

LOT_14 FOURTEEN



2023 Annual Report

Boundless
collaboration



Government
of South Australia



Acknowledgement of Country

Ngai / Ngadlu tampinhi ngadlu Kurna Miyurna yartangka.
Munaintya puru purruna ngadlu-itya. Munaintyanangu yalaka
tarrkarriana tuntarri.

We acknowledge we are on Kurna Miyurna land. The Dreaming
is still living. From the past, in the present, into the future, forever.

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Message from The State Project Lead

It's my pleasure to present the inaugural Annual Report on the Lot Fourteen
Strategic Plan 2022-26.



Diane Dixon

State Project Lead,
Lot Fourteen

Department of the
Premier and Cabinet

Lot Fourteen is a world-class
innovation district dedicated to
solving complex global challenges,
with a focus on Defence, Space,
Cyber, Creative Industries and
Green Tech, underpinned by Critical
Technologies as an enabler.

This report focuses on the
innovation's districts activities and
highlights in 2023, which covers the
first year since the Strategic Plan's
release and comes at an important
junction for Lot Fourteen as it
transitions from an 'Establishment
Phase' to a 'Growth Phase'.

Annually assessing the district's
performance allows us to identify
improvements but also celebrate
where we are excelling; and it's
clear that Lot Fourteen is delivering
economic and social benefits to
South Australians.

In 2023, the district experienced a
significant increase in our workforce
and student population, tenancy
occupancy sat at above 95%, our
Start Up Hub businesses raised
more than \$81 million in capital,

“
From global tech companies,
research institutions and high-
growth startups; Lot Fourteen is
where the future is designed and
built.”

First Nations business members
increased by nearly two-thirds, and
we delivered an expanded calendar
of events.

This report coincides with the
release of the Lot Fourteen Master
Plan 2024, which delivers an updated
blueprint for the delivery of the 7ha
innovation district's built form.


As the district grows, I am excited
to continue to share how Lot
Fourteen is further building a
thriving innovation ecosystem where
industry, business, research and
education converge, drive economic
output and growth, and contribute
to the jobs and skills pipeline of the
future.

This report is focussed on delivery and accountability over the first 12 months of the Strategic
Plan, and primarily:

- ✓ tracks measures of success as at end of 2023
- ✓ highlights key initiatives and achievements in 2023 under each strategic pillar
- ✓ celebrates development progress to date.


2023 at a glance

Powered by its people, global district partners, and project collaborators from around the world, Lot Fourteen’s vision is underpinned by four strategic pillars:



Economic Impact

Lot Fourteen will be a driving force for the South Australian economy, attracting new investment through partnerships and supporting education and tourism.



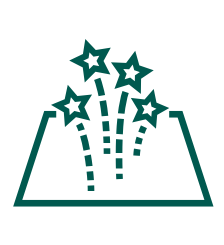
Skills and Jobs

Lot Fourteen will enable people from all ages and backgrounds to access a pipeline of skills and jobs in enduring careers that respond to global demand.



Innovation and Business Ecosystem

Lot Fourteen will drive collaboration between business, industry and research institutions to develop supply chain capability and ideas that solve global challenges.



A Magnetic, Cultural and Engaging Place

Lot Fourteen will be a sustainable, vibrant and inclusive district which celebrates First Nations cultures, and where events and placemaking will inspire those who work and visit.

\$81M

Capital raised by Stone & Chalk residents

+61%

Membership increase in The Circle – First Nations Entrepreneurs Hub

>15%

Increase in workforce population at Lot Fourteen

+46%

Increase in students and researchers in the district

98.7%

current occupancy rate

+11

New businesses moved in

320k+

Visitors in 2023

734

Business and community events held in 2023

To be a world-class district delivering innovation, enterprise and global collaboration for economic, social and cultural prosperity.

Strategic partners



AUSTRALIAN
INSTITUTE FOR
MACHINE LEARNING



“
The dynamic environment of Lot Fourteen harbours a flourishing innovator ecosystem that presents opportunities to scale impact through collaboration.”

