured by the impost of a Land Management Agreement over the relevant Land Titles. They cannot be forcefully imposed on landowners and therefore require a level of cooperation between parties. Essentially, the landowners need to recognise that there is a benefit derived from entering into such an agreement. This is usually the recognition that the up zoning of their land is dependent upon the collective funding of infrastructure delivered by the Deed. (This incentive is diminished where the up zoning delivers relatively little additional value to the land, which is sometimes the case with the conversion of prime horticultural land to employment land.)

6.2.2 Infrastructure Schemes under the Planning Development and Infrastructure (PDI) Act

The PDI Act creates two alternative approaches to the creation of an infrastructure funding mechanism, namely:

- Basic Infrastructure Scheme, which is essentially limited to the funding of roads and stormwater infrastructure within a designated growth area and does not require the agreement of affected landowners; and a,
- General Infrastructure Scheme, which can fund a wide range of infrastructure within a contribution area but requires the agreement of all affected landowners.

As the General Infrastructure Scheme is not yet available as the relevant legislative provisions have not commenced, this option is not explored further in detail within this report.

A proposal to proceed with either scheme may be initiated by either the Minister or at the request of another person or body interested in the provision or delivery of infrastructure. The Council would therefore qualify as an interested body which could initiate such a proposal. It is then the responsibility of the Minister, acting on the advice of the Commission, to draft the subject scheme and to determine to proceed with the scheme.

There are many steps in the process of establishing an infrastructure scheme and, to date, no such schemes have been created. Indeed, the pilot scheme run by the (then) DPTI resulted in none of the three selected infrastructure schemes proceeding.

Should Council wish to pursue this approach then it would be logical to initiate a Basic Infrastructure Scheme for two fundamental reasons, firstly, such a scheme will cover the two key infrastructures of interest to Council, namely roads and stormwater and, secondly, it is not realistic to expect all landowners to agree to the instigation of the scheme and, hence, only the Basic Infrastructure Scheme, which does not require the agreement of all landowners, could proceed under such circumstances.

The key actions required to pursue a Basic Infrastructure Scheme can be summarised as follows:

- Initiation of scheme and identification of the designated growth area (GEP could involve a series of designated growth areas);
- Identify the need for the introduction of a scheme to coordinate the delivery of the basic infrastructure;
- Preparation of a draft outline of the scheme that:
 - a) *Provides detailed information – about*
 - i) *The nature and intended scope of the basic infrastructure; and*
 - ii) *Any related development that is proposed to be undertaken as part of the scheme; and*
 - b) *Identifies the proposed designated growth areas; and*
 - c) *Provides information about the proposed timing or staging of the various elements of the scheme; and*
 - d) *Assess the costs and benefits of the scheme; and*
 - e) *Outlines a funding arrangement for the scheme, including whether it is proposed to impose a charge under Subdivision 7; and*

- f) Provides information about the person or body that will be carrying out the work envisaged by the scheme (to the extent that is known); and*
 - g) Identifies any basic infrastructure or other assets that might be expected to be transferred to another entity when the scheme has been completed; and*
 - h) Provides such other information as the Minister thinks fit after consultation with the Commission.*
- The infrastructure must be:
 - a) Fit for purpose; and*
 - b) Capable of adaptation of standards or technology change over time (insofar as is reasonably practicable or appropriate in the circumstances; and*
 - c) Capable of augmentation or extension to accommodate growth or changing circumstances over time (insofar as is reasonably practicable or appropriate in the circumstances; and*
 - d) Where appropriate, designed to build capacity for the future, including by allowing for connections, extensions or augmentation by others who are able to leverage off the initial investment in the basic infrastructure; and*
 - e) Designed and built to a standard that is appropriate taking into account the nature and extent of development that is proposed to be undertaken within the relevant designated growth area; and*
 - f) Capable of being procured and delivered in a timely manner to facilitate and promote orderly and economic development.*
- The designated growth area must be:
 - a) The area or areas which will benefit from any basic infrastructure to be provided under the proposed scheme; and*
 - b) The extent to which it is possible to establish an area that will provide fair and sufficient funds over time with respect to the provision of the basic infrastructure under the proposed scheme; and*
 - c) The extent to which the designated growth area may overlap with a contribution area under Subdivision 3.*
- Any imposition of a charge must take account of:
 - a) The extent that is reasonable that other sources of funding be used instead; and*
 - b) Any schemes or arrangements (including with respect to the imposition of separate or other rates or charges) that are already in place, or already planned (and known to the Minister) with respect to the provision of basic infrastructure or the undertaking of works in the designated growth area (or in an adjacent or related area).*
- The Minister must seek the advice of the Commission and have regard to any relevant state planning policy and regional plan and relevant provisions of the Code (or the intended amendments to the Code;
- The Minister must consult with:
 - a) Take reasonable steps to consult with -*
 - i) The owners of land within the proposed designated growth area; and*
 - ii) The person or persons who are intending to undertake any relevant development within the proposed designated growth area; and*
 - b) Take reasonable steps to consult with the council within whose area the proposed designated growth area is situated,*
And may consult with any other person or body as the Minister thinks fit.
- The Minister must then publish the draft outline in the Gazette and on the SA Planning Portal;
- A Scheme Coordinator must then be appointed by the CEO (of PLUS);
- The Scheme Coordinator must then:

1. *Prepare scoped and costed proposals for the scheme that accord with any relevant design stands;*
 2. *Develop a work program for the scheme;*
 3. *Undertake consultation in relation to the scheme in accordance with any requirement under the Community Engagement Charter;*
 4. *If it is proposed that a funding arrangement should be established under this Division – develop the funding arrangement;*
 5. *Such other functions assigned by the Minister after consultation with the Chief Executive.*
- Identify the basis upon which charges under the scheme will be triggered;
 - Identify the funding proportions to be paid by the scheme beneficiaries;
 - The Scheme Coordinator will then provide a report on all relevant matters, which the Minister then determines whether or not to proceed with the scheme and publish the scheme on the SA Planning Portal.

As can be gleaned from the above, the preparation of an Infrastructure Scheme under the PDI Act is complex and requires extensive coordination with the Minister, albeit that many of the investigations are likely to be required to be undertaken by Council (and the landowners) to progress the scheme.

This means that there are unlikely to be cost advantages to attempting to develop such a Scheme, particularly given that the cost of the Scheme Coordinator must be considered. Council would also potentially lose control of the administration of the delivery of infrastructure as a scheme was implemented. The fact that no scheme has yet been implemented nor the process of delivering a scheme completed, gives cause for considerable concern regarding the timing and costs associated with implementing such a mechanism.

At this stage, where landowners are cooperative, it would likely be more efficient for Council to utilise Infrastructure Deeds instead of a scheme under the Planning, Development and Infrastructure Act.

6.2.3 Declaration of a Precinct under the Urban Renewal Act

The Urban Renewal Act 1995, as amended, intends to provide for the planning and redevelopment of specific areas through their declaration as Precincts and involving the creation of a Precinct Authority to administer a Precinct Plan and a Precinct Implementation Plan.

The Precinct Authority may exercise a range of powers including acting as the planning authority in respect of a specified area but, more particularly, may provide infrastructure and may impose rates, levies or charges to fund that infrastructure (as well as various administrative functions).

The Minister may establish a precinct at the request of a Council (or others) and a precinct authority could be a Council through appointment by the Minister.

The process of establishment of a Precinct and Precinct Authority has been notionally usurped by the Joint Planning Boards and Infrastructure Schemes introduced by the PDI Act in 2016.

The process of establishment of a Precinct is possibly more complex than the process previously described in respect of the introduction of an Infrastructure Scheme under the PDI Act. Moreover, while there have been several attempts to establish precincts over the last decade, none have progressed to formal declaration. These attempts have been very costly and ultimately thwarted by the uncertainty of implementing an unproved mechanism. As with our commentary in respect of Infrastructure Schemes, where the cooperation of landowners can be obtained, an Infrastructure Deed represents a less costly, less complicated and familiar mechanism for infrastructure delivery.

6.2.4 Code Amendment and Development Application Negotiations

Logically, any Code Amendment introducing new zoning over the subject area, would be linked to the introduction of an Infrastructure Scheme or the execution of Infrastructure Deeds (and LMAs) by relevant parties, which secure the financial performance of the affected landowners.

In some instances, this may not be of sufficient attraction for some landowners to encumber their land with the obligations arising from any Infrastructure Deeds, given the limited uplift in land values derived from rezoning in some instances (recognising under a Basic Infrastructure Scheme, landowners would not have the option to opt out).

While perhaps not ideal, an alternative is to proceed with the Code Amendment irrespective of Infrastructure Deeds and wait for the market to provide a delivery solution. Council would then rely upon the development approval process to manage traffic and stormwater solutions. This ability would be enhanced by the inclusion of a Concept Plan within the Code Amendment which clearly identifies the infrastructure triggers required prior to the development of the land. Proponents would then have to demonstrate their ability to appropriately address any traffic and stormwater management issues prior to gaining Development Approval. As supply of employment land tightens and prices rise, solutions to traffic and stormwater infrastructure requirements are likely to become increasingly tenable to landowners.

Council can play a pro-active role in defining infrastructure needs, logical landowner groupings and delivery management mechanisms. However, this option carries additional risks. Applications may have relevant authorities unrelated to Council (the State Commission Assessment Panel or Minister, or Minister in the case of Crown development, for example), and this could result in the loss of control concerning orderly and coordinated delivery of infrastructure. Infrastructure may proceed in a fragmented fashion or may be of a different order to that which Council had envisaged. There is also a risk that applicants for development may only be required to deliver infrastructure that benefits their sites alone.

Council should also consider whether once an area is rezoned it is likely that a developer may seek to change that zoning through their own future code amendment. With the passage of time, the change of governments in power and shifting priorities of the State, it is possible that plans of individual developers may erode any code provisions including with respect to infrastructure. Further, it is possible that the State could compulsorily acquire land

subject to an Infrastructure Deed and LMA, so frustrating the full delivering of infrastructure and/or the financial contributions related to such.

6.2.5 Separate Rate

Council may be able to apply a separate rate imposed under the *Local Government Act 1999*, across the rezone area, either as a mechanism to directly collect contributions towards the delivery of infrastructure that benefits the rezone area, or, more probably, as a mechanism (with associated rebates) to entice landowners to enter into Infrastructure Deeds, where such landowners are seeking to develop under the new zoning. Council could also consider using rating mechanisms to encourage development.

In this way, a separate rate can be used in conjunction with Infrastructure Deeds as a ‘backstop’ in a scenario where there is majority support in a particular precinct, albeit that a minority of landowners are not prepared to enter Infrastructure Deeds.

Under the *Local Government Act*, declaration of a separate rate is not a straightforward process. If the Council is interested in pursuing this further, separate legal advice may assist to better understand the process and potential cost, administrative and risk implications.

Furthermore, introduction of a separate rate will typically seek to collect the required funds over an extended period in order to “manage” the financial burden on landowners, particularly those not wishing or able to develop their land in the short to medium term. It is unlikely to generate sufficient funds in the short term to fully fund the required infrastructure interventions.

However, it can act as an equalisation mechanism by its application only to properties which refuse to commit to a broader infrastructure scheme which benefits those properties. For example, the separate rate could apply to all properties in a declared area and would be progressively lifted as the infrastructure contribution is paid by a landowner undertaking development but remains in place over those parcels that are not developed.

6.2.6 Council Funds Infrastructure

Council may wish to consider whether it would be beneficial for infrastructure to be funded or partly funded by a means external to the landowners, particularly if landowners indicate an unwillingness to develop, enter Infrastructure Deeds or make landowner contributions. Council may consider the rate revenue increase as a sufficient offset to warrant the investment in infrastructure. Alternatively, Council may be able to secure other funding sources such as from the State Government or Federal Government, particularly given the current emphasis on grants and infrastructure generally. Indeed, an argument could be mounted that infrastructure requirements cross Council boundaries and are of regional significance.

This mechanism places a substantial financial burden on Council, albeit that its implementation could be the means of unlocking State or Federal funding assistance. That is, a project that is fully documented and underway will demonstrate the level of commitment often sought by other funding authorities when determining their grants priorities.

A Council funding approach may also be identified as most suitable for some infrastructure where the investment is in all, or part, fixing an existing infrastructure gap. It is foreseen that some of the necessary infrastructure identified in the Strategic Growth Framework recommendations, is required not only because of the new development proposed but to address existing stormwater and traffic (intersection and road upgrades) for the existing land uses. This analysis would need to be undertaken on an intervention-by-intervention level.

As a subset of this option, Council could commit to a partial funding of the infrastructure as a means of sharing the financial burden of infrastructure delivery with the landowners and use this as an incentive to obtain landowner buy in to another funding mechanism e.g., Infrastructure Deeds or separate rating.

6.3 Infrastructure Delivery Method Comparison Analysis

The following table seeks to summarise the advantages and disadvantages of the alternative approaches to infrastructure delivery for consideration of the City of Salisbury to inform the approach for the orderly and coordinated delivery of infrastructure across the Strategic Growth Framework.

The table has not attempted to weight the criteria; however, it is apparent that some criteria could be more important than others.

Table 17. Infrastructure Delivery Mechanism Comparison Analysis

Infrastructure Delivery Method							
Evaluation Criteria	Infrastructure Deeds and LMA	Basic Infrastructure Scheme under PDI Act	General Infrastructure Scheme under PDI Act	Precinct Declaration	Rezone and Negotiate of DA Stage	Separate Rate	Council Funding
Ease of implementation	o	o	-	-	+	-	o
Able to address roads and stormwater	+	+	+	+	+	+	+
Acceptance by Landowners / Developers	o	o	-	o	+	o	+
Delivery of required Infrastructure Outcomes	+	+	+	+	o	+	+
Delivers Council control	+	o	o	+	-	+	+
Financial certainty for Council	+	+	+	+	o	+	+
Time required to Implement	o	-	-	-	+	o	o
Flexibility to apply to Discrete Areas	+	+	+	+	+	+	+
Structuring and staging of development and infrastructure outcomes	+	+	+	+	-	+	+
Flexibility to address changing circumstances	-	-	-	-	+	-	+
Initial cost to establish	-	-	-	-	+	o	o
Requires cooperation of Landowners / Developers	-	+	-	o	+	-	+
Cost for an external Scheme coordinator	o	-	-	-	+	+	+
Equitable sharing of costs	+	+	+	+	o	+	+
Cost to Council	+	+	+	+	o	+	-

The symbols in the table are generally intended to imply the following:

- + Readily achievable; relatively low cost; timely
- o Involves some difficulties in achieving; moderate cost; moderate timeframe to implement
- Very difficult to achieve; high cost; long timeframe to implement

6.4 Regional Infrastructure Funding

Another consideration is that some of the required infrastructure likely to be required as part of the Strategic Growth Framework will provide regional benefit and as such the cost of this infrastructure delivery should not be attributed solely to the immediate affected allotments or even the City of Salisbury. This regional infrastructure that would likely include signalised intersections and stormwater channels at Port Wakefield Road that will service the Greater Edinburgh Parks area will need an infrastructure mechanism that also involve negotiation with the City of Playford and the relevant State Agencies.

The timing and trigger for this regional infrastructure will be complex as it may be triggered by development of land within the adjacent Council area. Accordingly, it will be important that adequate reservation of land is made for this future required infrastructure within any negotiated infrastructure deed agreements and Code Amendments.

6.5 Summary and Recommendations

Having regard to the foregoing discussion and analysis, we believe that a hybrid approach which focusses upon the preparation of Infrastructure Deeds supported by the introduction of a separate rate and Council funding (notably through grants) represents the most appropriate approach considering there being some 300-separate allotments in the growth framework study area.

This approach is proposed because it delivers the following:

- Council is in the strongest position to ensure the delivery of the required infrastructure;
- Council can manage its level of financial contribution;
- The creation of a separate rate over the land to be rezoned can be used as an incentive for landowners to agree to the Infrastructure Deed by rewarding those who sign up to the Deed and penalising those that do not;
- The landowners are encouraged to commit to the Infrastructure Deeds by Council's willingness to fund a proportion of the infrastructure costs and to actively seek grant funds to improve the overall infrastructure delivery outcome;
- Infrastructure Deeds are reasonably well understood and not subject to the uncertainty associated with a new process under the PDI Act or an unused process under the Urban Renewal Act;
- The total package of Infrastructure Deeds, introduction of a separate rate and Council funding contributions should provide a comprehensive basis for attracting grant funding to mitigate overall costs to Council.

