



WARRINGAH ECONOMIC DEVELOPMENT PLAN



Warringah Council



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Cover photo: Lifestyle Working, 117 Old Pittwater Rd,
Brookvale NSW 2100



General Manager's Message

The Warringah LGA, part of the Northern Beaches area of Sydney is well known for its vibrant lifestyle, strong local economy, diversity and strength of businesses with low unemployment rates. The area encompasses 153 sq kilometres, comprising bushland, beaches and lagoons among high quality residential areas, traditional industrial zones and major manufacturing and retailing. Brookvale – Dee Why, the region's Major Centre is evolving as a vibrant civic, cultural and business area for the region.

Warringah, along with Pittwater, Manly and Mosman Councils make up the four Council SHOROC region. Warringah has the largest local economy with significant economic development-related strengths including a stable, highly skilled and educated workforce and an increasingly diverse economic base, supporting innovative micro, small to medium and some larger globally competitive businesses.

Future challenges relate to the provision of local jobs to match business expansion needs. There is also an urgent need for new health and transport – related infrastructure investment to support the overall economic development of the region.

Warringah Council views economic development as a high priority and through the Plan it will implement a range of action – based local and regional business activities and partnered initiatives, over a four year timetable.

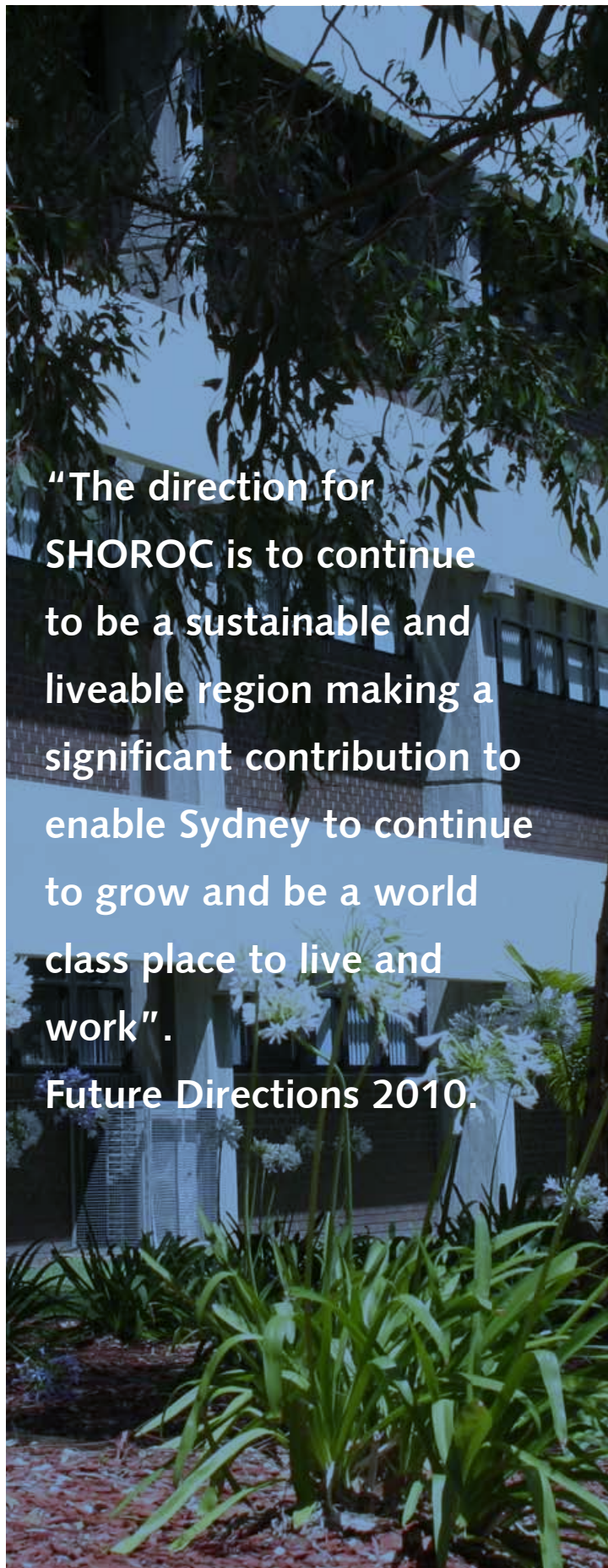
The Council is committed to reducing obstacles and progressing actions that maximise opportunities for economic development to strengthen existing and new business and generate jobs growth. Collaborative Council initiatives that seek to improve business performance, encourage partnerships with key stakeholders, connect and promote networks can open up exciting opportunities that attract new investment, grow business, profile the region and drive the economy.

The implementation of the Warringah Economic Development Plan also relies on building stronger relationships between the SHOROC Councils and other key government agencies contributing to and supporting the region's competitive strengths and Sydney's future.

Warringah Council welcomes your involvement in the implementation of this Plan.

Rik Hart, General Manager





“The direction for SHOROC is to continue to be a sustainable and liveable region making a significant contribution to enable Sydney to continue to grow and be a world class place to live and work”.
Future Directions 2010.

2. Purpose of the Economic Development Plan

The main purpose of the Warringah Economic Development Plan, is to provide a positive framework and direction to guide, support and help promote sustainable economic development in Warringah. Four key economic development themes that support the Plan’s strategic actions were identified in the engagement phase have been endorsed by Council and business community.

The priority, staging and implementation of actions to help business grow and develop will link to Council’s annual budget cycle and identify a range of stakeholder involvement. The focus for the economic development initiatives is the Local Government Area of Warringah. Importantly, some of the local actions influence stakeholder initiatives across the SHOROC region and the Plan is designed to inform and integrate regionally with the direction of SHOROC’s strategic roadmap - ‘Shaping Our Future’.

This Economic Development Plan is a strategic tool with aims to achieve the following objectives:

- *Create an environment that is conducive to business investment and industry development and attraction;*
- *Demonstrate connections to other major relevant local, regional and NSW State plans;*
- *Enhance the region’s competitive advantages as a business location;*
- *Encourage sustainable and innovative business practices;*
- *Help to ensure that infrastructure provision meets business needs;*
- *Support partnerships, business networks and collaboration;*
- *Influence the business – related promotion, marketing and branding activities of the local area and region;*



- *Facilitate economic development initiatives to create increased community awareness, grow employment, support training and strengthen our skills base;*
- *Support continued self-containment of employment opportunities.*

A successful community engagement process helped set the strategic framework for the Plan, defining the direction through identifying four key themes which reflect overall local business needs, opportunities and issues in what is a 'new space' of economic development for Council. Implementing the actions based upon these themes is the next step in the Plan's implementation phase.

The following four themes create a framework and direction for economic development until 2016:

Warringah Economic Development Plan - Four Themes

Theme One

• **Growing Employment Opportunities**

Developing a strong local economy which promotes enterprise and innovation, builds a skilled and educated workforce and contributes to a high quality of life for the community

Theme Two

• **Council providing Information, Support & Advice**

Council will provide support to increase business engagement and awareness of the contribution of business, build business capability and promote, strengthen and profile the area's competitiveness

Theme Three

• **Advocacy for local and regional initiatives**

Recognising the importance of the local and regional economies associated with decisions and projects such as transport, jobs and infrastructure, which support sustainable economic development

Theme Four

• **Connectivity, engagement and communication**

Initiating and fostering business networks, partnerships and other mechanisms to connect, promote and grow business



Warringah and other SHOROC Councils are close to the Global Economic Corridor extending from the airport through to Macquarie Park, and over the longer term towards Parramatta. This corridor contains around 40 per cent of Sydney's jobs and is a powerhouse of the Australian economy. The success of Sydney's other cities and centres rely on the continuing strength of activity in Global Sydney and this economic corridor.

Council will seek ongoing assistance and strategic advice from business, stakeholder agencies and interest groups as part of implementation, reviewing the Plan and monitoring action progress and outcomes.

Warringah Council has a growing small to medium business sector (SME) which provides over 45,000 jobs (full and part time). Council, together with its business stakeholders is committed to playing a major role in identifying and addressing the challenges, as well as promoting and facilitating opportunities for economic development in the area. Developing and promoting a greater awareness of Council's economic development support role is a major step in the successful implementation of actions, as part of this first Economic Development Plan.

While private enterprise is the primary driver of economic growth, it is Local Government that can make an important contribution as a promoter, facilitator and coordinator of local and regional economic development activities. Effective local government participation is vital to the success of local and other levels of economic development planning.

Warringah Council has been successful in attracting collaborative support from the NSW Government Trade and Investment, Regional Infrastructure & Services and existing local business networks. Since 2010, Council has been able to offer quality partnered mentoring programs that have leveraged financial support for quality speakers, seminars, business information and workshopping programs that are being hosted on the Northern Beaches including –

- Manufacturing Week
- MicroBiz Week
- Small Business September
- Cluster Grants
- Mentoring Programs



The local Chambers and other key local business networks have enthusiastically involved their memberships in the various seminars and programs such as those identified above.

The purpose of the Economic Development Plan is also to understand and highlight the importance of the small and medium business contribution to the LGA and to their role in building strong, vibrant communities, so that our businesses grow and remain competitive in metropolitan, national and global markets. The implementation of the strategic action initiatives through the Plan will also help to facilitate the development of sustainable business practices and increased business engagement will contribute to improved business performance, business excellence and building regional profile for the Northern Beaches and the Global City of Sydney.

Making it easier to do business locally and in the subregion is a necessity, as it helps to attract investment and provide new employment-generating opportunities. Council can do this through: its support of business excellence and by fostering a business-friendly organisational culture and high levels of customer service; through quality decision making on planning, regulation and development of the built environment.

The success of the Plan will be founded on the ongoing engagement, effective partnerships and collaborative relationships with local business, chambers, government and non-government organisations, SHOROC, industry stakeholders and service providers. Maintaining economic sustainability and meeting State Government job targets will also be essential, in an environment of increasingly limited supply of local employment lands, skills to match growing business sectors and other infrastructure in the NE Subregion of Sydney.



Outlook – “We remain an effective, efficient and innovative organisation with an unwavering purpose – serving Warringah and our community. We are well positioned and have implemented a more holistic and integrated approach to planning and reporting which puts us at the forefront of Councils in NSW”. Warringah Council Strategic Community Plan

3. Council's Role in Economic Development

Warringah Strategic Community Plan 2010

The Warringah Economic Development Plan has been prepared under the umbrella of the new 2009 State Government reporting regime that integrates broad, economic, social, cultural, political and environmental issues that define communities in New South Wales.

In 2009, Council began a strategic planning process to update the comprehensive, “Living Warringah - In Focus” report which was prepared in 2005 endorsing Council's commitment to the principles of Ecologically Sustainable Development (ESD).

Council's objective with the new 2010 Strategic Community Plan and Budget 2010 - 2020 process was to preserve Warringah's long-term sustainability and improve residents' quality of life by ensuring a rigorous and integrated budget and service delivery plan that is as community-focused as it is business-critical.

The Warringah Strategic Community Plan 2010 comprises:

- A 10 year plus Community Strategic Plan
- A four year Delivery Program for each service area
- A 1 year Operational Plan and Budget.



The Warringah Strategic Community Plan 2010 provides a 'big picture' 10 year strategic vision for the area with the Corporate Vision, Mission, a statement of values and strategic community key outcomes and directions for council to achieve. The Plan includes a detailed view of services, projects and activities to be delivered over the next four years and provides greater detail in a one year Operational Plan and Budget. Yearly actions will be determined by delivery program and budget and the annual review of data and the economic development issues and opportunities in the Plan. Council prepared the Plan on behalf of the business community and other stakeholder groups and partners.

The new integrated Planning and Reporting Framework for NSW Local Government aims to:

- Improve integration of various statutory planning and reporting processes undertaken by councils;
- Strengthen councils' strategic focus;
- Streamline reporting processes.

Warringah's 2010 Community Strategic Plan details how Council will achieve the aims above over five Strategic Community outcome areas, each with their own strategies and goals:

- **Living Environment**
- **Living Communities**
- **Living Spaces**
- **Living Enterprises**
- **Living Organisation**

The Economic Development Plan process successfully integrates with Council's new reporting framework which is built around – 'creating a sustainable future'. Long term sustainability for Council is defined as balancing the social, environmental and civic leadership needs of the community.

Economic development is included as one of the key focus areas of the 'Living Enterprises' outcome and has the clear direction to – shaping the future of Warringah and contributing to Council's Vision for the future which is – "a vibrant, growing and healthy community offering lifestyle choices".

There are three Goals for 'Living Enterprises' which influence economic development in the area and are described as:

- Sustaining a strong local economy that provides employment and training opportunities
- Balancing the economic benefits of visitors and the impact on local resources and the community
- Well managed business infrastructure to support a thriving local economy.

The integrated planning and reporting framework for local communities in New South Wales does not exist in isolation and importantly 'economic development' has a significant strategic role to help influence and shape the future of the State.

The framework supports connectivity of land use and infrastructure planning which produces social, environmental and economic outcomes for the community. It is through the Strategic Community Plan, economic development considerations and Councils' wider statutory local environmental planning and development control roles provide guidance to investors and businesses on what development is permissible. Other current key strategic documents that will help to guide activities in Warringah include the Sustainability Strategy 2011 and Social Plan 2010.



Economic development is well known in the national and international research as having a positive link to creating jobs, economic prosperity, a vibrant city and quality of life for individuals, residents and the business community.

The Northern Beaches was historically built upon its natural resources. However, today the dominant business sectors in the NE subregion are: professional, scientific and technical services, retail, and health care and social assistance, construction. The SHOROC Councils will continue to support the development and growth in these sectors, to increase value, meet the expected job increases (up to 30,000 over the next 20 years) and overall Gross Regional Product (GRP).

Warringah and the NE subregion face a number of other challenges too, including climate change, highs and lows in the international economic cycle, demographic shifts and an aging population impacting the labour market and services provision locally. The Economic Development Plan proactively responds to these issues and will over the time of the Plan turn the challenges into opportunities for the economy by, for example:

- Supporting the growth of business hubs and clusters while attracting green and innovative clean and high tech businesses
- Helping to retain and promote key job skill sectors, such as health and education services, through Council and other government supported education and training to increase the levels and diversity of employment opportunities
- Supporting inward investment, local business and jobs growth and promoting business best practice
- Progressing collaborative economic development programs, support information and referrals between all levels of government, business and the wider community



- Supporting branding, marketing, promotion and sponsorship of business activities in the Major Centre (Brookvale - Dee Why), the proposed potential Specialist Centre at Frenchs Forest and throughout selected key village centres, as part of the NE subregion's hierarchy of centres
- Supporting land use planning that informs quality urban design outcomes for the public domain, to upgrade and enhance visually attractive centres that underpin local and regional business growth and create great places to live, work and invest
- Participating and supporting regional economic development planning initiatives.