Matthew Salier, Chief Executive Officer, Australian Cyber Collaboration Centre

Key tenants

AIRBUS



CHAMONIX



INOVOR
TECHNOLOGIES

MITRE



OPTUS



“
The precise curation of motivated and complementary technology organisations, underpinned by a melting-pot of talented and motivated expert individuals, makes Lot Fourteen the perfect epicentre for space, defence and cyber security in the Asia Pacific region.”

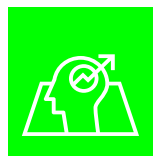
Julie Bowen, Senior Vice President for Operations and Outreach and Chief Legal Officer - MITRE Corporation



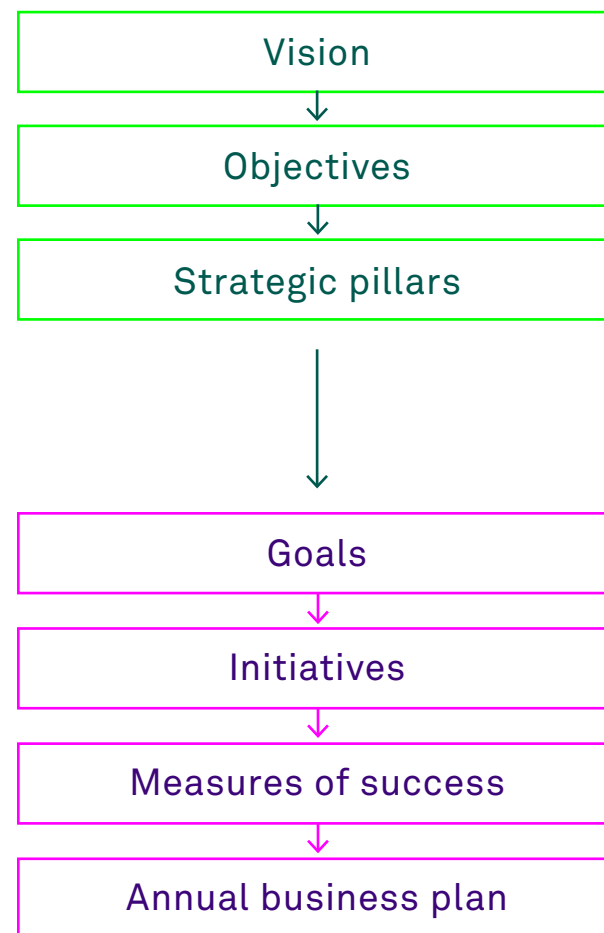
Affiliate partner



Our Strategic Framework



STRATEGIC FOCUS



DELIVERY AND ACCOUNTABILITY

Strategic objectives

The aspirations and principles that encompass the purpose for Lot Fourteen are:

1

Curate a globally connected district for hi-tech industry research and development collaboration, translation and commercialisation.

2

Support technology skills, training and education pathways to grow emerging industries.

3

Grow employment and career opportunities to attract, develop and retain talented people in South Australia.

4

Promote further investment into the innovation district and State through strategic partnerships, infrastructure delivery, business expansion, research funding and venture capital.

5

Advance the awareness, knowledge, preservation and teaching of First Nations cultures and languages.

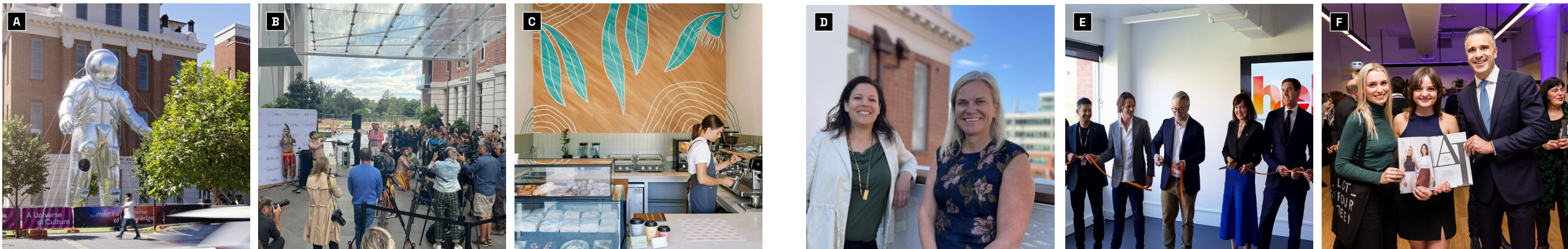
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Facilitate economic business and employment outcomes for First Nations Peoples.