While this maybe the preferred approach, it does come with its challenges, the most serious being the requirement for landowners to willingly encumber their landholding with a Land Management Agreement, which requires adherence to a Deed that requires contributions towards infrastructure delivery.

Should landowner interest be low, then the option is available to introduce a higher separate rate across a wider area to capture funds to be held exclusively to fund key Council headworks infrastructure, which would then hopefully trigger new development that would, in turn, deliver additional infrastructure outcomes. Alternatively, Council could be the first entity to pursue a Basic Infrastructure Scheme under the PDI Act.

7.0 Stakeholder Consultation

To inform the Strategic Growth Framework a stakeholder consultation process was undertaken to secure an understanding of the likely plans and development intentions of the approximately 300 landowners within the Study Area.

Ultimately, any zoning or land use changes that may be proposed by the Strategic Growth Framework, will be enacted through a future Code Amendment(s), that may be either Proponent or Council led. This future Code Amendment process will involve additional legislated community engagement delivered in accordance with the Community Charter under the Planning, Development and Infrastructure Act.

The engagement methodology adopted for the recent consultation sought to build open communication channels between Council staff and the landowners, identifying that there needs to be ongoing and more detailed communication between affected landowners as the detailed planning to guide delivery of any components of the Strategic Growth Framework progresses.

7.1 Engagement Planning

A comprehensive engagement plan was developed by Holmes Dyer to inform the scope and method of consultation undertaken to inform this Strategic Growth Framework.

The engagement plan was developed to align with the standard template and content required by the State Government Planning & Land Use Services for planning the consultation activities required for any future Code Amendment in line with the Community Engagement Charter as set out in the PDI Act.

While it was not necessary, for the purposes of the Strategic Growth Framework, to have a detailed engagement plan compliant with the charter, this was developed irrespective, with the intention by the City of Salisbury that this would form a starting template for any future Code Amendment Engagement Plans to ensure consistency and alignment with the identified stakeholders and methods for consistency and clarity of all parties. For this reason, a full copy of the adopted engagement plan for this project is provided in Appendix 4, for future reference of Council and planning consultants engaged to work on any subsequent Code Amendments that may follow.

7.2 Engagement Approach

The following stakeholders were engaged during the 21-day engagement period from the 2nd of May to the 27th of May;

- Owners and occupiers of the land within the study area and owners and occupiers of adjacent land to the study area boundaries and within the broader planning areas, with a direct letter sent to all owners/occupiers.
- Planning and Land Use Services
- City of Playford
- City of Salisbury

- » Staff
- » Elected members
- » Other relevant City of Salisbury Interest Groups
- Relevant Government Departments
- Relevant Service Infrastructure Providers

The wider Salisbury & Playford Community outside Study Area were able to participate with information being made available on the City of Salisbury website relating to project scope. Due to the specific objectives of the engagement approach, widespread promotion was not undertaken. Relevant bodies, community members and groups were engaged on one of four different levels, including;

- Inform
- Consult
- Involve
- Collaborate

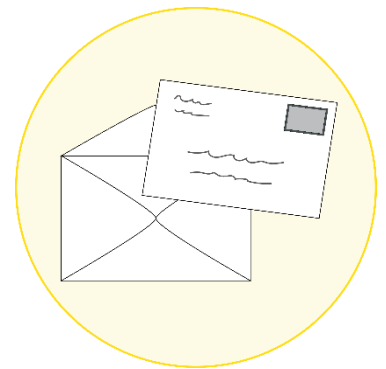
Responses from the consulted groups were collected via three primary means including verbal feedback, online survey response, two community drop-in sessions and written letters.

Relevant Government Departments were contacted by written correspondence in either a letter or email form with details of the proposal and invited to provide feedback. Feedback provided by Service Authorities who were directly contacted, are referenced in the Greenhills Service Investigation Report.

A workshop was coordinated by the Holmes Dyer team for both Planning and Land Use Services, Department of Infrastructure & Transport, and the City of Playford to secure early feedback and share outcome and technical investigations where applicable based on the preliminary information available at the time.

A drop-in session was held during week 2 and week 4 of the consultation period was held at the Salisbury North Community Centre and St Kilda Progress Association Hall. These sessions which were held during an evening timeslot providing owners and occupiers and State and Federal Members of Parliament an opportunity to speak to the City of Salisbury project lead and a Holmes Dyer Representative regarding the proposal, clarify questions and impact and provide direct feedback.

Owners and occupiers of the land within the study area and owners and occupiers of adjacent land to the study area boundaries and within the broader planning areas were contacted via written correspondence providing information about the Strategic Growth



300+ Letters Sent



**27 individuals
provided verbal
feedback**

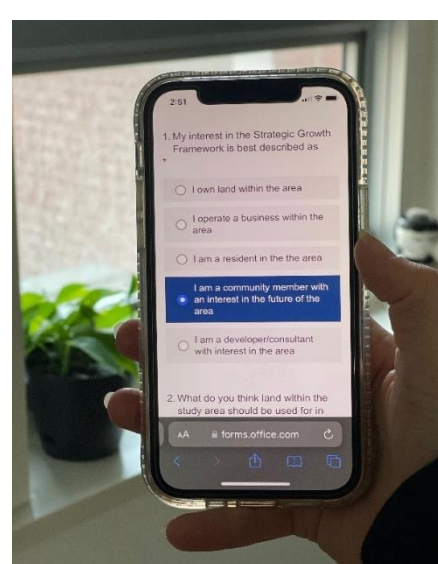
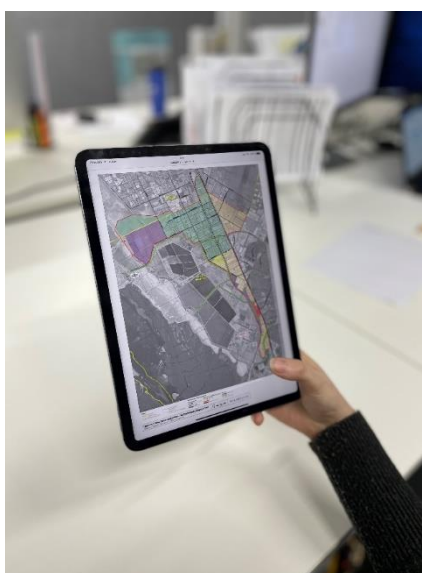
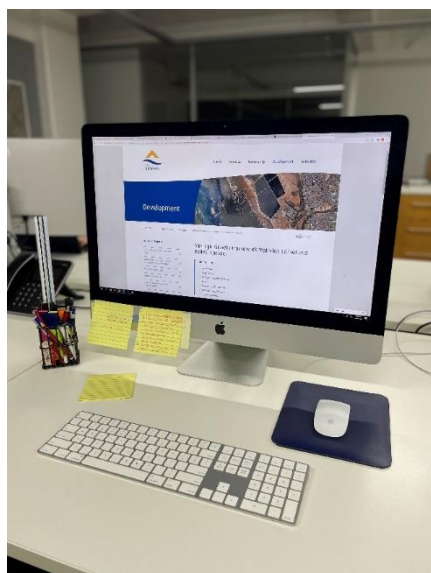


**38 individuals
completed an online
survey**

Framework, directing people to a website where additional project information can be found, providing opportunities to provide feedback through an online survey and with a City of Salisbury contact to approach for further information. Alternatively, some individuals chose to contact the Council via phone and verbally provide responses to a set of questions about the proposal.

Prior to and during the consultation period, any planning consultants or landowners who had previously demonstrated interest in developing land within the study area were contacted by a City of Salisbury representative to draw attention to the consultation process and secure direct feedback such as to inform the development of the precincts, development timeline estimates and land use preferences.

The wider Salisbury & Playford community outside Study Area were made aware of the proposal via an information page accessible on Council's website, inclusive of the same information sent to stakeholders within the study area. The webpage included next steps and future opportunities for involvement in consultation activities.



7.3 Outcomes of the Engagement

This engagement report provides a high-level summary of the input received from various online survey response, verbal feedback, written submissions, drop-in session, workshops, and additional commentary from the engagement period of the 29th of April to the 27th of May 2022.

7.3.1 Confidentiality

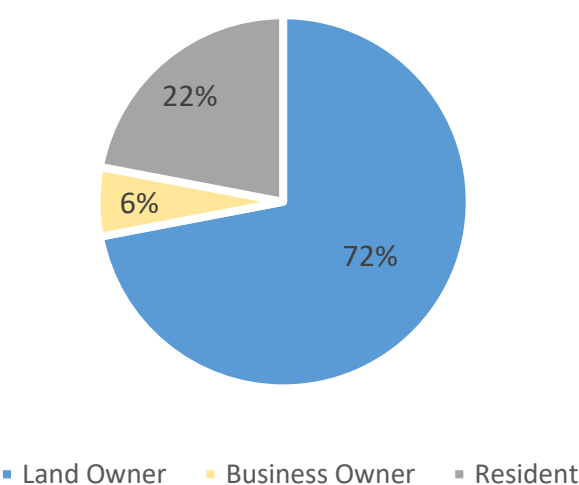
A full consultation summary report, including mapping of the development intentions of each individual landowner who responded during the consultation period has been provided to the City of Salisbury as a confidential document. This development intention information contained within this full document has 'commercial in confidence' elements for the individual property owners and was provided to Council in good faith to inform the strategic planning as part of this Strategic Growth Framework.

It is critical for the ongoing investigation and planning work that will be required to implement the Strategic Growth Framework that open communication channels are established and maintained between Council and the landowners relating to planning and development intentions, and it is appropriate that this early communication is able to be undertaken in a confidential manner to protect the identify and commercial interests of any individual party. While confidentiality had to be managed, it is possible to summarise the general attitude and concerns that were expressed during the engagement period which is summarised in the following sections for general information.

7.3.2 Engagement Survey Outcomes

There was strong interest in the project during the engagement period, and varied views on development timelines and priorities were shared by landowners within the study area. The online and verbal feedback survey tool generated a total of 65 responses. Of the survey responses received, 72% of respondents were landowners within the identified study area. The remaining 28% of respondents either operated a business or were tenants within the study area.

Figure 23. Survey respondent connection to Study Area



Most survey respondents detailed that land within the study area should be used for a wider range of business activities, including, industry, warehousing or commercial. Of the 37 respondents, 10 specified that broader business activities should be introduced along Port Wakefield Road, whereas 17 stated that business activities should be introduced across the entirety of the study area and 10 did not specify a preferred land use in their response

Seventeen (17) survey respondents (26%) recorded that land in the study area should be used for residential purposes, with three of these respondents supporting both employment and residential development opportunities.

The City of Salisbury received a ‘standard form response’ with sixteen (16) signatories by residents, objecting the interference to the existing rural residential area with potential industrial or commercial operations and proposing that no change is required to the zoning or land use.

7.3.3 Issues for Consideration

Issues that were raised through the survey as critical considerations for Council to consider as part of the future planning of the study area included;

- Rezoning of land for residential, commercial, or industrial uses;
- Encourage more business growth, new and existing;
- Development of commercial buildings and warehousing;
- Infrastructure provision and/or upgrade including:
 - » Access to arterial roads, including Port Wakefield Road;
 - » Upgrade road services;
 - » Sewer/wastewater/stormwater;
 - » Street lighting;
 - » Power supply;
 - » Greenspace;
- Increase housing provisions, residential development opportunities;
- Retain residential land
- Business and development support from Council to landowners; and
- Water allocation licenses.

25% of respondents identified some form of infrastructure upgrade was required for the future planning of the study area. Another 23% of respondents specifically identified a need for rezoning of land within the study area. Some respondents did not provide an answer or were unsure at the time.

7.3.4 Landowner Development Intentions

Survey respondents were asked if they were planning on establishing or expanding a business in the area. 43% answered yes, 37% no and 19% maybe. One respondent did not answer. Of those who responded yes, 22 stated they would proceed with a development in relation to their business “as soon as possible,” and 6 stated within a 2–5-year period.

7.3.5 Agency Responses

Environment Protection Authority (EPA)

The EPA provided a written response during the engagement period and highlighted that potential intensification of development in the study area should have consideration for:

- The interface with the Norther Connector
 - » Require sensitive land uses to be appropriately separated from the Northern Connector to manage noise and other environmental impacts.

- Stormwater management
 - » Due to the locality of the site, stormwater should be upgraded, and Water Sensitive Urban Design (WSUD) should be implemented (e.g., detention ponds, landscaping, infiltration).
- Interface with EPA licensed activities
 - » EPA regulated industries and activities (e.g., Bolivar Wastewater Treatment Plant and a Landfill Depot) should be considered in any intensification of development and it is recommended that a gas assessment is undertaken in relation to landfill sites prior to any development proposals or rezoning within the affected land parcel.

The EPA further stated that more targeted feedback would be provided during the designated public consultation period for future Code Amendments.

Federal Department of Defence

The Department of Defence provided feedback on the Strategic Growth Framework. They outlined their support of urban growth and development however made note that development must be strategically located as to not effect Defence facilities. Any development within proximity to a defence facility should therefore consider:

- Aircraft noise
 - » A reference to the ANEF system and AS2021 be included in the Strategic Growth Framework.
- Bird strike
 - » Avoid land uses that attract wildlife
- Extraneous lighting and glare
 - » Any future developments are to be comprised of non-reflective building materials
 - » Any future development of the land complies with the extraneous lighting controls detailed in NASF Guideline E
- Defence (Aviation Area) Regulations
 - » Building height control for aircraft safety
- Navigational, Communication and flight procedures
 - » Defence will need to assess the proposal for any impact on Defence navigational aids, Air Traffic Control communications and radar operations and any impact on IFR procedures.

7.3.6 Agency Workshops

Department for Infrastructure and Transport (DIT)

On 12 May 2022, a workshop was held with representatives from Department for Infrastructure and Transport (Andrew Excell and Marc Hycicuk), City of Salisbury, Cirqa and Holmes Dyer to discussion the strategic growth

framework study area. The key position points represented by Department for Infrastructure and Transport as part of this meeting are summarised below:

- No more interchanges are proposed to this section of the North South Motorway.
- Port Wakefield Road will continue to serve as a through road and critical local area connectivity. The changes to traffic volume and type may support consideration of new signalised intersections, where demand required for right turn out to access the CBD. Department for Infrastructure and Transport will not support them in multiple locations and need to be strategically planned for where the broad network best requires this infrastructure.
- No immediate plan to consider a speed limit reduction, however as development intensity increases there may be some potential to explore a reduction to 80km p/h.
- General likelihood that existing service roads will be maintained.
- No scenario where a light rail tram between St Kilda and Salisbury would be supported, however a future public transport corridor to space allowance could be identified in the strategic framework to support future infrastructure in the long term.
- The PWR weigh bridge at the south of the study area, is historic infrastructure however the space is still required for other SAPOL road safety activities.
- More detailed Growth Modelling linked to Code Amendments will be required to inform Department for Infrastructure and Transport position on infrastructure funding. Agreement that this strategic framework, with additional analysis based on growth scenarios and associated traffic movements being provided by Cirqa could be used as an early test case for the Department for Infrastructure and Transport modelling. With initial outcomes likely to be able to be provided to CoS in June/July to inform future detailed planning post resolution of the high-level strategic growth framework.

Office of Recreation Sport and Racing

A meeting was held on 10 May 2022, with David Nash from Office Recreation Sport & Racing, CoS and Holmes Dyer Representatives, to discuss potential opportunities and any state alignment for zoning as part of the Strategic Growth Framework for a recreation zone to reinforce existing noisy sport activities relating to the Southern Go Kart Club and South Australian Gun Club and explore future land uses that are aligned to this general activity.

General support by ORSR to the concept, with confirmation that they receive regular enquiries from sports associations and clubs linked to motorcycling, motorsport, field archery and shooting that are difficult to locate in metropolitan locations and could be suited to this location and form of recreation zoning, with the benefit of improved access because of the North South Motorway.

There is no specific demand or initiative within the ORSR 4-year Infrastructure Plan but grant funding may become available and a supportive zone to capture this opportunity may assist Council to attract further investment into this precinct.

