

Invest
SA



South Australia

The home of game development

invest.sa.gov.au





Contents

5	Why South Australia
6	Incentives and rebates
7	Investing in the future: Skilled talent pipeline and visas
10	Game development ecosystem
	<ul style="list-style-type: none">• Big Ant Studios• Team Cherry• Mighty Kingdom• Foxie Ventures• We Made A Thing Studios• We Have Always Lived in the Forest• Half Giant• Dino Rocket• Adelaide Studios
23	R&D partners supporting web3, blockchain and NFTs
24	Case study: partnering for innovation
27	Innovation districts
28	Advanced technology infrastructure
29	Supporting your transition to net zero
33	Australia's most cost competitive city
35	Benefits of living in South Australia
36	Enviably lifestyle
40	Let's talk

“We're looking forward to further developing our partnership with the South Australian Government and appreciate the support so far. With Adelaide having so much potential for growth within the global games industry, the future looks very bright!”

Mr Tom Crago, Director Keywords Studios Australia.
(March 2023)



Handpicked Festival, Fleurieu Peninsula, photo by Bronwen Caple Photography



Why South Australia

Led by successful releases from a mixture of international, independent and established mid-sized companies, South Australia's game development reputation is thriving.

The arrival of Tantalus South (Keywords Studios) in late 2022 has further cemented South Australia as a preferred location for progressive game developers.

With significant tax incentives coupled with the lowest cost of doing business in Australia, a skilled talent pipeline, great Adelaide CBD studio site options and a fun, affordable lifestyle, our state is the perfect location to open your next studio.

Saving you AUD\$37 million

Establishing a game development studio in prime accommodation within the Adelaide CBD will save your company up to AUD\$37 million over 10 years when compared with other Australian CBD locations.

South Australia was the first Australian jurisdiction to offer a tax offset for the video game industry, and its commitment to supporting the growth of the sector remains strong. The combination of state and federal incentives, and the lowest cost of doing business in Australia, sees South Australia rival Vancouver and Los Angeles as one of the most desirable game development centres in the world.

Skilled talent pipeline and visas

South Australia's world-class universities and vocational education and training institutions are committed to partnering with game development industry leaders to design courses that ensure creative talent for the future, producing 1,900 graduates in interactive software (VFX, AR/VR and games) in the last three years.

In addition, South Australia has the highest staff retention rates in the country and is experienced in supporting companies to bring staff with specialist skills and experience to Adelaide.

Studio sites

Our capital city Adelaide offers the lowest CBD accommodation cost in Australia. Many suitable sites are available in the Adelaide CBD, with sites up to 66 per cent cheaper than other Australian states.



Star Trek: Lower Decks: The Badgey Directive by Mighty Kingdom

Incentives and rebates

Australia is committed to the growth of gaming companies, offering a 30 per cent tax offset to eligible companies. As the first Australian jurisdiction to offer an additional 10 per cent rebate for eligible projects, South Australia demonstrated to the international games community that we both understand and support the industry.

South Australian Government incentives

The South Australian Video Games Development Rebate (SA VGD Rebate) enables video games studios to claim 10 per cent of expenditure on video game development work undertaken in South Australia, on eligible project expenditure of AUD\$250,000 or more in South Australia. This is in addition to the Australian Government's 30 per cent Digital Games Tax Offset.

Australian Government incentives

The Digital Games Tax Offset is a 30 per cent refundable tax offset for eligible businesses that spend a minimum of AUD\$500,000 on qualifying Australian games expenditure. This is one of the most significant game development incentives to be implemented world-wide.

Research and Development Tax Incentive

The Research and Development (R&D) Tax Incentive is a program that supports companies to increase their investment in R&D activities, with eligible companies able to claim an offset equal to their corporate tax rate plus a premium.

“The high standard of education in South Australia is producing top-quality graduates. We’ve had graduates who have shown so much talent in their first three months that we’ve made them the lead on a project.”

Tony Lawrence
Chief Operating Officer, Mighty Kingdom



Investing in the future: Skilled talent pipeline and visas

Alongside industry-led training are three world-class public universities (the University of Adelaide, University of South Australia and Flinders University), each delivering undergraduate and post-graduate game design and development and VFX qualifications. Joining the universities are internationally-recognised private training institutions and vocational training providers including CDW Studios, the Academy of Interactive Entertainment (AIE), Adelaide College of the Arts and SAE Institute Adelaide, providing specialist technical courses. All our education and training providers work with companies directly to shape and influence courses to ensure they are relevant for the future needs of the industry.

The Government of South Australia has supported the state's game development sector through key initiatives including:

- research into best practice methodologies and course content to develop the industry's first Certified Digital Artist accreditation
- co-designing games course development and VFX micro-credentials with local industry to expand existing certificates and diplomas; and
- growth of local talent in world-class 2D animation, supporting local employers with essential skills.

Specialist technical campuses

CDW Studios

CDW Studios is a design school offering study options in visual effects and entertainment, and a Bachelor of Creative Arts (Visual Effects and Entertainment Design) in conjunction with Flinders University. This degree combines a university education with the practical, hands-on experience of working in industry.

Instructors are current industry professionals with experience working for companies such as Disney, Blizzard Entertainment, Rising Sun Pictures, WETA, Wizards of the Coast, and Lego.

Academy of Interactive Entertainment

Australia's most awarded 3D animation, game design, film and visual FX educator.

Using state-of-the-art facilities, students learn the the latest in:

- filmmaking
- game development
- game programming
- 3D animation and visual effects education.

Adelaide College of the Arts

Adelaide College of the Arts is Australia's only tertiary institution housing the study of performing arts, visual arts and design, all in one building.

A campus of TAFE SA, South Australia's largest vocational education and training provider is designed to achieve excellence in arts training with industry-standard performance and exhibition spaces, workshops and studios.

It is Australia's only tertiary institution housing the study of performing arts, visual arts and design, all in one building.



Rocket Bar Rooftop, Adelaide, photo by Andre Castellucci

SAE Institute Adelaide

Provides specialist vocational and higher education courses worldwide. The new state-of-the-art, multi-level campus in Adelaide excels in programs across:

- animation
- audio
- creative industries
- design
- film
- games
- music.

Visas for international talent

The Government of South Australia can support companies to bring staff with specialist skills and experience to Adelaide via a state nomination process.

For skilled migrants, state nomination can assist them with qualifying for a skilled migration visa from the Australian Government Department of Home Affairs, providing additional points towards visa applications.

The South Australian Government, universities and local gaming industry are committed to advancing the games sector, skilling digital creatives for the future.

