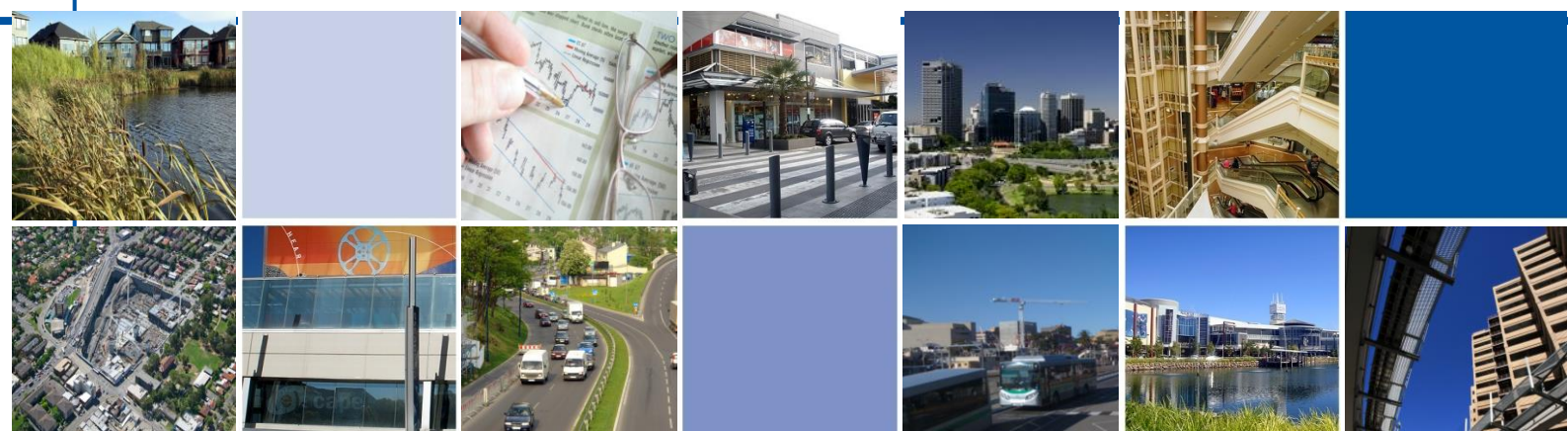


Wilton Junction

Economic Development & Employment Strategy

May 2014



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Quality Assurance

Report Stage	Author	Date	Review	Date
Final Report	David Dragicevic	May 2014	Wayne Gersbach	May 2014

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Executive Summary

MacroPlan Dimasi was commissioned by the Wilton Junction Land Owners' Group to undertake a series of reports to inform the housing and employment needs of the Wilton Junction new township.

This current report draws upon our previous findings with respect to potential employment drivers for Wilton Junction and explores the key strategic directives that will assist in delivering the nominated number of jobs for the locality. In doing so, the report addresses relevant matters raised in the Director General's Requirements (DGRs) with respect to the preparation of an employment strategy.

We note the purpose of the Economic Development and Employment Strategy is to identify and target industry types in order to harness employment opportunity in Wilton Junction. For industries that are predominantly population driven i.e. retail, social infrastructure, health care, education and public administration, employment will evolve sequentially with population growth, and therefore are not as dependent on strategy and marketing. In contrast, the development of a strategy approach is imperative to optimise employment outcomes for external market driven industries.

In this report we:

- Review key employment background and strategy documents that have been prepared for the Wollondilly LGA and during the earlier master plan process for Wilton Junction.
- Review various state strategies and plans to ascertain their implications for Wilton Junction and the Wollondilly LGA.
- Consider a range of economic/employment development strategies from around the country including metropolitan and regional locations.
- Present an understanding of key employment drivers that will impact the take-up of employment opportunity at Wilton Junction over time.
- Outline the key employment challenges for the district.
- Identify key employment levers and corresponding policy triggers that will assist in securing achievement of the projected employment outcomes for

Wilton Junction. Importantly, the economic and employment strategies promoted in this document reflect the unique locational attributes of Wilton Junction as a stand-alone township. The strategies are intended to allow Wilton Junction to develop as a distinct community that is able to support its own employment and service needs and to trade beyond its local borders.

A summary of our recommended employment strategies is presented below.

Employment Strategy Summary

TASK	ISSUE & STRATEGIC RESPONSE	WHO, WHEN & HOW
1	<p>A Competitive Industry Environment</p> <ul style="list-style-type: none"> Identifying and trading to Wilton's natural advantages, including its direct connectedness to Sydney, Wollongong and to markets further south, will be required to compete with other existing and planned employment offerings. Such an approach should consider the success of other peri-urban towns such as Gisborne, Victoria; and similarly positioned employment hubs located outside of their major cities such as Somersby at Gosford, NSW and Yatala, outside Brisbane. <p>Strategic Response</p> <ul style="list-style-type: none"> <i>Preparation of a Business Prospectus – focusing on Wilton's gateway credentials and its comparative advantages.</i> <i>Development of 'postcode' and location specific strategies and a 'best of both worlds' awareness campaign.</i> <i>Creation of the Wilton Junction Economic Technical Working Group</i> 	<p>WHO – Wilton Land Owners Group, Wollondilly Council & local Economic Development Partnership (EDP) involving representatives from the public, private and voluntary sectors. A technical working group comprising of Council representatives, economic (MacroPlan Dimasi) and planning (Elton Consulting) consultants and business advice and service organisations (South West Sydney Business Enterprise Centres & NSW Business Chamber) has been formed to discuss ongoing responsibilities that stem from this analysis.</p> <p>WHEN - a business prospectus, website and marketing material should be developed to coincide with the initial release of town centre and employment land.</p> <p>FUNDING – possibly involving the Wilton Land Owners Group with assistance from Wollondilly Council, but with ongoing consideration by the working group.</p>
2	<p>Facilitating Industry Growth</p> <ul style="list-style-type: none"> Population-based employment is expected to occur in sync with actual population growth but requires the timely provision of zoned and serviced land to meet market need. Other industry will require assistance in terms of infrastructure provision e.g. home-based employment. <p>Strategic Response</p> <ul style="list-style-type: none"> <i>Early consideration and delivery of employment land. A logical sequencing is to provide for development around the proposed town centre and near to the juncture of Picton Road and the Hume Highway.</i> <i>Timely delivery of retail land to address the shopping needs of the new town ship residents.</i> <i>Sequential delivery of supportive retail (bulky goods etc) and other employment land (e.g. schools and health services).</i> <i>Continued roll-out and early access to the National Broadband Network (NBN) service and development of digital enterprise awareness amongst the Wilton Junction township, e.g. via a specific digital enterprise capacity program.</i> 	<p>WHO – Wilton Land Owners Group as part of the Master Plan process and in an ongoing capacity as joint-developers of the estate. Development sequencing will largely be coordinated by the joint owners.</p> <p>WHEN – the timely release of employment and retail land will need to be managed on an ongoing basis.</p> <p>FUNDING – normal subdivision development costs will be incurred by the Wilton Land Owners Group. Under the newly elected Coalition Government it is intended that fibre will generally be deployed to new 'greenfield' housing estates unless there are particular commercial reasons not to do so. Private builders/operators of fibre networks in new estates will be offered a financial incentive that reflects any net cost savings that their investment generates for NBN Co, provided such networks meet specified standards and are available on non-discriminatory terms.</p>