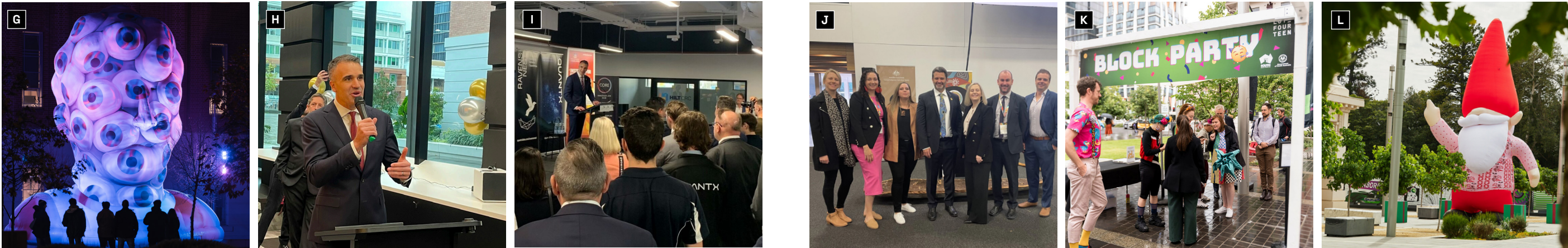
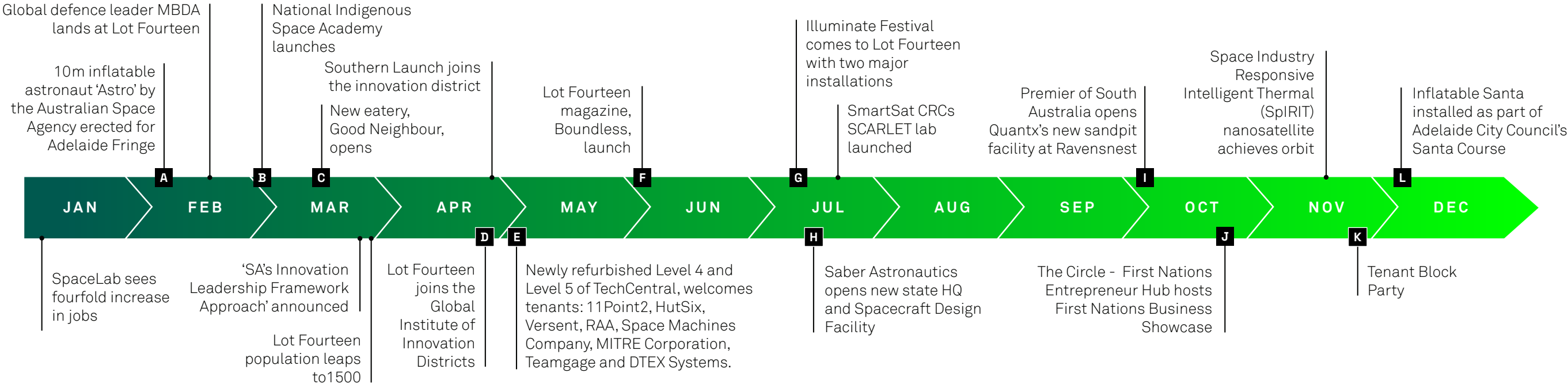
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Establish a vibrant and exciting place for the community, workers, students and visitors through activation, arts, culture and placemaking.

2023 highlights



LOT FOURTEEN - 2023 Annual Report





Economic impact

South Australian innovation will be developed at Lot Fourteen and offered to the global market. Strong leadership and the concentration of impact will be a beacon of opportunity and attract new investment into South Australia.