The Economic Development Plan has a wider definition of "economic development" that was developed in the engagement process and which builds on the earlier Living Enterprises goals. The following objectives have been included in the delivery of the Plan's actions to increase the level of information and business support services referrals:

- **Building up the economic capacity of the local area to improve its economic future and quality of life for all**
- **A process by which public, business and non-governmental sector partners work collaboratively to create better conditions for economic growth and employment generation**
- **Measurements by improvements in for example, employment, education and training, health, culture and community well-being**
- **Includes reference to sustainability and links to a visually appealing people environment and Council's strategic land use planning framework.**

The Plan makes specific references to and sets the big picture relating to key regional, NSW State policies, plans and directions which will help inform and shape the future of Warringah's economy in the NE Subregion of Sydney. This integration with other levels of government policy helps support and creates a wider awareness of Warringah's and the regions' existing and future economic development strengths and business capabilities.

Council's economic development role is also significant as part of identified key local economic development issues, challenges and opportunities in the wider NSW strategic economic development framework. Business trends are influenced by, for example, population growth, our specialist occupations profile, educational levels and workforce skills, all of which make a significant contribution to business and employment growth locally, regionally and nationally.

Warringah businesses in the regional economic context have a role in fostering innovation and nurturing ideas and technology, talent and creative enterprises. Advocating and building on links between tertiary institutions and research organisations, as well as the individuals and businesses who can translate products, services and processes into commercial opportunities is the way to nurture an innovation system in the community.



4. Data Snapshot – Warringah and the SHOROC Region

Warringah and SHOROC Region Economic and Demographic Profile snap shot

Warringah Council is located on Sydney’s Northern Beaches between 10 and 27 kilometres from the Sydney CBD. The area is bounded by Pittwater Council to the north, the Tasman Sea in the east, Manly Council area and Middle Harbour in the south and the Ku-ring-gai Council area in the west. Warringah encompasses a total land area of 153 square kilometres.

The Warringah Council area includes the suburbs and rural localities of Allambie Heights, Beacon Hill, Belrose, Brookvale, Collaroy, Cottage Point, Cromer, Curl Curl, Davidson, Dee Why, Duffys Forest, Forestville, Frenchs Forest, Freshwater, Ingleside (part), Killarney Heights, Manly Vale, Narrabeen, Narraweena, North Balgowlah, North Curl Curl, North Manly, Oxford Falls, Queenscliff, Terrey Hills and Wheeler Heights.

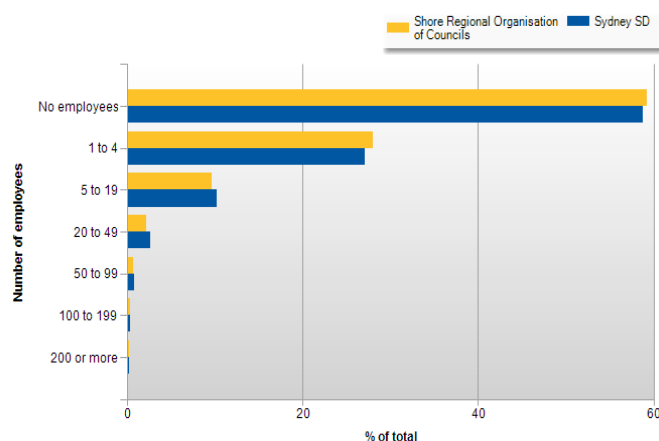
Warringah is part of the SHOROC region which provides more than 500 hectares of employment lands, with over 33,000 registered businesses with future business growth and development tied closely to existing transport corridors, while ensuring protection of the natural environment.

Retaining existing levels of self – sufficiency and supporting high levels of containment in the future will benefit Warringah and the region. New development that supports vibrant, sustainable communities for living and working also stimulate local economic development and jobs growth. High containment levels for Warringah and SHOROC residents are also supported by greater take up of home-based employment and the growth of telecommuting which can help reduce travel times and road congestion locally and regionally.

Business Size and Turnover

Over 85 per cent of registered businesses in the SHOROC region, as at 2009 are classified micro and small businesses which employ between either none or up to 4 employees. This ratio is comparable to the Sydney Statistical Division as depicted below.

Registered businesses by employment size 2009

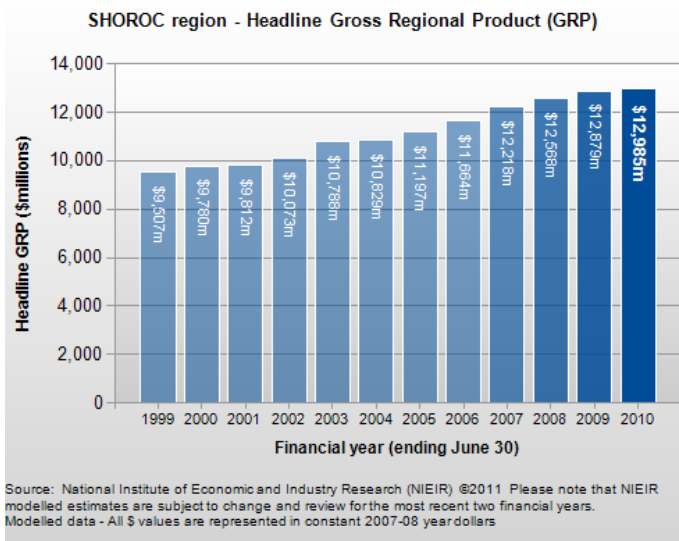


Source: Australian Bureau of Statistics, Australian Business Register 2009, Cat. No. 8165.0 NOTE: "No employees" contains sole proprietors where the proprietor does not receive a wage or salary separate to the business income.

Gross Regional Product

Warringah as part of the North East Region of Sydney, along with Manly and Pittwater Councils, is determined by the broader geographic area established by Sydney's Metropolitan Plan 2036. The three councils, including Mosman Council are affluent areas, where the residents' incomes and other measures of socio-economic prosperity fall well above the national and Sydney averages. They are also relatively geographically isolated from the rest of Sydney (Pittwater in particular), resulting in a more self-contained economy than many parts of Metropolitan Sydney.

The SHOROC economy in 2010 was worth \$13.0 billion, or about 5% of Sydney's Gross Regional Product.



For the Warringah LGA, over 83 per cent of the 15, 857 businesses, as at June 2009 had a turnover between \$0 and \$500,000, which is also comparable to the Sydney Statistical Division results below:

Australian Business Register

Count of registered businesses by estimated annual turnover, June 2009 Warringah prepared by .id (informed decisions) using data supplied by the Australian Bureau of Statistics.

Employment size	Warringah No.	Warringah %	Sydney SD %
Zero to less than \$25k	2,461	15.5%	16.7%
\$25k to less than \$50k	1,900	12.0%	12.6%
\$50k to less than \$75K	1,678	10.6%	9.7%
\$75k to less than \$100k	1,436	9.1%	8.2%
\$100k to less than \$150k	1,686	10.6%	9.6%
\$150k to less than \$200k	1,119	7.1%	6.6%
\$200k to less than \$500k	2,841	17.9%	17.6%
\$500k to less than \$1m	1,162	7.3%	7.8%
\$1m to less than \$2m	713	4.5%	4.7%
\$2m to less than \$5m	508	3.2%	3.5%
\$5m to less than \$10m	176	1.1%	1.4%
\$10m to less than \$20m	102	0.6%	0.8%
\$20m to less than \$50m	48	0.3%	0.5%
\$50m to less than \$200m	27	0.2%	0.2%
\$200m or more	-	0.0%	0.1%
Total	15,857	100.0%	100.0%

Australian Business Register

Count of registered businesses by employment size, June 2009 prepared by .id (informed decisions) using data supplied by the Australian Bureau of Statistics.

Employment size	Warringah No.	Warringah %	Sydney SD %
No employees	9,146	57.7%	58.8%
1 to 4	4,563	28.8%	27.1%
5 to 19	1,545	9.7%	10.2%
20 to 49	399	2.5%	2.6%
50 to 99	111	0.7%	0.8%
100 to 199	54	0.3%	0.3%
200 or more	39	0.2%	0.2%
Total	15,857	100.0%	100.0%



Business Employment Trends

New National Institute of Economic and Industry Research (NIEIR) data for SHOROC's estimated employment

in 2010 identifies that the region was dominated by three popular industry sectors:

- Construction (15.3 per cent)
- Retail Trade (13.8 per cent)
- Professional, Scientific & Technical Services (10.5 per cent)

Combined these three sectors employed an estimated 41,372 people in total, or 40 per cent of local jobs.

Financial year ending June 2010			Financial year ending June 2006			Change		
Industry sector (2006 ANZSIC)	Jobs (number)	% of total		Sydney SD %	Jobs (number)	% of total	Sydney SD %	2006 to 2010
Agriculture, Forestry and Fishing	383	0.4		0.6	355	0.4	0.5	27
Mining	90	0.1		0.3	45	0.0	0.2	45
Manufacturing	6,834	6.5		10.1	8,282	8.2	9.7	-1,447
Electricity, Gas, Water and Waste Services	636	0.6		1.0	546	0.5	0.8	89
Construction	15,964	15.3		8.7	11,778	11.6	8.1	4,186
Wholesale Trade	6,166	5.9		4.7	7,149	7.1	5.1	-983
Retail Trade	14,452	13.8		10.1	14,410	14.2	10.7	42
Accommodation and Food Services	6,308	6.0		6.9	8,253	8.2	6.5	-1,945
Transport, Postal and Warehousing	1,931	1.8		6.1	1,993	2.0	5.8	-61
Information Media and Telecommunications	2,506	2.4		3.0	2,175	2.2	3.5	330
Financial and Insurance Services	2,284	2.2		6.3	2,711	2.7	6.6	-426
Rental, Hiring and Real Estate Services	3,281	3.1		1.8	2,551	2.5	1.9	729
Professional, Scientific and Technical Services	10,956	10.5		9.4	9,160	9.1	9.4	1,796
Administrative and Support Services	2,875	2.8		3.3	3,267	3.2	3.7	-391
Public Administration and Safety	3,561	3.4		5.5	3,389	3.4	5.6	172
Education and Training	6,430	6.2		6.5	7,071	7.0	6.8	-641
Health Care and Social Assistance	8,705	8.3		10.1	10,403	10.3	9.5	-1,698
Arts and Recreation Services	2,388	2.3		1.7	2,048	2.0	1.6	339
Other Services	8,753	8.4		4.1	5,536	5.5	4.1	3,216
Total industries	104,513	100.0		100.0	101,132	100.0	100.0	3,380

Source: National Institute of Economic and Industry Research (NIEIR) ©2011

Please note that NIEIR modelled estimates are subject to change and review for the most recent two financial years.



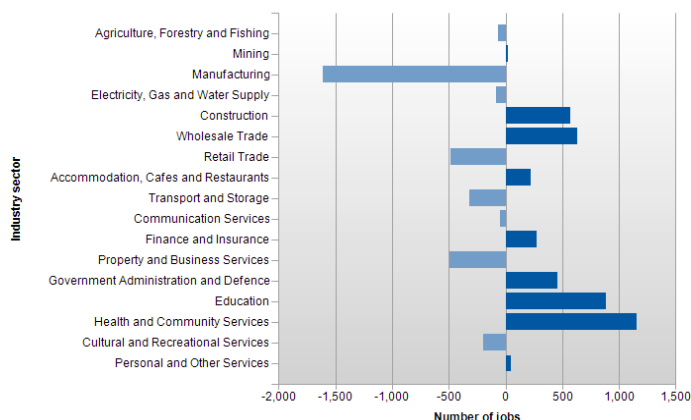
Some of the key trend estimates in job sector changes between 2006 – 2010 are as follows:

- The increase of Construction jobs over retail jobs growth to almost equal numbers of jobs (Construction, 15,964 jobs 2010 / Retail 14,452 jobs 2010)
- The rising levels of jobs in the Professional, Scientific and Technical Services area with almost 1,800 new jobs created between 2006 – 2010
- The loss of Health Care and Social Assistance jobs of around 10 percent, (1,698 jobs) following closely the drop for the Sydney SD of 9.5 percent for this same period
- The loss of Education and Training jobs over the period, down 641 jobs for the SHOROC region
- The total increase of jobs in the SHOROC region increasing by 3,380 to 104, 513 jobs in 2010.

A comparison of changes in employment between industry sectors for SHOROC, 2001 – 2006 below reveals the dominant trend of a gradual decline of traditional manufacturing amongst the SHOROC Councils, with a loss of over more than 1,500 jobs.

The manufacturing business sector movement further west in Sydney to cheaper, larger land packages and greater transport infrastructure involving simpler distribution logistics is a clear trend. The increase of employment in health and community services areas reflects the demands of an ageing SHOROC population and existing strengths associated with the hospitals and allied healthcare services.

Change in employment by industry sector, Shore Regional Organisation of Councils 2001 to 2006 (ANZSIC 1993 - Time series industry classification)



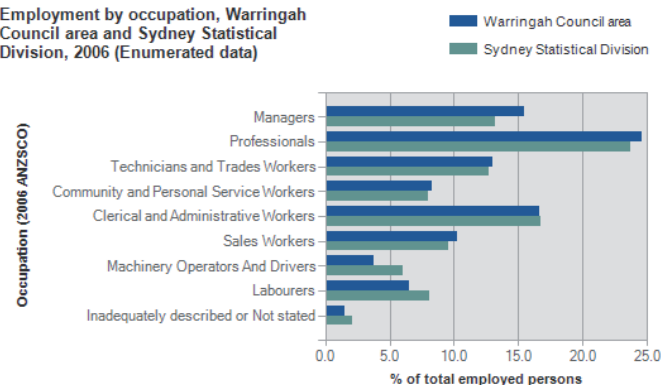
Occupations

The three most popular occupations held by the resident population in the Warringah Council area in 2006 were generally white collar job areas for the following occupation categories:

- **Professionals (16,848 persons or 24.6 per cent)**
- **Clerical and Administrative Workers (11,411 persons or 16.7 per cent)**
- **Managers (10,572 persons or 15.4 per cent).**

Combined these three occupations accounted for 38,831 people, a total or 56.7 per cent of the employed resident population. By comparison, the Sydney Statistical Division employed 23.7 per cent as Professionals; 16.7 per cent as Clerical and Administrative Workers; and 13.2 per cent as Managers.

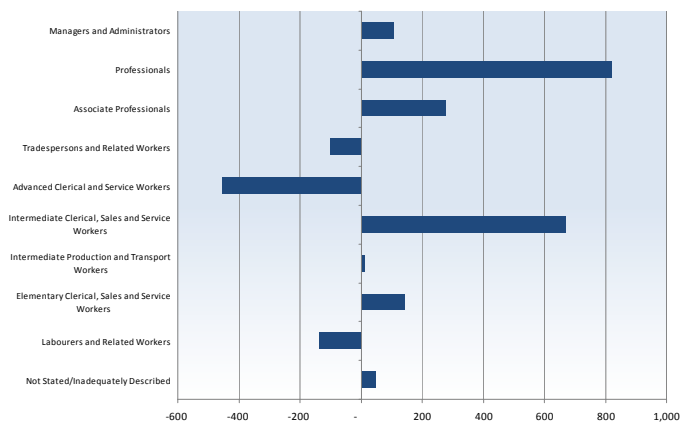
Employment by occupation, Warringah Council area and Sydney Statistical Division, 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)



Change in Occupation of workers, 2001-2006



The same comparison of Occupations between Warringah, SHOROC and Sydney shows higher levels of Professionals, Technicians and Trades Workers and Community and Personal Service Workers in SHOROC than Warringah. For the Labourers occupation category, Warringah, SHOROC and Sydney display similar percentages of around 7.5 per cent.