Planning and Land Use Services

A presentation to the Code Control Group (Meeting 2022.15 – Item 2) was held on 11 May 2022, involving City of Salisbury and Holmes Dyer representatives. The key discussion items from this discussion are summarised below:

- Support the coordination discussions that have occurred to date with the City of Playford on the growth framework and strategic employment planning and encourage this to continue to present a regional perspective to planning that will inform the Regional Planning to commence in 2022.
- PLUS acknowledged the challenges with multiple proponents led Code Amendments within the study area and agreed that there needs to be a collective agreement of which ones are positioned such as they are generally aligned with this strategic work and could proceed independent and which ones require wider coordination.
- PLUS confirmed that appropriate measures would be required to provision of infrastructure to the satisfaction of all relevant parties (including Council) prior to any Code Amendment Initiation.
- PLUS, preferred solution for multiple Code Amendment coordination would be either for the landowners to join together into coordinated precincts or Council to lead the Code Amendment. Alternative options, including government involvement and fee waivers would be open to discussions subject to regional perspective, timing and further detailed negotiations with PLUS following the finalisation of the initial Strategic Growth Framework to establish Council's preferred strategic position, staging and prioritisation.

7.3.7 Summary Findings

While there were different views, there was a majority view that the area does require detailed planning to investigate rezoning, with some areas and landowners, specifically those either directly fronting or immediately adjacent to Port Wakefield Road who are looking to redevelopment in the immediate term. The process has identified;

1. Areas of the study area where there are discreet groups of landowners with common views on redevelopment and timing that could form a precinct that could potentially proceed through a rezoning process early in the Strategic Growth Framework Timeline.
2. Other sections of the study area, where the landowner views are more mixed, with interspersed owners who both want intensification of development in the short term and landowners who want no change. These mixed areas will likely require Council to take a more leading role to form a view on the future direction and likely lead any required Code Amendments.

The feedback relating to development intentions and those landowners, who have already committed resources to the technical investigations and consultants required to lead a proponent led Code Amendment has been used by Holmes Dyer to inform the recommended precinct plans and staging as set out in the recommendations section of this report.

There was strong engagement and interest in the Strategic Growth Framework from landowners during the engagement period, with a high attendance rate at the two drop-in sessions. This level of interest was likely in part a result of the same group of land holders having been affected by the compulsory acquisitions process undertaken to establish the North South Motorway corridor. It will be important that regular communication be continued with the landowner group, as detailed planning progresses.

The key concern by survey respondents was the lack of infrastructure in the study area and the need for additional provisions including road infrastructure, sewer and wastewater before any commitment to development related investment in the area could be made.

It is recommended that any future Code Amendment Engagement Plan should extract and update as appropriate, the community and stakeholder mapping and engagement approaches included within the engagement plan provided in Appendix 4. A register has been created from this engagement process of all participants, ranging from those who lodged formal submissions to those who made telephone enquiries during the engagement period with this database enabling Council to keep people informed of the project outcomes and the future consultations activities.

It is recommended that Council retain the information on the City of Salisbury Major Projects website with all existing material. The outcomes of the study area and any additional information that may become available should be uploaded onto this website, to enable landowners and any consultants who may be working with them to have access to the most current information and contact details for the nominated City of Salisbury representative.

8.0 Strategic Growth Framework Recommendations

As has been set out in the previous sections of this Strategic Growth Framework, there are several key considerations and inputs that need to be balanced to define the Strategic Growth Framework overall structure, definition of individual precincts and the linked infrastructure and staging assumptions. Holmes Dyer, with key inputs from Greenhill and Cirqa have developed a set of recommendations based on the current available information to provide a coordinated baseline that can be used by landowners, Council and State Government, when considering individual proposals within this area to deliver an orderly development outcome.

Importantly, as more detailed investigations are completed, further discussions are held with landowners and State Government agencies, assumptions set out below may need to change or evolve to capture current development opportunities, balancing the requirement for infrastructure investment and orderly development that will need to be considered on case-by-case basis.

8.1 Strategic Growth Framework – Study Area Structure Plan

A high-level structure plan for the entire Study Area has been developed by Holmes Dyer. This structure plan has been informed by the below key inputs:

- The findings from the site analysis investigations set out in Section 2.0 of this report,
- The technical investigations completed by Greenhill relating to stormwater and service infrastructure provided in Appendix 1
- The transport infrastructure investigations completed by Cirqa provided in Appendix 2
- The agency feedback returned as part of the engagement process set out in Section 7.0 of this report.

For legibility the full study area Structure Plan is presented as Figure 24, with the full study area broken down to provide additional detail into a southern, central and northern area in the subsequent Figure 25, 26 and 27. For full legibility of these plans, A3 versions are provided in Appendix 5 as a consolidated plan set for reference.

It is anticipated that this Strategic Growth Framework Structure Plan will be used for the following purposes:

- Inform the scope and coordination of stand-alone Code Amendments or infrastructure projects within this area that could include investment by Salisbury Water, landscape and road upgrades, future infrastructure corridors and individual development applications.
- Inform critical negotiations required to be undertaken with adjacent landowners including SA to secure access for the open space, pedestrian network and drainage corridors and drainage outflow required to facilitate development across the study area in a planned and coordinated manner that maximises development capacity.
- Identify cross precinct connections that may be required at an all of study level to ensure delivery of orderly development. This will be critical to enable informed decision making, where an individual

precinct rezoning may proceed prior to final detailed infrastructure planning or rezoning having occurred across the balance of the study area.

- Inform ongoing negotiations with the City of Playford to inform service infrastructure location and connection points, capacity and design, specifically relating to stormwater and road infrastructure that will have a regional benefit.
- Inform the upcoming Regional Planning process due to commence in 2022 by Planning & Land Use Services, to support Council to advocate to government the development capacity of the study area to provide additional employment land to that forecast within current land use planning models and seek the associated State support and investment to upgrade the critical infrastructure that will be required to realise this opportunity.
- Inform the City of Salisbury Long Term Financial Plan and future detailed planning and technical investigations that are still required to realise the development potential for the land west of Port Wakefield Road in line with the City Plan 2035 key action.

It is anticipated that the Structure Plan will be updated regularly across the 35-year development timeline anticipated for the land within the Study Area based on current market assumptions. Accordingly, Council should establish a regular review cycle for this strategic work, linked with the 4-year City Plan cycle, to ensure currency of information is available to inform the Long-Term Financial Plan, Asset Management Planning and yearly budget cycle processes.

8.1.1 Recommended Land Use & Zoning Changes

The analysis undertaken by Holmes Dyer as set out in Section 3.0 Economic & Market Overview and Section 7.0 Stakeholder Consultation along with our professional opinion on best practice employment growth area planning recommends a staged land use transition be adopted as part of the Strategic Growth Framework.

As indicated in Section 5.0 the forecast uptake for employment lands across the study area will occur over an extended period out 35 years, this level of development uptake will support Council transitioning to a more intensive employment land-use in stages over an extended timeframe, as infrastructure investment required to support this growth can be designed and delivered based on the infrastructure governance mechanism selected for any individual precinct within the Study Area.

This extended timeline will also allow staged Code Amendments to deliver the Strategic Growth Area that is likely to be a mix of proponent led Code Amendments and Council or State Government led changes to the zoning across the study area. From a land-use zoning perspective, there are a range of options relating to the zoning, subzones and overlays that could be applied as part of future Code Amendment (s) that could support the recommended land uses. Further the Code addresses pre-existing use rights for existing established land-uses, which can legally continue to operate within current facilities and intensity irrespective of any proposed zoning change. However, the zoning change may impact on pre-existing land use rights to expand or change operations which would be assessed against the new zoning.

Holmes Dyer have reviewed the current template zoning options under the Planning & Design Code. However alternate zoning, overlay or Technical and Numerical Variations (TNV) that can still achieve the recommended Land Use and overall strategic growth framework objectives, while managing any relevant interfaces to existing or future planned land-uses should be considered by Council on merit at the time of an individual Code Amendment and are not intended to be overly prescriptive given development proposals and the market response to this land will evolve over the full development timeline.

The high-level land use and recommended policy for the Strategic Growth Framework Structure Plan is summarised below.

8.1.1.1 Strategic Growth Framework Concept Plan

The Planning & Design Code supports the use of Concept Plans where a specific spatial area requires a visual expression of the desired development over time. Planning and Land Use Services consider that concept plans are specifically appropriate where:

- » Policy and zoning tools available in the Code cannot adequately address the development outcomes envisaged in the concept plan; and
- » The subject concept plan has an active policy role in the future staging of development and provision of infrastructure.

Holmes Dyer consider that the Strategic Growth Framework would meet these criteria, and a concept plan for the extent of the Study Area would assist Council to secure the critical drainage infrastructure corridors and detention basins, open space corridors and road widening identified with the Strategic Growth Framework to support the ultimate development configuration and intensification.

The Figure 25 Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan would provide the key inputs that Council would require to create a concept plan as part of a future Code Amendment and should be an early discussion point with Planning & Land Use Services.

8.1.1.2 Employment Land

The economic and market overview and the Strategic Growth Framework study area economic and employment forecasts justify the orderly and staged transition of the Rural, Rural Horticulture (part) and Deferred Urban Zone to an employment focussed zone that would primarily support a wide range of commercial, industrial activities, and other employment generating land uses. This land is identified in purple on the Structure Plan provided in Figure 25 Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan.

It is not envisaged that a one size fits all strategic employment or employment zone would be created across all land holdings through a single Code Amendment with a more nuanced

approach, aligned to the development staging and infrastructure delivery likely to result in the best outcome for Council and landowners to secure the highest and best use of the land and realise the associated economic benefit

The structure plan generally identifies how the land holdings across the study area can be clearly divided into discreet precincts by the existing road networks and open space corridors. The existing and future required infrastructure corridors provides clear breaks where different employment focussed areas to be created. This nuanced approach will support a wider variety of employment generating activities, providing opportunities to create areas with a specific focus that could support business clusters, support gateway quality outcomes at key junctions such as the interchange ramps at Waterloo Corner or provide buffers or transition of lower impact employment land uses to an existing more sensitive land use or an area that may have a more sensitive land use in the future.

As set-out in Section 5.0 Holmes Dyer have forecast that approximately 80% of the employment land identified within the study area is forecast to include stores, services, office and other retail (including bulky goods) and commercial activities that would typically be considered a low-impact light industrial land-use that would be most closely aligned with an Employment Zone.

The forecasting identified approximately 20% of the employment land demand could be required for manufacturing, which would be considered a Strategic Employment land use with a higher level of noise and other impacts. With the separation opportunities linked to the road and stormwater infrastructure corridors this can be easily catered for within several areas of the study area, depending on individual landowner or development outcomes. However, it is Holmes Dyer view that this would be ideally located within the northern sector of the study area, east of Port Wakefield Road and north of Mumford Road. This area will share a boundary with the City of Playford future employment lands, the land holdings are larger and there is less rural residential housing and there is an existing character of established Strategic Employment east of this precinct, that includes several noise generating manufacturing operations that make this area of the Study Area unsuitable for any sensitive land uses.

The transition to employment zoning will likely be delivered by a mix of proponent led and Council Code Amendments and given the disparate land ownership across the study area, there will be an ongoing character of horticultural activities and residential uses operated under pre-existing land use rights that will require consideration at a Code Amendment level to ensure the road and infrastructure investment can be delivered to support the employment activity. Further details regarding how the study area could be divided into discreet precincts to support this transition is detailed in Section 8.2.

8.1.1.3 Commercial Land

The Bolivar and Waterloo Corner North South Motorway Interchanges provide a unique gateway opportunity into both the study area and also the City of Salisbury that could support a more commercial focussed activity centre, such as a roadside service centre or eco or traditional commercial business park. This sort of land use would typically be supported by a standard employment zone, as described in the previous Section 8.1.1.2 ,but a higher proportion of retail or commercial activity would be ideally suited on these gateway interchange sites.

Individual proponents may propose a more specific land use such as a roadside service centre through a proponent led Code Amendment that Council may wish to consider a roadside service centre or alternate subzone, depending on the alignment of the proposal to the general principles of this Strategic Growth Framework

These commercial gateway opportunities are specifically identified on the structure plan in Figure 25 Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan in a blue colour. Ultimately the boundary between the blue and purple land uses, will be flexible to respond the individual development opportunity and market demand.

8.1.1.4 Recreation Zone

Bordered by Driver Road, Robinson Road and the North South Motorway is a triangle of land that is currently a mix of zones including Open Space land containing the Southern Go Kart Club, Rural Horticulture containing the d South Australian Gun Club and a Deferred Urban parcel with a single private owner and land owned by Department for Infrastructure and Transport acquired as part of the North South Motorway. This parcel is identified in dark green on Figure 25 Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan.

The City of Salisbury and Office of Recreation Sport & Racing during the stakeholder consultation identified that there may be a potential in this precinct to reinforce and strengthen the existing ‘noisy recreation’ land uses, to provide a unique recreation offering in metropolitan Adelaide, to cluster this activity within an inner metropolitan location that is highly accessible while not creating impacts on sensitive land uses. This direction would be further strengthened by establishing a recreation zone over these land holdings that could better support the establishment of ancillary retail/commercial clubrooms and ancillary entertainment venues linked to the recreation uses that could strengthen the economic benefits that could be realised from this unique location.

8.1.1.5 Open Space Zone

The existing open space zone within the Study Area may need to be expanded to reflect the network of open space and drainage corridors identified as part of the Strategic Growth Framework to support both passive and active recreation and the critical stormwater channels

and wetland areas. Extension of the Open Space Zone via future Code Amendment may be appropriate where the Open Space Zone aligns with a boundary cadastre and should be considered by Council as part of all future Code Amendments within the Study Area. Timing for this change to an Open Space Zone would be less critical, if a concept plan as identified in Section 8.1.1.1 is established to guide the necessary provision of land for the drainage and open space corridors through individual development application throughout the Study Area.

8.1.1.6 Rural Horticultural Zone

The area of existing rural horticultural zone, bounded by the City of Playford boundary to the north, North South Motorway to the east, Coleman Road to the west and the Waterloo Corner Interchange Connector to the south, has a strong existing character of rural horticulture with many properties operating intensive horticultural activities, with significant investment in greenhouses and other infrastructure. This area, of all parts of the study area has not experienced the same level of pressure for commercial or employment activities as the land parcels fronting Port Wakefield Road. This parcel is identified in light green on Figure 25 Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan.

It is anticipated that any land use transition within this precinct would be later in the overall 35-year development timeline, and there is no immediate pressure to change the current land use operations. Given this situation, and that long term forecasting of demand for land-use is challenging out beyond 10 years, it is recommended that this land and any decision on its highest and best use of land in the future, whether that be for further employment land or an alternative more sensitive land use, that could include consideration of residential, be deferred and ongoing land use operations continue under the current zoning, with encouragement for value-add horticultural options to develop and expand on the existing established operations to ensure viability.

To ensure that a wide range of land-use options remain a viable consideration into the future, it will be important that this area is protected from more intensive land-use creep and that approval of any land-use that may prevent future sensitive land-uses be discouraged. To further support future options, it is recommended that tight subdivision controls be established to prevent any further fragmentation of land holdings through exploration of a Limited Land Division Overlay.

The community consultation that has informed this Strategic Growth Framework, identified existing infrastructure challenges relating to road widths and road infrastructure and lighting and stormwater management. Traffic movement through this area, to the major tourist precinct of St Kilda has changed as a result of the North South Motorway construction and the truncation of the previous direct route via St Kilda Road. It is likely that road infrastructure

investment to this St Kilda route will be required, including upgrade of lighting at key corners for safe vehicle movement across the short to medium term. As a result, it would be prudent for Council to complete a road cross section study and design for the major traffic routes and intersections/corners and if additional land is likely to be required consider establishing a Local Road Widening Overlay as part of a future Code Amendment to preserve the required road corridors that can support both the current and future demands within this precinct.

8.1.1.7 Infrastructure Zone

The existing Infrastructure Zone has been appropriately established over the SA Water Bolivar Wastewater Treatment Plant (WWTP) and Federal Defence landholdings, and no change is required to this zoning framework.