Partnerships with the private sector and universities will deliver new infrastructure and programs to support the productivity and prosperity of South Australian industry and businesses.

The energy and opportunity at Lot Fourteen will attract new people to South Australia and support international education and tourism.

2026 GOAL
Lot Fourteen is a driving force in the South Australian economy, showcasing where South Australia has advantage and promoting this capability, products and services to the global market.

Measures of success

Investment attraction	As at December 2023
Total government investment	\$756M

Startup growth	As at December 2023
Number of start-ups in the Start-Up Hub	56
Number of FTEs employed by start-ups	719
Number of businesses that have scaled out of the Startup Hub	21
Cumulative capital raised by start-ups since 2019	\$180M

First Nations business support	As at December 2023
Number of First Nations businesses who are members of The Circle FNEH	280
Number of people employed by First Nations business members	4684
Number of First Nations employees employed by First Nations business members	1559
Number of business development sessions delivered by The Circle FNEH	375
Number of referrals made by The Circle FNEH (all types)	440
Expenditure with First Nations Businesses across Lot Fourteen project	> 3% spend target

Key highlights in 2023

Fostering startup growth

Startups and entrepreneurs are a critical component of South Australia’s innovation ecosystem. Based in the refurbished, heritage-listed Marnirni-apinthe Building at Lot Fourteen, the Stone & Chalk Startup Hub, provides a co-working space designed to give local startups the best foundations for success.

Supported by the Department of State Development, the Startup Hub brings together founders, investors, industry stakeholders & mentors into one network to drive growth and commercial success for tech startups and scaleups.

Since opening in October 2019, the Startup Hub has supported over 100 startups. The economic impact of the Startup Hub is undeniable, with resident businesses employing over 719 FTEs. Since opening, Startup Hub residents have raised over \$180 million in capital. Between October 2022 to December 2023 alone, residents raised over \$81 million in capital, and are aiming to raise \$35.5 million in capital in Q1/Q2 2024.

The Startup Hub and other start-up supports across South Australia have seen Adelaide rise 33 places in the global ranking of startup ecosystems from 2022 to 2023.

Teamgage and MyVenue are just two examples of startups that have benefited from the Startup Hub, successfully scaling up and expanding into the broader Lot Fourteen district in 2023.

“
Being based at Lot Fourteen has opened doors with industry for partnerships and client acquisition, as well as helping the company create relationships with investors at home and abroad.”
Noelle Smit, Co-Founder and CEO, Teamgage

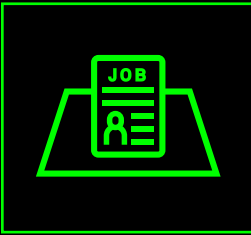
First Nations business support

The Circle – First Nations Entrepreneur Hub First (The Circle) was established in 2021 in partnership with the Australian Government and the South Australian Government, under the Adelaide City Deal. The Circle provides First Nations entrepreneurs and businesses in South Australia access to support and advice; creating opportunities to build capacity, capability, and connections to thrive.

“
The Circle have a great understanding of the industries in South Australian and future works that assist Aboriginal business to apply and capture the available opportunities.”
Member of The Circle

As of 31 December 2023, The Circle had 280 First Nations business members and continues to deliver quality services according to the Service Model. This is an approximately 65% increase in members on the previous year, representing considerable growth and far-exceeding KPIs. Members receive one-on-one support to identify opportunities, overcome barriers and challenges and participate in business support activities towards achieving their business goals.

In its second year, the First Nations Business Showcase, an event organised by The Circle ran on 5 October 2023. More than 140 businesses exhibited, with 1500 registered guests from across industry, private enterprise, government and non-for profit organisations.



Skills and jobs

Lot Fourteen will create enduring, high-value jobs and career pathways for people of all ages and backgrounds.

A pipeline of industry-focused skills will be developed in partnership with tertiary education providers (universities and vocational education providers) to attract and retain talent, supporting industry and business capacity and capability.

School, tertiary and post-graduate students will engage with Lot Fourteen, combined with industry driven training to meet local and global skill demands.