Between 2001 and 2006, the change in Occupation of workers for Warringah shows major increases in Professionals and Intermediate Clerical, Sales and Service workers with a decline of over 400 in change of occupation for Advanced Sales and Service workers.

Self containment in SHOROC and Warringah

Self-containment measures the proportion of the workforce who reside in the same local government area as they work and indicates whether workers need to travel significant distances to work, or can live near work. If employment lands were to decrease in future the rate of residents working outside of the LGA will potentially increase and it would be difficult for Council to achieve existing desirable high levels of economic self-containment.

Areas of residence for SHOROC workforce (all industries) employed in the local area 2006 (ANZSIC 1993 - Time series industry classification) shows the containment trend with very high numbers of SHOROC residents living and working in this region in 2006 was 62, 758 or 78.2 per cent. The City of Ryde and Sydney City were recorded, at this same time as the two local areas with the least workers residing locally.

Areas of residence(a) for All industries workers in the area 2006		
Local Government Area	number	%
SHOROC region	62,758	78.2
Ku-ring-gai (A)	1,951	2.4
Hornsby (A)	1,754	2.2
North Sydney (A)	1,691	2.1
Willoughby (C)	1,283	1.6
Ryde (C)	876	1.1
Sydney (C)	847	1.1
Other areas	9,119	11.4
Total people working in the SHOROC region	80,279	100.0



2006 Census of Population and Housing						
Count of persons resident in selected areas of work destination by industry (ANZSIC) prepared by .id (informed decisions) using data supplied by the Australian Bureau of Statistics LGA of residence selection						
Industry of Employment, ANZSIC93*, 2006	Work Destination				Total	% self-containment 2006
	Works within Warringah	Works in remainder of SHOROC	Works elsewhere	Work destination not stated		
Agriculture, Forestry and Fishing	98	18	74	4	194	50.5%
Mining	14	-	61	10	85	16.5%
Manufacturing	2,826	656	2,375	197	6,054	46.7%
Electricity, Gas and Water Supply	71	20	244	4	339	20.9%
Construction	1,973	514	2,851	362	5,700	34.6%
Wholesale Trade	2,507	361	1,872	110	4,850	51.7%
Retail Trade	5,631	1,399	2,196	328	9,554	58.9%
Accommodation, cafes and Restaurants	1,292	735	803	144	2,974	43.4%
Transport and Storage	591	127	1,534	96	2,348	25.2%
Communication Services	315	35	847	32	1,229	25.6%
Finance and Insurance	806	258	3,406	80	4,550	17.7%
Property and Business Services	3,766	793	6,188	211	10,958	34.4%
Government Administration and Defence	655	377	1,256	49	2,337	28.0%
Education	1,945	684	1,845	103	4,577	42.5%
Health and Community Services	2,637	1,426	2,392	208	6,663	39.6%
Cultural and Recreational Services	842	240	1,199	81	2,362	35.6%
Personal and Other Services	1,166	453	1,091	90	2,800	41.6%
Non-Classifiable Economic Units	359	70	427	89	945	38.0%
and Not stated	44	12	55	680	791	5.6%
Total	27,538	8,178	30,716	2,878	69,310	39.7%

69,310* Industries in this table use the older, ANZSIC93 classification, which allows comparison between 2001 and 2006 data.

The Retail Trade sector according to the above count of persons resident in Warringah and working in this sector in 2006 displayed the highest level of self containment at 58.9 per cent, followed by Wholesale Trade with 51.7 per cent.

The overall level of self containment for the number of persons resident and working in Warringah LGA was 39.7 per cent which is a high for the Sydney Statistical Division. Whereas the Electricity, Gas and Water Supplies sector of workers displays the lowest per cent self-containment (20.9 per cent) with almost half having to work at a destination outside the SHOROC region.



Education and Qualifications

Education sector assets in the economy are a catalyst for business development and job generation. The SHOROC region can be referred to as a 'Learning Region' due to high concentration of well performing state, selective and independent primary and secondary schools as well as Brookvale TAFE, which offers a wide variety of tertiary courses and teaches Macquarie University programs. Building strong partnerships with education and training providers helps increase the local skills base for Warringah businesses and encourages people to live and look for employment locally.

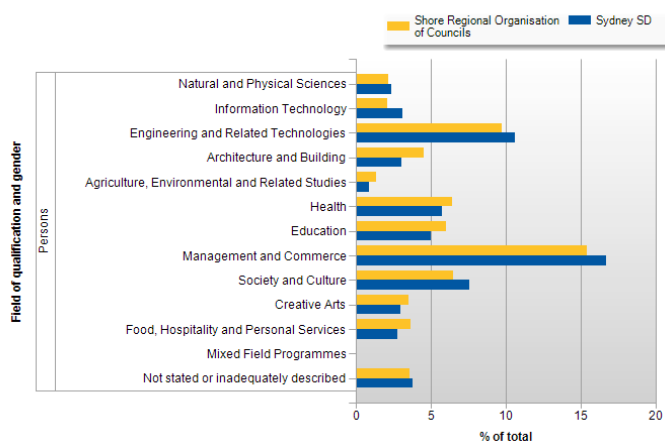
The establishment of a Northern Beaches university would generate even greater tertiary educational and business-related resources for the community, reducing the need for higher skilled graduates and support occupations to leave the area for employment. Given the already limited public transport, a local University would reduce travel time and costs for students retain new and professional skills and support local business growth and development. An attractive, "world class" international university campus would be the only Sydney-based, stand alone facility of an internationally renowned university campus. If successful the university presence would be a first to directly serve a growing local population projected to rise to over 300,000 people by 2036.

A university would also make a substantial contribution to local and regional liveability, help to profile Sydney as a Global City and strengthen business links to government, industry and the community. Depending on faculty specialisation, the future Frenchs Forest hospital would help encourage the clustering of local health / wellbeing / medical devices / research and development businesses in the area which would have direct linkages to the university as has occurred at Macquarie University. Work experience and student internship opportunities with business and specialist staff recruitment across a variety of industry sector clusters, could also be generated to and benefit containment with students and specialist staff living and working locally.

The education and research sector plays a significant role in the larger NSW economy. Education was its second largest export earner in 2009, worth \$6.7 billion, experiencing a five year trend growth of 16% per annum. With 11 universities and a large number of scientific centres, NSW has excellent research capacity in areas of strategic importance, such as clean energy, food production, health, environmental management, manufacturing and ICT.

The SHOROC workforce for key fields of qualifications exceed the levels in comparison to the fields of qualifications for the Sydney Statistical Division. For the SHOROC workforce, the qualifications in a number of areas - Architecture and Building, Agricultural, Environmental and related Studies, Health, Education, Creative Arts, Food Hospitality and Personal Services exceed numbers in the Sydney Statistical Division workforce and represent almost 20 per cent of total qualifications.

Field of qualification of the workforce, Shore Regional Organisation of Councils and Sydney SD 2006



Almost half of the workforce population of SHOROC held educational qualifications and a third had no qualifications, compared with 43 per cent and 42.8 per cent respectively for the Sydney Statistical Division.



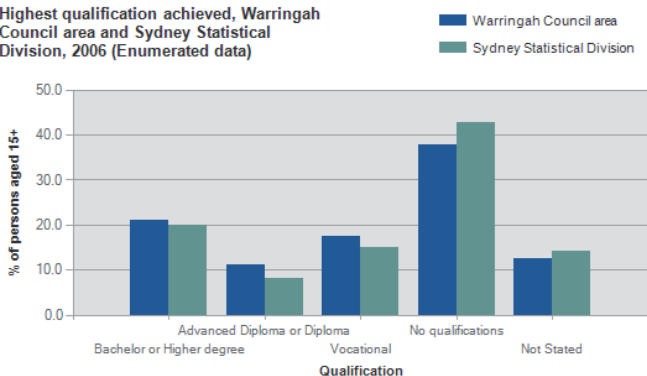
The major differences between the qualifications held by the population in Warringah Council area and the Sydney Statistical Division in 2006 were:

- A larger percentage of people with Advanced Diploma or Diplomas (11.1 per cent compared to 8.1 per cent), and
- A smaller percentage of people with No qualifications (37.9 per cent compared to 42.8 per cent).

The largest changes in the qualifications of the population in Warringah Council area between 2001 and 2006 were in those with:

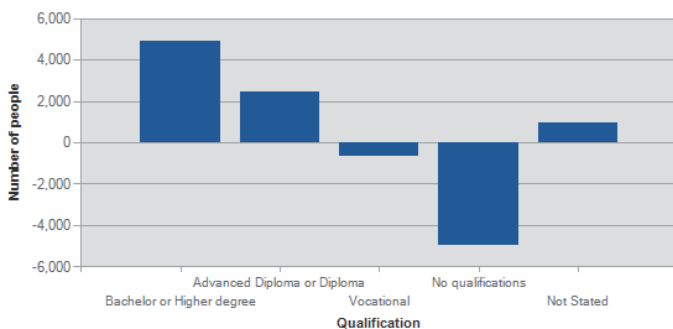
- Bachelor or higher degrees (+4,889 persons), and
- No qualifications (-4,937 persons).

Highest qualification achieved, Warringah Council area and Sydney Statistical Division, 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)

Change in highest qualification achieved, Warringah Council area, 2001 to 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 and 2001 Census of Population and Housing (Enumerated)

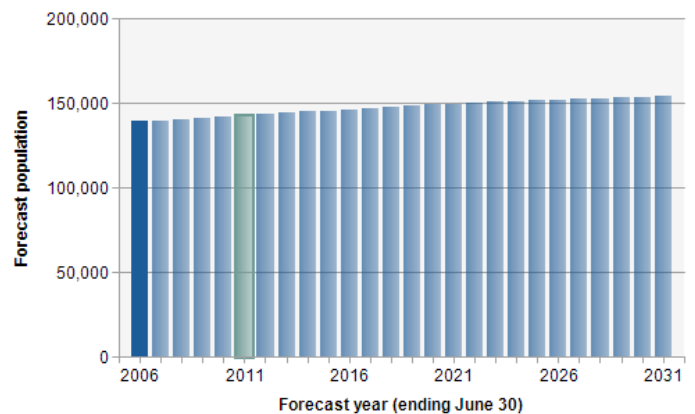
Demographics

The Warringah LGA and the SHOROC region are predominantly residential areas. Warringah and Pittwater LGA's contain the largest industrial areas. Brookvale supports the highest levels of bulky goods premises, business and office space, warehouse and distribution space and vehicle showrooms.

The current forecast population of Warringah is 142, 441. In 2006, the total population of Warringah Council area was estimated at 139,159 people. The LGA is expected to experience an increase of over 10,400 people to 149,578 by 2021, with an average annual growth rate of 0.48 per cent per annum over 15 years. In 2031, the population of the Warringah Council area is estimated to be 154,104, an increase of 14,945 persons (10.74 per cent) from 2006. This represents an average annual growth rate of 0.41 per cent.

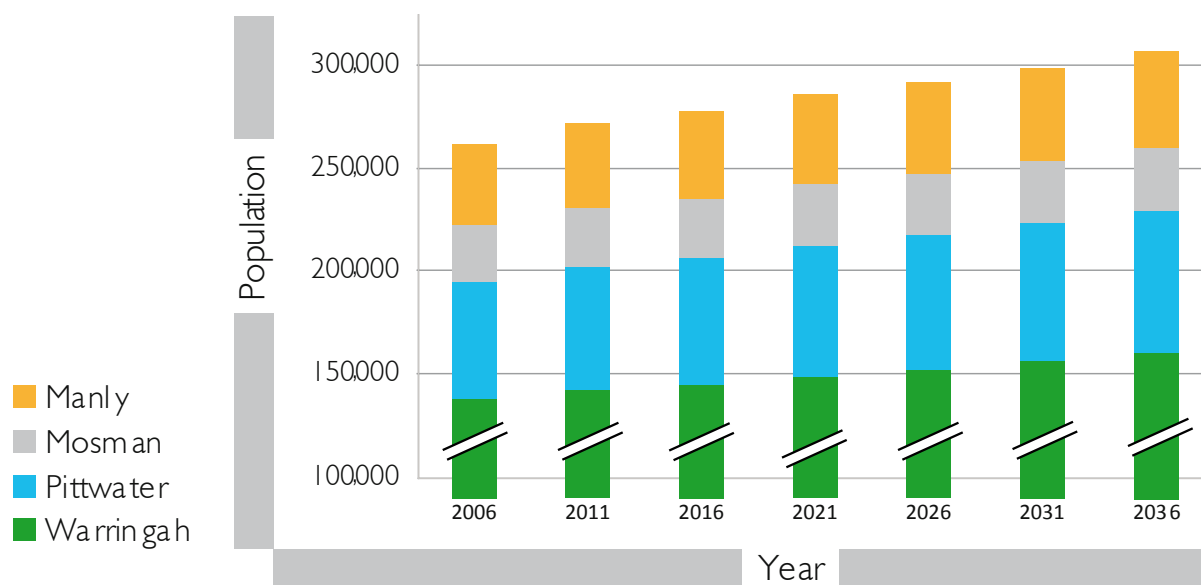
Brookvale is forecast to show the greatest percentage change in population to 2021, increasing by 25.3 per cent from 2006, or an average annual growth rate of 1.2 per cent. In contrast, Terrey Hills - Duffys Forest - Cottage Point is forecast to decrease by 4.7 per cent by 2021.

Forecast population, Warringah Council area





Population projections for the SHOROC region to 2036 are as follows:



Source: New South Wales Statistical Local Area Population Projections, 2006-2036 (Department of Planning 2010)

Internet connection of households - Warringah Council

Type of internet connection (Household internet connection)	Warringah Council area 2006		
	number	%	Sydney Statistical Division %
Enumerated data			
Broadband connection	26,761	52.9	45.0
Dial-up connection	7,673	15.2	16.5
Other connection	344	0.7	0.7
Total internet connections	34,778	68.7	62.1
No internet connection	12,624	25.0	29.0
Internet connection not stated	3,193	6.3	8.9
Total households	50,595	100.0	100.0

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006, 2001, 1996, and 1991.

Analysis of the type of internet connection of households in Warringah Council area compared to the Sydney Statistical Division shows that there was a smaller proportion of households with either no internet connection or a dial up connection, but a larger proportion of households with broadband connectivity. Broadband internet connection is vital to the SHOROC Business profile with both home – based / micro business and small to medium businesses requiring fast internet service for both domestic and regular day to day business use.