There are two localised exceptions that are recommended to be picked up as part of a future Code Amendment. The first is an area of WWTP buffer land that was dissected from the main site as part of the North South Motorway. The majority of this land is required for a drainage corridor to connect development run-off from both the north and south to the existing outfall channel and this land could be transitioned to Open Space Zone in Council ownership. Areas of this land that are potentially surplus to drainage requirements (subject to confirmation as part of the future stormwater study discussion in Section 8.1.3) could be rezoned for either Caravan and Tourist Park (if adjacent to the existing caravan park) or as employment land (in the northern part of the site adjacent the City of Salisbury's Recycled Water Site) when the immediate adjacent Rural Zone is rezoned.

The second exception, is that while the SA Water Bolivar Wastewater Treatment Plant is technically outside the Strategic Growth Framework Study Area, Figure 25 Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan has identified an opportunity to use of part of the buffer lands owned by SA Water for drainage and open space pedestrian corridors. This intent maximises the development capacity and potential for the adjacent employment land and increases the likelihood that Council can secure the full corridor required early in the study deliver timeline, as negotiation to access this corridor only needs to occur with a single State Government agency. If this access can be negotiated, it is not considered that the zoning would necessarily need to change, however limitations on land division within an Infrastructure Zone may make handover of the land to Council on a separate title more difficult, and access may need to be secured via rights of way or other form of easements or a special approval sort for any land divisions that may be required.

8.1.1.8 Caravan and Tourist Park Zoning

The existing Caravan and Tourist Park Zoning is not recommended to change, as the current zone is suitable for the current use and future proposed use. Any adjacent land zone changes

specifically to the north will need to consider the sensitive nature of this existing land use and would likely result in this land being more suitable for a light industry or commercial land use, noting that the existing tourist park is impacted by the current traffic noise from both the North South Motorway and Port Wakefield Road.

8.1.1.9 Coleman Road Waste Transfer Station

The City of Salisbury has taken over ownership and the ongoing management of the former Coleman Road land-fill site in the northern section of the study area, currently zoned Rural Horticulture. This requires Council undertake groundwater monitoring, minimisation of landfill gas emissions and improvement of on-site drainage to protect the groundwater system and increasing the cap coverage to the landfill which has an ongoing capital cost to Council. Opportunities for alternate use of this site, to harness energy from the methane extraction or other form of eco-industrial outcome could be explored by Council. This sort of facility would typically be in a resource extraction or infrastructure zone that would not normally support innovative employment activities

Any innovative solution to the ongoing operation will need to be considered considering the existing and future buffers required to adjacent horticultural activities within the balance of the Rural Horticultural Zone that should be identified on a Concept Plan created as outlined within Section 8.1.1.1.

There is no existing sub-zone within the Code Library Framework, that specifically supports this sort of opportunity, and the best policy approach and timing would need to be negotiated on an individual basis with Planning & Land Use Services.

8.1.2 Recommended Transport Initiatives (Cirqa)

Cirqa have completed a traffic infrastructure assessment, of existing and planned development capacity proposed as part of the Strategic Growth Framework, to inform the development content of the Structure Plan. The full report can be view in Appendix 2 -Cirqa Transport Investigations.

The key principles and planning policy controls that informed the Structure Plan are reproduced below:

- » New connections to the North-South Motorway, as an established non-stop transport corridor, are not supported.
- » Access between development precincts and arterial roads such as Port Wakefield Road and Waterloo Corner Road should be facilitated via service roads and not direct access to those arterial roads.
- » Service roads should be left-in/left-out only and equipped with acceleration/deceleration lanes (designed in accordance with relevant Austroads' criteria, relative to the posted speed limit).
- » Consideration by the Department Infrastructure & Transport of a reduction of the Port Wakefield Road speed limit would assist in reducing the level of infrastructure improvement required on Port Wakefield Road, as well as assisting in achieving better safety outcomes (i.e., for uncontrolled right turns from side/service roads) and should by an advocacy position that the City of Salisbury adopt as an outcome of the Strategic Growth Framework.
- » U-turn lanes may be used to facilitate turning in Port Wakefield Road where right turns are not supported at intersections and two have been identified on the structure plan in locations recommended to service traffic movements as intensification of development occurs across the study area.
- » The typical road hierarchy within the study area will provide Sub-arterial or Collector Road access to Port Wakefield Road and Waterloo Corner Road. Collector Roads would then link to Local Roads. Securing the corridors for these roads, through individual land ownership in some precincts may impact on the timing and form of development, especially where a central landowner whose land provides a critical connection is not part of the initial development scheme. As one potential solution in some locations, Council should advocate to Department for Infrastructure and Transport for the handover of land holdings that run parallel along the North South Motorway, for the potential delivery of a local road network that can service an individual precinct as an alternate to a slip lane or central road corridor that may be limited by land holding and development timing. The ultimate cost to construct this local road network would still be shared by the property owners.
- » Shared Use Pedestrian/Cyclist network should align with stormwater and open space corridors and adjacent arterial corridors to maximise the efficiency of the space.

- » Collector Roads should be designed with facilities for pedestrians and cyclists and for future public transport provision.
- » Port Wakefield Road is gazetted for road trains, so consideration should be given to extending road train access to designated precincts of land within the Employment zoning. The precinct bounded by Heaslip Road, Waterloo Corner Road and the North-South Motorway may be most suitable for provision of new road train gazettal.
- » Consideration should be given to the increase in public transport services throughout the study area, noting existing services are limited. Alternate transport offering (to motor vehicle) is likely to assist in reducing associated traffic volumes on the surrounding road network. Further, future east west transit corridors that could connect Salisbury City Centre to St Kilda and the ultimate development delivered through the study area should be considered and consideration of reserving a corridor included as part of the Structure Plan.

The planning policy controls to facilitate implementation of the general principles above could include:

- Future Local Road Widening Overlay (applicable to Council-owned roads);
- Future Road Widening Overlay (applicable to Department for Infrastructure and Transport owned roads);
- Major Urban Transport Routes;
- Non-stop Corridor Overlay;
- Traffic generating development overlay; and
- Major urban transport routes.

Additional legislative requirements may also be applied as needed to ensure adequate land is available. This includes the Metropolitan Road Widening Plan (MARWP) which is typically reflected on land titles.

8.1.3 Recommended Infrastructure Initiatives (Greenhill)

Greenhill has completed a preliminary service infrastructure assessment, of existing infrastructure and likely additional augmentation and infrastructure as part of the Strategic Growth Framework, to inform the development content of the Structure Plan. The full report can be view in Appendix 1 - Greenhill Preliminary Service Infrastructure Report.

A challenge in respect to infrastructure planning is that the service authorities, specifically SA Power Networks (SAPN) and SA Water require an advanced level of planning and forecast development capacity in order to be able to provide information on augmentation costs and staging. While preliminary feedback has been provided to date, ongoing negotiation following finalisation of the Strategic Growth Framework is required with the key service authorities to secure this more detailed information and inform the staging and costing for any required infrastructure agreements. Typically, this level of detail would be finalised as part of further investigations undertaken to inform a Code Amendment. Greenhill, at the request of the City of Salisbury, has requested that SA Water and SAPN continue with their internal planning and investigation over the study area, to communicate the likely solutions for servicing the precincts direct to City of Salisbury and to inform any future Code Amendment investigations, outside the timeline available to complete this Strategic Growth Framework.

The requirement for a detailed stormwater solution through the study area was a major focus of the Greenhill investigations, considerate of the existing low nature and flooding risk of the study area and the lack of major stormwater infrastructure in this precinct. A preliminary stormwater layout, including a network of storage wetlands/ponds and drainage swales/underground pipe networks has been developed and has informed the Structure Plan set out in Figure 26.

More detailed stormwater investigation modelling, including negotiations with the City of Playford, is required to develop a stormwater management plan and stormwater infrastructure to inform the roll-out of development within the Study Area. The further detailed stormwater investigations would enable Council to investigate the business case to expand the Salisbury Water network west of Port Wakefield Road, and the linked approach to stormwater capture and treatment whether this be at an individual site or all of catchment level. While the delivery of catchment wide stormwater solutions, owned and managed by the City of Salisbury and joint funded by developers either as a cost per hectare charge paid into a stormwater fund or as part of the broader infrastructure agreements, individual site management to pre-development flows may be required for early project delivery until the downstream system can be constructed to manage any short-term flooding risks. This interim solution could be transitioned to further development potential on these sites as part of a future expansion once the downstream system is in place or be a permanent solution of the overall stormwater system subject to negotiation with each individual party.

Ultimately, the feedback from the service authorities relating to capacity and augmentation charges and the additional stormwater investigations will need to be advanced by the City of Salisbury to allow the associated cost charges and frameworks to be identified at either a precinct or individual site level to inform the negotiation of infrastructure agreements as part of either a future Code Amendment or an individual development proposal.

Figure 25. Strategic Growth Framework Bolivar Waterloo Corner – Full Study Area Structure Plan
(Full Resolution Version available in [Appendix 5](#) (click her) for legibility of notes/legend)

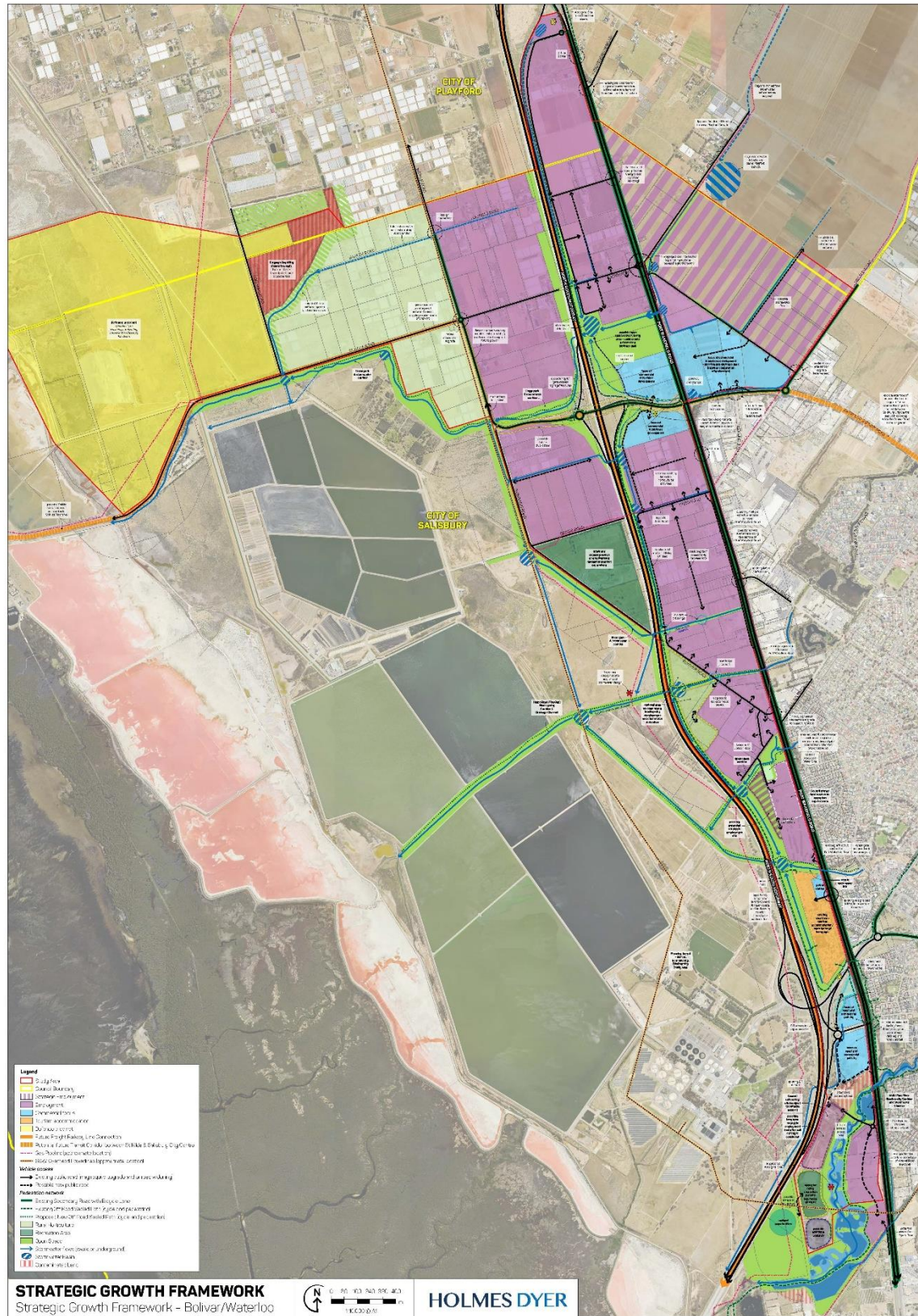


Figure 26. Strategic Growth Framework Bolivar Waterloo Corner– Structure Plan South
(Full Resolution Version available in [Appendix 5](#) (click her) for legibility of notes/legend)