“
My Government is committed to setting up the workforce of the future, which is why we’re backing Lot Fourteen.
”

The Premier of South Australia,
Peter Malinauskas MP

2026 GOAL

Lot Fourteen has an established pipeline of jobs and skills in priority growth sectors that respond to the labour demands of the global economy.

Measures of Success

Attracting talent	As at December 2023
Year on year growth of the workforce in the district	1766 (+15% YOY)

Discovery and learning	As at December 2023
Number of visitors to the Australian Space Discovery Centre	90,000
Number of students that participated in Schools in Space Program	12,000
Number of school holiday discovery and learning workshops and sessions at ASDC	99

Growing skills	As at December 2023
Growth in number of students studying or researching at Lot Fourteen	175 (+46% YOY)
Number of training courses conducted at the district	155+

Key highlights in 2023

Growing skills and attracting talent



Australian Institute for Machine Learning (AIML), Lot Fourteen, Adelaide

As a globally recognised innovation district, Lot Fourteen’s innovation and commercialisation outputs are generated through collaborative partnerships between government, research and education institutions (including universities), and industry.

Once complete, the district will provide fully integrated pathways through the education hierarchy in critical technologies, ensuring that Lot Fourteen is contributing to workforce development to address current and future industry/business needs.

There are a range of opportunities for those taking their first career steps in space, cyber, defence and hi-tech sectors at Lot Fourteen, with opportunities for upskilling from both government and businesses at the district. In 2023:

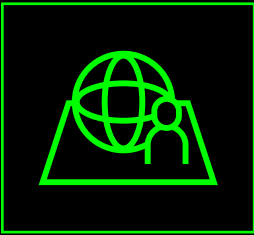
- The Australian Institute for Machine Learning (AIML) was home to more than 70 postgraduate students engaged in both fundamental machine learning research, and industry-affiliated projects with leading multinational companies.
- Lot Fourteen based defence and space company Inovor offered both a graduate and internship program, providing career opportunities that cater to individuals at various stages of their educational and professional journeys.
- A SA Government Cyber Security Traineeship Program was offered 2021-2023, a commitment to develop a cyber security career pathway and promote cyber security. From this, two cyber trainees were employed within the Cyber Security Directorate in DPC at Lot Fourteen, with all other trainees placed out in other government agencies. The trainees graduated in June 2023.

First Nations employment opportunities

RAWsa, a 100 per cent Aboriginal owned and operated Aboriginal Business Enterprise, is responsible for traffic management services at Lot Fourteen.

RAWsa was created to grow Aboriginal Workforce Participation, Economic Independence and Social Inclusion across multiple support mechanisms for Aboriginal and non-Aboriginal peoples in South Australia.

Into its fifth year at the district, RAWsa continues to show creating significant benefits for the individuals, their families and the broader community. Completed in 2022, the early works package for the Tarrkarri – Centre for First Nations Cultures project at Lot Fourteen achieved a 14.63% cumulative Aboriginal workforce participation result. Construction is currently on hold pending consideration of outcomes of the Independent Review.



Innovation and business ecosystem

Collaboration will underpin the success of Lot Fourteen. The built form, economic and networking assets will drive collaboration between business, industry and research institutions to develop supply chain capability.

The enabling infrastructure will be designed, delivered and managed to support the needs of target industry sectors, now and into the future.

Lot Fourteen will be a leading district that leverages and complements the South Australian innovation ecosystem and links with global networks - setting global benchmarks and best practice standards locally and internationally.

2026 GOAL

Lot Fourteen is a well-balanced and diverse innovation ecosystem, where ideas are developed that solve global challenges and drive the advancement of target industries in South Australia.