Over 60 per cent of Warringah households had internet connection in 2006. This connectivity rate is predicted to be much higher for households in 2011 due to increasing micro and home based business growth. Overall only 29 per cent of Warringah households had no internet connection or a dial up connection, and 52.9 per cent had broadband connectivity, compared with 45.5 per cent and 45 per cent respectively in the Sydney Statistical Division.

Employment and business profile

Warringah has the greatest area of employment generating land in the region with a total just over 393km². As at June 2006 Warringah also had the greatest number of jobs available in the region (55,600 or 56 per cent of all SHOROC jobs). Warringah provides 143 ha of all commercial and retail lands and 250 ha of industrial lands.

The largest employment lands areas in Warringah include:

- **Brookvale Industrial Area** **59.2 ha**
- **Cromer Industrial Area** **51.6 ha**
- **Austlink Business Park** **52.1 ha**
- **Warringah Mall** **7.1 ha**

In relation to types of employment generating businesses in the Warringah LGA, the top 4 in 2006 were:

- **Retail (11,384 or 20 per cent of jobs in Warringah)**
- **Property and Business Services (7,928 or 14 per cent of jobs in Warringah)**
- **Manufacturing (7,410 or 13 per cent of jobs in Warringah) and**
- **Wholesale Trade (5,105 jobs or 9% of jobs in Warringah)**

As a proportion of SHOROC jobs, Warringah provides 72 per cent of all manufacturing jobs, 73 per cent of all wholesale trade jobs and 68 per cent of all jobs in communications.

It is important for Council to continue to recognise through its planning processes the provision and protection of employment lands to ensure this future diversity of job opportunities for its residents.

Employment status (persons aged 15 years and over)	Warringah Council area						
	2006			2001			Change 2001 to 2006
Enumerated data	number	%	Sydney Statistical Division %	number	%	Sydney Statistical Division %	
Employed full time	44,259	62.9	63.0	43,840	63.3	63.5	419
Employed part time	22,583	32.1	28.9	21,216	30.7	27.5	1,367
Employed not stated	1,638	2.3	2.8	1,757	2.5	2.9	-119
Total employed	68,480	97.3	94.7	66,813	96.5	93.9	1,667
Total unemployed	1,877	2.7	5.3	2,403	3.5	6.1	-526
Total labour force	70,357	100.0	100.0	69,216	100.0	100.0	1,141
Total in labour force	70,357	66.0	60.7	69,216	66.6	61.4	1,141
Total not in labour force	30,502	28.6	31.8	30,555	29.4	33.4	-53
Not stated	5,756	5.4	7.6	4,142	4.0	5.2	1,614
Total	106,615	100.0	100.0	103,913	100.0	100.0	2,702

Source: Australian Bureau of Statistics, Census of Population and Housing, 2006, 2001, 1996, and 1991.



Northern Beaches 2009, Photo courtesy of Alex E. Proimos

The size of Warringah LGA labour force (persons aged over 15 years) in 2006 was 70,357 persons; of which 22,583 were employed part-time (32.1 per cent) and 44,259 were full time workers (62.9 per cent). A comparison of the employment status of the population in the Warringah Council area in 2006 compared to the Sydney Statistical Division shows that there was a larger proportion of people in employment, and a smaller proportion unemployed.

Overall, 97.3 per cent of the labour force was employed and 2.7 per cent were unemployed (1.8 per cent of the population aged 15+), compared with 94.7 per cent and 5.3 per cent respectively for the Sydney Statistical Division.

Between 2001 and 2006, the number of people employed in the Warringah Council area showed an increase of 1,667 persons and the number unemployed showed a decrease of 526 persons.

The labour force participation rate refers to the proportion of the population over 15 years of age that was employed or actively looking for work. The labour force is a fundamental input to domestic production and its size and composition are therefore crucial factors in economic growth.

Self-sufficiency

Self-sufficiency measures the proportion of the workforce who reside in the same Local Government Area or region as they work. Like containment, measures indicate whether workers need to travel significant distances to work, or can live near their place of work.

Self sufficiency is likely to be higher for regional areas, lower in metropolitan areas and is influenced by:

- The nature of employment opportunities versus the skills and qualifications of residents
- Transport options available and commuting times
- Relationship between wages and salaries and house prices in the area and
- The geographic size of the area.



There are an estimated 33,000, mainly small to medium businesses operating in the SHOROC region across a range of industry sectors. There are only small numbers of large businesses operating either locally or in the region. The larger range of businesses includes major corporate sector representative companies such as, Ricoh, Blackmores, Gordon and Gotch and Beam.

The majority of businesses in the region employ up to 300 employees, displaying specialization in sectors as diverse as: pharmaceuticals, multi-media and light manufacturing. For the SHOROC region it is the retail sector in all centres and

villages that is significant employer, with concentrations of specialist retail stores at Warringah Mall and Warriewood Shopping Centre, bulky goods at Belrose and Manly Vale and niche retail shops located throughout all small centres.

It is the micro business sector that is the one of the fastest growing in the NSW economy, making up 88 per cent of the State's small businesses. Within the SHOROC - Northern Beaches area, micro businesses and working from home has been found to be over 50 per cent higher than the Sydney average, and similar to small to medium businesses they display a great diversity of business sectors.

2006 Census of Population and Housing					
Count of persons working in selected areas by area of usual residence, by industry (ANZSIC06)					
prepared by .id (informed decisions) using data supplied by the Australian Bureau of Statistics					
LGA of work selection					
Industry of Employment (ANZSIC06 classification)	Usual Residence			Total	% self-sufficiency
	Lives within Warringah	Lives in remainder of SHOROC	Lives elsewhere		
A Agriculture, Forestry and Fishing	65	15	43	123	52.8%
B Mining	12	3	12	27	44.4%
C Manufacturing	2,646	864	1,270	4,780	55.4%
D Electricity, Gas, Water and Waste Services	158	61	124	343	46.1%
E Construction	1,986	385	824	3,195	62.2%
F Wholesale Trade	2,411	916	1,717	5,044	47.8%
G Retail Trade	4,508	1,320	1,374	7,202	62.6%
H Accommodation and Food Services	1,832	433	488	2,753	66.5%
I Transport, Postal and Warehousing	708	165	198	1,071	66.1%
J Information Media and Telecommunications	509	129	308	946	53.8%
K Financial and Insurance Services	811	143	174	1,128	71.9%
L Rental, Hiring and Real Estate Services	660	187	105	952	69.3%
M Professional, Scientific and Technical Services	2,593	456	807	3,856	67.2%
N Administrative and Support Services	876	146	220	1,242	70.5%
O Public Administration and Safety	834	290	280	1,404	59.4%
P Education and Training	2,137	830	678	3,645	58.6%
Q Health Care and Social Assistance	2,583	852	913	4,348	59.4%
R Arts and Recreation Services	400	96	102	598	66.9%
S Other Services	1,404	327	487	2,218	63.3%
Not Stated/Inadequately Described	405	87	178	670	60.4%
Total	27,538	7,705	10,302	45,545	60.5%



5. Background - The NSW Policy Context

The Australian and NSW Economies

At the national level, the Australian economy has proven its resilience, recording seventeen years of uninterrupted growth to 2007-08, despite two global downturns. Macroeconomic policies and structural reforms over almost three decades have increased responsiveness to shifts in the global economy and delivered world's best practice financial, legal and political systems.

Australia has been one of the world's better performing countries over the last 12-18 months. This position is due to Australia's strong economic growth prior to the Global Financial Crisis (GFC), timely fiscal and monetary response, flexible exchange rate and resilient financial system.

The NSW economy is the largest and most diverse economy in Australia, contributing about one third of the nation's (GDP) Gross Domestic Product. The NSW economy is larger than many national economies in the Asia Pacific including Singapore, Malaysia and the Philippines, and 84 per cent of the State's industry income is derived from services. NSW is Australia's leading manufacturing and services State, with the major share of finance and insurance, property and business services, communications and manufacturing.

Sydney displays many attributes which lends the metropolitan area its Global City identity highlighted by the NSW Government. Some major characteristics include – being the corporate and regional headquarters for multinational companies; significant financial output; a lively cultural scene and important educational establishments with a large and growing tourism market and advanced communications systems.



In 2008-09, the Sydney Region had an estimated Gross Regional Product (GRP) of \$257.9 billion, representing 64.1 per cent of the estimated Gross State Product (GSP) for New South Wales and contributing approximately 20.6 per cent of Australia's economy. Sydney is the national gateway to the global economy, the financial centre of the Australian economy and home to the regional headquarters of numerous multinational corporations. The state also attracts the largest share of private business investment in Australia. In 2007-08, almost \$46 billion or 25 per cent of national business investment occurred in the State. This represented growth of 17 per cent over 2006-07, and marked a record annual level of business investment for any state.

New South Wales has extensive links to international markets. In 2008-09, the State's exports of goods and services were valued at \$60 billion, with around two-thirds of the State's merchandise goods exported to Asia. The state dominates Australia's services exports and provides 41 per cent of all services exports from Australia and is the nation's largest exporter of professional, financial, computer and other business services, as well as a centre for international learning and business.

New South Wales is well positioned to benefit from the liberalisation of bilateral goods and services trade. Australia now has free trade agreements with the United States, Thailand, Singapore, Chile, New Zealand and the 10 members of the Association of South-East Asian Nations (ASEAN), and is currently negotiating and considering agreements with other countries including Japan, China, Malaysia, Korea, Indonesia, India and the Gulf Cooperation Council.

Australia was ranked among the 10 most attractive destinations in the world for foreign direct investment (FDI) in the last three surveys of transnational corporations in the World Investments Prospects Survey conducted by the United Nations Conference on Trade and Development.

The total stock of foreign investment in Australia topped \$1.9 trillion as at December 2009. Over the past five years, the world's investment in Australia has grown by 65 per cent, with foreign direct investment expanding by almost 30 per cent. New South Wales is home to 48% of the top 500 companies in Australia, reflecting the State's advantages as the place to do business.

Sydney is an important regional financial hub in the Asia Pacific. The Australian Securities Exchange, based in Sydney, is the first major market to open each day and is the 13th largest in the world by market capitalisation, or the seventh largest in terms of float or freely available share capital. Australia has the fourth largest managed investment market in the world, which has attracted many global funds management companies to Sydney.

NSW Key trade facts:

- **New South Wales' exports have grown by an average of 4 per cent every year over the past five years.**
- **Key drivers of export growth over the last five years were services, manufactures and fuels.**
- **Services exports increased by 1 per cent to \$21 billion in 2009, driven mostly by education and personal-related travel, while professional and management consulting services are now among NSW top 4 exports.**
- **Growth in exports to Japan - NSW's top export destination - remains robust, while exports to India, the USA and New Zealand are also growing strongly.**
- **China is NSW's biggest two-way trading partner. In 2009-10, bilateral trade with China was valued at \$21.6 billion.**
- **New South Wales has a financially stable economy. In 2009, the Government was awarded triple-A ratings from both Moody's and Standard and Poor's.**



Australia's economy, helped by a once-in-a-century mining boom, has fared better than many other developed economies in recent years, but higher interest rates have hit consumer confidence and a strong local dollar encouraged overseas purchases. Online shopping continues to increase transparency and forced retailers to offer discounts to bargain-hunting shoppers.

Four significant trends that will likely have an economic impact on the NSW economy and NE subregional economic growth and development to 2020 and beyond have been identified in research produced by NSW Government and Access Economics, 2010.

These trends are:

1. Climate change mitigation and adaptation and transition to a low carbon economy

Climate change will create opportunities and challenges for NSW industry over the next decade. It will create opportunities for businesses specialising in carbon reduction technology, consulting services, research and trading. It will also shift incentives towards renewable and lower emission electricity generation. It will also provide impetus to reduce greenhouse gas emissions in all aspects of business, with a variety of implications for various business sectors.

2. Demand and Competition from emerging economies

The growth of China and India presents opportunities for new business as well as challenges for the NSW economy and local business. Many business sectors are expected to benefit from growth in China and India, such as mining and related industries, construction and utilities. The growth in these countries' middle classes will continue along with demand for new high value goods and services. This will be particularly important for NSW as a service economy, especially in the growing export areas of education, health and professional services which are also business sectors of significance locally.

There will be greater competitive pressures from these international economies as they increasingly move from production of less complex goods into higher-value manufacturing and services. Australia's surging mining sector, driven by rapid growth in Asia will also have further competitive implications for NSW. Higher terms of trade and exchange rates will have negative implications for trade-exposed areas, such as manufacturing and tourism.



3. Rapid development of the digital economy

The information economy will have both a direct and indirect effect on the composition of the NSW economy. These changes are being brought about by the rapid development of new products and services around the globe including the introduction of intelligent systems in virtually every part of the economy. The roll-out of the National Broadband Network (NBN) provides the potential to extend these developments through the economy and society.

4. Ageing and growing population

An implication of demographic shift will likely be changing and increasing service requirements, particularly in health, aged care and housing (with increased rates of dementia and disability). An ageing population will also have direct impacts upon the availability and supply of labour; this will be reflected in influences such as, workforce changes, penetration of technologies and how work itself is managed. A relatively older population will also have different consumption patterns, with increased demand for leisure, tourism and financial services at the expense of more durable consumer products such as cars and whitegoods. Overall population growth and the cost of housing will have impacts on the required stock of dwellings and related infrastructure, especially in Sydney.

In 2010, the characteristics of NSW's five largest industry sectors by share of value were as follows:

- **Financial and insurance services** - Sydney is well placed to build on its existing strong financial services reputation and sound regulatory system;
- **Construction** - economic and population growth will generate demand for hard infrastructure and new dwellings, providing opportunities for renewable and sustainable technologies and building methods;
- **Professional, scientific and technical services** - higher education levels and servicing emerging Asian economies in accounting, legal and education will boost growth

- **Manufacturing** - while its share of the economy will fall, its scale will grow through development of highly specialised and technologically advanced manufacturers, and;
- **Health care and social assistance** - a larger, ageing population will drive growth in demand for care.

Draft North-East Subregional Strategy 2007

The Draft North-East Subregional Strategy translates the major objectives of the earlier NSW Metropolitan Strategy 2005 and NSW State Plan to the local and regional levels.

When finalised, the draft North East Subregional Strategy will continue to guide land-use planning until 2031 in the North East Subregion - Manly, Pittwater and Warringah local government areas. Warringah Council covers the largest land area component and is located strategically in the centre of the region.

This Draft Strategy sets the broad directions for economic growth and employment lands in the North East and outlines objectives and actions to support employment growth and prosperity. A target of 19,500 additional jobs was established for the Subregion between 2001 and 2031 with LGA employment capacity targets as follows:

Manly	1,000 additional jobs
Warringah	12,500 additional jobs
Pittwater	6,000 additional jobs
TOTAL	19,500 jobs

The NSW State Government agenda through these targets manages population and housing growth, with policies to ensure that employment lands comprising retail, commercial and industrial lands in the main urban centres can meet growth to 2031.