The interactive games sector has one of the highest rates of growth in Australia, with AUD\$4.21 billion spent in 2022, and video game subscriptions alone increasing by 55 per cent¹.

South Australia's games ecosystem makes it an attractive destination for skilled gaming talent, with games businesses looking to increase staffing through employment of Australian and overseas talent (IGEA 2021). With increasing demand for visual effects technologies to be applied in a broader scope of industries including defence, manufacturing, cyber, space and health, South Australian universities and vocational education and training institutions are committed to continuous evolution of their courses and partnering with industry leaders to design courses that ensure creative talent for the future.

South Australia has produced 1,900 graduates in interactive software (VFX, AR/VR and games) from tertiary and vocational education and training (VET), in the last three years.

“As a proud South Australian, it's incredibly exciting be opening of Tantalus South in Adelaide,” said Mr Tom Crago, Director Keywords Studios Australia. “We're on a steady path of growth and the talent pool in South Australia is up there with the best in the world.”

Mr Tom Crago, Director Keywords Studios Australia (March 2023)

¹ *Australian Consumer Video Game: Sales 2022 snapshot* (released June 2023), Interactive Games and Entertainment Association

Pink Moon Saloon, Adelaide, photo by Ian Routledge



Game development ecosystem

South Australia is home to some of Australia's most exciting independent games studios including Tantalus South.

Tantalus South (Keywords Studios)

Keywords Studios, the world's largest provider of end-to-end technical and creative solutions to the video games industry, is the first AAA video gaming business to establish in South Australia, with its new Tantalus South studio in Adelaide's CBD.

Founded in 1998, and listed on the London Stock Exchange in 2013, Keywords Studios has over 12,000 employees worldwide across more than 70 offices in 26 countries and provides services to 24 of the top 25 video game publishers including Sony Interactive Entertainment, Microsoft, Google, Nintendo, Apple, Electronic Arts, Riot, SEGA, Sledgehammer and Ubisoft.

Keywords Studios has worked on some of the world's most played games, most notably global online video game sensation *Fortnite* as well as *Star Wars Jedi: Fallen Order*, *Mortal Kombat*, *Rocket League*, *NBA 2K*, *Madden*, *HALO*, *Clash Royale* and *Minecraft*.

The company plans to grow Tantalus South to 50 employees in its first three years and focus on developing AAA games for the world's best publishers including the *Age of Empires* franchise, *The Legend of Zelda: Skyward Sword* and the *Cities: Skylines* series. Tantalus South is already recruiting for roles across engineering, art, technical art, quality assurance and is in the process of developing training programs with local providers to offer graduates on-the-job experience as well as offering experienced staff the opportunity to upskill.

Keywords Studios' Adelaide move comes after the company opened an office in Melbourne last year following their acquisition of Australian game development company Tantalus Media. With the acquisition of over 60 businesses in the last 10 years and a dedicated focus on improving customer offerings, Keywords Studios recorded revenue of €691 million (AUD\$1.1 billion) in 2022, significant growth from its initial €16 million revenue (AUD\$26.2 million) when first listed in 2013.

"As a proud South Australian I'm delighted to be part of a game development studio in Adelaide once again. The talent in South Australia is as good as anywhere in the world, and we look forward to growth and success from day one."

Tom Crago
CEO, Tantalus Media (March 2023)





Cricket 22 by Big Ant Studios

Big Ant Studios

Big Ant Studios is Australia's leading developer of sports games.

Acquired by French publisher Nacon in 2021 for €35 million (AUD\$57 million), Big Ant opened their Adelaide studio in 2023. One of the largest game developers in Australia, Big Ant Studios develop premium character action and racing content for platforms that include the Sony PlayStation 2, PlayStation 3, Nintendo Wii, Microsoft Xbox360 and PC.

Released in 2023, Big Ant Studios' most recent game *AFL23* is the most authentic and realistic video game football experience to date. It features the fully licensed 2023 AFL Premiership and AFL Women's competitions and over 30 detailed stadiums.

Cricket 22: The Official Game of the Ashes, released in December 2021, delivers the most robust, substantial game of cricket that fans have ever seen, with reviewers giving it a 9 out of 10 rating on Steam (July 2023).





Team Cherry

Silksong, Team Cherry's highly-anticipated sequel to *Hollow Knight*, is consistently in the top three of the most wishlisted games on the Steam charts.

A recent new trailer of *Silksong* has the games world abuzz with a release anticipated in late 2023. This will be the long-awaited follow up to their hugely successful first release *Hollow Knight* (2017).


Team Cherry started *Hollow Knight* as a small project when they first met at a game jam. Fleshing out the idea for *Hollow Knight*, they took to Kickstarter to crowdfund the game in late 2014, which saw them achieve double what they had asked for from just over 2,000 backers.

By November 2017 *Hollow Knight* sold over 500,000 units and in June 2018 surpassed 1,000,000 units in sales.

It was subsequently released on Nintendo Switch to continued success, selling 250,000 units in its first two weeks. It is now available in six languages.

***Hollow Knight* has now sold over 2,800,000 copies world-wide.**

Team Cherry has no plans to leave Adelaide, believing the benefits of starting their business here are the same influences that will allow them to continue thriving.



“For *Silksong* we’re running on Cherry-time over here,” said Team Cherry. “That means both ‘when it’s ready,’ and ‘when it matches the quality and scale of *Hollow Knight*.’ Just know, we will talk about a release date when we’re 100% certain we can hit it... The last thing we want to do is make promises, only to see things slide. For now, we’ll continue stuffing all sorts of strange critters and surprises into *Silksong*. We can’t wait for you all to play it.”

Team Cherry



Mighty Kingdom

Established in 2011, Mighty Kingdom has developed over 75 games and applications for mobile, console and PC to more than 50 million customers worldwide.

Mighty Kingdom has proven experience delivering multiple high-level projects for Disney, Funcom, Google, LEGO, Lion, Mattel, Moose Toys, Sony, Spinmaster, Snap and Uken across all platforms.

Notable releases from the company include licensed titles *Peter Rabbit Run* with Sony, *Shopkins* with Moose Toys, *LEGO Friends: Heartlake Rush* and *Gabby's Dollhouse* with Spinmaster, Netflix and Dreamworks, as well as original games including *Ava's Manor* with Canadian-based Uken Games.

Mighty Kingdom's *Star Trek: Lower Decks*, in partnership with East Side Games and Paramount, received the highly coveted Best Storytelling award at the Pocket Gamer Mobile Game Awards in April 2023. Among other awards, it was also 2019 Studio of the Year at the Australian Game Developer Awards. In April 2021, Mighty Kingdom listed on the Australian Securities Exchange (ASX), with the company successfully raising AUD\$18 million on the beginning of its public trading.