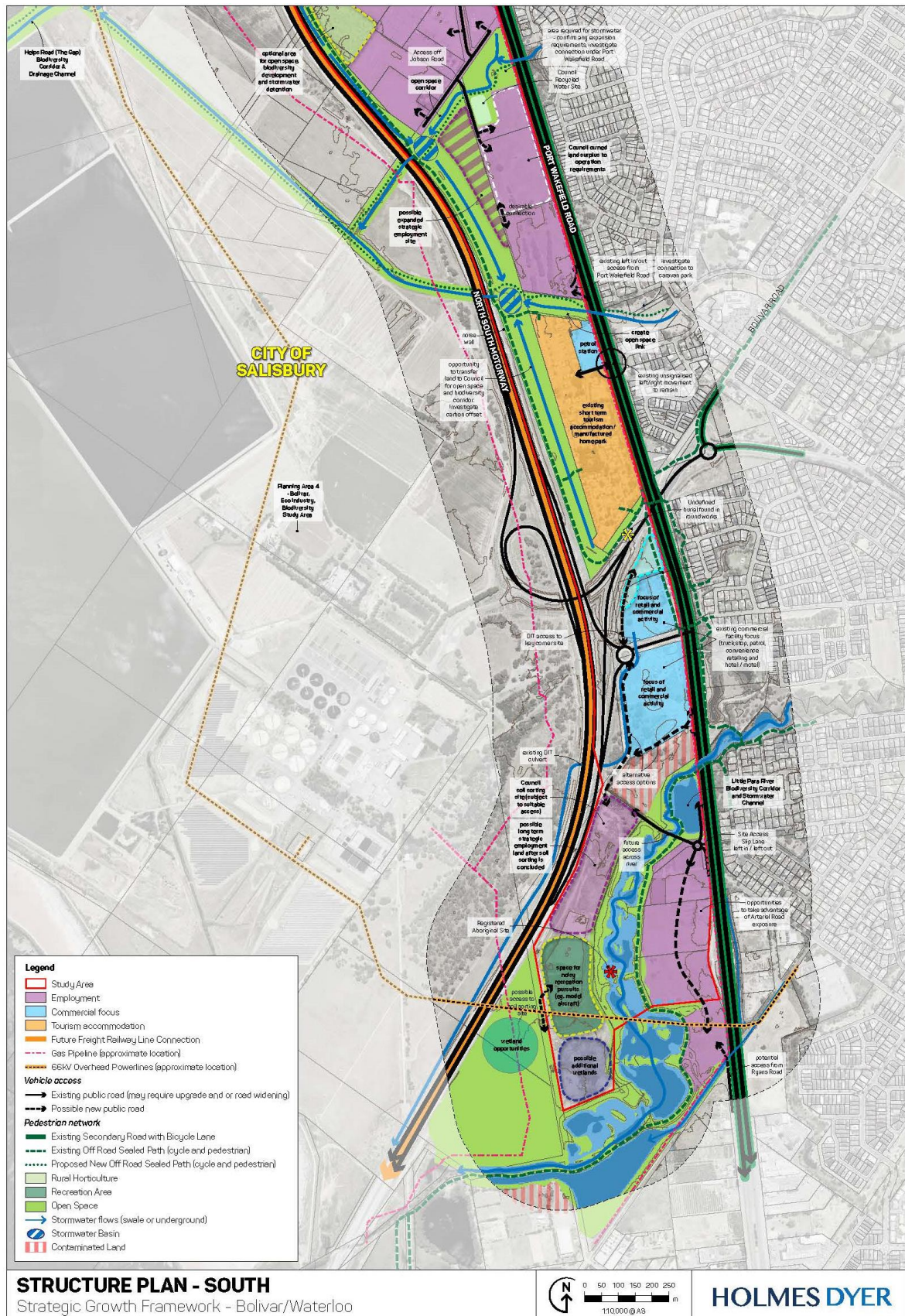
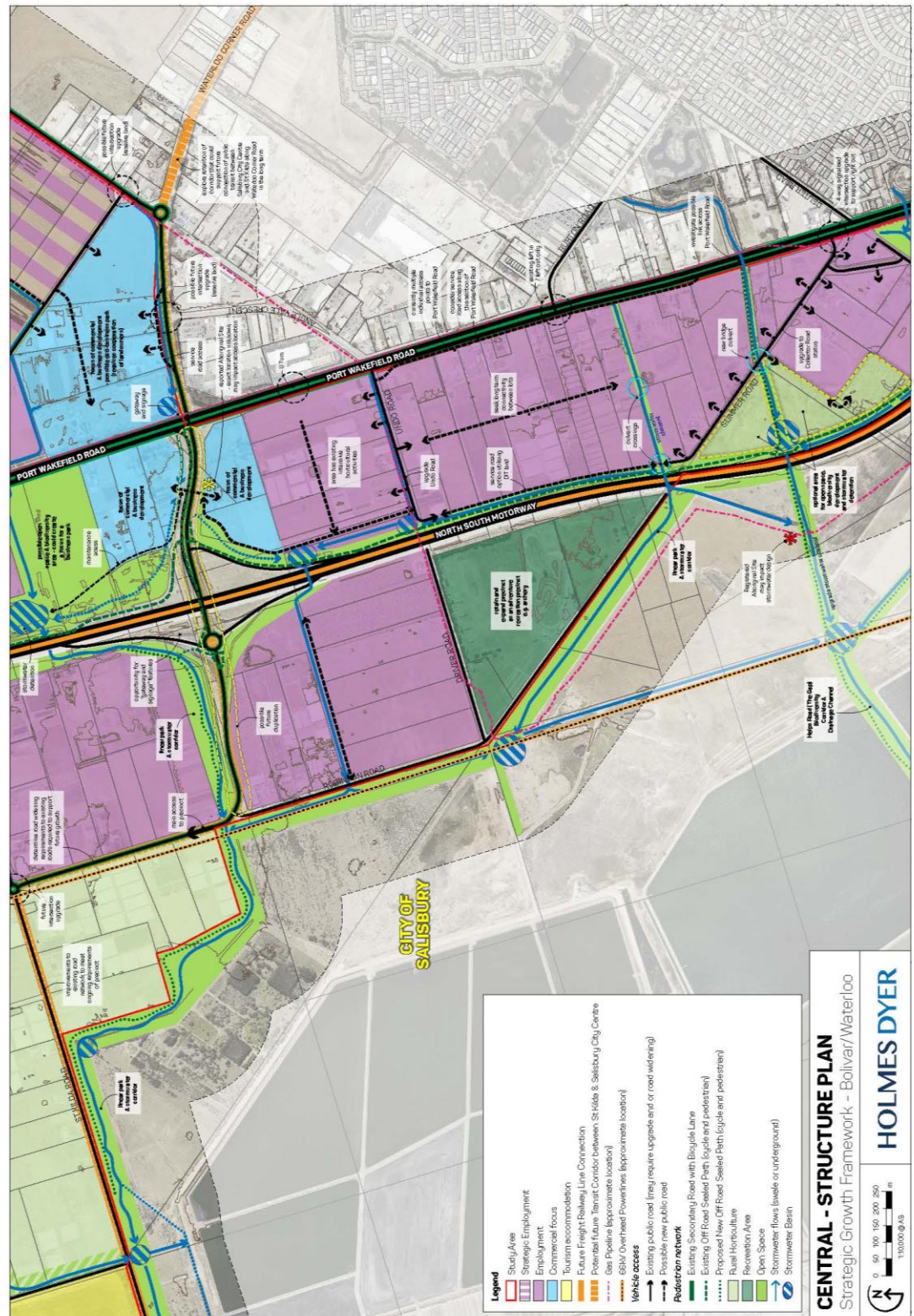


Figure 27. Strategic Growth Framework Bolivar Waterloo Corner – Structure Plan Central
(Full Resolution Version available in [Appendix 5](#) (click her) for legibility of notes/legend)



8.2 Precinct Approach & Infrastructure Planning Sub Areas

While there is a logic to the division of the subject land into Code Amendment areas that would be either Council or Proponent Led, dependent on development readiness within the overall Structure Plan developed for the Strategic Growth Area. Infrastructure planning and delivery will need to be developed at a sub-area level.

Ultimately, Council should ensure a flexible approach is adopted to ongoing planning that could support the programming of Code Amendments to capture existing developer interest and economic development in an orderly manner, with the infrastructure investigations continuing at a more sub-area granular level, that can be linked to the selected infrastructure agreement model, to maintain flexibility for boundaries to change as will be required as the delivery of this area evolves.

Infrastructure sub-areas by their nature are required to be more granular linked to landform and stormwater directions which does not always align neatly with a boundary linked to landowners and responsibility for future Code Amendments. As a result, there are different boundaries that have had to be drawn for Code Amendment responsibility precincts, Infrastructure Precincts and Traffic Modelling Precincts that are set out on the following pages. To facilitate cross tabulation a table is reproduced below that identifies the relevant sub areas that are set out in this section of the report.

To assist Council with the immediate planning and consideration of Proponent led Code Amendments that are already proposed, Holmes Dyer have split the Strategic Growth Framework Structure Plan into eight indicative Code Amendment Precincts which consider the area of land required to be considered to ensure orderly development.

For some precincts, further consultation is required to identify development interest timing given the extended delivery timeline of the Strategic Growth Framework and high level of consultation being able to be undertaken to date. It is anticipated that some of these precincts, specifically Precinct 4 Bolivar Centre could be broken into smaller sub-precincts if a group of landowners seek to proceed ahead of a broader rezoning process that Council may explore over the study area, informed by the granular sub area infrastructure and transport modelling areas to determine if this sub-precinct delivery is orderly within the context of the broader Strategic Growth Framework.

Land within the City of Playford both above Coleman Road and between the North South Motorway and Greyhound Road, has been developed as part of the Figure 25 Strategic Growth Framework Bolivar Waterloo Corner Full Study Area Structure Plan to ensure coordination with planning underway by the City of Playford to the North. Given this land and timing and decisions relating to its delivery will be the responsibility of the City of Playford this land has not been identified as a precinct.

Should Council and Planning Land Use Services agree to the inclusion of a concept plan within the Planning & Design Code to align with the Strategic Growth Framework, Holmes Dyer would recommend that the minor changes required to protect the Rural Horticulture land identified as Precinct 5 be undertaken by Council as a Code Amendment to set the overall structure and protection measures, early in the overall delivery timeline.

To enable cross tabulation, Holmes Dyer have produced the following table, identifying those sub-areas that apply to each individual precinct as set out in the table below and the boundaries and set out on the subsequent pages. Section 8.3 provides additional details for each Precinct on the assumptions relating to delivery timing and infrastructure.

Table 18. Strategic Growth Framework -Precinct Cross Tabulation

Recommended Code Amendment Precincts*	Predicted Code Amendment Responsibility*	Priority*	Stormwater Infrastructure Sub-Area	Transport Modelling Sub-Area
Precinct 1 – Little Para River (South)	Proponent Led	Immediate	1A (part)	1.3 (part)
Precinct 2 – Waterloo Corner Interchange	Proponent Led	Immediate	3 (part)	3.3, 2.4
Precinct 3 – Waterloo Corner Triangle	Proponent Led	Medium	3 (part)	3.1
Precinct 4 – Employment Land Balance Areas	Council Led	Medium	2A, 2B, 2C (part), 1A (part)	4.2, 2.5, 2.6, 2.7, 2.8, 2.9, 1.1, 1.2, 1.3 (part)
Precinct 5 – Rural Horticulture Protection Measures and Concept Plan	Council Led	Short	4	4.3, 4.4, 4.5, 4.6, 4.7, 4.8, 4.9, 4.10
Precinct 6 – Recreation Area	TBD	Long	2C (part)	4.1
Precinct 7 – Strategic Employment Balance Areas	TBD	Long	3 (part)	3.2
Precinct 8 – Coleman Road	Council Led	Long	4	N/A

* Subject to change in respect to individual developer interest and future Council decisions

The priority in the above table is considered to have the following timelines

- Immediate – Work to commence immediately, with landowners and their nominated planning consultants to consider a Proponent Led Code Amendment, subject to required investigations being provided by the landowners, where aligned with the general framework set out in this document.
- Short – Within the next 12-24 months
- Medium – Within the next 3-10 years, subject to the detailed investigations being completed and the level of land-owner interest, full precincts or sub-precincts could be brought forward.
- Long Term – No interest identified, likely to be out beyond 10 years, unless new interest is identified.

Figure 29. Precinct Boundaries

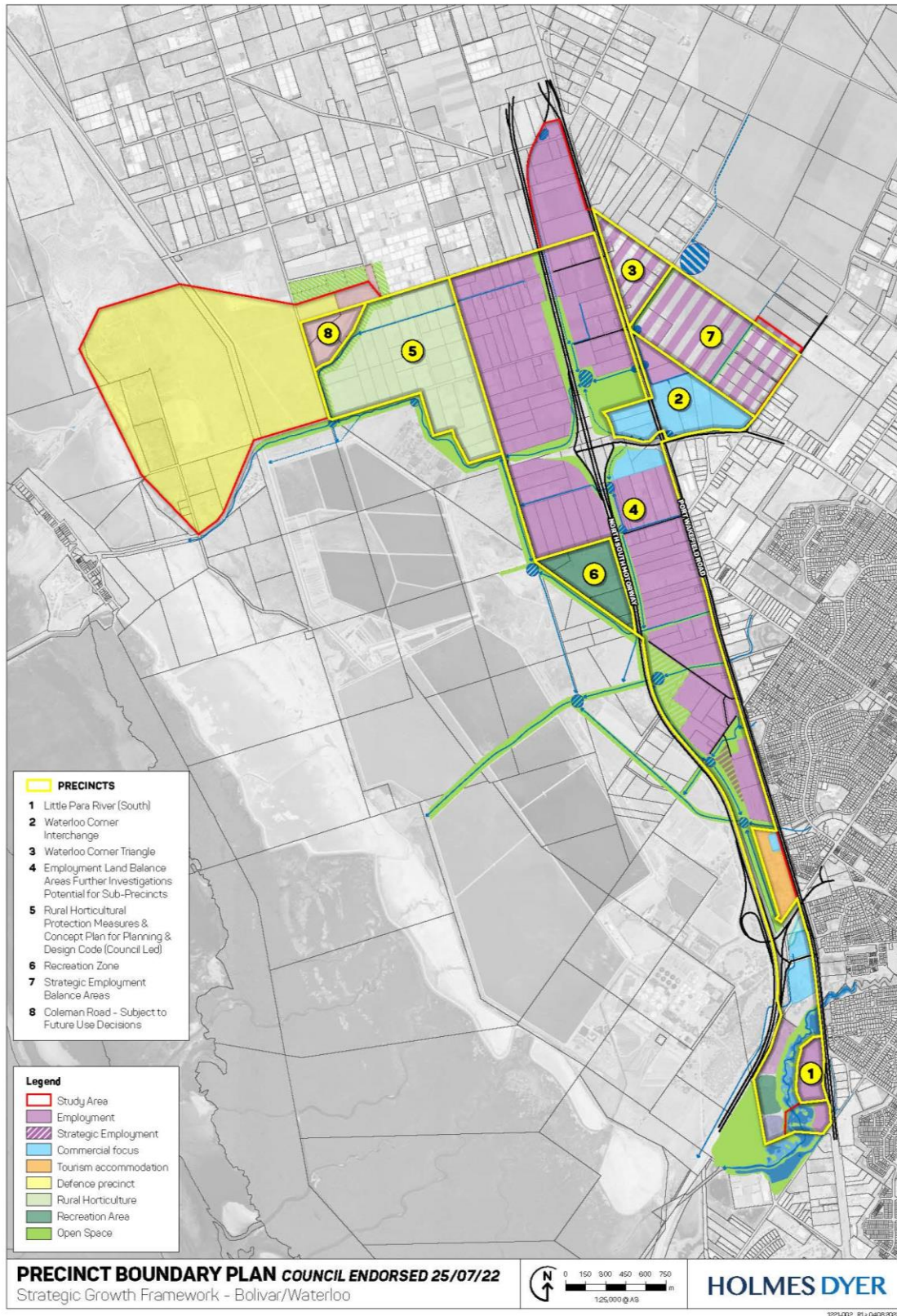


Figure 30. *Stormwater Funding Sub-Areas (Greenhill)*

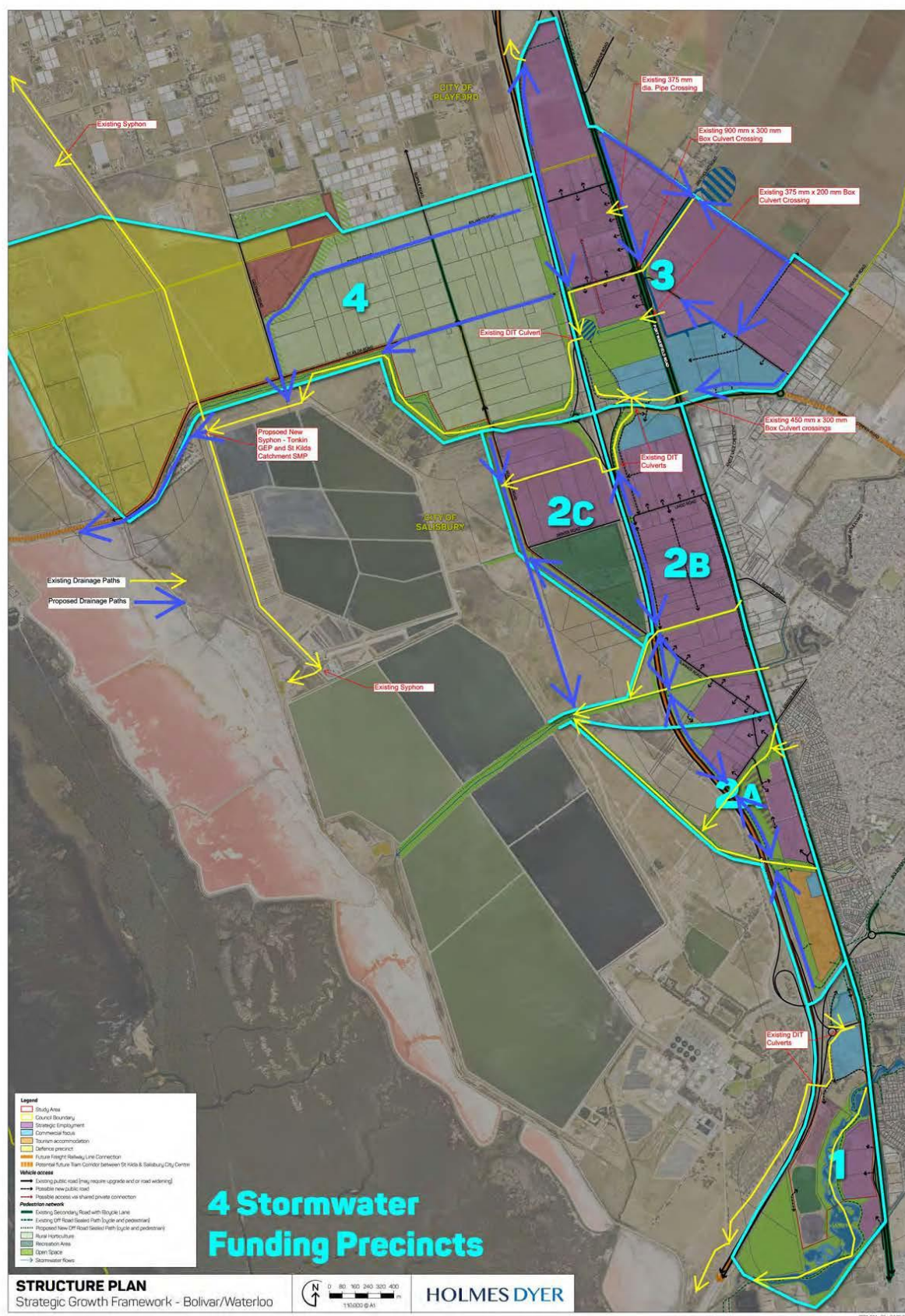




Figure 31. Traffic Modelling Sub-Areas (Cirqa)





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DRAWING AMENDMENTS					
REV	DATE	DESCRIPTION	DWN	CHK	
A	15/06/2022	FOR DISCUSSION	ABH	TAW	



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STRATEGIC GROWTH FRAMEWORK
WATERLOO CORNER & BOLIVAR
SUB-AREA LOCATIONS
PROJECT # 21611 SHEET # 01_SH01

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8.3 Recommended Code Amendment Precincts

8.3.1 Precinct 1 – Little Para River (South)

Precinct 1 is envisaged under the Structure Plan to be used for employment uses, capitalising on its exposure and direct access to Port Wakefield Road.