The NE Subregion in 2007 was identified with strengths in the retailing, hospitality and personal services sectors and compared to Sydney there was strong industry specialisation in, for example, sport and recreation. The Strategy identifies that the area depends largely on the consumption by the subregional population which has a high level of employment self-containment and a higher than average proportion of micro or and small businesses which have been increasing to 2011. The main small to medium business sectors in 2007 were, property and business services, construction, finance and finance and insurance and cultural and recreational services which also attracted high skill level micro and home-based consultancies.

A summary of the business-related objectives listed in the NE Strategy have relevance in 2011 and are supported by the Warringah Economic Development Plan and action areas:

- **Support for Industry Clusters and encouragement of emerging businesses,**
- **Support zoned land for low-cost premises for start-up businesses,**
- **Skills development and learning city initiatives associated with the future of Brookvale – Dee Why and the role of Brookvale TAFE**
- **A Northern Beaches hospital and Master Plan for the Frenchs Forest area**
- **Concept of an Enterprise Corridor for Pittwater Road between Brookvale – Dee Why**
- **Revitalisation of older industrial areas – Brookvale.**

In more detail the Draft NE Strategy 2007 identified the following planning directions:

- Warringah Mall is an important element of Brookvale and serves the whole of the northern beaches for high end retail and entertainment. Retail floor space is approximately 125,000m². Currently approved expansion plans will provide an additional 35,000 m² of retail space generating a range of specialist retail business and employment opportunities. The DCP controls currently provide around 800 jobs for this area.



- Brookvale will develop into a more accessible and attractive centre of employment with an integrated TAFE campus and with potential in the medium to long term as a commercial office precinct to cater for the highly skilled workforce in the area.
- The majority of the existing industrial uses are likely to remain in Brookvale. However, projections suggest a decline in traditional, industrial-related jobs and an increase in the intensity of use of the industrial lands.
- Opportunity to investigate more intensive uses of some of this industrial land in and around the existing retail and education uses, such as commercial offices, to ensure that the centre can meet the employment needs of the subregion. Brookvale will remain the retail hub of the subregion based around Warringah Mall.
- Future planning work for Brookvale should be based on subregion employment capacity forecasts to identify the extent of industrial land required for local services and any broader strategic industrial uses. This will then identify if there is the opportunity to create more intensive employment generating activities for commercial and retail uses.
- Pittwater Road has the potential to grow as an enterprise corridor, linking the Dee Why and Brookvale centres. These links should be strengthened to provide better connection and integration between Brookvale and Dee Why. These corridors, usually consisting of land up to a block back from busy roads, generally have high employment numbers across a complex mix of uses, which provides services to the local community. Some of these uses would include nurseries, plumbing and building supplies, retailing and light industrial.
- The existing TAFE facilities at Brookvale is important education infrastructure, although connectivity with the adjoining centres remains limited owing to the street access at the back of Warringah Mall. Long term planning for Brookvale should look to strengthen connections between the TAFE, Mall and any other activities in the centre to provide an improved environment for students and other users of the centre.

- Future planning for Brookvale, in the vicinity of Brookvale Park will provide the opportunity to give consideration to the provision of new uses, such as business support services that will strengthen the evolving role for the major centre and connection to the role and functions in the area.

The future challenge for Brookvale – Dee Why is the creation of vibrant civic and mixed use and industrial spaces that integrate seamlessly with their urban context. To be successful, recognition must include an equal focus on functionality as well as creating a place the public, visitors and business can enjoy and appreciate.

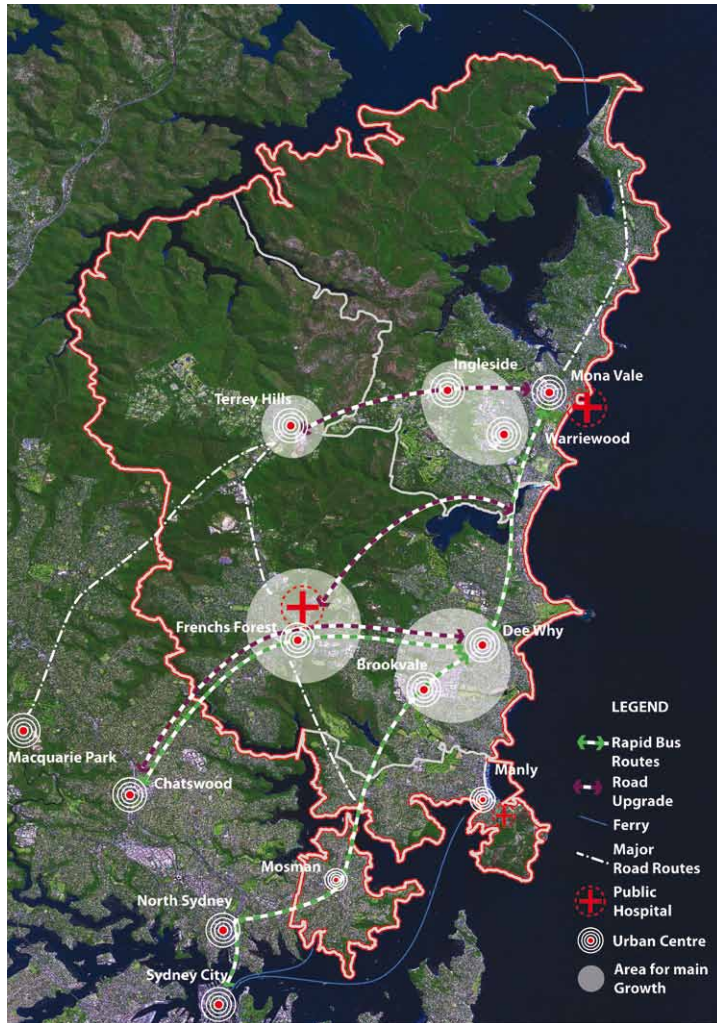
Metropolitan Plan For Sydney 2036

The Metropolitan Plan 2036 draws on the strengths and principles of two documents—2005's Metropolitan Strategy—City of Cities: A Plan for Sydney's Future, and the 2010 Metropolitan Transport Plan: Connecting the City of Cities. It incorporates public feedback on the Metropolitan Transport Plan and the first five-yearly review of the Metropolitan Strategy to form a single, integrated Metropolitan Plan for Sydney to the year 2036.

The Metropolitan Plan 2036 supports economic, social and environmental sustainability which are all principles applicable to Warringah and the region, to guide metropolitan growth and development over the next twenty five years.

The major economic development – related challenges facing Sydney and Warringah as part of the NE Region are:

- Sydney's population is growing faster than previously expected and NSW forecasts show Sydney's population is expected to grow by 1.7 million people between 2006 and 2036 to 6 million.
- Sydney's growth will require 760,000 more jobs, with half in Western Sydney where the greatest population growth will occur. By 2036, half the city's population will live in Western Sydney.



- Long-term land use and infrastructure planning and delivery must be better integrated to improve certainty for government agencies, the private sector and the community. Improved investment decision-making to ensure more efficient use of public and private resources to support continued economic growth.
- As Australia's global city, Sydney carries a major responsibility to remain strong, efficient and internationally competitive. While highly ranked in most global comparisons, Sydney has to adapt to changing international circumstances while protecting and building on its environmental, social and economic advantages.

Four identified trends impacting the NSW economy growth path to 2036 and beyond include:

- **Climate change mitigation and adaptation, and transition to a low carbon economy**
- **Demand and competition from emerging economies**
- **Rapid development of the digital economy**
- **Ageing and growing population.**

The Metropolitan Plan describes economic growth and competitiveness and focuses on the private sector as the key economic driver. Business makes decisions about investment, the manufacturing of products, service delivery, hiring skilled workers, location needs and logistics. The availability of serviced employment lands and access to potential employees are critical to Warringah and the NE Subregion's competitive position.

Even with the integration of transport and land use planning and a much greater emphasis on a connected and networked city in the Metropolitan Plan 2036, Warringah and the NE region still face additional critical infrastructure challenges. For transport there will be no additional transport infrastructure in addition to the 'strategic bus corridors' outlined in the 2005 Strategy. For health, the Northern Beaches Hospital is referred to as 'potential' and Frenchs Forest as a 'potential specialised centre'.

Warringah will need to retain skilled labour and avoid the loss of skilled employers metropolitan centres. The NSW vision for 2020 is an economy that will be 30 per cent larger than today and driven by growth in highly skilled,



high – value - added industries – the NSW industry base will be internationally recognised for its innovation, productivity, knowledge, intensity and carbon efficiency. Achieving this outcome will need to be a joint task of government and the private sector.

The following employment targets are identified and it is up to Council to demonstrate that it can provide the planning platform to allow development to occur that can address these employment numbers over the planning period to 2036:

Employment:

- The target jobs numbers for the North East region is 23,000 to 2036 (was 19,500 to 2031)
- The target for the Inner North region is 62,000 to 2036 (was 54,000 to 2031)
- The target capacity for Dee Why – Brookvale in 2036 is 17,000 (2006 – 2036 growth being 5,000 jobs)

North East Sub Region – Employment Capacity Targets

Base Employment 2006 (89,000)

Long Term capacity (112,000)

Employment growth (2006 – 2036) (+23,000) or 26%

NSW State Plan 2010

The initial NSW State Plan adopted in 2006 has since been reviewed and recognises that the Government’s role is to provide policy and infrastructure that offer an attractive and competitive business environment.

The following new priorities for business and jobs in 2010 have been established and have relevance to the NE subregion and the themes of the Warringah Economic Development Plan.

- Increase business investment and support jobs
- Supporting Business and Jobs
- Speed up planning decisions
- Drive innovation to grow productivity

- Cut red tape
- Maintain AAA Rating
- Ensure a reliable electricity supply

In support of the clever state highlighting education and training, the NSW Government will continue to invest in knowledge and innovation in NSW, working with TAFE NSW and universities, research, green technologies and business sectors such as ICT, design and new media.

NSW Innovation Strategy

The NSW Innovation Strategy provides the Government’s framework for innovation policy throughout NSW and has special relevance to Warringah and to regional sustainable economic development. The Strategy identifies that there is a need for governments and industry to work to achieve sustainable economic growth, increase productivity and improve the competitiveness of the NSW economy.

The Innovation Strategy framework has specific relevance to enhancing business and industry innovation, improving productivity and increasing business investment in Warringah. The Warringah Economic Development Plan supports the Innovation Strategy in the following areas:

- Improving human capital
- Upgrading knowledge and information infrastructure
- Reducing the cost to business of utilising science and technology
- Encouraging capital allocation to invest in innovation
- Reducing regulatory barriers to innovative NSW companies

The NSW Government sees the Innovation Strategy as a key part of its commitment to support economic growth throughout NSW and it contains principles which have strategic relevance to local economic development activities and business support action initiatives such as those in the Warringah Economic Development Plan.



“The NSW economy will continue to be the largest economy in Australia and a significant economy in its own right within the rapidly growing Asia–Pacific region. The NSW economy will be more productive, driven by the strength of its service based economy, particularly knowledge intensive business services, a rising level of skills in the workforce, our engagement with the global economy and increases in innovation and technology application across the economy”.

NSW Business Sector Growth Plan

The NSW Business Sector Growth Plan links to the Sydney Metropolitan Plan 2036 and Innovation Strategy with actions and initiatives that the NSW Government together with Industry will undertake to promote NSW’s long-term economic growth. The Business Sector Growth Plan was created in close partnership between business leaders and the NSW Government.

Of relevance to Warringah and the NE Subregional business this NSW Plan lists some key features of the NSW economy in 2020 will be:

- Services industries will account for approximately 85% of industry output. Growth in emerging economies like India and China will fuel a growth in exports in services, including those in accounting, legal, consultancy and education
- Finance and insurance services will remain the largest industry sector within NSW, based on the State’s competitive advantages of a highly educated multinational population and Sydney’s position as Australia’s ‘global city’
- Health and aged care services will continue to grow within the NSW economy, driven by increasing complexity, an ageing population and local innovation
- The manufacturing sector will become more globally competitive and more technically advanced, and
- The construction industry’s share of the economy will grow with increased infrastructure requirements and demand for new dwellings. In order to capitalise on significant opportunities and trends identified through the Access Economics The NSW Economy in 2020— A Foresighting Study, the NSW economy will also need to be technologically advanced, highly innovative and creative, leading in low carbon approaches and globally competitive.



6. Warringah Council and Sydney's North East Region

The SHOROC Regional Employment Study 2008

The study was prepared on the basis of economic, social and environmental trends to 2031 that may influence employment. A variety of recommended strategies and principles are described that support sustainable employment and business growth for Warringah and the region. All four SHOROC local government areas have individual strengths and attributes which should be built on, but it is through regional collaboration of the Councils' working together that key regional objectives and strategies, also supported in the Draft NE Subregional Study can be implemented.

A new strategic Employment Study for Warringah is supported, as there is a need to update the employment lands capability in all centres locally and regionally, taking into consideration outcomes from the Warringah Housing Strategy. The State Government's final employment targets for the North East, as part of its statutory planning obligations, including future impact of jobs to be generated from the Frenchs Forest potential specialised centre, will be of relevance to the Warringah Economic Development Plan.

The main trends to influence future employment identified in this 2008 SHOROC Study are:

- Demand for retail floorspace will increase significantly
- SHOROC residents are working longer hours and therefore increasing demand for out of hours retail and service provision.
- Growing demand for bulky goods retailing
- Increased demand for higher specification, flexible commercial units
- Growing demand for business parks for co-location of commercial and industrial components
- Manufacturing changes due to new technology and increased efficiencies

- Need to recognise regional importance of industrial land in Brookvale
- The forecast is for industrial floorspace demand to decline in Warringah between 2016 and 2031
- The number of jobs in Manufacturing and Construction industry sectors will decline, resulting in a net loss of industrial jobs in Warringah by 2031
- Allow higher order commercial office and distribution services in Brookvale West, maintaining Brookvale East for a range of industrial and urban support services.

With regard to projections of changes to demand and supply in the region to 2031, demand for additional retail space would result from, not only population growth, but the affluence and mobility of the region. Commercial jobs are projected to increase relating to key business sectors such as, Property and Business services and Warringah LGA will have the greatest growth in demand. Industrial floorspace is projected to peak by 2016 and forecast then to generally decline. Future employment growth will be influenced by the cost of housing, which will likely impact essential workers who may have to reside outside the region.

An Employment Study for Warringah would need to address investment attraction and marketing strategies which should address the impacts of for example, the rapid growth of white collar, high tech specialist employment at Macquarie Park, which will increasingly attract employees from the SHOROC region, unless new local jobs growth can fill the skills demand.