Foxie Ventures

***Horse Riding Tails* is the number one mobile horse game in the world. Foxie Ventures has over two and a half million players per month and grew by 100 per cent in 2021, gaining third place in 2021 Fast Movers SA Top 25 Awards.**

Connecting players to their passions and hobbies through original IP immersive family mobile games, Foxie Ventures games have been downloaded by tens of millions of players worldwide.

Founder and Director Dineth Abeynayake was recognised in South Australia's top 40 leaders at the annual 40 Under 40 Awards in 2021. Release-focused and dedicated to updating and creating new experiences within their existing games, Foxie Ventures have recently released their latest hit, *Star Equestrian*, rated 4.5 out of 5 (August 2023, App Store).





We Have Always Lived in the Forest

We Have Always Lived in the Forest is an independent game development studio innovating empathetic meaning-making AI systems in the production of avant-garde emergent narrative games.

Focused on developing cybernetic processes for emotion- interaction, utilising natural language processing (NLP) and artificial psychology (AP) techniques, their PC game *darkwebSTREAMER* is already gaining significant interest from gamers and investors alike.

Due for release in 2024, *darkwebSTREAMER* made IGN Entertainment's list of the *Best Little Games I Played* at Gamescom 2022, Kotaku's *10 Aussie Games That We Loved* at PAX Rising list and *WellPlayed's Best Games We Played* at PAX Aus 2022.

The occult horror RPG streamer game repping 90s internet vibes gives players the mission to become the number one ranked streamer - or die - and is powered by AI tech allowing for infinite possibilities for game play.

We Made A Thing Studios

Featured at Gamescom in Cologne in October 2022 and a winner in the Aus Indie Showcase class of 2022 at PAX Aus 2022, We Made A Thing Studios is an award-winning production company that focuses on high concept IPs with global audiences.

They specialise in creative development, production, virtual production and multi-platform storytelling.

They build worlds.

Box Knight, their first video game, is a funny, silly and irreverent action RPG roguelike due for release in late 2023.

A mix of *The Office* and *Lord of The Rings*, by day you are just a normal office worker but when the clock hits 5pm on a Friday you become the *Box Knight* - protector of the office realm.

Fighter of evil beings and deliverer of beers! No matter what project, platform or creative, at the end of it, all We Made A Thing Studios want to do is sit back and proudly say... "we made a thing!"





Half Giant

Half Giant is an award-winning full service animation studio specialising in game trailers and cinematics.

Half Giant's trailers include Australian Game Developer Awards' Game of the Year, *Cult of the Lamb*, which sold over one million units in its first week.

Using the perfect blend of animation and game capture, Half Giant has produced trailers for clients including Devolver Digital, Massive Monster, Mighty Kingdom, Mino, Future Play, Happy Juice, Cellar Door Games and Cranky Watermelon.

With the animation expertise of a high-end animation studio and a focus solely on games, Half Giant is the perfect local provider for your studio's releases.

Dino Rocket

Dino Rocket is a small Indie game studio based in Adelaide, creating games that they themselves want to play. The studio is currently developing its debut title *Kādomon: Hyper Auto Battlers*.

Kādomon: Hyper Auto Battlers is a monster-taming auto battler with Roguelike elements. With over 100 unique Kādomon to fight, collect, upgrade and evolve, players will have a wide variety of options to choose from when building their ultimate team. Discover different synergies to unleash wicked combos on powerful bosses. Expected release is late 2023.



Kādomon: Hyper Auto Battlers by Dino Rocket



Adelaide Studios

Located just 15 minutes from Adelaide's CBD, 30 minutes from Adelaide's international airport and close to South Australia's world-class post-production and visual effects businesses, the custom-built Adelaide Studios offer an ideal working environment for feature films and television series of varying budgets and is perfectly positioned to handle virtual production.

Managed on-site by the South Australian Film Corporation (SAFC), Adelaide Studios continues to draw high profile projects, including feature films *The New Boy*, *Talk to Me*, *Run Rabbit Run*, *The Unknown Man*, *Gold*, *Mortal Kombat*, *Hotel Mumbai*, *Cargo*, *I Am Mother*, *2067*, *Storm Boy* and *The Babadook*, as well as TV series *The Tourist*, *Stateless*, *Pine Gap*, *Wanted* and *Wolf Creek*.

The facilities have been designed specifically to operate as an integrated hub and can accommodate virtual production set-ups.

Available facilities include:

- two sound stages
- Dolby certified mixing theatre
- virtual production capability
- Foley stage
- edit rooms
- production offices
- 100-seat screening theatre
- set construction workshop

For productions that require a larger footprint, the SAFC can facilitate access to additional warehouse space within easy distance of the studios and CBD.

Adelaide Studios is also a buzzing hub for visual effects and screen creatives, housing more than 25 South Australian businesses from digital content creators to production companies, editors, casting and talent agents, animation studios, and more.





Beep and Mort set
Image courtesy of South Australian Film Corporation



524
3
1.55A

Mortal Kombat - BTS Hiroyuki Sanada as Scorpion - Photo by Mark Rogers, Warner Bros

R&D partners supporting web3, blockchain and NFTs

Adelaide is the ideal location for your studio to leverage the potential of web3, blockchain and NFTs.

Your company can work alongside world-leading artificial intelligence and machine learning capability, the Australian Institute for Machine Learning, world-leading data analytics capability Massachusetts Institute of Technology (MIT) Adelaide Living Lab and the number one research capability for augmented and virtual reality, the Australian Research Centre for Virtual and Interactive Environments (IVE).

Decentralised digital rights management, asset management and trading

South Australia's world-leading research and development capabilities focused on AI, data management, blockchain and cybersecurity can be applied to game development, distribution, rights management, disbursement and asset trading.

Blockchain Lab

An ideal research and development partner, the Blockchain Lab welcomes members from industry, research institutions and government with areas of relevant knowledge, interest in the potential for blockchain technologies or those who wish to fund and/or participate in the design, development or deployment of these technologies.

Positioning Adelaide as the trusted hub for blockchain development in the Asia-Pacific region, the Blockchain Lab works to:

- identify immediately useful applications for blockchain technology
- work with industry to realise blockchain-based solutions
- identify opportunities for training and professional development
- foster innovation
- support new and emerging technologies; and
- reduce obstacles to development, adoption, and implementation.

Lot Fourteen

Lot Fourteen is Adelaide's innovation precinct. A premier location for leading organisations to accelerate innovation, entrepreneurship, research and education.