Measures of success

District curation	As at December 2023
Percentage of total companies involved in each target sector	48% Critical Tech 17% Defence 12% Space 11% Cyber 4% Creative Industries
Total number of businesses based	163
Number of new businesses	+11 new businesses
Business activity breakdown	35% Start-up 31% Scaling & SME 18% Global & large multinat corps 9% Research & Industry 7% Government
Strong tenancy demand	As at December 2023
Vacancy rate across district	1.3%
Collaboration outcomes	As at December 2023
Number of national Cooperative Research Centres (CRCs)	3

Key highlights in 2023

Quantx unveils Ravensnest

One of South Australia's fastest-growing deep-tech start-up companies, QuantX Labs, launched a breakthrough concept in Defence innovation, occupying the first floor of the SpaceLab building at Lot Fourteen. RavensNest was opened on 13 October 2023 by Australia's Chief Defence Scientist Professor Tanya Monro and the South Australian Premier the Hon Peter Malinauskas MP.

This new facility, a capability accelerator, will super-charge South Australia's defence innovation ecosystem by allowing defence companies to work hand-in-glove with defence researchers, University researchers and the Australian Defence Force.

The environment is designed to ensure that transformative technologies will be fast-tracked from research through to sovereign capability, answering the most urgent problems for defence by harnessing complementarity between the partners as well as delivering focus, scale and a can-do culture.

RavensNest is a place where ideas take flight, and inventions are translated into capability.

Saber Astronautics state HQ launch

In July 2023, Space mission operations company Saber Astronautics opened its new Adelaide-based office during a visit by the Premier of South Australia, Peter Malinauskas MP. The new facility in the Bice Building at the Lot Fourteen industry innovation centre, serves as Sabre's primary place of business in the state, and includes both software development and new spacecraft design facilities.



Saber Astronautics state HQ launch at Lot Fourteen, July 2023

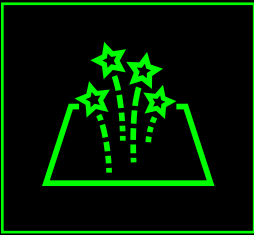
Innovation Framework announcement



South Australian Premier Peter Malinauskas and Di Dixon, State Project Lead, Lot Fourteen, Department of the Premier and Cabinet

In March 2023 the Premier announced, in a national first, the government is introducing a new state-wide innovation model to strategically connect the state's innovation places including Lot Fourteen, Tonsley Innovation District and Adelaide BioMed City.

The Framework, developed by Lot Fourteen State Project Lead Diane Dixon, will seek to capitalise on South Australia's competitive advantage in defence, space, advanced manufacturing and critical technologies industries like renewable energy, cyber, information warfare, quantum computing and artificial intelligence.



A Magnetic, Cultural and Engaging Place

The 7-hectare CBD district will thrive in its unique Adelaide location and celebrate its place in the Adelaide Park Lands, with open accessible green space, adjacent to university and cultural precincts. The district will be activated by the people who choose to work and visit, motivated by a sense of wonder and discovery.

Lot Fourteen will be a leader in its sustainability, health and wellness, social connectivity and superior community credentials, providing a place that helps amplify focussed and inspiring work. First Nations cultures will be celebrated and add richness to the district's experience.

2026 GOAL

Lot Fourteen is a magnetic, vibrant, engaging and sustainable place that is powered by the people who work and visit Lot Fourteen.

Measures of success

Inviting people in	As at December 2023
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Year on year growth in number of visitors	320,000 (+28% YOY)
Year on year increase in number of events	734 (+23% YOY)

Spreading the word	As at December 2023
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Increase in Lot Fourteen website visits	91,886 (+30% YOY)
Increase in social media followers	33,526 (+9.6% YOY)

Sustainability and wellbeing	As at December 2023
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Maintain 6-Star Green Star Community Rating	✓
6-Star Green Star building ratings on all heritage listed and new buildings	✓
Maintain pre-certification of WELL Community rating	✓

Key highlights in 2023

Tarrkarri review

In October 2022, Premier of South Australia, Peter Malinauskas MP, launched an urgent project review to examine how best to deliver Tarrkarri as a place of international significance, to celebrate all forms of First Nations cultural life.

Three eminent Australians Ken Wyatt AM, Bob Carr and Carolyn Hewson AO were appointed by the Premier to conduct the high-level review and

were supported by the Lot Fourteen project team in undertaking this significant and comprehensive piece of work. The objective of the review was to ensure that the scope, program and budget of the Centre is benchmarked to a world-class standard, which is able to attract global visitors. In Q1 of 2023, the Premier was provided with the full report for consideration.