Areas in Warringah such as Austlink Business Park, Cromer, Brookvale – Dee Why and Frenchs Forest and Terrey Hills will in future continue to offer employment opportunities, especially highly skilled employment to support ongoing jobs containment in the region reducing the need to travel elsewhere. There is also potential to build on business sectors which today include clusters of, innovative green tech, small niche manufacturing businesses. The SHOROC Regional Employment Study advocates that a regional approach is essential to promote sustainable economic development and support local jobs growth.



The SHOROC mayors collectively refer to the region as, “a unique area with a vibrant community that values our natural environment and lifestyle and contributes strongly to the economy of global Sydney”. A world-class business locality, highly skilled, educated workforce and quality of life second to none.

The SHOROC Region – “Shaping Our Future”

SHOROC’s roadmap – “Shaping Our Future” received strong endorsement by all four SHOROC Councils and wider business community in 2010. The plan describes major directions and investment priorities for a vibrant and sustainable future for the region. For economic development the major issues and challenges revolve around much needed upgrades in major infrastructure – especially public transport and health investments. The clear message for the NSW Government is that investment is urgently needed to grow employment, reduce increasing road congestion and enhance the liveability, sustainability and connectedness to Sydney - the designated Global City.

Shaping Our Future was adopted in September 2010, the strategy calls for investment from the NSW State and Commonwealth Governments’ to fix our transport and health systems and enable our councils to ensure growth is sustainable in our region. Inter-council working groups have now been meeting to guide implementation of the recommendations linked closely to each Council’s ‘Community Strategic Plan’ to maintain regional liveability and sustainability.



Shaping Our Future – “The main growth will be focussed around four key areas as vibrant sustainable centres”

The Warringah Economic Development Plan supports the following key directions of SHOROC - Shaping Our Future:

- Growth and development of Dee Why – Brookvale. Planning for the future redevelopment of the Dee Why Town Centre is necessary for the long term land uses which support, rejuvenate and re-establish civic and community functions and reinforce its status as the Major Centre along with Brookvale in the centres hierarchy for the Northern Beaches.
- Frenchs Forest is identified as a new potential 'Specialist Centre' with dwellings and job generation capacity linked to a new Frenchs Forest hospital and upgraded arterial road and tunnel infrastructure. This role for Frenchs Forest is identified in the Metropolitan Plan 2036 and provides an opportunity to grow highly skilled employment and build on the innovation and competitive advantage necessary for a business precinct associated with the regions' new hospital / health services, retail and residential land uses.
- The SHOROC region has the potential over the next 25 years to support small to medium jobs growth to strengthen containment in the region. The area can draw on the region's high skills base, encouraged by new, diverse and sustainable employment opportunities. The final planning decision for the 'potential' Frenchs Forest Specialised Centre has still to be resolved by NSW Government. However, the longer term potential of this area to continue to provide innovative and integrated solutions to locate jobs, improved transport and housing together, while reducing time and travel costs and improving amenity is significant.
- Terrey Hills, Warriewood and Ingleside are also areas with the potential to provide future employment opportunities for the region. These areas require improved west – east transport links. Like Frenchs Forest, priority State and Federal Government investment is critical to meet the Governments future job targets.

Shaping Our Future supports regional collaboration to promote a more coordinated regional approach to economic development.



7. Economic Development Issues and Opportunities

The following economic development issues and opportunities are highlighted as being part of the theme and action areas of the Warringah Economic Development Plan:

- **Micro and Home based businesses**
- **Employment Centres Hierarchy**
- **Economic Development Drivers**
- **Business Clusters – Northern Beaches**
- **Frenchs Forest Specialised Centre**
- **National Broadband Network (NBN)**

Micro and Home based businesses

Micro and home-based businesses are an important sector of the Australian business community, with over one million people operating a business at or from home. Home-based business is also one of the fastest growing sectors in the NSW economy, making up 88 per cent of the State's small businesses. Home based businesses are successful in allowing small and start up enterprises to grow without incurring the costs of rental accommodation by reducing overheads such as power costs.

According to research conducted by Bankwest, NSW is beginning to experience an increase in the number of start-up small to medium enterprises (SMEs). Over the 12 months from February 2010 the number of people running their own business has increased by 7.4 per cent with an additional 29,000 entrepreneurs starting an SME. This is the strongest level of growth seen in almost a decade with 419,000 NSW residents now running their own business.

NSW is also the state with the strongest growth in the number of people running their own business over the year, closely followed by Tasmania with 7.1 per cent growth in SME numbers. Nationally, the number of people running a business increased by 3.3 per cent for the year. Data from the ABS Labour Force Survey, also found that the highest number of people running a business across NSW are in the construction industry (18 per cent / 77,000). Construction is trailed by those running an SME within agriculture, forestry and fishing (12 per cent / 52,000) and professional, scientific and technical services (12 per cent / 49,000).

Within the SHOROC - Northern Beaches region micro businesses and working from home has been found to be over 50% higher than the Sydney average. This high local level can be linked to trends such as pursuing work-life balance, the high levels of professional skills in the region and rising attraction of telecommuting. In Warringah home-based and micro businesses are as varied as, small scale production, digital design and computer support services, professional services such as, accounting, financial planning, health and well being and on-line product sales.

The SHOROC Transport Study recommended that the recorded high levels of job self containment should be maintained to help minimise strain on the regional road network. There are limited public transport options and long travelling distances to other major employment concentrations areas such as Macquarie Park, Chatswood, North Sydney and the CBD. It is also likely that the high skill levels of the local population reflect subregional support a high rate of micro and home-based businesses and range of professional consultancies. Anecdotal information suggests that telecommuting is also popular for business owners who work from their place of residence for part of the week and therefore contribute to maintaining or increasing containment and help to reduce localised traffic congestion.



For some time Warringah and the NE subregion has been an area with high levels of employment self-containment (ie. residents that live and work in Warringah and the region). Future employment growth and capacity will ensure that the subregion can provide jobs for its residents close to home. With advancing technologies, working from home is becoming easier work – life balance option providing an option for people who want to live and work locally. For Warringah and SHOROC region, the majority of local businesses support five or fewer employees.

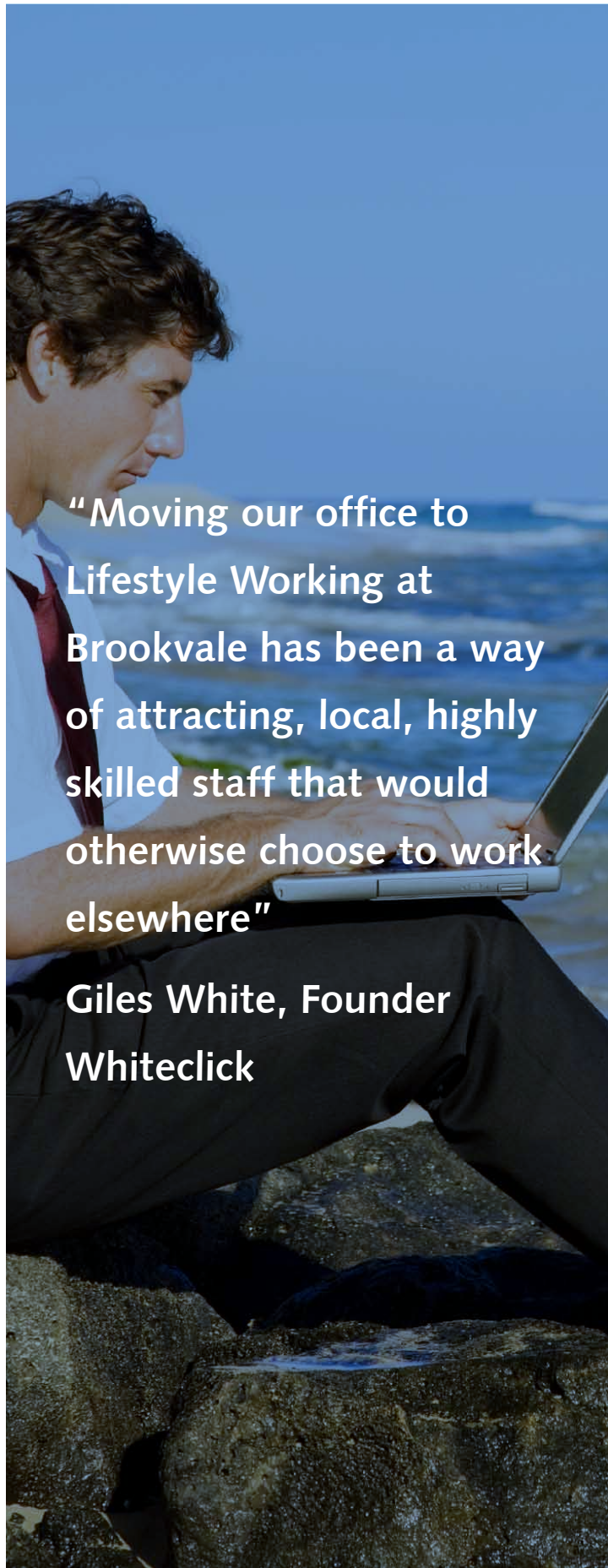
Micro and home-based businesses help grow new jobs and retain skills locally. The delivery of telecommunication and broadband services, such as the NBN and potential of local business support services in the form of community space, a business incubator or Business Enterprise Centre in Warringah can grow jobs and encourage networking of businesses such as exporters, women and start –up businesses. Home-based business networks could link into any future business incubator that would allow the coordination of shared business services and use of facilities, provision of business advice and assistance to member companies.

Micro and home based businesses and small office / home office (SOHO) development is a style of mixed use development that supports professional and technical business sectors of home based business, combining working and living space in a single tenancy. SOHO development operates successfully with broadband access and other local support services such as on-going Council and stakeholder business advice services. SOHO development has been successfully developed in other states and locally in the City of Sydney's Green Square Urban Renewal Area.

The employment targets of the Draft North East Sub - Regional Strategy reflect the major policy directions of the Metropolitan Plan and NSW State Plan which are to provide jobs close to home and to increase employment opportunities in strategic centres such as Brookvale – Dee Why.

The Warringah Economic Development Plan action initiatives support the SHOROC Regional Employment Study findings that identify ways to pursue micro and home based business to locate or expand within the region including:

- Promoting and marketing the merits of micro and home based businesses locating within the region and to prospective employees of working within the region
- Improving the efficiency of the regulatory system to fast track micro and home based business development applications as required and help minimise business risk
- Supporting sustainability by encouraging living, working locally through increasing micro and home based businesses in the area
- Providing partnered business seminars, networking and web-based Council information related to local micro and small business opportunities.



“Moving our office to Lifestyle Working at Brookvale has been a way of attracting, local, highly skilled staff that would otherwise choose to work elsewhere”

**Giles White, Founder
Whiteclick**

Employment Centres Hierarchy

The Metropolitan Plan for Sydney 2036 and the Draft North East Subregion Strategy clarify the future role of Sydney’s strategic centres by establishing a hierarchy of centres locally. Brookvale - Dee Why is the Major Town Centre for the region and also a key future retail, mixed use and office employment centre for Warringah. The Mona Vale Town Centre in Pittwater and Manly Town Centre at Manly are classified as the second level Centres in the SHOROC centres hierarchy and can be important for local employment, essential Council and other community services.

All strategic Centres play a vital role in shaping the future of all subregions and are essential for sustainable economic growth, providing a focal point for development, and are often a defining feature of a subregion. To understand the economic development contribution of centres such as, consumer behaviour, employment growth, retail needs and opportunities and future skills gaps, it is important to appreciate that businesses and consumer markets are not confined to local government boundaries, but often reach across local, regional and state government boundaries.

The Draft North East Subregional Strategy envisages Brookvale developing into a more accessible and attractive centre of employment with an integrated TAFE and a commercial office precinct to cater for the highly skilled workforce in the area.

Some small and neighbourhood centres support local economies by providing employment opportunities particularly for retail and other community uses such as child care and health and wellbeing. Employment opportunities vary for the different size and function of a centre, as does their economic vitality. The larger, busier village centres such as, Frenchs Forest, Collaroy and Allambie, for example, provide a convenient place for residents to work, shop and visit. For villages and neighbourhood centres, the diversity of business types and small scale of businesses reflects the likelihood of most of the businesses being locally owned and therefore having the ability of the centre to capture profits for local benefit.



The economic vitality and employment opportunities of all Warringah's small centres can also be supported by Council ensuring each centre has a high quality public domain, to attract and retain business, customers and visitors alike.

For the major centre of Dee Why, It will likely develop as a highly liveable centre and remain the focus for civic and cultural activities. Brookvale will retain its industrial and commercial presence and newer commercial office core and public domain improvements to better integrate the Warringah shopping mall with a pedestrian-based street network connecting the TAFE, community services, medical and a range of small manufacturing and light industrial uses.

The economic advantages of development to stimulate new local jobs in Dee Why – Brookvale, for example is that they will provide opportunities for people to live and work close to the region's Major Centre which will provide sustainable growth to reduce reliance on cars and encourage local walking and cycling. The potential for Dee Why is to provide up to 2000 new jobs with future planned additional commercial and retail space. The Brookvale - Dee Why of the future is envisaged to be a vibrant, diverse, safe, healthy and sustainable centre for the Northern Beaches with connectivity via a Business Enterprise Corridor to Brookvale. It is envisaged that planning for Dee Why centre will deliver jobs as well as a completely different shopping experience to that of Warringah Mall and the smaller Warriewood Centre.

The Major Centre of Brookvale-Dee Why and smaller existing commercial/business park areas of Frenchs Forest, Terry Hills and Forestville could, for example benefit from the approach described above. Planning controls which aim to provide cheaper, flexible accommodation to support mixed use and professional offices, start-up and small business incubator space could also contribute to employment diversity in Warringah.

Marketing Warringah and the Region's centres for business is about raising the awareness of the capabilities and attributes of the area. The Metropolitan Plan for Sydney 2036 establishes the State Government's broad landuse framework to support sustainable economic growth of the major centres around the metropolitan area which need to be attractive places to live and work. Their planning agenda includes public transport accessibility, general affordability of retail, commercial and residential accommodation, cultural and recreational facilities and general environmental quality.

There are many ways that Council currently supports business development in Warringah to create greater awareness and positive perceptions in the community. Art, cultural and business and environmental – related events, exhibitions, youth festivals, theatre are just some examples which showcase the region and support new business development and jobs generation. The major celebrity surf and beach events also celebrate our unique environment, opportunities and advantages of a coastal living and working in the area.

Competitive centres need a combination of supporting infrastructure, lifestyle and cultural assets, connectivity, available skills and an environment that fosters innovation and business excellence. Business expansion and business investment attraction also relies on marketing. Brookvale - Dee Why is the major centre of regional significance that will continue to provide a significant economic contribution to the SHOROC and NE Subregion. For the major centre there are many new opportunities as the centre evolves, relate to its central location for Northern Beaches workers, residents, investors and visitors alike, over the next twenty to thirty years.

Our local centres are the heart of community life. Concentrating new development in existing centres or identified centres has been recognised as a more sustainable approach to population and resource management, with major benefits such as, more lively and interesting places, ability to capitalise on existing services, reduced infrastructure costs, reduced emissions and improved liveability.