Home to global leaders in machine learning and data, including the Australian Institute for Machine Learning (AIML) and MIT's Adelaide Living Lab, all working alongside global tech firms, leading research institutions, startups and brands, the Lot Fourteen innovation precinct provides a unique opportunity for companies to partner with ground-breaking companies to innovate and grow.

Other key precinct partners include:

- Amazon Web Services
- Australian Cyber Collaboration Centre
- CGI
- Google Cloud
- Makers Empire
- Microsoft Azure
- MIT Adelaide Living Lab



Case study:

Partnering for innovation, Rising Sun Pictures and the Australian Institute for Machine Learning

Rising Sun Pictures (RSP) is a cornerstone of the South Australian screen industry, having created some of Hollywood's most memorable screen moments since establishing in 1995.

RSP has provided visual effects for recent global successes including Warner Bros. Pictures' *Elvis*, Marvel Studios' *Ant-Man and the Wasp: Quantumania* and *Thor: Love and Thunder* and Amazon Prime series *Lord of the Rings: Rings of Power*.

RSP has a long history of partnering with leading studios, reaching new technical visual effect achievements in film and television including Alfonso Cuarón's *Gravity*, Marvel Studios' *Shang-Chi and the Legend of the Ten Rings*, *Black Widow*, *Mortal Kombat* and the *X-Men* series, Warner Bros. Studio's *Harry Potter* series and HBO's *Game of Thrones*.

RSP's work has been recognised through Visual Effects Society (VES) and Australian Academy of Cinema and Television Arts (AACTA) awards as well as contributing to Oscar and BAFTA winning films.

“Collaborating with AIML has enabled us to do what we have never been able to do before and proves to global studio executives RSP is among the best in the world at embracing and implementing advancements in technology such as AI.”

Tony Clark
Managing Director, Rising Sun Pictures



Still from *Elvis* showing work by Moving Picture Company and Rising Sun Pictures

The Australian Institute for Machine Learning (AIML), ranked in the top six globally for computer vision ([csratings.com](https://www.csratings.com)), is Australia's largest artificial intelligence (AI) capability.

RSP has recently collaborated with the AIML Industry Solutions team, embedding AI into its production pipeline. RSP is among the best in the world at embracing and implementing advancements in technology such as AI. They deliver superior results in what has been termed 'deepfake' technology, but extends to face replacement, digital makeup and age modification among other applications.

Elvis

RSP's most novel work with AIML involved augmenting clips from several of Presley's movies, including *Live a Little, Love a Little* and *Girls! Girls! Girls!*, by using machine learning to fuse Austin Butler's features with Elvis Presley's.

The studio employed a stack of proprietary deep-learning software to analyse the facial features and expressions of both Presley and Butler.

“Our technique combines machine learning and traditional visual effects. We did a lot of compositing work to adjust for small differences in physical appearance between Austin and Elvis. Austin has a slightly smaller frame and a narrower neck and shoulders. His cheekbones are higher. It was an interesting blending of techniques and, ultimately, quite successful.”

Julian Hutchens, RSP VFX Supervisor
(June 2022)



Still from Thor: Love and Thunder showing work by RSP

Shang-Chi and the Legend of the Ten Rings

RSP's creative team worked with AIML to build novel machine learning techniques to replace a stunt performer's face with the actor's during martial arts fight scenes in Marvel Studios' blockbuster, *Shang-Chi and the Legend of the Ten Rings*. These results would not have been achievable 12 months prior without huge cost to both RSP and its clients.

Thor

RSP worked with AIML to create Baby Thor, a wholly-digital character, based on the real-life infant of a Marvel executive, created through animation and artificial intelligence.

"The advantage of this technique over standard 'deep fake' methods is that the performance derives from animation enhanced by a learned-library of reference material," explains RSP Senior VFX Producer Ian Cope. "The result is a full screen photo-real Baby Thor storming in to battle."

An early adopter of AI, RSP used machine learning to give the baby and uncannily lifelike quality while exhibiting behaviours required by the script.

"Subtle nuances are what make a baby look like a baby," explained RSP Main Unit VFX Supervisor Dan Bethell.

"We had great references of the real baby and used them to get details right, such as how his mouth moves, and the way light reflects in his eyes. Over several iterations we honed the look and achieved a digital baby that audiences will accept as real."

Innovation districts

Our sectors co-exist in hi-tech hubs and research centres, forging collaborative ecosystems that open doors and inspire new ways of thinking.

Northern Sound System

27 kms from CBD

Youth-focused music and creative industries facility which includes three recording studios, 420-person music venue, Internet Broadcast Studio and GigCity internet.

Technology Park

17 kms from CBD

Hub for systems development and integration, information communications technology, advanced manufacturing and electronics, and home to over 100 small to medium enterprises, multinationals and start-ups.

Lot Fourteen Innovation District

Adelaide CBD

Australia's first ideas and innovation neighbourhood and home to the Australian Space Agency, SmartSat CRC, Defence and Space Landing Pad, FIXE start-up hub, MIT Adelaide Living Lab, Australian Institute for Machine Learning and the Australian Cyber Collaboration Centre.

Gameplus

Adelaide CBD

Collaborative workspace for game developers and related specialist technology start-ups to share resources, knowledge and opportunities. Also, a hub for government and industry to access a range of specialist expertise in interactive entertainment, simulation and training.