3	<p>Sector-specific Approaches & Target Industries</p> <ul style="list-style-type: none"> • The identification and targeting of particular industry types will be required to harness employment opportunity. • Specific focus will also be required to seek, attract and secure new ‘external industries’. • Even for population-based employment which will occur in response to the resident population’s needs, it is necessary to facilitate particular outcomes, particularly if the early activation of this potential is sought. <p>Strategic Response</p> <ul style="list-style-type: none"> • Health Sector - formation of business partnerships with the South Western Sydney Local Health District; the region’s private hospitals and care providers; as well as specific aged care and home care providers, preferably early in the residential precinct development cycle. • Business partnerships with health equipment manufacturers and distributors. • Education Sector – establish business partnerships with private schools, TAFEs and potentially involving industry training partnerships and/or enterprise partnerships with nearby facilities at UWS Campbelltown and the University of Wollongong. • Educational focus on local industry needs and trades sector e.g. work with NSW Transport to implement its Master Plan objective to maintain the state’s freight workforce through initiatives that attract and retain skilled workers in the industry. • Work with the Bureau of Freight Statistics to streamline freight data collection and strategic analysis, e.g. by liaising with freight industries to ensure their needs are understood and accommodated and that the necessary industry skills are developed, or through applied research in freight management. • Construction Sector – identification of candidate construction supply companies eager to locate at Wilton Junction to take advantage of its proximity to broader development fronts at the South West Growth Centre and in Wollongong. • Work with specific supply industries to understand their training needs and partner with education providers to create Wilton as a place of trade learning. • Transport, Postal and Warehousing – maximise the broader appreciation of Wilton Junction’s natural advantages in terms of its connectedness to Sydney, Wollongong and other regions. • Ensure the allocation of suitable land and simultaneous marketing to attract those businesses which have the potential to benefit from a southern Sydney regional location. • Identification and targeting of specific logistics businesses. • Tourism and Recreation – work with Council’s toward the review and implementation of its Tourism Business Plan. • Align current objectives to Destination NSW’s agenda to double the state’s overnight visitor expenditure by 2020 in order that regional funding may be obtained. • Develop local tourism partnership between Council and respective businesses – and seek regional development funding from the Federal Government. • Agribusiness - supporting primary production in a research, training or trading capacity. Tap into the presence of research institutions to encourage Wollondilly as a centre for innovation in the agricultural industry and/or for food production and manufacturing. • Identify existing agribusinesses in Sydney’s south-west that will be impacted by encroaching urban development to pursue their relocation to Wollondilly e.g. Inghams Enterprises, Flora International, NuFlora International and Andreasens Green. 	<p>WHO – the development of specific industry sector initiatives and partnerships will largely be the responsibility of Wollondilly Council, although its task could be assisted by a local Economic Development Partnership (EDP), involving representatives from the public, private and voluntary sectors. Ongoing responsibilities are to be the subject of further discussions with council and other parties.</p> <p>State agencies will also play a key role in coordinating the potential delivery of health, education and other services (e.g. tourism). Initiatives for other sectors (e.g. construction, agribusiness, warehousing) will primarily be coordinated privately through the identification of particular needs and means of addressing these, involving targeted partnership arrangements.</p> <p>Council and the Economic Development Partnership (EDP) will be largely responsible for the targeting of specific industries that could be attracted to Wollondilly. Several candidate businesses for each of the key sectors identified are nominated in this report.</p> <p>The Wollondilly Strategic Health Forum initiated by Wollondilly Shire Council may be expanded to help realise employment potential of this sector.</p> <p>WHEN – sector-specific strategies should be developed as a matter of priority to coincide with the first release of development land.</p> <p>FUNDING – funding for the development of sector-specific strategies may be available under the Coalition Government’s Stronger Regions program or through the current Regional Development Australia (RDA) program.</p>
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4	<p>Catalytic Employment Projects</p> <ul style="list-style-type: none"> The identification and targeting of specific catalytic employment projects would assist in either establishing an early town centre presence or would operate to attract other industries that could benefit from co-location with a major service or particular infrastructure facility. <p>Strategic Response</p> <ul style="list-style-type: none"> <i>Pursue specific catalytic employment projects for Wilton Junction, such as:</i> <ul style="list-style-type: none"> <i>District medical & allied health services</i> <i>The relocation of Council's administrative centre</i> <i>State Distribution facilities (e.g. Myer at Somersby)</i> <i>A data centre</i> 	<p>WHO – Wollondilly Council & the local EDP would likely resume responsibility for targeting specific catalytic industries and pursuing their potential interest in locating at Wilton Junction.</p> <p>Wollondilly Council will, in due course, consider the potential of moving its administration offices to Wilton Junction as the major population centre of the LGA.</p> <p>WHEN – an early decision on potential catalytic employment projects and then developing a targeted action plan would assist in the activation of non-population driven employment generation in Wilton Junction. It would also encourage development of other employment generating uses.</p> <p>FUNDING – possible federal/ state government grant monies might be available; otherwise consideration will need to be given by Wollondilly Council & the recommended local EDP as to other potential funding sources.</p>
5	<p>Infrastructure Delivery</p> <ul style="list-style-type: none"> The completion of major motorway projects would increase Wilton Junction's trade and employment competitiveness. The development of rail infrastructure also could significantly alter the employment attractiveness of the area. <p>Strategic Response</p> <ul style="list-style-type: none"> <i>The identification and pursuit of such investment ought to be a priority position taken by Wollondilly Council and supporting businesses.</i> 	<p>WHO – Council and business groups/chambers would be expected to work together to pursue State and Federal Government funding for key projects. Subdivision infrastructure will be provided by the Land Owners Group.</p> <p>WHEN – such action is required on a current and ongoing basis.</p> <p>FUNDING – State and Federal Government funding is necessary to complete major infrastructure projects.</p>
6	<p>Regional Partnerships and Business Support</p> <ul style="list-style-type: none"> Developing partnerships with existing and potential industries will harness entrepreneurial activity and will assist in understanding the specific needs of the various industry sectors. Seek to facilitate and promote start-up businesses or to focus support for those industry sectors from which recent business registrations have been generated. <p>Strategic Response:</p> <ul style="list-style-type: none"> <i>A survey of new and existing local businesses to ascertain the main issues facing business growth.</i> <i>The establishment of a local Economic Development Partnership (EDP) that provides a platform for key stakeholders to co-ordinate economic development initiatives. The EDP could include representatives from the public, private and voluntary sectors.</i> <i>The creation of Employment and Skills Centre, as a focal point for the delivery of employment advice and training services in partnership with local schools and TAFE colleges. Such a facility could be incorporated into the early provision of retail and other space as part of the Wilton Junction town centre.</i> <i>Making start-up business space available – either by utilising existing community buildings or by drawing on resources from private businesses or state agencies to establish a new incubator space within or adjacent to the Wilton Junction town centre.</i> 	<p>WHO – Wilton Land Owners Group, Wollondilly Council & the recommended local Economic Development Partnership (EDP) involving representatives from the public, private and voluntary sectors.</p> <p>WHEN - A business prospectus, website and marketing material should be developed to coincide with the initial release of town centre and employment land.</p> <p>FUNDING – the new Federal Coalition Government's 'Stronger Regions Fund' may be able to be accessed to fund the establishment of local Economic Development Partnership (EDP) to co-ordinate economic initiatives for the LGA.</p> <p>The current RDA program may also be able to be utilised to help establish the framework of a regional employment platform, including the creation of a local business incubator and an Employment & Skills Centre.</p>

Key to the successful implementation of these strategies will be the preparedness of state agencies and business forums to develop strong partnerships in pursuit of a sustainable employment future for the LGA.

Much success will also depend on the ability to secure funding for the initiatives and to target specific industry types identified as possible candidate industries that could be attracted to Wollondilly.

Other matters that will drive the success of the strategies relate to:

- The quality and inventiveness of specific marketing material;
- Appropriate implementation structures and arrangements; and
- The ongoing ownership and refinement of the initiatives.

Section 1: Introduction

Project Background & Context

In November 2011, the State Government invited landowners with large properties in suitable locations to nominate sites which might be able to deliver additional housing to address Sydney's housing supply shortfall. Walker Corporation, Governors Hill, Bradcorp and Lend Lease responded to the Program and nominated landholdings of more than 100ha in Wollondilly Shire, surrounding the Hume Highway-Picton Road intersection for consideration. This area has subsequently become known as Wilton Junction, and is the subject of this application.

Following a Wollondilly Shire Council resolution in May 2012, four major landowners (collectively known as the Wilton Junction Landowners' Group) signed an agreement to work cooperatively with Council in the preparation of a high level master plan for Wilton Junction. The master plan aims to deliver high quality new housing, jobs close to home, supporting social and utilities infrastructure and services, and a range of complementary land uses.