Economic Development Drivers

Identifying some local economic development drivers was highlighted as an area of interest during the community engagement process and some broad drivers have been acknowledged in the Economic Development Plan. Economic and employment growth and development has been a major issue of interest to the State and for policy and decision-makers for a long time. The issue of what drives economic growth is central to the development of good economic policy and is information that can be identified for a greater understanding of where the local and regional economy is likely to head over the next decade.

Some of the key economic development drivers supported by the Warringah Economic Development Plan are as follows:

Population growth

The region is expected to see steady population growth and increased life expectancy which will lead to an ageing population with demand for health related services

Globalisation

Further globalisation requiring businesses to achieve best practice and innovation

Highly skilled local workforce

The NE region has a highly skilled and educated resident workforce across a variety of skill sets.

Proximity to other key Centres – Chatswood, Macquarie Park, North Sydney, Sydney CBD

The Northern Sydney Region is currently accessible by road to other important centres.

Existing strengths in small manufacturing

The Northern Sydney Region has a good manufacturing base, which can provide existing supply chains for future manufacturers.

Natural assets

The region is home to world class, well known natural assets including superb beaches, waterways, and national parks.

Education and Learning Excellence

Tertiary TAFE NSW presence and concentration of secondary and primary education schools.



Business Clusters – Northern Beaches

The Metropolitan Plan for Sydney 2036 advocates that the Major Centre of Brookvale – Dee Why has a key role to encourage greater collaboration between businesses to support competition and innovation among those businesses through 'clustering'.

Business clusters are often groups of competing, collaborating and interdependent businesses working in a like business or industry sector and concentrated in a geographic region. Clusters draw on shared infrastructure and a skilled labour pool which is greater than the national average – creating specialisation, comparative advantage and critical mass in a given region. It is through cluster development such as engaging businesses in partnered projects that employment growth can occur. The longer term evolution of niche and specialist strengths of business clusters are also a major attraction to potential employees, who possess creative and technological trade skills.

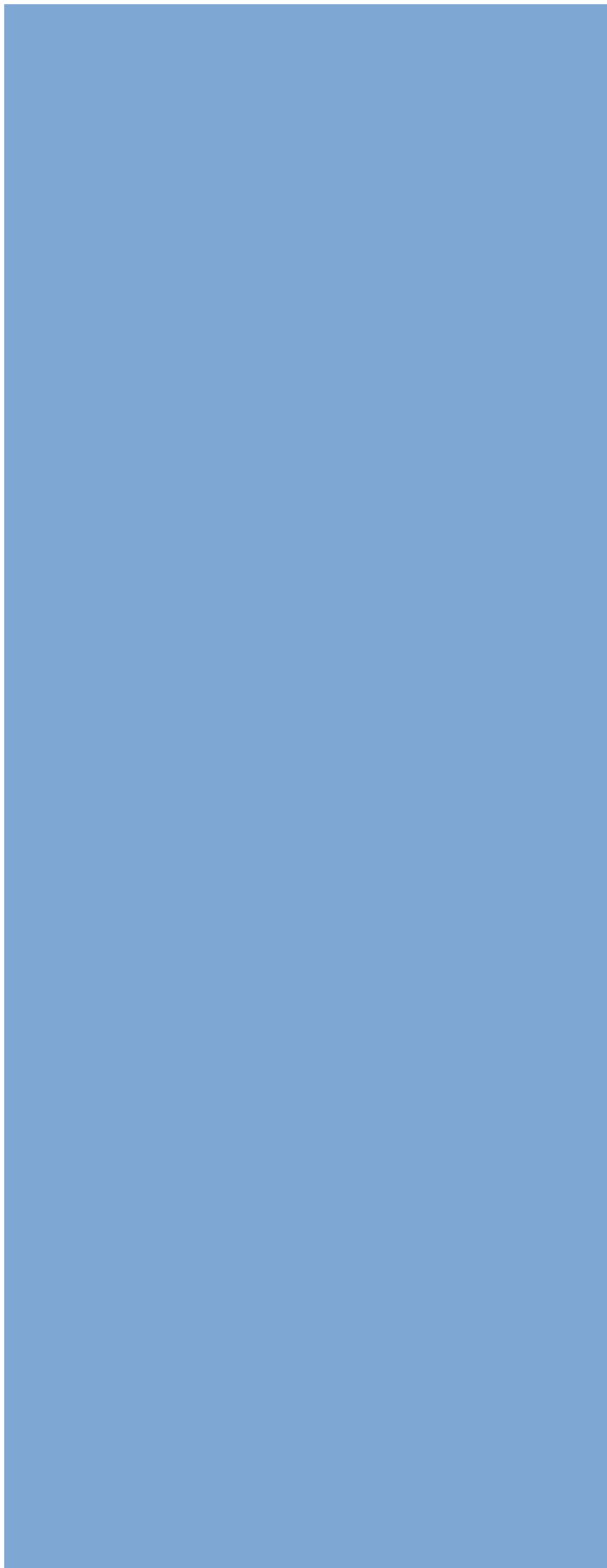
"Clusters" is also a way of thinking about the building blocks of a local economy. Clusters are often groups of businesses or industries concentrated in a geographic area that are interrelated through alliances, competition or buyer/supplier linkages and draw upon common talent, technology and personnel support base. Examples of developing local clusters include the IT & T sector at Macquarie Park associated with high profile companies such as Optus, Canon and Fuji Xerox and presence of Macquarie University. This combination offers synergies for business collaboration, training, research and development in this important business sector.

The NSW Government has recently developed a defence – related business cluster at North Ryde. Other NSW examples of successful business clusters include: the potential and growing regional presence of an equine cluster in the Warringah and Pittwater areas, the Upper Hunter equine industry, Hunter and Riverina wine industries, Blue Mountains and Southern Highlands tourism industries.

Strengthening our local and regional business clusters and profiling industry strengths, through further research, is an action area of work identified in the Warringah Economic Development Plan. The joint contribution of for example, the Marine business sectors (sail making, yacht design, surf clothing, water based tourism and chandlery supplies) supports a unique cluster for the region. Education services clusters such as (NSI NSW TAFE at Brookvale, local secondary schools and primary schools), local small niche manufacturers located at Austlink business park, health and well being businesses, creative industries, small IT companies, multi-media and printing are potentially clusters that can support greater innovation, research, jobs growth and business development for Warringah and the NE Subregion.

The Metropolitan Plan also identifies that the Subregion has developed industry specialisation in sport and recreation. The Sydney Academy of Sport and Recreation at Narrabeen acts as a regional attractor for all NSW providing sports and training facilities for the NSW Rugby Union, NSW Rugby League and Australian Surf Life Saving. Together with Narrabeen Sports High School the area has an emerging cluster of sports and recreation activities.

An 'industry cluster approach' is one where the economic development focuses on a range of activities to grow and expand the leading and emerging industries in the area. For example, an industry cluster approach might start with an economic analysis of one of the city's clusters, such as a clean energy cluster at Terrey Hills. Cluster investigation and analysis can help to identify prospective firms to match the skill base of a community. Through agglomeration economies - that is, the benefits that result from the 'clustering' of activities and their flow-on effects on innovation and specialisation, the cities and regions can achieve a considerable productivity premium.



Frenchs Forest Specialised Centre

A new role for Frenchs Forest was announced by the NSW Government in 2010, identifying the area as having great potential to become a major transit-oriented destination, delivering a significant amount of high quality employment, accommodation and recreation, while creating a memorable gateway to the Northern Beaches. The area has yet to undergo comprehensive site analysis and development of a conceptual vision for the location of a private hospital, health and other professional suites, biomedical research, education, employment, retail and residential uses.

The potential role of Frenchs Forest will have a range of economic development implications locally and regionally for employment and new business opportunities in particular. The Frenchs Forest area today is a key local business park and commercial area for Warringah and it has attracted a diverse range of businesses and industry sectors, including firms specialising in printing and publishing, multimedia, banking and IT. Many of the existing Frenchs Forest businesses have strong services and product-related links to national and international markets and they contribute to raising the economic profile of the area.

Frenchs Forest was identified by NSW Government in 2005 as a State Significant Site. Council has been supportive of a "specialised centre" designation in the area on the basis of a hospital being built first to service the needs of the local population. The NSW Metropolitan Plan 2036 identifies Frenchs Forest as a "potential specialised centre" and Northern Beaches hospital site, one of two similar sites for Sydney. As a 'potential' specialised centre, the area is envisaged for the future as supporting the clustering of health, technology and medical device companies around a new hospital which is the catalyst for employment and business growth. Frenchs Forest will continue to support larger businesses and niche employment opportunities for a range of specialists, including new graduates from across the region, who are increasingly attracted to the Northern Beaches lifestyle to live and work locally.



SHOROC's Future Directions identifies the new Northern Beaches Hospital at Frenchs Forest as priority government infrastructure investment for the Northern Beaches Health services. This vision for the region also supports major road infrastructure investment to alleviate local road congestion around a new hospital. It has also been acknowledged that the establishment of the new hospital would be ideal for intensification of Frenchs Forest as a health and technology business-related specialist centre for the year 2036.

Information provided by NSW Government identifies that the Frenchs Forest potential specialised centre is anticipated to accommodate up to 12,000 – 17,000 additional jobs (including 5,000 hospital jobs) and the North-East subregion has been given the target of 23,000 additional jobs by 2036, from the NSW Metropolitan Plan for Sydney 2036. The existing employment target identified by NSW Government is to provide 12,500 extra jobs by 2031, with 4,000 of these designated to be provided in the identified Major Centre of Brookvale-Dee Why. This figure will increase when the sub-regional employment targets are revised to meet the new regional employment target set in the Metropolitan Plan for Sydney 2036.

There are significant economic development advantages of being able to work and live close to a specialised centre such as an increase in highly specialised skilled and commercialising job opportunities, business clustering, innovating technologies and increased employment containment for the NE Subregion. For business, more life and activity outside business hours can be a stimulus to investment and growth. A mixed use area also provides some housing choice and reduces the pressure to increase housing in the surrounding residential areas.

Accommodating more people and activity in a Specialised Centre, with access to public transport connections where possible, is a more sustainable approach for urban growth and population management. Healthier communities can also be promoted by providing increased walking, cycling and public transport options for more people with activities available in accessible locations such as Frenchs Forest.

The Frenchs Forest Specialised Centre over the next 25 – 30 years could help to profile the region as a regional employment destination, particularly for Warringah and Pittwater residents. The centre also has the potential to be a model of sustainable development and architectural excellence for living and working in Warringah. Major regional road and other public transport infrastructure improvements such as RBT to and through Frenchs Forest, with connections to other major centres such as Chatswood, North Sydney and the CBD could help further stimulate subregional employment containment. Improved transport infrastructure could also be a catalyst for inward investment and attract a reverse flow of employment skills to this area for future growth and development.

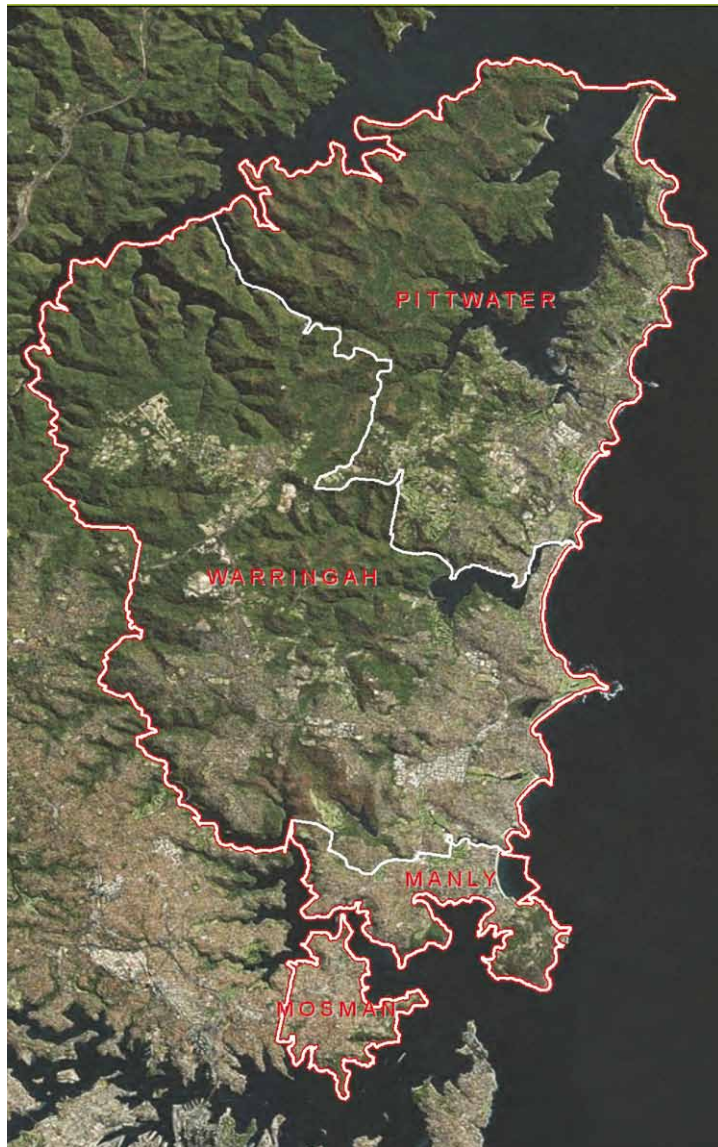
National Broadband Network (NBN)

Warringah Council has given its support to the National Broadband Network to deliver much needed communications infrastructure locally and regionally, with significant sustainable economic, as well as social benefits to the community.

Given the existing and growing numbers of micro and small to medium businesses, locally and in the region, enhanced broadband services will provide more ways of connectivity and accessing information about services, locally and across the Northern Beaches, to link SHOROC businesses.

For the local economy it is important that improved connectivity will directly benefit educational and training resources in our local schools with significant positive impacts such as, further enhancing education and qualification levels, improving the accessibility to resources and by helping to reduce current service inequalities in the area. NBN can greatly contribute to a wider influence of tertiary educational institutions and may help to encourage local qualified youth, to live and work locally.

For more sustainable energy and water management, NBN could enable customers the opportunity to directly manage their demands.



Given a focus on economic development in the Warringah Local Government area, the NBN can further enhance future development and opportunities especially in terms of job growth, new business investment and attraction. The NBN could potentially help promote the opportunities and advantages in home-based and micro businesses, thereby reducing commuter costs and local traffic movements / congestion throughout the NE Subregion.

The increased accessibility for companies, greater opportunities for export, improved efficiencies and better access to on-line services are just some of the benefits from the NBN that would boost the local and regional economies, especially for small to medium enterprises. The implementation of the NBN nationally will be of overall benefit to the community with major social benefits relating to education and community connectivity building and usage by individuals and groups, to help optimise well-being, social inclusion, independence and neighbourhood awareness.