South Australian Film Corporation

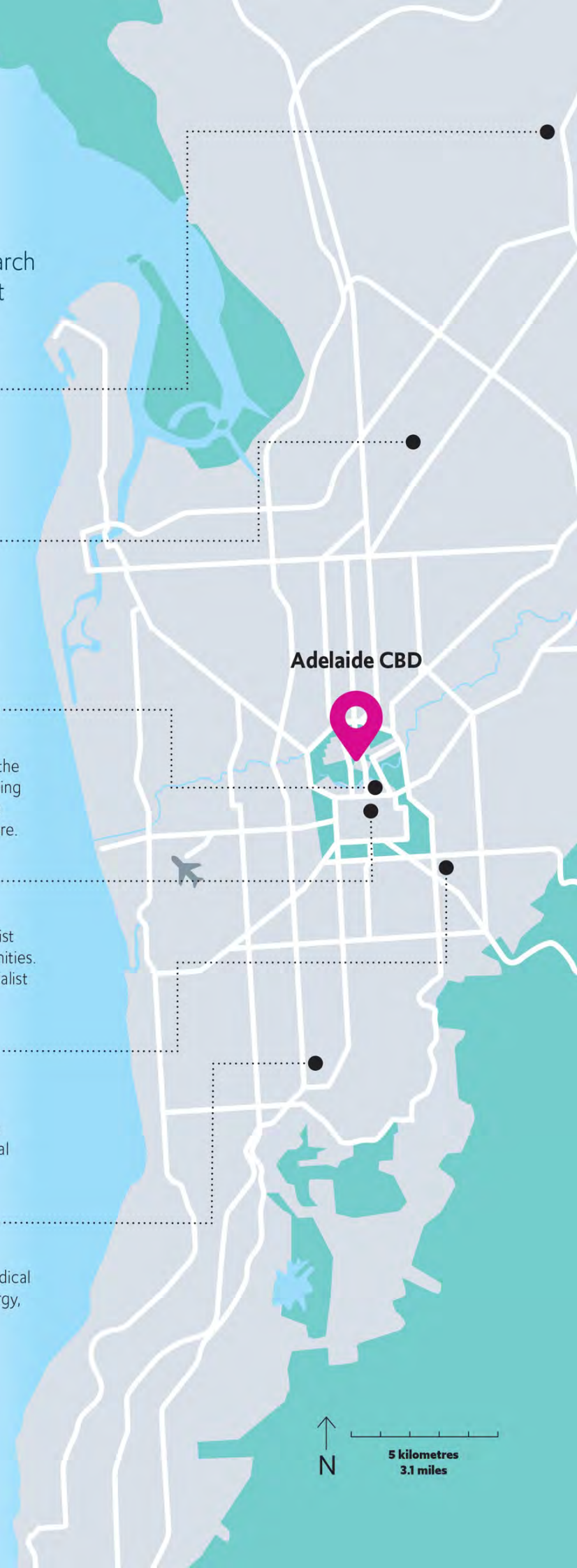
4 kms from CBD

South Australia's leading screen authority and investment body, supporting the development, growth and promotion of the state's screen production sector through feature film, television and digital screen projects.

Tonsley Innovation District

12 kms from CBD

Home to high value manufacturing industries including health, medical devices and assistive technologies, clean tech and renewable energy, software and simulation, mining and energy services.



Adelaide CBD



5 kilometres
3.1 miles



Advanced technology infrastructure

Cloud infrastructure

Cloud infrastructure in Adelaide is comprised of 24 colocation data centres, 177 cloud service providers, 24 network fabrics and 50 service providers (*Cloudscene, 2023*).

Adelaide hosts one of Equinix ISO Certified Green ISO 14001:2015 data centres. Equinix has been named Frost & Sullivan's Asia-Pacific Data Center Services Provider of the Year for the 10th consecutive year (*Frost & Sullivan, 2022*).

ASX 100-listed technology company NEXTDC is building an Uptime Institute Tier IV certified data centre facility in Adelaide, in proximity to the Lot Fourteen innovation district.

Asia-Pacific leader DCI Data Centers' Uptime Institute Tier III certified data centre is located just 10 minutes from the CBD and Adelaide Airport. A second data centre is in development.

Ten Gigabit Adelaide

Ten Gigabit Adelaide is a revolutionary high-speed, high-performance fibre optic data network that has been rolled out to commercial buildings across the city of Adelaide. The network enables businesses and organisations to share and receive high volumes of data at phenomenal 10Gbps data speeds.

The transformational network delivers a wide range of new possibilities for businesses and organisations, without being inhibited by the restrictions and congestion often experienced with traditional internet services. Each service in the Ten Gigabit Adelaide suite has its own, dedicated and uncontested connection, meaning businesses can access the same upload and download speeds via a clean, superfast, low-latency connection.

SABRENet

SABRENet is a fibre only telecommunications network constructed to link South Australia's major education, research and innovation sites, including university campuses, innovation precincts, teaching hospitals, TAFE campuses and schools.

SABRENet's purpose is to raise South Australia's education, research and innovation performance through its fibre network, enabling specialist broadband and related services on behalf of its members and customers.

The SABRENet network extends over 400km of fibre optic cable and connects more than 230 locations in the greater Adelaide metropolitan area, typically at data speeds from one gigabit to 100 gigabits per second (Gbps).

Removing constraints on available bandwidth for education, research and innovation to create a critical mass of interconnected sites, users and applications, is the advantage that SABRENet has helped create in South Australia.



Leading transition to renewable energy

South Australia is a global leader in renewable energy production, with a world-leading average of over 70 per cent of electricity from renewables (openNEM, 2021-2022 financial year). With a geographical advantage that provides world-class coincident wind and solar resources. South Australia boasts the highest penetration of residential solar globally on a per thousand household basis (AEMO, 2020).

The state is also Australia's second largest recycler of water, reusing one in every three litres of treated wastewater.

Supporting your transition to net zero

South Australia is a global clean energy powerhouse: a world-leader in green energy production and the ideal destination for companies to achieve their sustainability targets.

As Australia's clean energy capital, South Australia is a leader in the circular economy in the areas of waste management and recycling, water management, climate change, smart cities, innovation and renewable energy. Successes include container deposit legislation, the ban on plastic bags, high-performing kerbside collection systems, reuse of stormwater, wastewater resource management and and more than 83 per cent of all waste generated in South Australia diverted from landfill - 4.13 million tonnes of material not going to waste (Green Industries SA, 2020).

We divert more than 80 per cent of all waste generated from landfill disposal to better purposes through effective recycling, reuse and waster prevention strategies (Rawtec, 2019). South Australia successfully demonstrates how good public policy can transform sustainability outcomes.

“We are encouraged by the commitment of these gaming companies, which shows recognition that we all must play our role in the global effort to lower carbon emissions and effect real change towards sustainability.”

Inger Andersen, Executive Director, UN Environment Programme (UNEP), discussing the commitment of the Playing for the Planet Alliance, CEOs from 14 of the biggest platforms and game makers, including Sony Interactive Entertainment, Microsoft, Google Stadia, Rovio, Supercell, Sybo, Ubisoft and WildWorks, towards fighting climate change, September 2019



Commitment to innovation

South Australia is home to the Hornsdale Power Reserve, one of the world's largest lithium-ion batteries, and Hydrogen Park South Australia's (HyP SA's) 1.25MW electrolyser, Australia's first renewable gas project and the largest of its kind installed in Australia.

Technology is critical to South Australia's net zero ambitions. South Australia is an innovation hub attracting some of the largest global technology partners and environmental, social and governance leaders to the state including Amazon Web Services, Google Cloud, Microsoft Azure, MIT Adelaide Living Lab, NEXTDC and Salesforce.

Low carbon leadership

South Australia's commitment to a low carbon future continues to attract leading global investors seeking to leverage the state's weather, infrastructure, natural and economic resources to power their manufacturing and production.

South Australia is in Australia's forefront position to produce green steel, with its vast magnetite resources, hydrogen economy and renewable energy strengths. It is a globally recognised natural supplier of critical minerals and rare earth elements, essential for decarbonisation of industries.