A high level Master Plan and a Preliminary Infrastructure Requirements Report were considered by Wollondilly Shire Council on 17th December 2012, with Council resolving to give in-principle support to the proposal. Council also resolved to request that the rezoning be a state driven process.

Subsequently, the NSW Government decided to coordinate the statutory planning process, led by the Department of Planning and Infrastructure (now the Department of Planning and Environment, DP&E). The Minister for Planning and Infrastructure (now the Minister for Planning and Environment) proposed to prepare a State Environmental Planning Policy (SEPP), as per Section 24 of the *Environmental Planning and Assessment Act 1979* (EP&A Act), which identifies that a SEPP is an Environmental Planning Instrument, and Section 37 of the EP&A Act, which relates to the making of a SEPP for State or regional significant development. This was done with a view to rezone the land through an

amendment to the Wollondilly Local Environmental Plan 2011 (LEP) to facilitate the early delivery of housing and infrastructure, linked to an agreed Infrastructure, Servicing and Staging Plan.

The Department of Planning and Infrastructure issued Key Study Requirements (KSRs) to the Proponents (Walker Corporation, Bradcorp and Governors Hill) to guide the planning investigations for a new town at Wilton Junction. The KSRs set the criteria for carrying out environmental investigations across the Study Area (excluding both Bingara Gorge and the existing Wilton village which will not be affected by any proposed amendments to their current zoning and planning provisions). The investigations examine the potential for the Wilton Junction Study Area to be rezoned under a SEPP.

The Department of Planning and Infrastructure has issued specific Director-General's Requirements (DGRs) to guide planning investigations for a new town at Wilton Junction. The DGRs set the criteria for carrying out environmental investigations across the site.

MacroPlan Dimasi has prepared this report to inform the SEPP-based rezoning of Wilton Junction. Specifically our report seeks to establish the likely demographic characteristics and housing needs of the new township of Wilton Junction. In doing so, the report specifically seeks to address the DGRs that have been issued to guide the necessary planning investigations.

Study Area

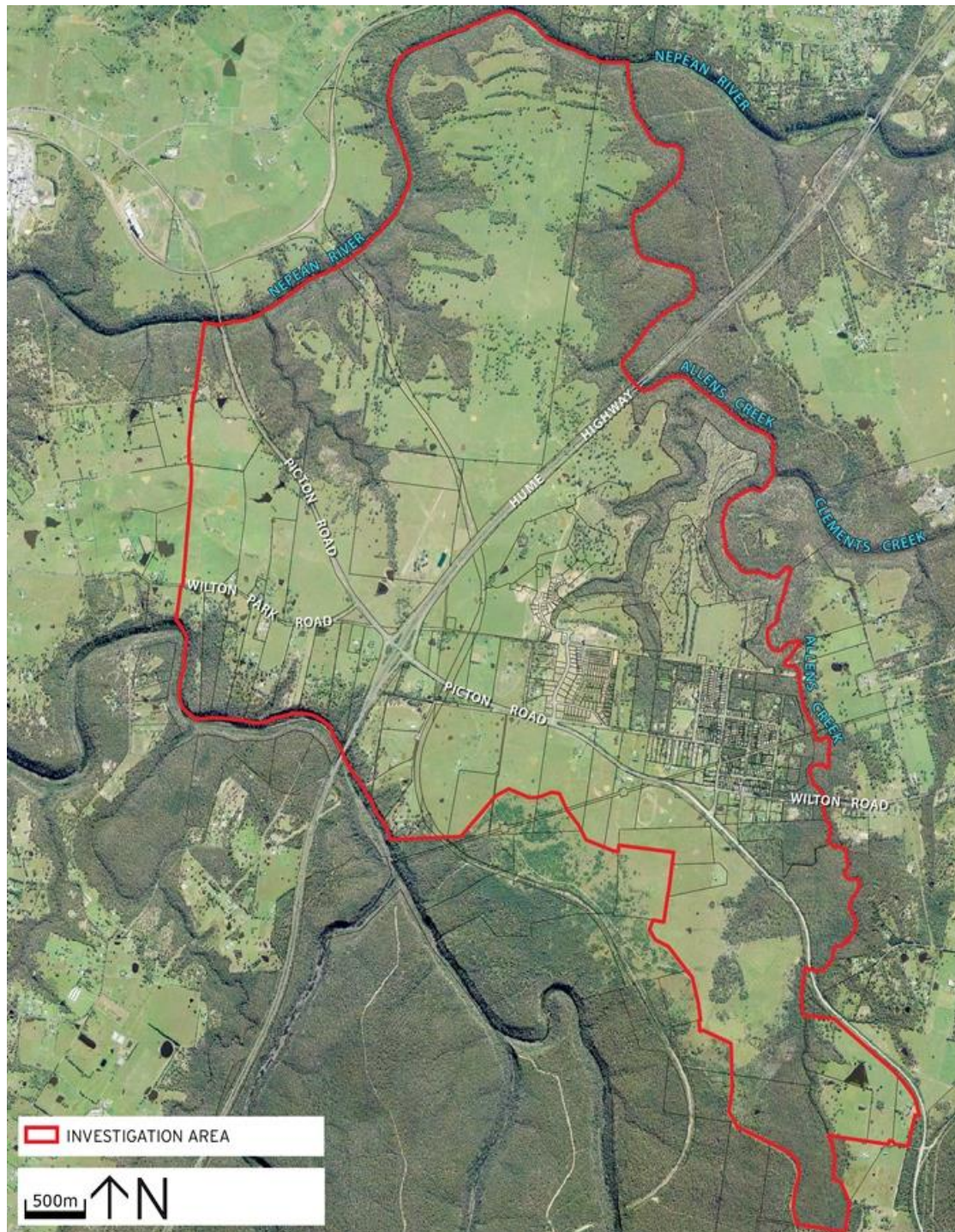
Wilton Junction is located within Wollondilly Shire Council and is approximately 80km from Sydney Central Business District, and 30km west of Wollongong. The study area includes the existing village of Wilton and the adjacent Bingara Gorge estate.

The area is strategically located around the Hume Highway/Picton Road interchange and represents the next potential major town along this transport corridor south of Campbelltown – Macarthur.

Wilton Junction has the distinct advantage of a consolidated land ownership of nearly 2,700ha in the control of recognised developers, with the resources and capability to expedite housing delivery, roll out enabling infrastructure, deliver social services and provide local employment.

Wilton Junction presents a good opportunity to address significant housing supply shortages and affordability pressures in Sydney. The new town will provide housing choice through a variety of dwelling sizes and locations. It will also provide a new 'district' level retail and commercial focus for the people of Wollondilly, deliver social infrastructure and provide jobs and services for the local population.

Figure 1. Study Area



Source: Connor Holmes (2014)

Land Ownership

There are four major landowners within the Investigation Study Area:

- Bradcorp Pty Ltd (land at Wilton West)
- Walker Corporation (land south of Picton Road and east of the Hume Highway)
- Governors Hill (land including the Wilton Aerodrome and land on both sides of Picton Road west of the Hume Highway)
- Lend Lease (land to the north-west of the Hume Highway-Picton Road intersection; but is excluded from the study requirements)