This discreet development parcel containing three titles sits at the far southern section of the Study Area and requires access from Port Wakefield Road via a left in / left out arrangement at the northern end of the precinct positioned to avoid the existing Department for Infrastructure and Transport Weighing Station.

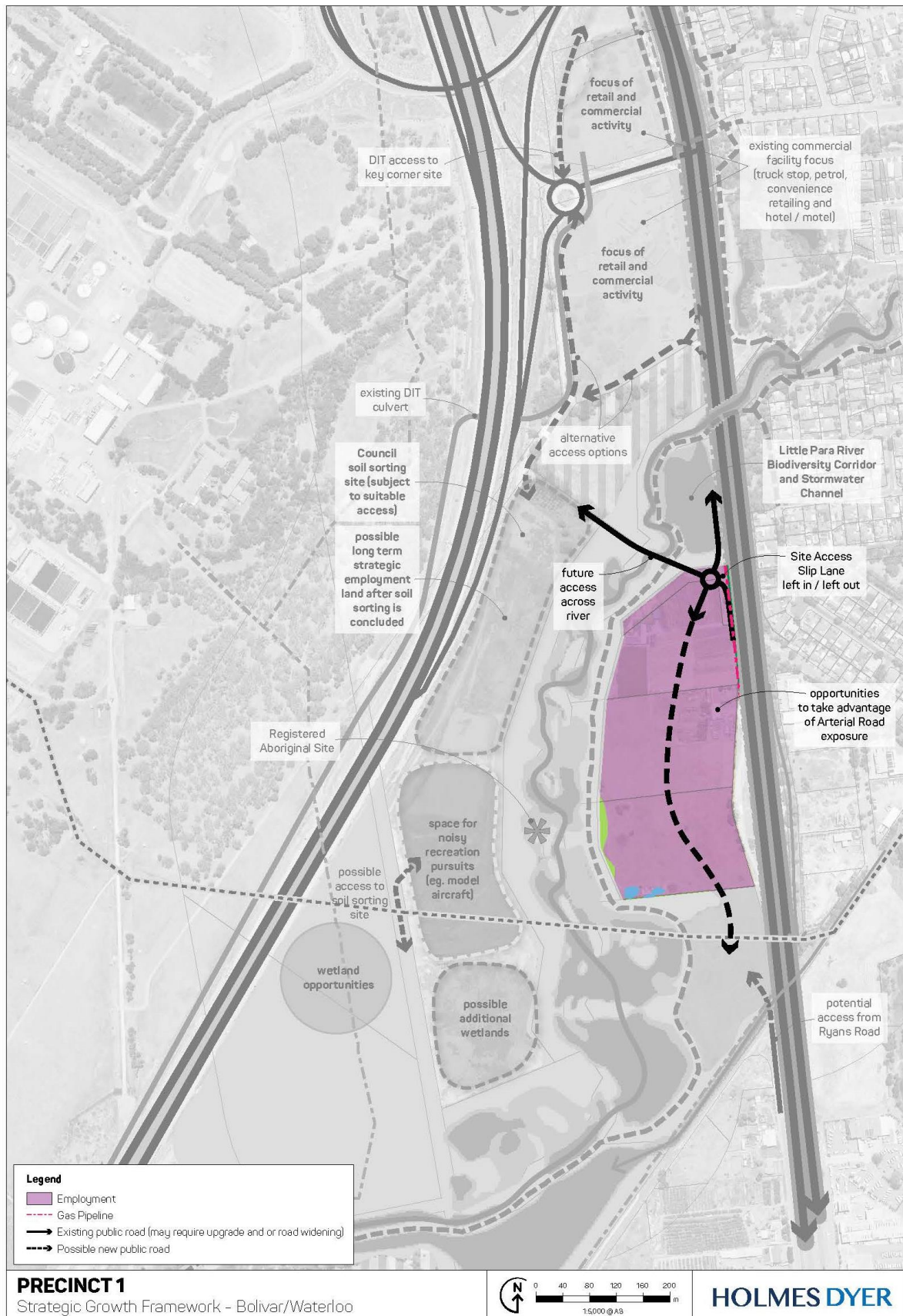
This new access point needs to be designed to not only provide internal circulation to these three titles but also a future connection point to the City of Salisbury land on the western side of the river corridor that is currently land locked. While Department for Infrastructure and Transport has granted the City of Salisbury temporary access immediately north of the Little Para River Corridor in the left slip lane for the OTR, however this access approval is provisional for Council use only and a more permanent access to the eastern land holdings must be provided through this precinct as part of a future Code Amendment, with construction of the required bridge over the river not required until a future land use is determined for Council's interim soil sorting use.

Current flood mapping for this land holding identifies inundation during the 1% Annual Exceedance Probability (AEP) rainfall event, with flood mitigation and development floor levels required to be developed prior to rezoning of this land to ensure developability.

Stormwater outflow volumes and the necessary quality controls (reed beds, gross pollutant traps etc) will be required but logically water should be directed into the Little Para River without detention, given the site's location close to the river's outfall.

Holmes Dyer understands that there is interest in a Proponent Led Code Amendment for this parcel to be developed in the short term. Given the clear infrastructure requirements, it is anticipated that this could be negotiated directly with the proponents as part of the Code Amendment with any infrastructure contribution or road connection corridors negotiated at this point and secured via an infrastructure deed. Given the discreet location of this development parcel, if the traffic connection to the eastern sites can be secured, this precinct could proceed ahead of broader planning across the balance of the Strategic Growth Area Framework Study Area.

Figure 32. Precinct 1 – Little Para South Detail Plan



8.3.2 Precinct 2 – Waterloo Corner Interchange

This precinct is envisaged under the Structure Plan to be used for employment commercial uses, linked to the Gateway position of the precinct on the Waterloo Corner Interchange. Strategic Employment uses to the back of the precinct fronting Mumford Road are envisaged that will mirror that uses proposed for the north side of Mumford Road into the future.

This precinct will be predominantly accessed via Waterloo Corner Road and Mumford Road and will serve as a major Gateway to Waterloo Corner Road and the North South. New access points and configurations will need to be negotiated with Department for Infrastructure and Transport both east and west of Port Wakefield Road will provide an opportunity for a new local access / maintenance road within Department for Infrastructure and Transport land which connects all properties north of this point. To the east, site access might be via a left in / left out slip road or a roundabout / traffic signals at the corner of Waterloo Corner Road and Angle Vale Crescent, with existing traffic volumes on this section of Waterloo Corner Road and Angle Vale Crescent, requiring local traffic planning to inform the final intersection design and distribution of costs.

The junction between Greyhound Road and Port Wakefield Road has been identified in the Structure Planning as a location for a future 4-way signalised intersection, that could service primarily regional growth in the City of Playford and development parcels to the north of this precinct. Precinct 2 is not considered to contribute traffic of a volume that would trigger upgrade to this intersection, but any connections to Mumford Road will need to consider this future infrastructure.

Current flood mapping for this land holding identifies inundation during the 1% Annual Exceedance Probability (AEP) rainfall event. Greenhill's preliminary investigations have identified that flood waters are ponding to the eastern side of Port Wakefield Road within this precinct with stormwater overland flows being blocked and stored in local depressions. Flood mitigation and development floor levels required to be developed prior to rezoning of this land to ensure developability given the current flood mapping pre-dates the North South Motorway delivery.

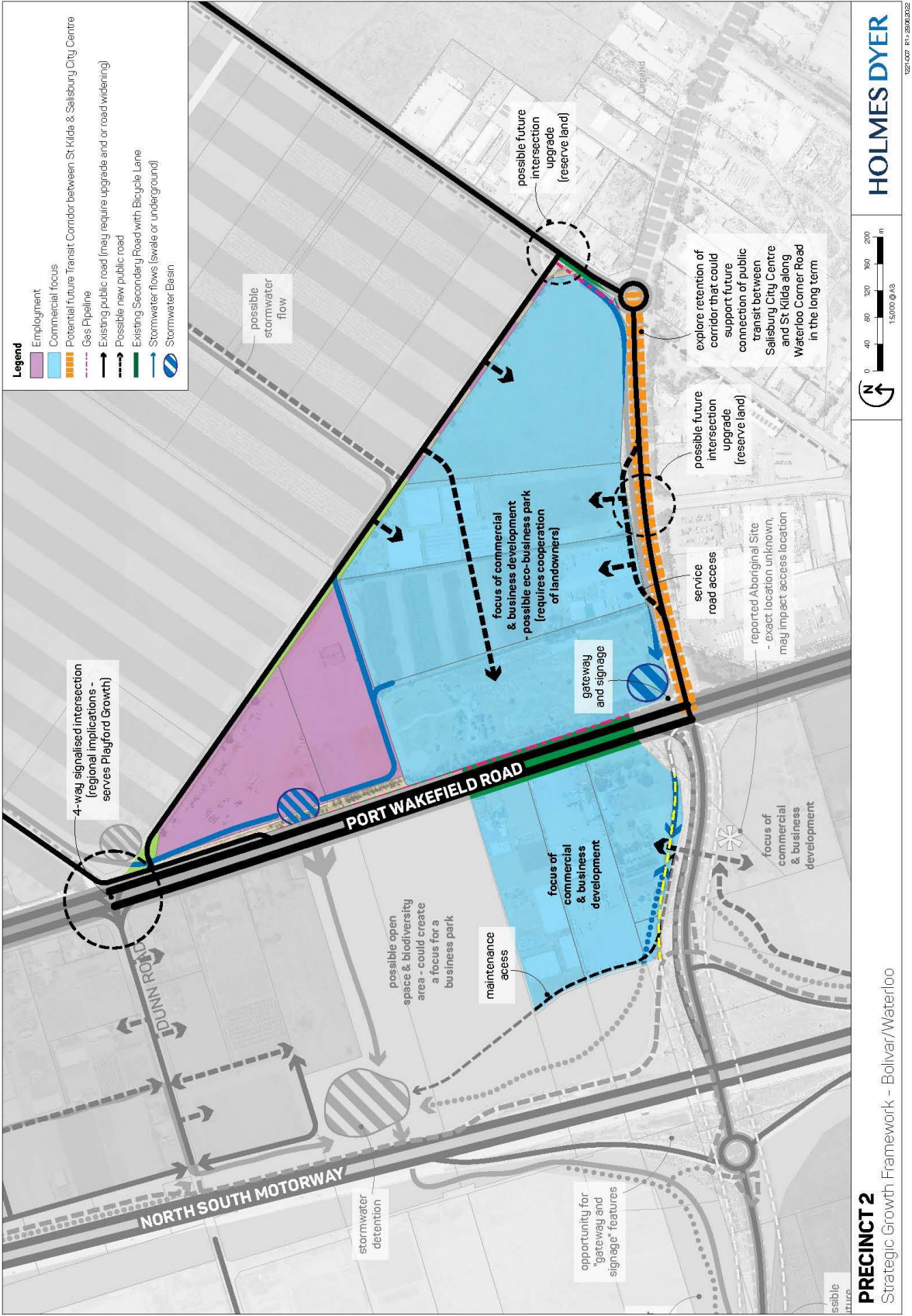
Land acquisition for stormwater detention would logically occur immediately east of the North South Motorway, just north of Waterloo Corner Road, where a Department for Infrastructure and Transport channel provides an outfall to the west of the North South Motorway on Department for Infrastructure and Transport land, which should be acquired by Council to provide critical drainage and open space land required to support both this precinct and regional stormwater flows from the City of Playford once Greater Edinburgh Parks is developed. This open space land transfer should be confirmed ahead of the Code Amendment for Precinct 2, as alternatively a larger volume of on-site detention required.

Stormwater detention will be critical for this precinct, combined with Precinct 3 and 4 and the future development capacity of the City of Playford land to the immediate north, so as not to exceed the capacity of the existing St Kilda Road channel and downstream channel limitations of Helps Road Drain (the Gap) through the Bolivar Wastewater Treatment Plant.

A detention basin connected to stormwater channels along Waterloo Corner Road will be required to temporarily hold water in major flood events until it can pass under Port Wakefield Road in the existing 450mm x 300mm box culvert. Stormwater channels will be required to direct flows to these key road culverts and to make provision for upstream flows as indicated on the Structure Plan.

Holmes Dyer understands that there is interest in a Proponent Led Code Amendment for part of this precinct to be developed in the short term, with landowner coordination and a planning consultant already engaged. As part of a Proponents Led Code Amendment flood modelling, stormwater infrastructure design, informed by Council's acquisition of the land immediately east of the North South Motorway from Department for Infrastructure and Transport will need to be resolved, along with the traffic access points identified within the Structure Plan. If these investigations are completed, the infrastructure funding to support the rezoning of this land could likely be agreed ahead of broader planning across the balance of the Strategic Growth Framework and contributions secured via an Infrastructure Deed.

Figure 33. Precinct 2 – Waterloo Corner Interchange



8.3.3 Precinct 3 – Waterloo Corner Triangle

This precinct is envisaged under the Structure Plan to be used for Strategic Employment uses given there are no sensitive land uses within proximity of this precinct, aligning to the established character of Strategic Employment Zone in this part of Salisbury east along Waterloo Corner

Road access in this precinct will be from Greyhound Road and Port Wakefield Road. Future subdivision and development should be coordinated to minimise access points to Port Wakefield Road. Ideally, a slip road would be provided. The possible upgrade of Port Wakefield Road / Dunn Road / Greyhound Road intersection would directly serve this precinct along with the demand from the north into the City of Playford, which results in this intersection serving both a local precinct and broader regional demand. The split will need to be calculated based on traffic modelling along with further traffic investigations to confirm a trigger for this intersection to be delivered in the future, likely to be beyond any development capacity delivered within Precinct 3 in isolation.

Stormwater will require channelling to existing 900mm x 300mm culverts under Port Wakefield Road. Dunn Road reserve provides an alignment to channel stormwater west to proposed future Council detention in Precinct 2, however until this full channel connection down Dunn Road can be delivered would simply spill across private landholdings west of Port Wakefield Road, making it more problematic as a stormwater channel route. Stormwater will need to be detained to pre-development flows in order to manage flows into Dunn Road if this precinct is delivered ahead of this part of Precinct 4.

Current flood mapping for this land holding identifies inundation during the 1% Annual Exceedance Probability (AEP) rainfall event. Greenhill's preliminary investigations have identified that flood waters are ponding to the eastern side of Port Wakefield Road within this precinct with stormwater overland flows being blocked and stored in local depressions. Flood mitigation and development floor levels required to be developed prior to rezoning of this land to ensure developability given the current flood mapping pre-dates the North South Motorway delivery.

Stormwater detention will be critical for this precinct, combined with Precinct 3 and 4 and the future development capacity of the City of Playford land to the immediate north, so as not to exceed the capacity of the existing St Kilda Road channel and downstream channel limitations of Helps Road Drain (the Gap) through the Bolivar Wastewater Treatment Plant.

Holmes Dyer understands that there has been some interest from landowners in this precinct however, there is no coordinated approach or planning consultant currently engaged. Further detailed consultation should be undertaken by Council with landowners in this precinct prior to a timeline for any rezoning being confirmed.