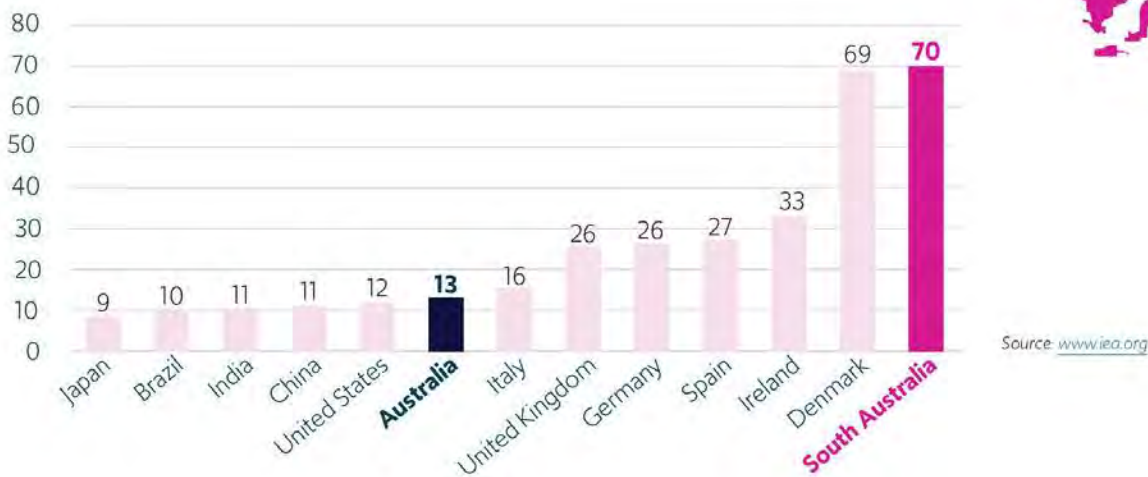
Operating in South Australia can provide your company with multiple green and low-cost energy options to power your company, meet emissions targets and bolster your brand's sustainability goals and credentials.

South Australia leading the renewable energy transition

- World-leading average of over 70% of electricity from renewables
- On track to achieve target of 100% net renewables by 2030
- On track to achieve target of 500% net renewables and be a national and international exporter of clean energy by 2050

South Australia ranked number one globally for annual renewable energy

%VRE in annual electricity generation 2022



Contribution to electricity generation by state (1 January to 31 December 2022)



Source: OpenNEM (2021-22)

“South Australia is better equipped to respond to the challenges and opportunities of climate change than any other Australian state and nearly all of the world’s sub-national jurisdictions.”

Professor Ross Garnaut, September 2020



HOTEL

AUSTRAL

The outdoor seating area is a designated smoking area. All outdoor seating areas are to be closed at all times. Thank you.

Dress Code
Smart Casual
No Hats
No Flip Flops
No Bare Feet
Thank you.

NO HAT
NO SERVICE

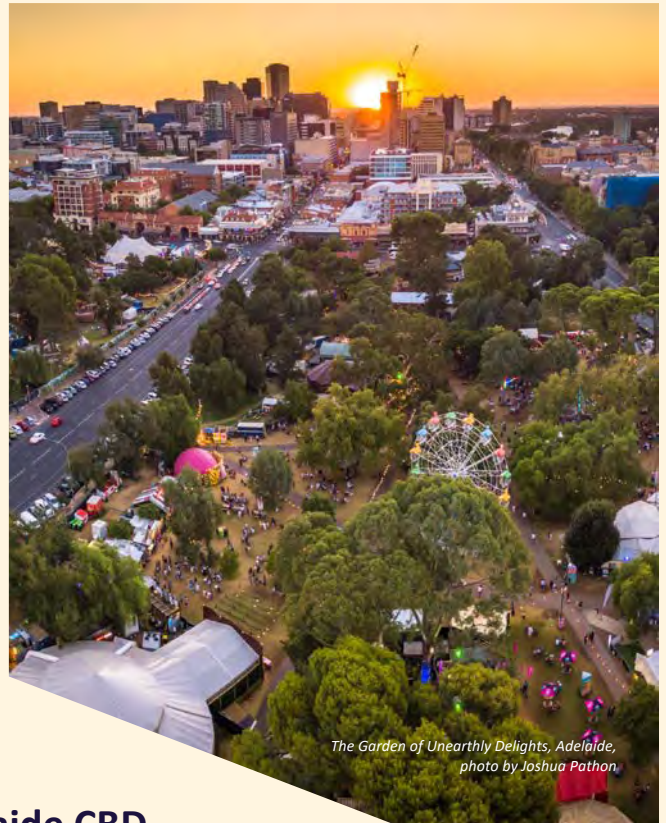
30%

The Austral, Adelaide, photo by Michael Waterhouse Photography

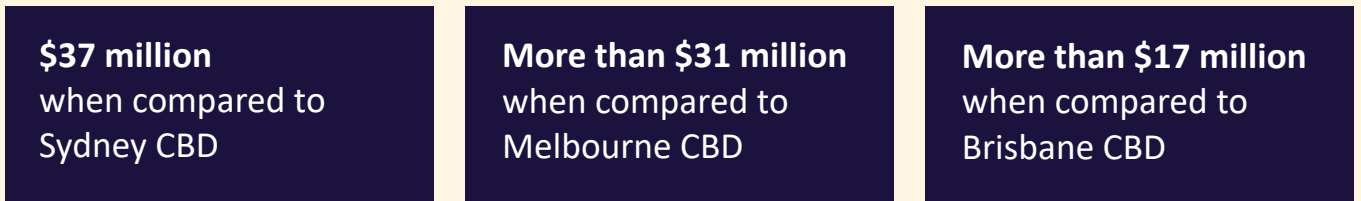
Australia's most cost competitive city

South Australia's competitive business environment supports commercial success and the scaling of operations.