The National Broadband Network together with other critical infrastructure such as, better public transport, roads and health services will help to ensure a more liveable, productive and accessible Warringah and NE Subregion for future generations and will support local business contribution to Sydney's international role as a Global City. The national release of a National Digital Economy Strategy to position Australia as a leading digital economy by 2020 will support the drive to become a leading digital economy, maintain our global competitiveness, improve our social wellbeing and help ensure the sustainability of our communities.



8. Implementation - Action areas of focus

The implementation of the Economic Development Plan will contribute to the local and regional economies in four major ways:

1. **Growing employment opportunities**
2. **Council providing information, support and advice**
3. **Advocacy for local and regional initiatives**
4. **Connectivity, engagement and communication**

The four focus areas form part of Warringah's overall Economic Development Plan, with implementation of specific economic development initiatives which are addressed in detail below as Action areas.

The Action areas of the Warringah Plan have both local and regional outcomes and are directly linked to the focus areas identified as part of the engagement process.

A total of sixteen action areas have been given priority over the life of the Plan. The actions will be monitored and reviewed each year over the five years of the Plan to ensure that the actions remain relevant to Warringah's economic development.

The Plan will remain dynamic and focussed on business in an environment of socio-demographics change, economic growth cycles, as well as the ongoing changes in the local and regional business sectors and Council's' perspectives.

Warringah Economic Development Plan Actions

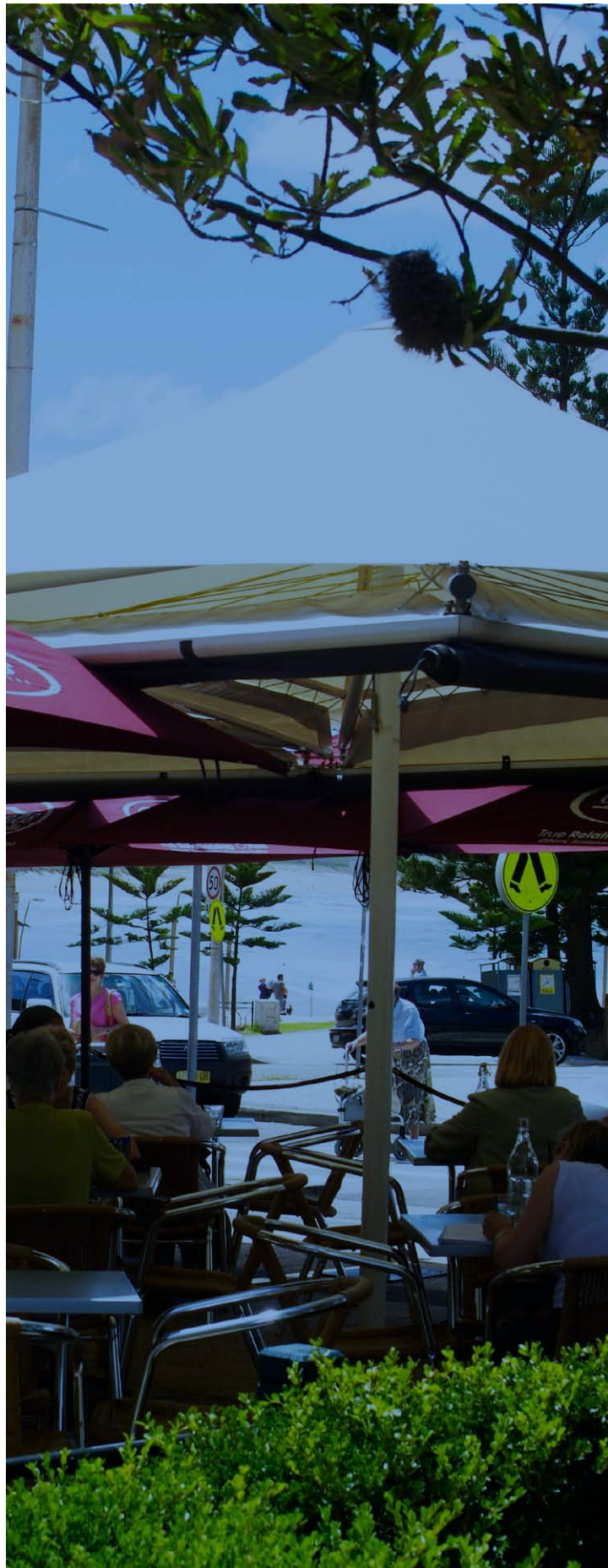
Priority Actions 2011 – 2013

Business Development Support

- Support a Business Development / Marketing Strategy for the Dee Why Town Centre to activate and help reinvigorate Brookvale – Dee Why as a distinctive, attractive and sustainable business location for the Northern Beaches
- Support the uptake of local education and training opportunities to help fill skills gaps and strengthen business to education partnerships
- Support regular media strategies to highlight and promote positive business news and business information, profile new or expanding businesses and business success in the local area or region.
- Prepare a business sponsorship policy and develop partnerships to facilitate, host, support seminars, workshops, events and speakers of economic significance.
- Liaise, research and prepare applications to foster awareness and support for small to medium enterprises (SME) business development for NSW and Federal grant programs.

Key Clusters Investigation

- Research leading business clusters relating to 'new economy' operations for IT&T / Medical / Marine / Creative Industries / Professional services / Green Tech / Retail. Develop at least one group identifying key stakeholders, NSW State and Federal policy and program support, skills, business improvement.
- Research and support initiatives in partnership with chambers, government, business agencies that nurture and attract intellectual capital to the area



Calendar of Business Seminars / Events

- On-going engagement, hosting and supporting key seminars, workshops, events and speakers in collaboration with NSW / Federal Government agencies, Chambers and other local business stakeholders
- Support a regional Jobs Fair 2012 and Careers EXPO 2012 to engage potential employers/ employees to target youth, unemployed and potential apprenticeship sectors
- Support, liaise and partner with the Events, Natural Environment, Human Resources or other areas of Council for business – related events that engage the local business community and promote the economic focus areas of the Economic Development Plan.
- Support the Local Business Awards through Council sponsorship, promotion and media

Northern Beaches Strategic Business Forum

- Facilitate and host a high level Forum with SHOROC Councils to raise the profile of economic development opportunities / issues and the importance of the local economy to the community
- Liaise with Council SRG (Strategic Reference Group) business, local Chambers, Pittwater Business Ltd (PBL) and government to obtain views, ideas and suggestions for a single overarching business organization to support and enhance regional business 'connectedness'. A business network that can deliver to a regional business audience and raise the profile of the NE Subregion.

Support the establishment of a Northern Beaches Business Enterprise Centre (BEC)

- Investigate the opportunity and lobby local and regional support with NSW Government for a Business Enterprise Centre (BEC) for the Northern Beaches based in Brookvale - Dee Why



Business Investment and Attraction

- Leverage funding from NSW Government to support the preparation of a Regional Data Profile to help promote the economic development and overall business strengths and opportunities in the Warringah LGA and NE Subregion

NSW State and Federal Collaboration

- Continue to build strong partnerships with key stakeholder agencies, business, all levels of government and other business stakeholders to leverage knowledge and opportunities for joint resourcing of economic development-related projects and programs
- Facilitate and support the growth of local and regional business networks (e.g. Micro businesses, export, education) that help to promote networking, jobs growth and employment containment
- Develop relationships with business and government that supports the SHOROC Future Directions economic development initiatives such as, employment generation, infrastructure provision and business growth for the region.
- Investigate the Sutherland Shire Model and other relevant models for incubator space to be available and accessible to Northern Beaches businesses

Warringah Web site upgrade for Business / Economic Development and deliver information to the business community

- Establish a distinctive economic development area as part of Council's website to promote business development locally and regionally, including key business data sources, local and other NSW, national business networks and information links.

- A Council website that includes relevant business agencies and Council information / policies such as home business, outdoor dining. Create links to key NSW and Federal Government agencies, SHOROC, chambers, bilateral business agencies, current business news, events and opportunities
- Establish an on-line Business registration facility for companies to build a comprehensive data base and investigate shared costs and sources of funding to support an ongoing data base.
- Red tape reduction – regularly liaise with the Strategic Planning, Planning Assessment and Compliance areas of Council to support policies of relevance to engaging with and promoting small business, employment generation and business development related activities such as – Home Business.

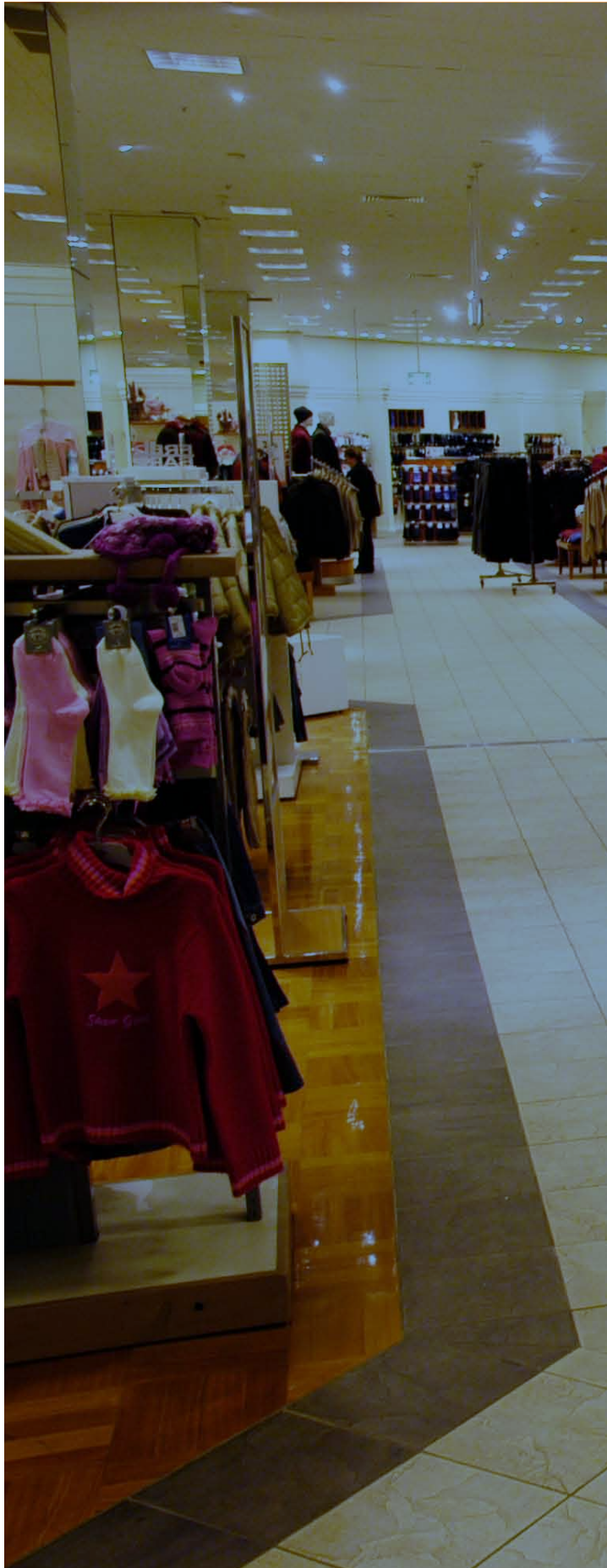
Business / Investment and Attraction

- Support and partner a Business Survey to identify local and regional business needs, trends, opportunities, strengths and weaknesses.

Other Actions to be implemented over the life of the Plan 2011 – 2016

Support Small Centres public domain upgrades and Small Centres / local employment opportunities

- Support Council's strategic land use planning and policy initiatives that help to enhance local amenities, attract visitors and customers to improve business viability
- Support planning controls for retailing and commercial zoning that encourage and attract a diversity of businesses, jobs growth, and customer satisfaction and inform future infrastructure decisions.
- Support an Employment Lands Strategy for the Warringah LGA that attracts investment and supports local jobs growth to meet NSW Government employment targets.



- Support planning controls that create vibrant, sustainable community hubs and stimulate economic development and local jobs growth
- Contribute to strategic planning policies and projects to support job growth and new business development and support upgrading and reinvigoration of our centres

Micro business Networks

- Council to support & facilitate the establishment of niche SME Networks

National Broadband Network (NBN) rollout for the NE Subregion

- Support the future National Broadband Network (NBN) rollout for the NE Subregion to underpin international competitiveness and related local business and jobs growth.

Business Sustainability

- Encourage sustainability practices within business and promote emerging technologies and services. Ensure Warringah is at the forefront of developing business sustainability programs and policies that ensure there are benefits for the environment, business practices and broader business networks in the community



Buy Local Campaign

- Reinvigorate, extend and promote the existing Warringah Council Buy Local Campaign to encourage community and business to buy and source product / services locally and regionally

Influence regional economic development initiatives that achieve scale, synergy and collaboration

- Support the investigation and feasibility for the establishment of an international university campus presence for the NE Subregion.
- Pursue potential partnerships and collaboration opportunities to connect Warringah businesses with Macquarie University (Sydney's Global Arc).

Land use planning

- Brookvale - Dee Why

- Frenchs Forest

- Encourage planning controls that support the economic development and job opportunities in local centres. Support Master Planning for Dee Why to include economic development opportunities
- Support the Enterprise Corridor concept for linking Brookvale and Dee Why
- Support the development and implementation of Master Plans and supplementary urban design guidelines that support jobs and business growth
- Contribute to major strategic planning projects and plans with economic development and employment generating outcomes
- Red Tape reduction – assist processes and policies that better educate prospective new businesses and development opportunities.



9. Review and Monitoring

It is vital that the Economic Development Key Issues & Opportunities, as part of the Plan preparation process, can be updated and communicated through regular business seminars, the website, business surveys and networked through local Chambers and other interested groups. The Plan was also prepared fully recognising the dynamic, economic, social, political, policy environments in which the Council's economy operates.

Warringah Council aims to accomplish the desired outcomes of the Economic Development Plan through focusing on identified action areas. Over a five-year implementation period, the Plan prioritises and describes priority actions, identifies partners where known to help achieve positive economic development results. Each year the Economic Development Key Issues and Opportunities statements will be reviewed and monitored.

Some of the theme areas purposely overlap and help contribute to a number of key outcomes for more than one of the focus areas of the Plan. As new economic development – related data such as the 2011 Census information becomes available to Council, the data as part of the Plan will be updated for on-line users and distributed to Council's small business data base.

The success in implementing the Plan actions will be dependent on continued networking with and involvement of local and regional business interests. Developing strong relationships with all levels of government, Chambers and Pittwater Business Ltd and other stakeholders will assist the Plan's implementation. All of the economic development actions will be outcome – oriented, seeking program / project results both locally and for the region.

10. Acknowledgement of contributors to the Plan

Warringah Chamber of Commerce and Industry

Narrabeen and Districts Chamber of Commerce

NSW Industry & Investment

Enterprise Connect

Regional Development Australia

Local SMEs



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12. For more information contact

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