Figure 34. Precinct 3 – Waterloo Corner Triangle



8.3.4 Precinct 4 – Employment Land Balance Areas

This precinct is made up of most of the employment land identified west of Port Wakefield Road, in the Deferred Urban and Rural Zones. This precinct is likely to be separated into several smaller sub-precincts as individual landowner interest in rezoning becomes apparent; divisible using the existing and proposed road network and drainage corridors. Alternatively, Council may wish to explore undertaking a broader Council Led Code Amendment to bring this part of the city into alignment with the structure and zoning proposed as part of the Strategic Growth Framework once the infrastructure investigations and costings and approach to contribution is fully resolved and can be implemented as part of the future Code Amendment.

Development of land within this precinct relies upon a combination of upgraded access to Port Wakefield Road and internal collector road network that provides options for accessing and egressing the precinct internally through new local Council owned, or connecting private roads, without the need for multiple access point to Port Wakefield Road which would not be supported by Department for Infrastructure and Transport.

Access to / from Port Wakefield Road is proposed via a 4-way signalised intersection at Summer Road, retention of the left in / left out at Undo Road, but supplemented with a U-Turn capacity to the north, existing unsignalised left / right movement into the Caravan Park and the existing left in / left out movement to serve land north of the Caravan Park is the proposed traffic arrangement to service the central part of this precinct

The area of the precinct north of the Waterloo Interchange will rely upon connections to Port Wakefield Road via Dunn Road (possible 4 way signalised that provides regional benefit as discussed within Precinct 3) and via Anjanto Road (existing unsignalised right turn into Anjanto Road and left in / out from Port Wakefield Road), with internal connectivity via a collector road parallel to the North South Motorway and within the Department for Infrastructure and Transport road reserve linking Dunn Road to Anjanto Road (and further north and south). A U-Turn option north of Anjanto Road would facilitate southerly movement along Port Wakefield Road from Precinct 4.

Part of the new road network through this precinct anticipates a new collector road within the Department for Infrastructure and Transport North South Motorway Road reserve running parallel from Summer Road to Waterloo Corner Road, and access south off Jobson Road also parallel to the North South Motorway, thereby providing options for almost every property to access Port Wakefield Road via the nominated intersections. Further mid-block connectivity would also be desirable as part of the subdivision of the landholding to provide for additional interconnectivity to supplement the new road corridor, if access to these landholdings owned by Department for Infrastructure and Transport and cost for construction can be negotiated with Salisbury, which would include landowner contribution through an infrastructure deed or similar.

Access to land west of the North South Motorway would be from the existing Robinson Road and Driver Road, with a mid-block east-west link possible between Driver Road and Waterloo Corner Road at the likely point of stormwater flow from the outfall under the North South Motorway, south of Waterloo Corner Road.

The structure plan identifies a potential upgrade of the intersection at Summer Road/ Port Wakefield Road to a 4-way signalised intersection, to support improved right turn out access for the land within Precinct 4. The ultimate location of a 4-way signalised intersection will be subject to negotiation with Department for Infrastructure and Transport and detailed traffic investigations to assess the broader regional benefit of this intersection, which should include consideration of relocating this 4-way intersection to Burton Road, dependent on the broader benefit this may provide to the new and existing road network.

The 'spine' road network shared between Precinct 4 and Precinct 5 is generally considered appropriate to facilitate vehicle access to the various allotments throughout. However, both Robinson Road and St Kilda Road will also likely require upgrade from a 'collector road' classification to a 'sub-arterial road' or 'arterial road' (dependent on final development traffic volume outcomes). This will involve a widening of the existing carriageways to provide additional trafficable width in line with the City of Salisbury's standard road cross-section. The intersection of Robinson Road and St Kilda Road will also likely require upgrade to increase its operational capacity. Given that property boundaries are currently located within very close proximity to the roundabout, a road widening layer at this intersection will be required (detail on the extent of this corridor will be required to be determined with further detailed traffic modelling analyses).

This Precinct has several key locations where the capacity of stormwater infrastructure is limited or constrained, including the North South Motorway culvert crossings as well as the capacity for the Helps Road Drain 'The Gap' stormwater channel.

Provision of stormwater detention measures are critical for 'The Gap', which is known to have capacity limitations. Stormwater detention measures are also critical to control stormwater flows arriving at existing major road culverts (North South Motorway and Port Wakefield Road) and Helps Road Drain that will require a combination of on-site detention to pre-development flows and collection of linked detention basins and stormwater channels developed and maintained by the City of Salisbury. Stormwater quality treatment measures will also be required and integrated with development, to treat the quality of stormwater runoff prior to discharge into the Barker Inlet. The details of this stormwater design will be required to be evolved through more detailed stormwater and flooding modelling, considering the impact of the North South Motorway.

While already predominantly established, the zoning for the land surrounding the existing Bolivar 'On the Run' and Whitehorse Inn currently sit in Rural Zoning with the zoning to support the development of the balance of sites around this precinct and future expansion corrected as part of a broader Code Amendment if delivered by the City of Salisbury. Access to the existing commercial development (On the Run and other tenancies) is via a left-hand slip lane off Port Wakefield Road and all way movement via Hodgson Road. The Whitehorse Inn is accessed via Hodgson Road. Hodgson Road provides all way movement onto Port Wakefield Road and left on / off connections to the North South Motorway. Bolivar Road provides north and south movement options onto the North South Motorway from Port Wakefield Road, providing the locality with exceptional strategic connectivity.

The southern portion of Precinct 4, is effectively land-locked, requiring a connection across the Little Para River from Precinct 1 and / or connection through the On the Run site. While this latter connection could occur largely through Department for Infrastructure and Transport land, it would need to cross the On the Run site to make a safe access point to Hodgson Road. The northern tip of the precinct is a site with high exposure (surplus Department for Infrastructure and Transport land), which could have commercial value. Again, access to this site can be largely via Department for Infrastructure and Transport land but needs a safe access point onto Hodgson Road.

Stormwater management for the southern half of the precinct is expected to be via direct disposal into the Little Para River (after appropriate treatment). The northern commercial area is served by an existing stormwater system which utilises an existing Department for Infrastructure and Transport culvert under the North South Motorway and then travels south towards the Little Para River outfall.

There is a Council owned, land parcel immediately south of the Study Area on the Little Para that has community land classification and may be surplus to need. This should be reviewed in light of the planning for Precinct 4 and any rezoning addressed.

As identified in Section 8.1.1.4, refinement of the Open Space Zone and finalisation of the network of drainage corridors required to service the greater study area, and access to the SA Water buffer land could be part of a broader Council Code Amendment over this employment land balance, west of Port Wakefield Road.

The landowner intentions survey and discussions undertaken as part of the Strategic Land Review, as set out in Section 7.0, demonstrated a mixed interest for more intensive employment land zoning across this precinct. Further discussions will need to be held with the landowners, to identify any discreet sub precincts that could be supported to proceed. Given the current mixed interest and overall size and infrastructure challenges through this area, it is likely that Council will need to lead the development of additional technical investigations including flooding modelling, stormwater management plans and design concepts, negotiation for acquisition of surplus Department for Infrastructure and Transport Parcels for road and stormwater infrastructure adjacent the North South Motorway and access to the SA Water buffer land. While there is interest in some landowners developing land within this precinct currently, it is critical for orderly development that these technical investigations and land acquisition negotiations proceed prior to any Council or Proponent Led Code Amendments being considered.

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8.3.5 Precinct 5 – Rural Horticultural Protection Measures & Concept Plan

Precinct 5 comprises land located on the western site of the North South Motorway, which would have previously been accessed via local roads connecting St Kilda to Port Wakefield Road prior to the North South Motorway's construction. This land has an existing strong character of rural horticultural land activities, and minimal interest was raised by landowners in this precinct for a more intensive employment land use in the short term.

As set out in Section 8.1.1.6, it is anticipated that any land use transition within this precinct would be later in the overall 35-year development timeline, and there is no immediate pressure to change the current land use operations. Given this situation, and that long term forecasting of demand for land-use is challenging out beyond 10 years, it is recommended that this land and any decision on its highest and best use of land in the future, whether that be for further employment land or an alternative more sensitive land use, that could include consideration of residential, be deferred and ongoing land use operations continue under the current zoning, with encouragement for value-add horticultural options to develop and expand on the existing established operations to ensure viability.

To ensure that a wide range of land-use options remain a viable consideration into the future, it will be important that this area is protected from more intensive land-use creep and that approval of any land-use that may prevent future sensitive land-uses be discouraged. To further support future options, it is recommended that tight subdivision controls be established to prevent any further fragmentation of land holdings through exploration of a Limited Land Division Overlay.

The 'spine' road network shared between Precinct 4 and Precinct 5 is generally considered appropriate to facilitate vehicle access to the various allotments throughout. However, both Robinson Road and St Kilda Road will also likely require upgrade from a 'collector road' classification to a 'sub-arterial road' or 'arterial road' (dependent on final development traffic volume outcomes). This will involve a widening of the existing carriageways to provide additional trafficable width in line with the City of Salisbury's standard road cross-section. The intersection of Robinson Road and St Kilda Road will also likely require upgrade to increase its operational capacity. Given that property boundaries are currently located within very close proximity to the roundabout, a road widening layer at this intersection will be required (detail on the extent of this corridor will be required to be determined with further detailed traffic modelling analyses).

The Code Amendment will need to identify the road widening and intersection designs required to support existing traffic movements through to the St Kilda township and future development scenarios, which should consider a wide range of potential options to retain flexibility for a future land use decision.

Detailed traffic modelling analyses and monitoring will be required to be undertaken for Waterloo Corner Interchange to ensure its continued satisfactory operation. This is particularly relevant to the roundabout on the western side of the motorway and the T-intersection on the eastern side of the motorway. At the point of consideration of a more intensive land use in Precinct 5, forecast volumes would be expected to trigger upgrade

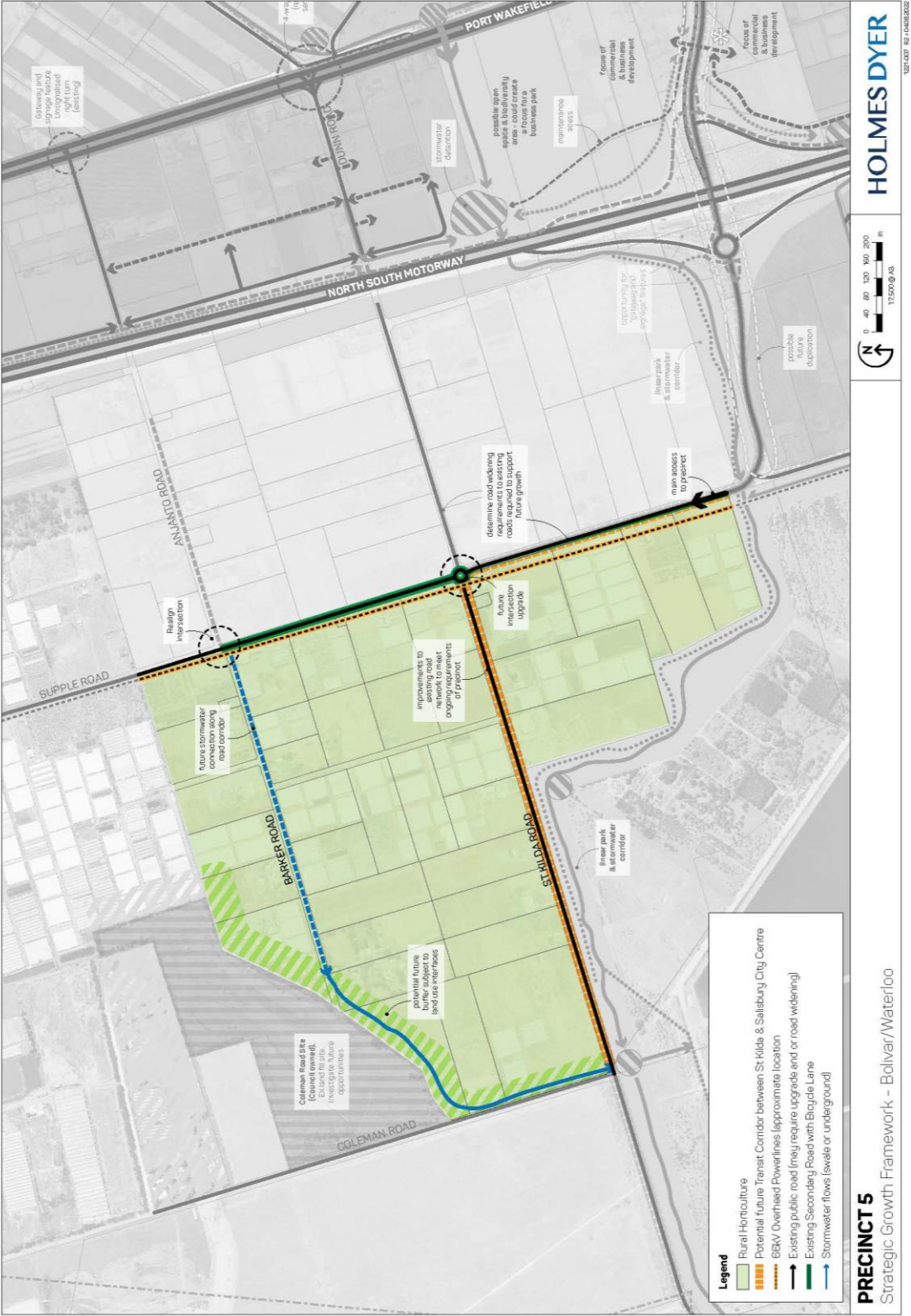
of Waterloo Corner Road (across the North South Motorway) beyond its current single-lane (in each direction) configuration.

The existing stormwater infrastructure in this precinct predominantly consists of shallow roadside swales with the occasional small culvert road crossing. On the southern extents of Precinct 5, the St Kilda open drain has recently been constructed with large culverts under Robinson Road discharging into the SA Water Bolivar WWTP land towards the west. The recently constructed St Kilda Road drain on the northern western corner of the North South Motorway, at the intersection with Waterloo Corner Road, may have also reduced the incidence of flooding at this location. Stormwater management measures provided as part of the development east of the North South Motorway may alleviate some of the overland stormwater flows into this Precinct.

Tonkin indicated in the Greater Edinburgh Parks and St Kilda Catchment Stormwater Management Plan, that the St Kilda channel outfall is restricted to the capacity of the syphon under the Bolivar treatment plant outfall channel. Upgrading the capacity of the system would require significant capital expenditure including a new larger syphon under the Bolivar channel and significant widening of almost 2.0km of open channel through the salt fields.

It is anticipated new trunk open channels would capture stormwater flows in this precinct and direct to the St Kilda drain. A precinct solution for stormwater detention may be provided adjacent the outlet of the catchment. This would significantly impact the land available for development as they would be in the form of large shallow basins and should be negotiated by Council with SA Water in the short to medium term to support the more intensive development of Precinct 5 in the latter years of the Strategic Growth Framework.

Figure 36. Precinct 5 – Rural Horticulture & Concept Plan



8.3.6 Precinct 6 – Recreation Zone

Bordered by Driver Road, Robinson Road and the North South Motorway is a triangle of land that is currently a mix of zones including Open Space land containing the Southern Go Kart Club, Rural Horticulture containing the d South Australian Gun Club and a Deferred Urban parcel with a single private owner and land owned by Department for Infrastructure and Transport acquired as part of the North South Motorway. Access to this precinct would be reliant on the transport infrastructure upgrades within Precinct 4, as set out in Section 8.3.4.

The City of Salisbury and Office of Recreation Sport & Racing during the stakeholder consultation identified that there may be a potential in this precinct to reinforce and strengthen the existing ‘noisy recreation’ land uses, to provide a unique recreation offering in metropolitan Adelaide, to cluster this activity within an inner metropolitan location that is highly accessible while not creating impacts on sensitive land uses. This direction would be further strengthened by establishing a recreation zone over these land holdings that could better support the establishment of ancillary retail/commercial clubrooms and ancillary entertainment venues linked to the recreation uses that could strengthen the economic benefits that could be realised from this unique location.

A zoning change within this precinct would likely be driven by the individual landowners, and no specific interest was raised as part of the Strategic Growth Framework. Holmes Dyer recommends that this is an opportunity for the City of Salisbury to advocate for this unique economic generating activity with State Government and landowners as a long-term goal within the City’s broader Recreation Planning and proceed with ongoing negotiations with all land holdings in this precinct to explore this opportunity.