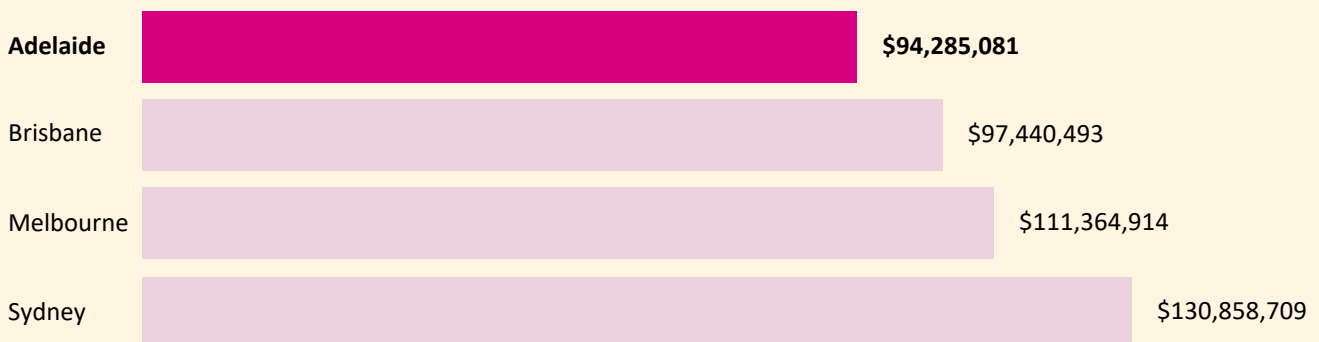
South Australia offers a suitably skilled and scalable workforce with clear competitive advantages with lower costs of production and significantly cheaper industrial land and accommodation than the rest of Australia, making Adelaide one of the world's three most cost-effective cities for digital services outside the United States.



Operating a 100-person studio in Adelaide CBD over a 10-year period can save an estimated:



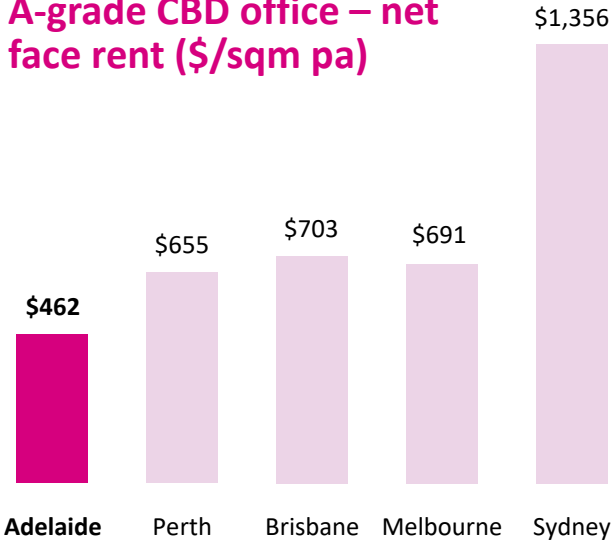
Cumulative operational costs over 10 years (inclusive of PDV and payroll tax)



All costs are in AUD.

Cumulative costs - include estimated salary and office costs, post, digital and visual effects (PDV) offsets and payroll tax.
 Office space costs sourced from CBRE Research - Australian Office Space Costs Q1 2023
 PDV grants are subject to minimum qualifying expenditure thresholds. Australian Government = \$500k, SA = \$250k, VIC = \$500k, QLD = \$250k, NSW = \$500k.
 State rebate criteria are assumed to have been met.
 Assumes 50 full time employees (FTEs) in year 1, 75 FTEs in year 2, 100 FTEs from years 3-10.
 Staff salaries sourced from Creative Recruiters 2022-23 and Hays Australia Salary Guide 23-24.
 All payroll tax payments assume no existing business in Australia. (States will pro-rate thresholds based on existing business).

A-grade CBD office – net face rent (\$/sqm pa)



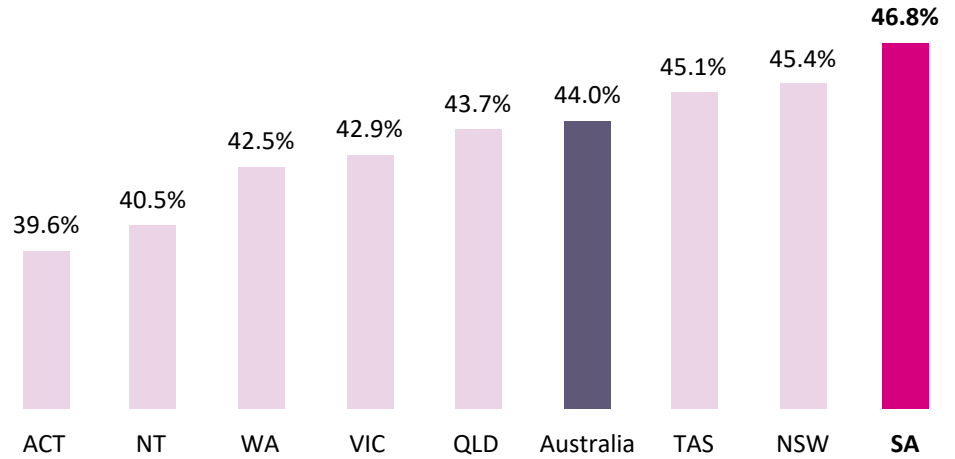
Adelaide CBD office rental space is:

66% lower than Sydney
34% lower than Brisbane
33% lower than Melbourne
29% lower than Perth