New website and Boundless Magazine launch

In June 2023, the Premier launched Lot Fourteen's new magazine and website, Boundless magazine, which tells stories from across the innovation district focused on defence, space, critical technologies, cyber and creative industries. The magazine's aim is to stimulate and drive business, workforce and investment attraction via global, national and local markets, while building community, collaboration and innovation locally. Lot Fourteen's new website positions South Australia firmly at the heart of innovation, with an updated look and feel (with fun interactive animation effects) and virtual tour built by tenant, Lateral Vision.



Boundless Magazine Launch at Stone & Chalk

Block party



2023 Lot Fourteen's end-of-year Block Party

On Thursday 23 November, Lot Fourteen together with partners, Australian Institute for Machine Learning, Stone & Chalk, Australian Space Agency and Australian Space Discovery Centre, hosted a whole-of-district end-of-year celebratory Block Party. Under the Bice Canopy a wine and gin bar served First Nations owned beverages, whilst punters tried for the best time peddling on smoothie-making bikes. Stone & Chalk hosted Lego Lab, Calamity Tash's Make Space and Blak n Deadly Gift Market. Despite the weather, software engineers, space communicators and animators mingled with founders, PhDs and idea validators to celebrate the year that was.

2023 Key Development Milestones

Quarter	Milestone
Q1	Completion of Marnirni-abinthi Building façade restoration
	Completion of SpaceLab refurbishment
	Stage 3.1 Public Realm (Gate 4 and access road) remediation work commenced
	Good Neighbour Deli Opened in Bice Building
	First concrete pour at Kuri Kurru park
Q2	Stage 1.5 Plaza (rear of heritage buildings) opened
Q3	Completion of TechCentral lift upgrade
	Completion of Bice Building, McEwin Building, Australian Institute for Machine Learning façade restoration works
	Stakeholder engagement workshops held for Strategic District Planning Project
	Stage 3.1 (Gate 4 and access road) remediation work completed
Q4	Tree of Voices (Mature Flame Bottletree) planted at Kuri Kurru park
	Meeting pod installed at Kuri Kurru park
	Residential Wing Stage 2 remediation works commenced

Strategic District Planning Project



In 2023, a whole-of-district strategic planning project was undertaken to inform the next phase of development and delivery of Lot Fourteen, and support continued implementation of the Lot Fourteen Strategic Plan.

The project utilised desktop research, global benchmarking, market analysis and stakeholder egagement to inform an updated Lot Fourteen Master Plan (expected to be released in 2024) to identify opportunities for future built-form and infrastructure that respond to target industry needs, and state and national priorities.

Tenants and industry stakeholders were invited to attend workshops in September as part of the engagement process.

Key points from stakeholder engagement

- 1.Strong buy-in**
Lot Fourteen's value proposition resonates with stakeholders. In particular, seeing the district achieve its strategic vision, its proximity to educational and cultural institutions -
- 2. Collaboration and connectivity**
Continuing to facilitate collaboration and connectivity - through infrastructure, services, activation, events and programming - is critical to achieving the strategic vision.
- 3. Development momentum**
Tenants and broader industry representatives look forward to seeing the next phase of construction at Lot Fourteen.

Stakeholder Engagement Workshops on 13 September 2023 at Stone & Chalk.



Kuri Kurru cultural layering

In 2023, planning and delivery of Lot Fourteen's new public park: Kuri Kurru – Place of the Turning Seasons, commenced. The park is the next important phase of unlocking Lot Fourteen for local workers, visitors and city residents to enjoy.

Kuri Kurru was co-designed by landscape architects, Oxigen and Karl Winda Telfer of the Mullawirra meyunna – Dry Forest people of the Kurna Nation and artists Jakirah Telfer, Tikana Telfer, who informed the park's cultural, spiritual and ecological layering.