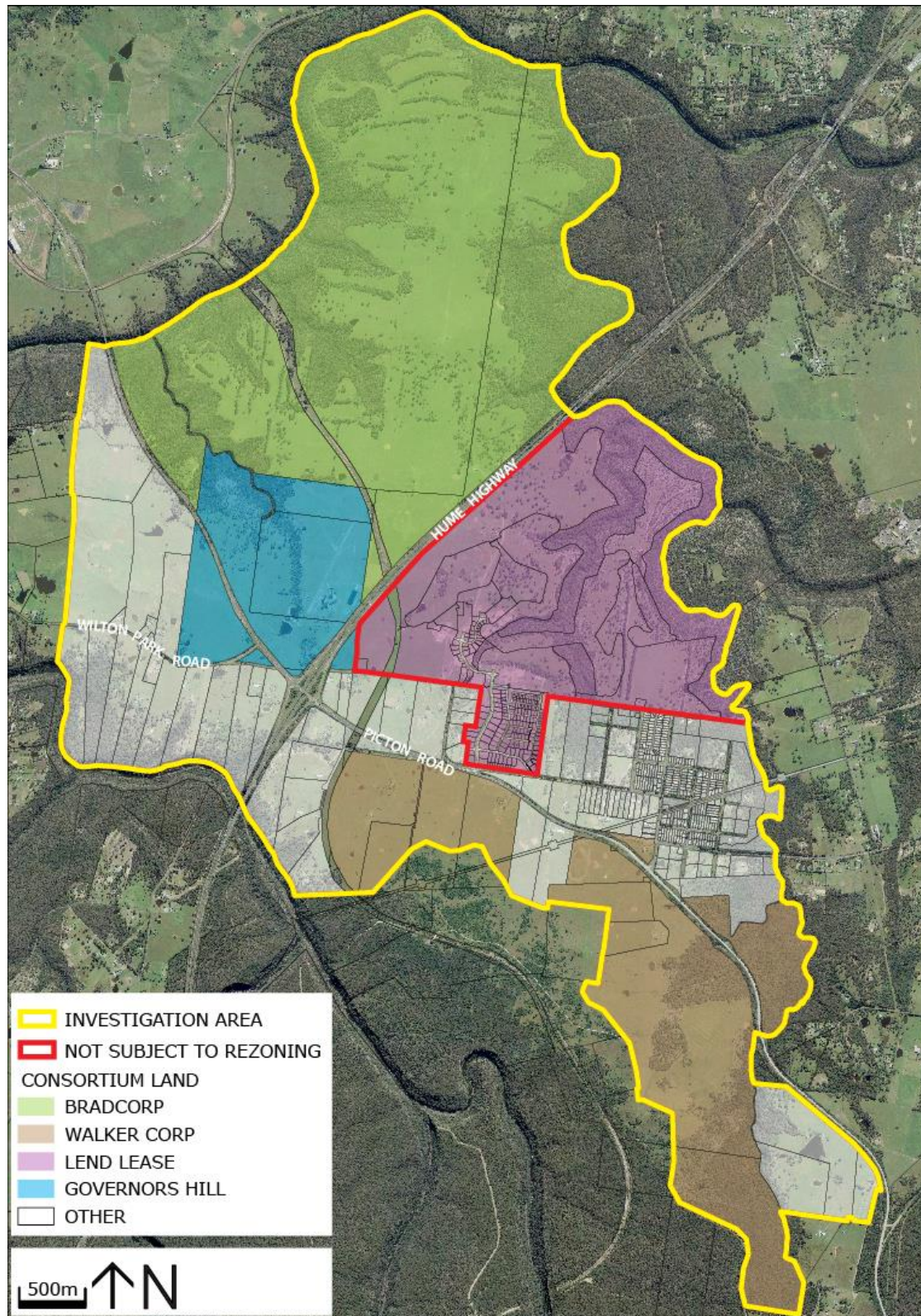
The Investigation Study Area includes the proponents' land and other land held by individual private owners, as outlined in the table below. A plan of the extent of ownership is provided below.

Land Owner	Gross area (ha)	Net Developable Area (ha)
Lend Lease	455.0	240.0
Bradcorp	872.4	458.7
Governors Hill	175.3	123.5
Walker Corporation	405.2	230.3
Other land owners**	572.3	489.2
Total	2,480.2	1,541.7

*** This comprises 113 other private landowners, excluding the new Bingara Gorge estate and the existing Wilton village which will not be affected by any proposed amendments to the existing Wollondilly Shire Council planning provisions.*

For the purpose of this rezoning application, the Proponents include Walker Corporation, Governors Hill and Bradcorp. Lend Lease will continue with the planning and delivery of its Bingara Gorge community at Wilton, which is already zoned for residential development. Lend Lease is working with the proponents to plan and deliver the new town at Wilton Junction and its associated infrastructure.

Figure 2. Land Ownership



Source: Connor Holmes (2014)

Vision for Wilton Junction

The Proponents have a vision for the proposed rezoning of land at Wilton Junction, which is:

Wilton Junction is a new community cradled in a unique landscape characterised by bushland, rivers, creeks, lakes and ridges set against the backdrop of the Razorback Range. By design, the place and the lives of its people are intertwined with the bush.

The community respects the location's rich bushland setting, engages with surrounding water features and embraces sustainability.

Inclusive and welcoming of diversity, it's a place to nurture relationships, grow a family - to put down roots.

Founded on a 21st century interpretation of timeless "Garden City" principles, Wilton Junction combines the best features of our most loved country towns with the facilities, services and technologies found in Australia's most successful, edgy, and vibrant town centres.

A safe place to visit – a healthy place to live – a great place to learn - a rewarding place to work – the local community takes pride in the strength of its cultural and civic life and the role of their town in Wollondilly Shire and the region.

Delivering the Vision and Project Description

The vision will be delivered through the creation of a new town with between 11,000 and 13,000 new homes and 11,000 jobs. Residential neighbourhoods will be created around green spaces to provide a range of housing choice and to facilitate healthy lifestyles options for residents.

A new town, comprising of approximately 17ha, will be established within the north-west quadrant of the study area and will be surrounded by employment generating uses for business, bulky goods and light industry. It will comprise of approximately 120-130ha of land.

Smaller neighbourhood centres will be created within the residential neighbourhoods to cater for convenient daily shopping choices. Social and physical infrastructure will also be provided facilitating the creation of a new community. Existing significant environmental features and heritage items will be preserved commemorating the natural and historical setting of the study area.

The proposed Master Plan will be informed by the following key principles:

- **Employment and commercial drivers.** The delivery of approximately 11,000 jobs focused around a new town centre and in close proximity to the Hume Highway & Picton Road.
- **Housing.** Providing between 11,000 and 13,000 new dwellings across the precinct, inclusive of the 1,165 already approved at Bingara Gorge.
- **Community facilities.** Providing a diverse range of high quality community facilities including a range of schools, a library, a community centre and three neighbourhood centres.
- **Environment.** Conserving ecological features and biodiversity and establishing a Trust to rehabilitate and manage approximately 630 ha of bushland.
- **Place making.** Delivering a high quality and connected network of streets, spaces and squares throughout the development.
- **Activity centres.** Focusing on the delivery of a new town centre and three smaller neighbourhood centres with a diverse mix of retail, commerce, business & light industry.
- **Traffic and transport.** Providing strategic motorway and bus access to surrounding areas and legible movement throughout the development.
- **Infrastructure.** Integrating water, waste water and stormwater management systems and access to all other utilities including gas and NBN.

Economic Development and Employment Strategy

DPI has issued specific Director-General's Requirements (DGRs) to guide planning investigations for the land release. The DGRs set the criteria for carrying out environmental investigations across the site. The criteria include a requirement to prepare an employment strategy for the new township at Wilton Junction.

MacroPlan Dimasi has provided separate demographic, housing and employment specialist reports to inform the master plan and the SEPP rezoning process.

This current report draws upon our previous findings with respect to potential employment drivers for Wilton Junction and explores the key strategic initiatives that will assist in delivering the nominated number of jobs for the locality.