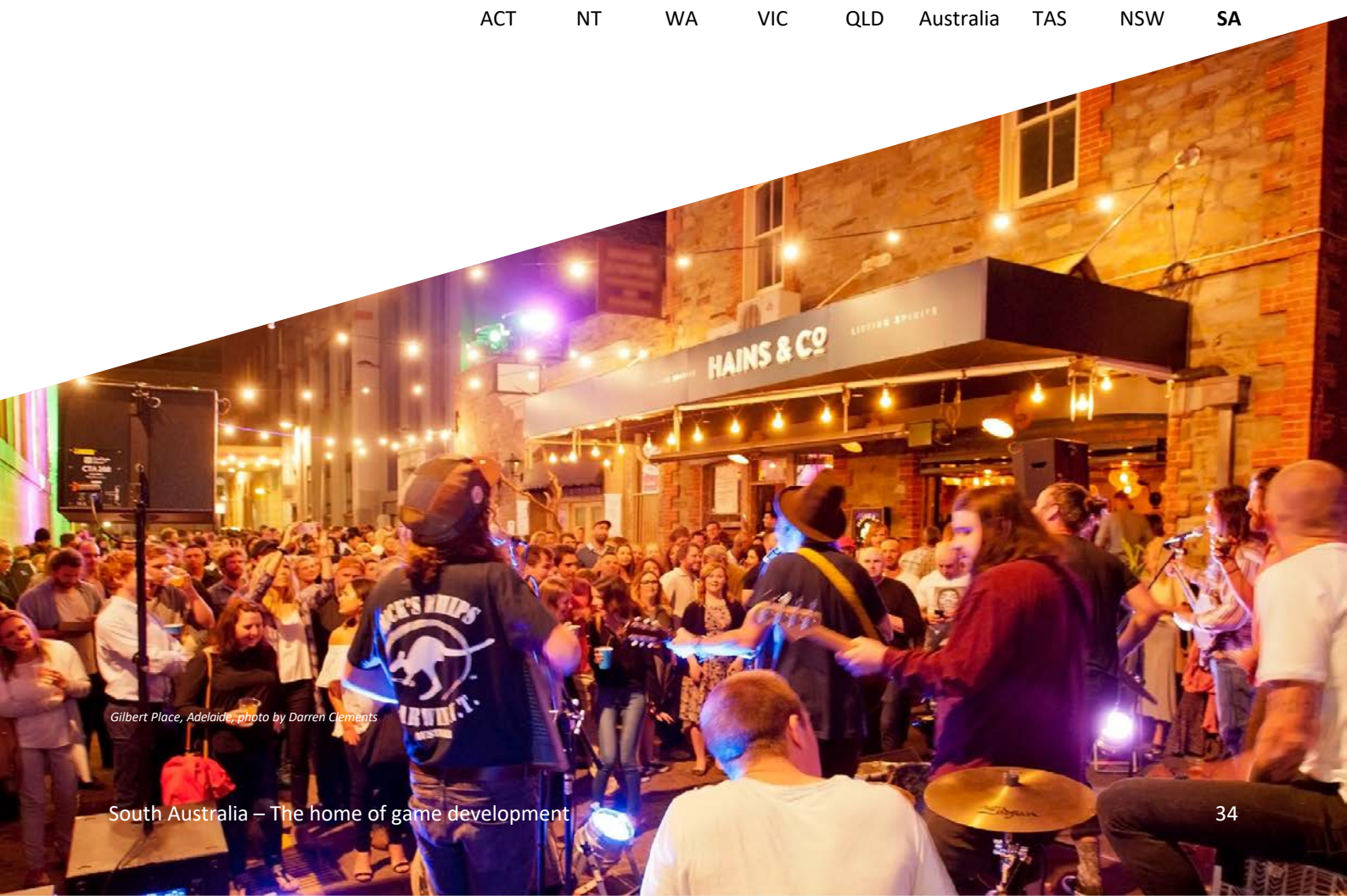
Source: CBRE Research - Australian Office Q1 2023

Better staff retention

% of employed persons with their current employer for 5+ years



Source: Australian Bureau of Statistics - Job Mobility [Table 1.2 - Labour mobility, retrenchments and duration of employment by state and territory, February 2023]



Gilbert Place, Adelaide, photo by Darren Clements

Benefits of living in South Australia



Adelaide Fringe Festival, photo by Meghan Coles

Affordable housing

Adelaide has the cheapest property prices of all mainland capital cities in Australia, with property prices almost half that of Sydney.

City	Established Houses	Attached Dwellings
Adelaide	AUD\$680,000	AUD\$481,000
Brisbane	AUD\$750,000	AUD\$480,000
Melbourne	AUD\$810,500	AUD\$577,000
Sydney	AUD\$1,205,000	AUD\$750,000

Source: Australian Bureau of Statistics – Total Value of Dwellings (March 2023)

Data from Domain highlights the median weekly rent in Adelaide is among the cheapest in the nation.

City	House	Unit
Adelaide	AUD\$540	AUD\$430
Brisbane	AUD\$580	AUD\$530
Melbourne	AUD\$520	AUD\$500
Sydney	AUD\$700	AUD\$670

Source: Domain Rental Report, June 2023

Work commute times

Adelaide’s short commute times compare favourably against all larger Australian capital cities.

City	Average daily time (mins)
Adelaide	56
Perth	59
Melbourne	65
Brisbane	67
Sydney	71

Source: Melbourne Institute: Applied Economic & Social Research, The Household, Income and Labour Dynamics in Australia Survey.



Enviably lifestyle

South Australia is famous for its cultural attractions, iconic nature experiences and world-class wine and food.

Immersive nature and wildlife experiences

The Flinders Ranges, the Outback and Kangaroo Island are home to incredible national parks and wildlife reserves, combining stunning scenery with once-in-a-lifetime wildlife encounters.

The South Australian coastline is more than 3,800 kilometres long, offering fantastic fishing, boating and surfing on Yorke Peninsula, while Eyre Peninsula is one of the only places in the world where tourists can cage dive with sharks and swim with sea lions.

South Australia offers warm, dry summers and short, mild winters with over 300 days of sunshine per year. Summer runs from December to February with an average temperature of 28.3 degrees Celsius.

Culture and events

Adelaide has a cosmopolitan culture with more live music, bars, restaurants and cafes per capita than any other Australian city. Adelaide's music scene has been recognised by UNESCO as an international City of Music joining the Creative Cities Network, with cities such as Seville, Bogotá, Hamamatsu, Glasgow and Hannover. South Australia's world-class events include Adelaide Fringe, Adelaide Festival and WOMADelaide.

Exceptional gourmet experiences

South Australia has a well-deserved reputation for delivering the best food and beverage experiences across the country, from culture rich Adelaide to the lush Adelaide Hills; the bountiful Barossa to the Eyre Peninsula; South Australia produces 80 per cent of Australia's fine wine and has been named a Great Wine Capital of the World. It is home to 18 distinctive, internationally recognised wine regions with more than 340 cellar doors and an all-star cast of world-famous chefs, winemakers and producers.



*Snelling Beach, Kangaroo Island
Image courtesy of @saltythebus*

*Seppeltsfield Road, Seppeltsfield
Image courtesy of South Australian Tourism Commission*

*Kati Thanda-Lake Eyre National Park
Image courtesy of Allan Dixon*

*Wilpena Pound, Flinders Ranges & Outback
Image courtesy of @saltythebus*

*Cape Willoughby, Kangaroo Island
Image courtesy of South Australian Tourism Commission*







Fire Gardens, Adelaide Festival, photo by Meaghan Coles

Let's talk

Gavin Artz

Director

Creative Industries

Invest SA, Department for Trade and Investment

T +61 417 083 174

E gavin.artz@sa.gov.au

Claudia Watson

Business Development Manager

Creative Industries

Invest SA, Department for Trade and Investment

T +61 424 134 909

E claudia.watson@sa.gov.au

Level 8, 250 Victoria Square
Adelaide, South Australia 5000

The Department for Trade and Investment and its employees do not warrant or make any representation regarding the use, or results of the use, of the information contained herein as regards to its correctness, accuracy, reliability and currency or otherwise. The Department for Trade and Investment and its employees expressly disclaim all liability or responsibility to any person using the information or advice.

This document is subject to change by the Department for Trade and Investment. Modifications to this document are not permitted.

August 2023