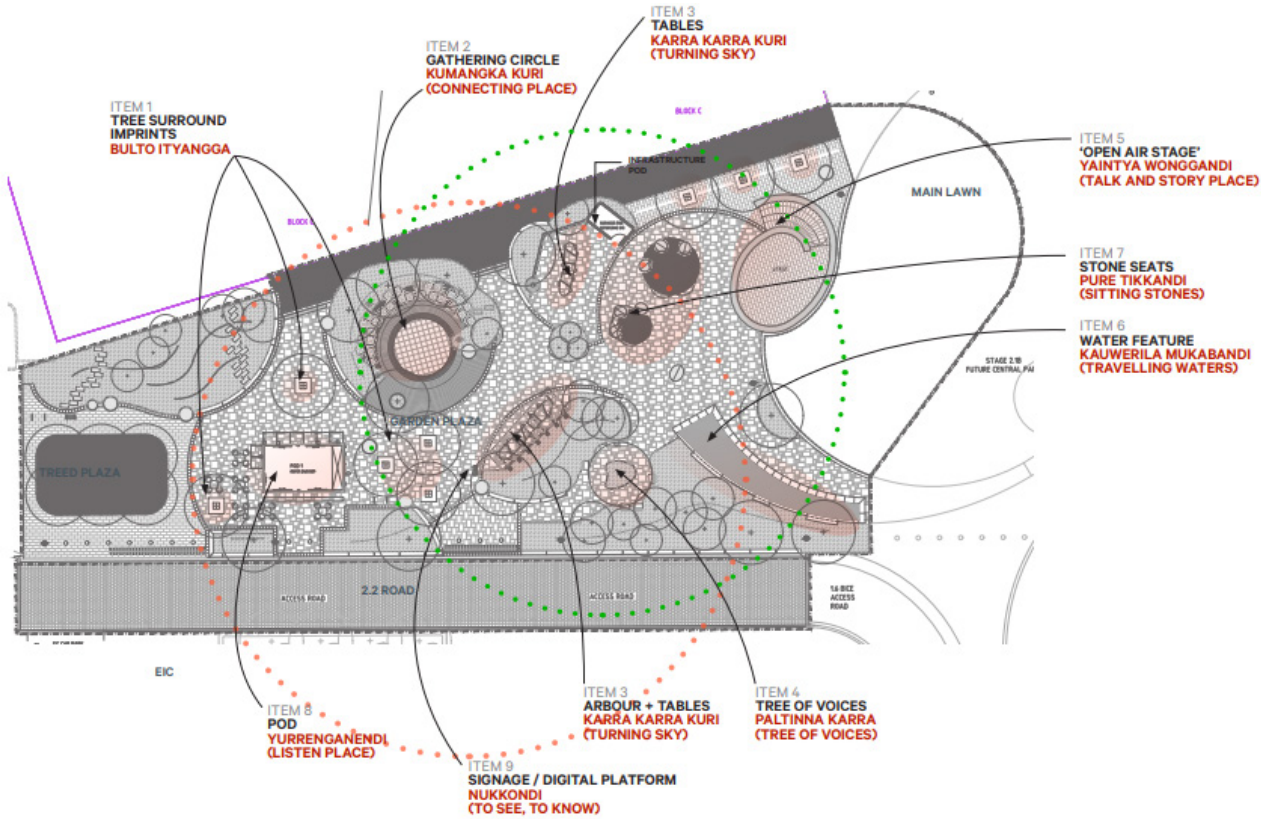
Kuri Kurru tells the stories of the Kurna Meyunna people, incorporating the cultural, spiritual and ecological significance of the Country on which it sits: Kainka Wirra (Forest Gum Place).

The park incorporates intricate details and cultural elements integrated into every aspect of its codesign.

Spiralling out from the meeting place is a tear-drop shaped lawn and native plants and trees which include kurrajong and flame trees. Wodliparri (the Milky Way) is incorporated into glass graphic patterning and the tables are shaped like Kurru (coolamon vessels), while tree gratings and local stone feature etchings of land and possum markings.

Kuri Kurru is where we will provide cultural education. Our stories are as ancient as the rock itself.

Burka Senior man, Karl Winda Telfer of the Mullawirra Meyunna.





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LOT_
FOUR
TEEN