We do this by:

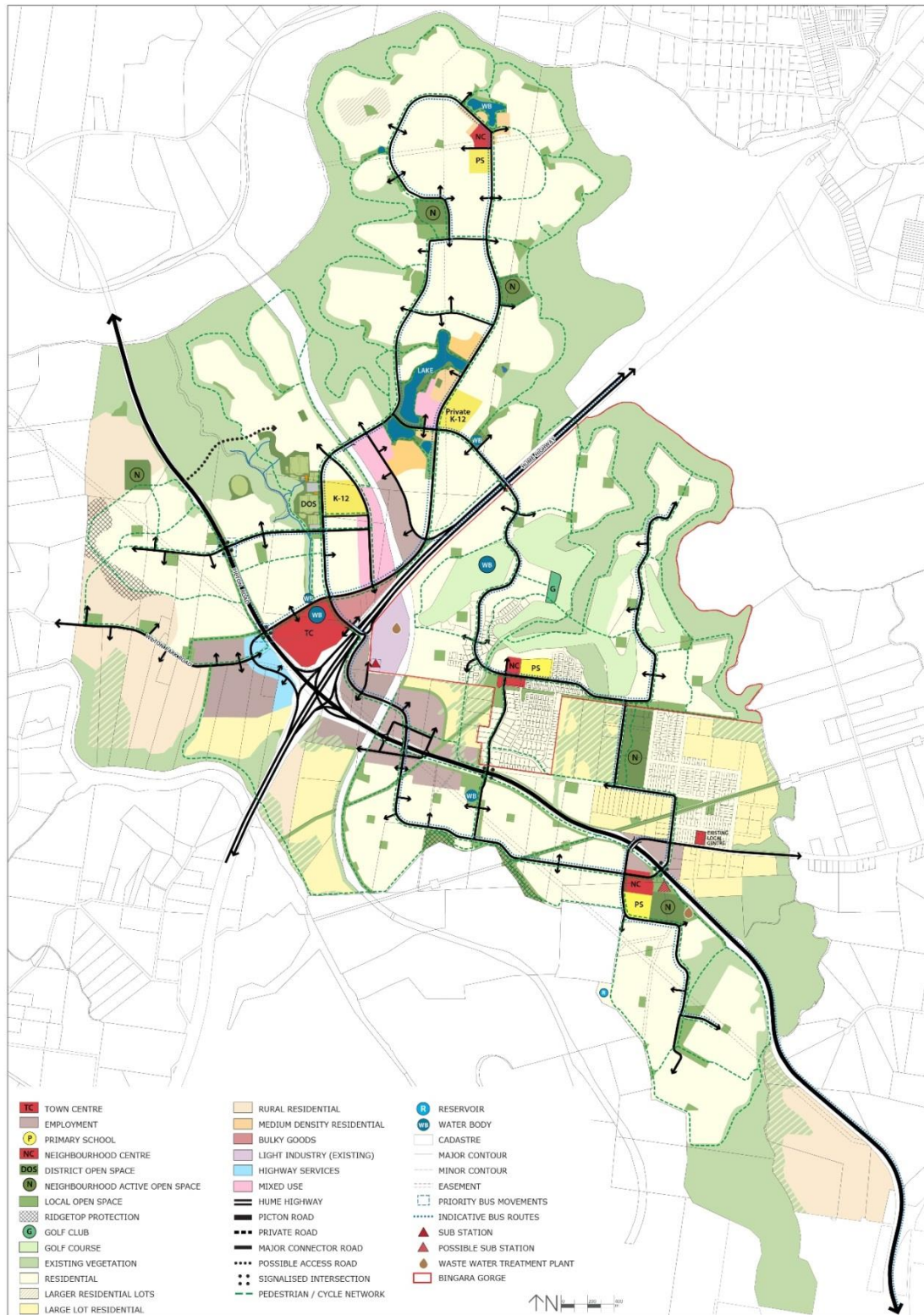
- Reviewing key planning and infrastructure strategy documents that set an employment framework for the greater Sydney area and beyond; and other employment specific strategies that have been prepared for the Wollondilly LGA prior to and during the earlier master plan process for Wilton Junction.
- Considering a range of economic/employment development strategies from around the country including metropolitan and regional locations.
- Presenting an understanding of key employment drivers relevant to the Wollondilly LGA that will impact the take-up of employment opportunity at Wilton Junction over time.
- Identifying key employment levers and corresponding policy triggers that will assist in securing achievement of the projected employment outcomes for Wilton Junction.

Importantly, the economic and employment strategies promoted in this report reflect the unique locational attributes of Wilton Junction as a stand-alone township. The strategies are intended to allow Wilton Junction to develop as a distinct community that is able to support its own employment and service needs and to trade beyond its local borders.

This report forms part of the series of studies required to be undertaken to meet the Director Generals' Study Requirements and to inform SEPP-based rezoning process. Together, the various outcomes and findings have informed the development and preparation of a Master Plan for Wilton Junction.

The derived Master Plan is presented below.

Figure 3. Wilton Junction Master Plan



Source: Connor Holmes (2014)

SEPP Study Requirements

In preparing this report MacroPlan Dimasi has considered the specific Director-General's Requirements (DGRs) pertaining to the investigation of 'Economic Development and Employment Need'.

The schedule below provides a concise response to each specific DGR item that is addressed in this and our previous employment assessment report.

DGR Item	Response
<i>Prepare an assessment of the retail, commercial, industrial and other employment needs for the projected population of the Precinct and wider LGA to support the preparation of a local economic development strategy, including impacts on existing towns within the LGA</i>	<ul style="list-style-type: none"> MacroPlan Dimasi has undertaken an assessment of employment outcomes and employment land need based on demand from the future resident population, and the comparative advantages (i.e. location and accessibility) presented at Wilton Junction. Our examination of employment need has considered the likely level of employment generated by industries that are predominantly population driven or service-based and others that are underpinned by external markets. Our investigations reference the employment influence of south-west Sydney but also have regard for the unique locational attributes of Wilton Junction as a stand-alone township and as the major centre/hub for the broader Wollondilly LGA.
<i>Consider future industry dynamics for key sectors both currently in the area and those which could benefit from locating in the area. This requires strategic analysis and should not be limited to existing forecasts based on historical data.</i>	<ul style="list-style-type: none"> Our assessment of employment need has considered both historical data relevant to the Wollondilly LGA as well as trend data from south-west Sydney. We have tested our assumptions of employment drivers and characteristics using a number of exemplar regions. On the basis of existing and projected differences between Wollondilly and the south-west Sydney region, we have estimated the employment potential of Wilton Junction as a stand-alone township.
<i>Identify factors that may drive certain types of commercial, industrial or retail development investment and activity, particularly in relation to the site's connections between the Southern Highlands and South-West Sydney and placement in</i>	<ul style="list-style-type: none"> Primarily, there are three factor or attributes that are expected to support industry and employment generation at Wilton Junction, including: <ul style="list-style-type: none"> A 35,000-strong resident population will support the creation of industries that are predominantly population-driven e.g. retail, service provision, education, etc. Wilton Junction will become the major centre/hub for the Wollondilly LGA. Wilton Junction is at a strategic junction of two significant roads (Hume Highway and Picton Road). Its locational

<p><i>the Sydney-Canberra-Melbourne corridor.</i></p>	<p>attributes will drive interest from externally trading industries.</p> <ul style="list-style-type: none"> ▪ Finally, Wilton Junction's separation from Sydney's south west and positioning on the Sydney-Canberra-Melbourne trade corridor is expected to facilitate a healthy representation of industries that predominantly operate in external markets.
<p><i>Develop an employment strategy to support a high level of employment self-containment in the Precinct. This strategy should assess how jobs generated within the Precinct will contribute to jobs targets for the sub-region.</i></p>	<ul style="list-style-type: none"> ▪ Our employment strategy is outlined in this report. It provides a solid foundation for capturing service-driven employment and proposes a series of development initiatives and promotional measures to attract external industries. ▪ A series of sector-specific partnership opportunities are also presented. ▪ Strategies to promote sustainable employment outcomes at Wilton Junction are presented in this report. A primary focus of the strategies presented is to harness the region's potential to attract 'external' industries (i.e. those that do not directly serve the needs of the local population, but instead choose to locate at Wilton but trade beyond the local catchment).

Section 2: Literature Review

MacroPlan Dimasi has undertaken a literature review of previous economic and employment related studies relevant to South West Sydney, the Wollondilly LGA and Wilton Junction. Reports examined include:

- Wollondilly Economic Development (2007)
- Menangle Economic Assessment: Moreton Park Road (2009)
- Employment Lands Development Program 2010 (2011 Update)
- Wollondilly Growth Management Strategy (2011)
- Various Council Documents – Planned Release Sites (August 2012)
- Wilton Junction – High level Employment Strategy (2012)
- Wilton Junction – Preliminary Employment Delivery Strategy (2012)
- Other Local Economic and Employment Strategies

Also included in our analysis is an examination of various transport-related and specific regional employment plans and strategies that have a bearing on infrastructure investment that could influence future employment opportunities at Wilton Junction either in a freight and logistics sense or from a tourism investment or regional development perspective. The documents examined are:

- Sydney Canberra Corridor Regional Strategy (2006-2031)
- Maldon-Dombarton Rail Link Feasibility Study (2011)
- Final Report - Visitor Economy Taskforce, (2012)
- Draft NSW Freight and Ports Strategy (2012)
- NSW Long Term Transport Master Plan (2012)
- Broader Western Sydney Employment Area – Draft Structure Plan (2013)

All reference documents are considered in their chronological order.