Figure 37. Precinct 6 – Recreation Zone



8.3.7 Precinct 7 – Strategic Employment Balance Area

Precinct 7 comprises the balance land located on the eastern site of Port Wakefield Road, covered by Precinct 2 and 3. This precinct is made up of most of the strategic employment land identified east of Port Wakefield Road that could support more intensive employment activities connected to the existing zoning and land use character established in this part of the City of Salisbury. The consultation that occurred as part of the Strategic Growth Framework to date has not identified any landowner interest in rezoning in the short to medium term. The future land zoning will be partially informed by structure planning work that needs to be completed by the City of Playford, in the land to the immediate north of the City of Salisbury Council boundary, and the associated stormwater management plan, flood modelling and traffic connection investigations that will be required and partially informed by the work required to be undertaken by Precinct 2 and 3 and the City of Playford.

Precinct 7 will be accessed via Mumford Road and Greyhound Road, with Mumford Road and Mill Road (outside the study area) providing links to Heaslip Road. The proximity of the Mumford Road / Heaslip Road intersection to the Waterloo Corner Road / Heaslip Road intersection is problematic. The upgrade of Port Wakefield Road / Dunn Road / Greyhound Road intersection into a 4-way signalised intersection provides an alternative access to / from this precinct as described within Precinct 3.

Mumford Road and Greyhound Road will require upgrading. An additional internal local road can provide access to allotments fronting Heaslip Road. Stormwater will need to be detained prior to crossing various Port Wakefield Road culverts, north of Waterloo Corner Road, south of Dunn Road and at Dunn Road. Coordination with Precincts 2 and 3 would be appropriate. Stormwater flows need to be accommodated along Mumford Road, Greyhound Road and across existing allotments.

While this precinct has been indicatively timed to be considered for rezoning in the latter stages of the Strategic Growth Framework, this timing may shift informed by landowner interest and the resolution of the stormwater and traffic interfaces with the City of Playford above. Given the relative containment of this parcel, retiming to earlier in the Strategic Growth Framework timespan with the appropriate infrastructure agreements should be considered by the City of Salisbury.

Figure 38. Precinct 7 – Strategic Employment Balance Areas



8.3.8 Precinct 8 – Coleman Road

The City of Salisbury has taken over ownership and the ongoing management of the former Coleman Road land-fill site in the northern section of the study area, currently zoned Rural Horticulture. This requires Council undertake groundwater monitoring, minimisation of landfill gas emissions and improvement of on-site drainage to protect the groundwater system and increasing the cap coverage to the landfill which has an ongoing capital cost to Council. Opportunities for alternate use of this site, to harness energy from the methane extraction or other form of eco-industrial outcome could be explored by Council. Any innovative solution to the ongoing operation will need to be considered considering the existing and future buffers required to adjacent horticultural activities within the balance of the Rural Horticultural Zone that should be identified on a Concept Plan created as outlined within Section 8.1.1.1.

There is no existing sub-zone within the Code Library Framework, that specifically supports this sort of opportunity. Holmes Dyer investigations has identified that land fill sites across Adelaide are in a mix of Resource Extraction, Infrastructure Zone or specialist precincts such as Gillman in respect to the Wingfield Site. As a result, the best policy approach to support the intended activities and timing would need to be negotiated on an individual basis with Planning & Land Use Services by the City of Salisbury.

Figure 27. Precinct 8 – Coleman Road



9.0 Risk Management

The Strategic Growth Management Framework carries a degree of risk due to the political and community interest in changing the land use and future direction for such a large parcel of land within the City of Salisbury, that impacts over 300 differently landowners.

Key risks were considered up-front to guide refinement of the approach adopted for the Strategic Growth Framework and key mitigations and priorities to minimise the risk adopted are set out below.

Risk Identification	Risk Analysis and Mitigation
<p>Securing authority advice on augmentation charges and future service capacity</p>	<p>The service authorities, specifically SA Water and SA Power Networks, need a level of planning detail akin to that developed as part of this document to provide augmentation and capacity feedback that is required to directly inform the development capacity and sequencing. This information would subsequently change the recommendations within the report.</p> <p>To resolve this timeline, the sub-consultant team engaged to produce the Strategic Growth Framework has provided the draft Structure Plan as set out in Figure 25 to the authorities and requested that they continue planning works to inform the more detailed infrastructure investigations, that will be received outside the timeline to deliver this report.</p> <p>The ongoing follow-up of this additional information will need to be managed by City of Salisbury, and the outcomes and conversations may result in changes to the precinct plan staging and issues as set out in Section 8.0.</p> <p>The Strategic Growth Framework has been developed to be flexible to enable the incorporation of additional technical information as it arises, however this follow-up needs to be proactively managed within City of Salisbury to ensure the outputs are received and analysed across the balance of 2022.</p>
<p>Strategic Growth Management outcomes creating concerns or expectations in the community in respect to timing and triggers for future zoning changes.</p>	<p>Strategic planning work can be difficult for the community to comprehend, as it is not yet detailed down to the individual opportunities, impacts and costs at an individual property level.</p> <p>While the Strategic Growth Framework engagement approach achieved a high level of engagement from the affected landowners, however there were still large numbers of landowners who did not choose to directly participate.</p> <p>Ultimately the recommendations set out in Section 8.0 of this Strategic Growth Framework, seek to establish a land use direction, but will not create immediate changes to land use zoning or opportunities, which all need to proceed through a standard Code Amendment process that will involve additional community consultation activities.</p>

	<p>It is important that Council maintain an open communication channel with the landowners in this precinct and provide updates and opportunities to brief them on findings from this study. It is recommended that the project website be retained, and new information be shared through this platform, to provide a single source of information available to both landowners and their consultants.</p> <p>To support a consistency of approach, a Community Engagement Plan, generally aligned with the Community Charter from Planning & Land Use Services was prepared for this project and is provided as Appendix 4. While this level of engagement plan is not normally required for a strategic investigation, its preparation was to establish a common set of stakeholders and clarity of information that can be built on for all future Code Amendments and consultation activities as may impact this precinct.</p> <p>As each precinct is advanced, Council will need to undertake direct engagement with all affected landowners to inform the direction, staging and approach to any land use change.</p>
SA Water and Department for Infrastructure and Transport negotiations for land acquisition and drainage/ open space corridors	<p>The Structure Plan presented in Figure 25, assumes that the City of Salisbury proceed with negotiations with both the Department of Transport and SA Water in respect to access and or site acquisition to key land parcels along the North South Motorway and SA Water Waste Water Treatment Plan for critical stormwater basins and channels, required to support the intensity of development outlined with the Strategic Growth Framework.</p> <p>The Department for Infrastructure and Transport land corridors along the North South Motorway, also provide an opportunity for a local road network to be delivered, to support several the potential sub-precincts within Precinct 4, that could provide flexibility not requiring all landowners to develop at the same time to create a road corridor connection.</p> <p>If access to these land parcels, cannot be secured, the overall structure and impact on the timing, staging and development capacity of the private landholdings will need to be reviewed.</p> <p>It is recommended that Council, as a priority seek to negotiate access to these areas with both SA Water and Department for Infrastructure and Transport to inform any Code Amendments outside Precinct 1 and 2 which are generally unaffected or where an interim solution can be put in place to enable the Proponent Led Code Amendments to proceed.</p>
Infrastructure Funding Mechanism and Estimated Costs	<p>As part of the Strategic Growth Framework, infrastructure investigations have been completed that enable an appreciation that a significant amount of investment into infrastructure will be required over the next 35 years to support the delivery of a more intense development across this precinct.</p>

	<p>The investigation work to date, has been able to identify a likely land take and corridor for stormwater and traffic works, however detailed costings will only be able to be undertaken following the completion of more technical investigations relating to flood mitigation, stormwater management planning, environment and geo-technical investigation.</p> <p>Augmentation costs and more detailed technical investigation and infrastructure upgrades need to be further evolved to enable a cost arrangement to be identified.</p> <p>While a range of infrastructure funding models has been proposed in this document for Council consideration, and a recommended approach identified, the final figures for each precinct will need to be developed through the next tier of technical investigations, at a precinct level either as part of a proponent led Code Amendment or further Council investigations.</p>
Technical Investigation Gaps	<p>The desktop analysis completed as part of Section 2.0 of this report has identified additional technical studies that will be required to be undertaken as part of refining the precincts within the Strategic Growth Framework .</p> <p>These studies are detailed in Section 10.1 of this report and Council should give consideration on timing and approach to fill these information gaps, aligned with broader Council planning and assignment of responsibilities with any proponent led Code Amendment that may proceed ahead of further investigations being able to be completed by Council.</p>
Cultural Heritage Survey	<p>As identified in Figure 8, the study area is at medium/high risk of cultural heritage discoveries. This risk relates not only to private development within land in the study area but also any excavation works that Council may be required to undertake as part of the road and stormwater drainage required to support the intensification of development.</p> <p>Given this risk, and to ensure that Council demonstrate a proactive approach to the risk of cultural discoveries, it would be recommended that Council undertake a desktop cultural survey by a qualified aboriginal heritage advisor which may include analysis of geo-technical or bore logs that may be available as part of other technical investigations.</p> <p>Council should also ensure that the discovery protocols under the Aboriginal Heritage Act is included as part of any consultant or contract works package in this area and that a rolling program of staff and contractor training into Aboriginal Heritage discoveries is undertaken.</p>
Maintaining the currency of the Strategic Growth Framework	<p>This document has a forecast delivery timeline out 35 years, based on current employment land take-up. The Strategic Growth</p>

<p>document across and extended delivery timeline</p>	<p>Framework has been written to provide a degree of flexibility for both landowners and Council, to capture the ‘highest and best use’ of land and the private market interest while ensuring orderly development within an overall agreed Structure Plan.</p> <p>Given the number of ongoing landowner discussions, technical investigations and negotiations to secure land holdings that needs to occur, it would be recommended that the Strategic Growth Framework be reviewed on a regular basis as set out in Section 10.4, to maintain relevance and currency to evolve as landowner and economic climate changes, on a minimum 4-year cycle linked to Council’s Annual Plan Update, so as to enable direct informing of Council’s Long Term Financial Plan.</p>
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10.0 Further Investigations & Next Steps

10.1 Additional Technical Studies

The desktop analysis completed as part of Section 2.0 of this report, combined with the preliminary service investigations completed by Greenhill provided as Appendix 1 and Cirqa Traffic Investigations provided as Appendix 3 has identified additional technical studies that will be required to be undertaken as part of refining the precincts within the Strategic Growth Framework and to inform future staging and Code Amendments.

Council should give consideration on timing and approach to fill these information gaps, aligned with broader Council planning and assignment of responsibilities with any proponent led Code Amendment that may proceed ahead of further investigations being able to be completed by Council

- » Update of the existing Flood Modelling to respond to the changing landforms and path networks created because of the North South Motorway Construction, noting that large portions of the Study Area are currently identified as experiencing inundation during the 1% Annual Exceedance Probability (AEP) rainfall event
- » Cirqa have been engaged by the City of Salisbury, concurrent with the development of this report to work with Department for Infrastructure and Transport staff on TAM traffic modelling, to produce the intersection and traffic data required to be entered as a trial project into the new TAM modelling system. The outcomes of this modelling is not available at the time of finalising this report with the outputs required to inform the traffic infrastructure requirements and triggers for each identified precinct.
- » Greenhill have identified that the desktop analysis has identified that more detailed stormwater management plans need to be produced for the Study Area. This will need to include modelling of the expected flows and be informed by the City of Playford's development intent north of the council boundary. While the overall network of basins and swales has been able to be identified the triggers, size and costs for this infrastructure would be informed by this advanced stormwater modelling that will be required to input future infrastructure deeds.
- » It is recommended that Council consider undertaking CBR studies, groundwater levels, topsoil depth, uncontrolled fills and testing across the study area to inform pavement design and road construction costs assumptions for any Council Road upgrade or stormwater infrastructure delivery.
- » The investigations undertaken to inform the site analysis for the Strategic Growth Framework has not included detailed site contamination investigations. Under the *Planning, Development and Infrastructure Act 2016*, the planning system is required to assess and manage risks posed by known or potential site contamination to enable the safe development and use of land. A more comprehensive set of investigations will likely be required as part of a future Code

- » Finalisation of negotiations with the service authorities in order to secure the extent of augmentation works or infrastructure upgrades as to inform the Infrastructure Cost Deeds, specifically SA Water and SA Power Networks, not available at the time of writing this report.
- » As identified in the previous risk section, given the location of the study area and risk of cultural heritage discoveries, Council should consider engaging an archaeologist to prepare a desktop cultural heritage survey for the precinct as a risk mitigation and to demonstrate best practice approach to managing the risk of Aboriginal Discoveries under the *Aboriginal Heritage Act 1993*.

10.2 Site Acquisition and Amalgamation Opportunities

The Structure Plan presented in Figure 25, assumes that the City of Salisbury proceed with negotiations with both the Department of Transport and SA Water in respect to access and or site acquisition to key land parcels along the North South Motorway and SA Water Waste Water Treatment Plant for critical stormwater basins and channels, required to support the intensity of development outlined with the Strategic Growth Framework. The Department for Infrastructure and Transport land corridors along the North South Motorway, also provide an opportunity for a local road network to be delivered, to support several the potential sub-precincts within Precinct 4, that could provide flexibility not requiring all landowners to develop at the same time to create a road corridor connection.

If access to these land parcels, cannot be secured, the overall structure and impact on the timing, staging and development capacity of the private landholdings will need to be reviewed. It is recommended that Council, as a priority seek to negotiate access to these areas with both SA Water and Department for Infrastructure and Transport to inform any Code Amendments outside Precinct 1 and 2 which are generally unaffected or where an interim solution can be put in place to enable the Proponent Led Code Amendments to proceed.

10.3 Advocacy

The outcomes of this Strategic Growth Framework should be presented by the City of Salisbury Planning & Land Use Services to inform both a common approach to the coordination and management of any Proponent Led Code Amendments and the upcoming regional planning process.

Holmes Dyer understands that the City of Playford is about to commence a similar strategic planning exercise for the land immediately north of the Salisbury Strategic Growth Framework and that regular meetings are held between City of Salisbury and Playford in respect to these study areas. This existing coordination is a positive process and should continue to ensure that both Council's have developed a common approach to the infrastructure planning required across this common boundary, and that wherever possible alignment is achieved to inform the orderly development and advocate for State Government support to achieve this outcome and the regional infrastructure outcomes, such as the Greyhound/Port Wakefield Road intersection that will open up development potential for this entire northern region.

10.4 Regular Review & Update

The Strategic Growth Framework, as set out in this document is a point-in-time output.

This document has a forecast delivery timeline out 35 years, based on current employment land take-up. The Strategic Growth Framework has been written to provide a degree of flexibility for both landowners and Council, to capture the 'highest and best use' of land and the private market interest while ensuring orderly development within an overall agreed Structure Plan.

Given the number of ongoing landowner discussions, technical investigations and negotiations to secure land holdings that needs to occur, it would be recommended that the Strategic Growth Framework be reviewed on a regular basis, to maintain relevance and currency to evolve as landowner and economic climate changes, on a minimum 4-year cycle linked to Council's Annual Plan Update, so as to enable direct informing of Council's Long Term Financial Plan.

This regular review will ensure that the prioritisation and projects are adjusted to respond to;

- » Changes to the Council's strategic agenda
- » Outputs from the State Government Regional Planning process
- » Community and Landowner Feedback relating to development intentions
- » Market force changes and
- » New technical information that may become available, specifically flood modelling, stormwater management plans and traffic infrastructure.
- » Completion and update of any order of infrastructure costs required to inform the Infrastructure Funding Delivery and a fair and equitable cost sharing between landowners/developers, Council, State Government and any other party (i.e., City of Playford)
- » Any new funding or grant opportunities that may be identified as an opportunity for State or Federal Investment to realise the economic potential of this Study Area.
- » Opportunities from changes to the State Government strategic agenda

APPENDICES

Appendix 1. Greenhill Preliminary Service Infrastructure Report

Appendix 2. Cirqa Transport Investigations

Appendix 3. Deloitte Economic Vision for Salisbury

Appendix 4. Strategic Growth Framework Bolivar & Waterloo Corner Engagement Plan

Appendix 5. Strategic Growth Framework Bolivar & Waterloo Corner

Structure Plan Consolidated Plan Set