Other relevant planning strategies, including the draft Metropolitan Plan for Sydney (2013) are addressed in Section 3 of this report which examines the context of Wilton Junction in a local and regional sense and the planning policy frameworks which impact potential employment outcomes at Wilton Junction.

2.1 Sydney Canberra Corridor Regional Strategy (2006)

The Sydney Canberra Corridor Regional Strategy (SCCRS) represents an agreed stance between the NSW Government and ACT on the future of the Sydney-Canberra Corridor.

The SCCRS outlines the specific regional infrastructure requirements for the transport corridor up until 2031. Its purpose is to guide and assist future infrastructure investment along the corridor. The strategy applies to the local government areas of Wingecarribee, Goulburn Mulwaree, Upper Lachlan, Yass Valley, Palerang and Queanbeyan.

The strategy document notes that the Sydney-Canberra Corridor is:

- A region of significant potential;
- A national passage for transport, communication flows, goods and services; and
- Represents a key economic advantage for the South West region

The Strategy asserts that increased freight movement between Sydney and Melbourne will result in a 70% increase in heavy truck volumes over the next 20 years. Although not specifically considered as part of the document Wilton Junction, in the Wollondilly Shire, is strategically located to benefit from increased trade along the Sydney-Canberra Corridor and a rise in freight between Melbourne and Sydney.

2.2 Wollondilly Economic Development Strategy (2007)

Wollondilly Shire Council engaged Strategic Economics to prepare an Economic Development Strategy (EDS) to assist in improving the learning and employment options for its residents.

Strategic Economics noted that the South West subregion's population is expected to double by 2030. The EDS considers this growth and applies conservative population and employment forecasts for Wollondilly. It identifies the primary employment sectors in Wollondilly as manufacturing, logistics, retail, local trades, tourism, recreation and community services.

Relevant findings from the work include:

- Manufacturing is strong in products which are costly to transport and require close access to local markets, e.g. building materials and products.
- Improvements in transport infrastructure with the M5 extension and the completion of the Sydney Orbital have driven investors and users to look at the South West Sydney locations.
- Other LGAs in the south west are earmarked to accommodate the bulk of new employment land.
- Wollondilly's proximity to Sydney and its natural amenity are strengths that ought to encourage the growth of tourism and recreational activities. Wingecarribee has four times more people employed in tourist related activities despite being further away from Sydney.
- Many residents travel out of the shire for retail shopping to Penrith, Campbelltown and Narellan. A reduction in this escape expenditure will stimulate local retailing.
- Demand for employment land in Wollondilly is likely to increase, particularly in areas served by the Main Southern Railway and the South Western Freeway.
- Global competition and outsourcing will impact Wollondilly's manufacturing base.
- Wollondilly is not well placed to capitalise on the emergence of the 'knowledge economy' or to attract a knowledge-based workforce.
- Wollondilly needs to attract and retain younger age residents to mitigate a decline in its workforce numbers resulting from its ageing demographic.

A key outtake of the EDS is to provide employment opportunities that match local skills. The EDS suggests that actions should be put in place to attract managerial and professional jobs, as the LGA is under-represented in these occupations.

2.3 Menangle Economic Assessment (2009)

Elton Consulting had been tasked with providing an economic and commercial overview of a proposed rezoning at Moreton Park Road, Menangle which proposed the rezoning of 250 ha for employment (Business Park) purposes.

Elton recognised a net deficit of around 65,000 jobs in the South West which supports the need for further employment land provision.

Elton identified a key objective of Council's EDS to increase employment self-containment within the LGA, noting that Wollondilly is a net exporter of employees, with only 30% of its residents working in the LGA. Increased containment is presented as a means to help minimise the LGA's employment deficit.

Elton estimated that the 250 ha allocation would have the capacity to generate around 4,430 permanent jobs, and suggested a range of potential uses including offices, light industry, warehousing and logistics and wholesale/ retail trade.

The site straddles the M5 Motorway/Hume Highway and is bound by the Main Southern Railway and Menangle Rd. Direct access to the Hume Highway is presently not available. The planning proposal remains undetermined.

2.4 Employment Lands Development Program (ELDP, 2011)

The NSW Government in conjunction with the Department of Planning and Infrastructure (now the Department of Planning & Environment) produce the ELDP report which outlines the provision of employment lands throughout NSW, with particular emphasis placed on Greater Sydney and its subregions.

The South West Subregion of Sydney comprises the LGAs of Liverpool, Campbelltown, Camden and Wollondilly. Although Wollondilly is part of the South West Subregion, it is excluded from the South West Growth Centre. Proportionally, very little existing employment land is located in the Wollondilly LGA, comprising just 9% of total South West subregion employment lands.

The availability of employment land throughout the Sydney South West Subregion is considered in more detail in latter sections of this report.

2.5 Wollondilly Growth Management Strategy (2011)

The GMS is a strategic document that identifies growth issues and concerns facing the Wollondilly Shire. Based on a 'relatively natural growth scenario', the document sets out key directions for accommodating future growth within the Shire.

The GMS aims for a balanced approach to support residential growth whilst retaining the LGA's environmental amenity and rural living appeal. The strategy nominates growth potential in and around existing townships and identifies the influence of the Hume Highway and Picton Road as a logical location for development in the Wilton area.

2.6 Maldon-Dombarton Rail Link Feasibility Study (2011)

Prepared for the Department of Infrastructure and Transport by Hyder and ACIL Tasman in September 2011 the report considers the feasibility of the potential freight rail link between Maldon (near Picton on the Main South railway line south of Sydney) and Dombarton (near Port Kembla), having regard for project economics, its engineering practicality, its design, cost, environmental and social viability, and the implications of not proceeding.

The Maldon-Dombarton rail connection was commenced, then abandoned, by the NSW Government in the 1980s. It was intended to provide an alternative to the two existing lines for the transport of freight to and from Port Kembla (i.e. the Moss Vale-Unanderra line and the Illawarra line from Sydney). Reasons given for completion of a line included potential increases in freight, road and rail congestion and encouragement of investment.

Most of the ground work for a 35km Maldon-Dombarton line has been constructed, but the expensive elements – a major bridge, part of another major bridge, and a tunnel – have not been constructed. With advances in technology, there are now more cost effective construction techniques for the required bridge and road underpasses.

The report's major findings are:

- The environmental impacts are attenuated because much of the line has already been built. The remaining impacts would require mitigation. None of the environmental issues present significant barriers to construction.
- Construction would take around 3-4 years for a financial cost between \$624-667 million. Operating and maintenance costs are relatively minor.
- The main type of freight that the line would be expected to transport is coal from mines near Lithgow and from the Port Kembla hinterland. Other

freight includes grain, copper concentrates, limestone, kaolin, cement and potentially iron ore, containers and cars.

- Bulk freight relevant to a Maldon-Dombarton line is expected to grow from 11.6Mtpa in 2010 to 15.5Mtpa in 2030 (coal is respectively 10.4Mtpa and 12.3Mtpa).
- Cars imported through Port Kembla are expected to continue to use road freight to avoid double handling costs.
- Most container freight growth through Port Kembla is required by the NSW Government to move by rail. Container freight could also increase, especially if there is overflow from Port Botany.

Importantly, the report has found that the existing transport system can handle expected demand, and that one of the existing lines (Moss Vale-Unanderra) can be expanded if necessary. Furthermore, the report found that:

- Demand could be higher than expected, due to increased coal production (though major expansion is more likely elsewhere in NSW or Queensland), possible iron ore exports, or earlier overflow of containers from Port Botany and a shift of some car freight to rail. The study considered these possibilities, as well as high oil prices and a carbon charge.
- One of the existing lines is the RailCorp-owned Illawarra line from Sydney to Wollongong and beyond. It is congested with passenger and freight trains, which affect reliability. There is little scope to increase capacity.
- The Moss Vale (on the Main South line) - Unanderra (near Port Kembla) line has spare capacity and could be upgraded to handle more frequent and longer trains for well below the cost of constructing a Maldon-Dombarton line. There would be higher operating costs associated with the use of this line.
- The potential to upgrade the Moss Vale-Unanderra line means there is not a capacity problem unless there is an extremely large increase in freight demand. However some trains might have to divert from the Illawarra line and this might need a new governance arrangement to allocate paths.
- The main benefits of the Maldon-Dombarton line relate to increased efficiency for train operators and a net reduction in noise and pollution impacts.
- Arterial roads in the Port Kembla area are congested; however a Maldon-Dombarton line would have little effect on the number of trucks. BHP, a

major transporter of coal by truck, has advised that it would not use a Maldon-Dombarton line. Imported cars are transported by truck to avoid double handling costs, and a significant portion of this market is not expected to shift to rail.

From a cost-benefit perspective, the report concludes that:

- The net present value using a 7% real discount rate is estimated as negative \$206 million – that is, constructing a Maldon-Dombarton line would not generate sufficient benefits to cover its costs. The benefit cost ratio is 0.56 – that is, estimated economic benefits are only 56% of the costs. The reasons for this result are the high cost of construction because of the terrain, and the existence of spare capacity on the Moss Vale-Unanderra line which can be increased if necessary.
- There is still a negative result under all upside scenarios modelled, except for major iron ore exports.
- Project cash flows are expected to support the funding of only around 20% of project costs. The remainder would be required from governments.
- It would not be prudent to build extra rail capacity for demand that might not eventuate, or that might eventuate many years later. However, it would be prudent to preserve the existing easement to maintain the option of constructing a Maldon-Dombarton line. Should it be required in future years the line could be approved and constructed within three or four years.

Notwithstanding the findings of the Hyder-ACIL Tasman report, and having regard for the potential long-term benefits of improved freight access to Port Kembla, a further \$25.5 million was allocated by the Federal Government in October 2011 for the preparation of detailed designs for the Maldon-Dombarton project (including civil, structural, geotechnical and track works). Other engineering, operational and environmental investigations are also presently underway.

2.7 Council Documents - Planned Release Sites (2012)

Wollondilly Shire Council has previously supplied an 'Overview of Planning Proposals & Potential Housing Release Sites' for the LGA. A summary of this information is presented in the table below:

Table 1. Planned and Potential Housing Release Sites – Wollondilly LGA (August 2012)

Wollondilly LGA		
Suburb	No. of Lots	
	Planning Proposals	State Govt. (Potential) Proposals
Picton	1,142	
Thirlmere		1,920
Tahmoor	358	
Oakdale	172	
Appin	373	5,500
Silverdale	733	
Warragamba		
Menangle	400	
Wilton		10,900
Bargo	101	
Cawdor		4,000
Brownlow Hill		3,250
Maldon		
Total	3,279	25,570
Total exc. Wilton Junction	3,279	14,670

Source: Wollondilly Shire Council

If all proposals were approved and potential sites developed, an additional 14,670 dwellings will be produced in Wollondilly LGA towards 2036 (not including Wilton Junction). This would equate to an additional 42,000 people (not including Wilton Junction).

Whilst we need to be conscious of this potential, our report has focused on the specific needs of the Wilton Junction township and residents. We also consider potential population growth on the basis of ABS and official DP&I projections, rather than assuming that all proposed planning proposals will proceed or deliver as much housing as is suggested in the above table. The same approach is taken in our retail needs assessment report, which assumes a background growth in primary and secondary trade catchments of around 9,800 persons.

2.8 Wilton Junction High Level Employment Strategy (2012)

Prepared by Connor Holmes in the early stages of the master plan process, the High Level Employment Strategy provides a brief overview of the employment principles and objectives for Wilton Junction.

Four key employment principles were identified as part of the Master Plan development, including:

- Make the best use of prominent location and accessibility
- Maximise catchment to maximise employment
- High amenity outcome to attract footloose businesses
- Wilton Junction as a catalyst and platform to capture escape expenditure and reverse the under-represented south west commercial/office market

Connor Holmes identified three key sources of business opportunity - trade from the resident population, the surrounding community catchment and passing trade on Hume Highway and Picton Road. The main marketing or incentive measures identified include:

- Provision of affordable and suitable land
- Facilitation of new business set up through financial incentives
- Relocation of State Government divisions and offices
- Target marketing of businesses and industries with horizontal and vertical growth opportunities
- Incubate start-up businesses through incentives
- Attracting suitable complementary support businesses

2.9 Wilton Junction – Preliminary Employment Strategy (2012)

Prepared by Elton Consulting in 2012, this report provides a further high level economic and employment outlook for the Wilton junction rezoning.

The strategy recognises the inherent strategic qualities of the site's location, envisaging employment opportunities in tourism, freight and logistics and business precinct activities over the medium to longer term as the local population grows.

The strategy also identifies employment opportunities within key service sectors, viz. the retail, commercial, health and social assistance sectors which are predominantly driven by the growth and demographic characteristics of the Wilton Junction township.

The strategy envisages that approximately 6,000 of an estimated 11,769 jobs are likely to be provided directly to service the new township, primarily in the form of retail, commercial, community and recreation and education services.

Specifically, the strategy outlines a set of key 'principles' to guide the achievement of 'other' employment projections, not including work-from-home employment (which will be supported by the continued roll-out of NBN infrastructure).

The key principles include:

- Utilise central, prominent and visible locations for employment and town centre uses to ensure strong exposure and access;
- Maximise the capture of passing trade from the Hume Highway to maximise employment opportunities and capture escape expenditure;
- Integrate and co-locate employment activities within the town centre;
- Create a high amenity outcome to attract and retain footloose businesses;
- Promote Wilton Junction as a catalyst and platform to capture employment opportunities and to reverse the under-represented south west commercial/office market; and
- Establish a balanced employment base for the region which attracts investment and expenditure for the benefit of the whole Shire.

These principles form the basis for an 'initial' economic development strategy which incorporates the following initiatives and actions:

Job Creation

- Containing retail and service 'escape expenditure'.
- Work with local communities to encourage local job creation, using the successful St Mary's (ADI) Skilling and Employment Centre as a positive example.
- Bringing civic and public sector services to Wilton.

- Early delivery of NBN infrastructure.

Marketing and Attracting Investment

- Business marketing to highlight Wilton Junction's strategic location, accessibility, business mix and infrastructure investment and readiness.
- Provision of affordable and attractive employment land.
- NBN marketing and promotion to business start-ups and teleworkers.
- Business incentives and partnership promotions for new businesses such as business incubators, industrial support programs and community employment development projects.
- Ensure the availability of employment to meet demand.
- Specific marketing to attract manufacturing industries attracted by the area's locational advantage, transport links, low development costs and its cluster potential.

Mix of Employment Opportunities

- Embrace the health and ageing sectors and pursue active recruitment of businesses in these fields.
- Attract key services that support businesses .g. conference facilities and hotel accommodation, and ensure early delivery of facilities to support businesses.
- Support employment on rural residential land, including rural industry and recreational activities.

Longer Term Initiatives

- Seek to establish specialist industry clusters and a dedicated business incubator or other business support facilities. These industries can support training/education opportunities, cross-industry relationships and potentially provide a knock-on investment effect.
- Undertake research into niche market opportunities e.g. local food production, packaging and distribution.
- Further develop the role of tourism, building on the strategic location and natural assets of the LGA.
- Expanding freight and logistics capability through infrastructure provision, e.g. by developing a business case for the Outer Sydney Orbital (M9)

highlighting its proximity to the interstate (NSW-VIC) freight line and the Moorebank IMT.

- Developing the educational capacities of the precinct – including state and private schools, TAFEs and other education facilities specialising in employment based skill sets and training.

2.10 Final Report - Visitor Economy Taskforce (2012)

In June 2011 the NSW Government established the Visitor Economy Taskforce and charged it with developing a strategy to double overnight visitor expenditure to NSW by 2020.

The Taskforce's report outlines the current facts on tourism performance, the challenges that lie ahead and the key actions that will be required to generate the business turnaround necessary to achieve the Government's stated goal.

The report provides a relevant example of an across-the board approach to industry development that is aimed to benefit a specific industry sector but with broader implications for the state of NSW. Its initiatives include specific recommendations for regional NSW that are relevant to Wollondilly, and include:

- **Target markets:** All marketing and promotional resources need to be focussed on the priority markets and be informed by the latest market insights on what appeals to visitors.
- **Destination Management Planning:** A new culture and process of Destination Management Planning must be implemented for NSW. This will require an integrated approach to product and infrastructure development, positioning, promotion and marketing and will ensure effective delivery of Government support (at all levels).
- **Regions:** Marketing must focus on, and showcase, the most appealing NSW destinations. Quality experiences and events are required to drive major regional destination re-launches.
- **Destination NSW:** Additional funding is required for Destination NSW to put in place initiatives to deliver on the 2020 visitor economy target. Destination NSW should have the operational flexibility to be commercially effective and provide a one-stop shop for visitor economy investors.

- **Regional support:** Funding for regional tourism should be at least maintained, which should be directly available to destinations through Destination NSW.
- **Revenue source for regional destinations:** A new sustainable source of revenue, derived from a special rate variation for investment in visitor economy initiatives, should be available to Local Councils. Destinations should be able to invest this revenue in critical visitor infrastructure and experience development activities necessary to achieve the 2020 target, subject to full transparency, accountability and governance requirements through new special purpose entities.
- **Governance:** A Cabinet sub-committee should oversee the progress of visitor economy priorities of Government.
- **Joint Visitor Economy Action Plan Co-ordination Committee:** A joint Government/Industry Co-ordination Committee should be established to support Destination NSW's implementation of the Visitor Economy Action Plan.

2.11 Draft NSW Freight and Ports Strategy (2012)

The NSW Government's Freight and Ports Strategy seeks to support economic growth in NSW through the delivery of an efficient and effective freight network.

The expected doubling of the freight task over the next 20 years has provided impetus for an across-the-board review of freight movements throughout the state and for recent infrastructure project investments including the Port Kembla Outer Harbour expansion project, the Northern Sydney Freight Corridor and continued highway upgrades.

Other recent Government initiatives enhancing the freight network include a \$277 million upgrade to NSW grain rail lines, a commitment to replace or upgrade road bridges in 17 key regional locations and initiating the development of transport network solutions such as the WestConnex scheme to improve linkages within the Sydney metropolitan area.

The draft Freight and Ports Strategy identifies a series of actions to achieve network efficiency, capacity and sustainability through government mechanisms including policy reform, program delivery and infrastructure investment.

Key findings and recommendations of the draft Strategy include:

- By 2031, the freight task in NSW is projected to nearly double to 794 million tonnes.
- The volumes of all commodities demanding capacity on the freight network will grow as population and economic activity increase across NSW. Mining represents almost half the current task.
- Coal will remain the single largest freight task in NSW, followed by manufactured products. The implications of this growth for ports, road and rail networks, intermodal terminals and freight corridors are significant. Capacity across the freight network varies, but key parts of the network are already under pressure to match demand.
- Opportunities exist to shift more freight onto rail.

Transport for NSW has modelled the movement networks for over 72 different commodities transported in NSW, identifying the following regional characteristics and distinctions:

- Illawarra, where Port Kembla is a major trading port, exporting coal and grain among other products, and importing motor vehicles.
- Central West, where mining and agricultural production (especially grain) dominate the transport network.
- Sydney metropolitan area, where export and import products, typically in containers, are transported through Port Botany. Products can range from agricultural exports to imported consumer goods, such as electronics and whitegoods.
- South West (NSW), which is a major producer of food, such as fruit, grains, rice and wine. In this region, producers can make a choice between transporting products south to Melbourne or north to Port Kembla or Sydney.

By 2031, the Strategy identifies that all key rail corridors are expected to struggle to meet demand unless action is taken. In particular, by 2031 the Sydney metropolitan freight network (MFN) will need to carry around two million TEU, which will equate to approximately 25,000 additional train movements each year on that part of the network alone.

The draft Strategy acknowledges that network optimisation requires governance arrangements to better coordinate supply chains and to measure and report on their performance. It also requires government support to improve the underpinning regulatory environment through the harmonisation of rules and removal of unnecessary impediments.

Further actions are recommended to identify and protect strategic freight corridors, develop effective port growth plans, foster intermodal terminals in metropolitan and regional areas and to coordinate regional infrastructure and service provision.

Specifically, of relevance to the Wollondilly LGA, the draft Strategy states that:

- Proposed long term corridors such as the Outer Sydney Orbital and Maldon to Dombarton Rail Line are needed to further separate freight and passenger rail movements, in order for both sectors to grow. Separating freight and passengers will continue through dedicated freight infrastructure such as the Southern Sydney Freight Line connecting Macarthur and Port Botany.
- Future corridor design must consider the potential need for a multi-modal outcome involving both road and rail. Increasingly, freight precincts like the proposed intermodal terminals at Moorebank, will support businesses that receive and distribute goods on road and rail.
- Early planning is needed to integrate future transport corridors and sites for new or expanding freight terminals, ... commencing with the dedicated Western Sydney Freight Line and Western Sydney Intermodal Terminal site. Investigations have already commenced for the Maldon to Dombarton Rail Line in partnership with the Australian Government. Work is also proceeding on the Northern Sydney Freight Corridor.
- Transport for NSW is proceeding with pre-construction activities for the Maldon to Dombarton Rail Link, which would support the rapidly expanding resources sector in NSW by giving the mining sector alternate access to Port Kembla. Additionally, it may enable Port Kembla to provide overflow capacity for Port Botany's container business and provide a more reliable link between the south west and western coal mines and the rest of the eastern seaboard.

- Planning for growth in Port Kembla will address the limitations of existing planning approvals by providing increased certainty through integrated planning of port and landside infrastructure needs. This will include, for example, investigation into the potential Maldon to Dombarton Rail Line.

Case Study: Outer Sydney Orbital Corridor

[Extract - Draft NSW Freight & Ports Strategy, November 2012 – p.81]

Proposed long term corridors support freight growth and provide opportunities to move a greater share of freight around the Sydney metropolitan area on rail. Examples of such corridors include the Outer Sydney Orbital, Inland Rail Line, Western Sydney Freight Line and Maldon to Dombarton Rail Line.

The potential for a new Outer Sydney Orbital corridor has been considered for some time as the means to address the significant industrial development occurring in the west of Sydney. The 2007 Pearlman Review into the F3 to M7 corridor selection recommended that work commence on the identification and reservation of a corridor for a new orbital link to the west of the M7 Motorway.

Identifying a new Outer Sydney Orbital corridor and protecting it from incompatible development is an increasingly urgent priority, particularly as the corridor is of key strategic significance to both the road and the rail task.

While the corridor offers the potential to improve mobility between emerging suburbs and employment locations on Sydney's fringe, it is also a key enabler in progressing the separation of the passenger and freight rail networks in the Sydney metropolitan area. The initial driver for a dedicated freight network includes the interstate freight rail task, as this traffic is the most difficult to accommodate within a densely trafficked, metropolitan passenger system. The movement of coal around Sydney is another potential driver that would facilitate alternatives to the congested Metropolitan Rail Network and, in particular, the Illawarra Line.

Analysis carried out by Infrastructure Australia suggests that a multi-modal corridor from Western Sydney north to the Central Coast and lower Hunter may provide a more effective long term connection between Sydney, the Illawarra and areas to the north.

An adaptive Outer Sydney Orbital corridor would support a new level of integrated transport planning. It would potentially allow four significant modal problems to be resolved through one integrated corridor. An Outer Sydney Orbital would:

- *Provide a dedicated rail freight line north from Sydney, beyond the current Northern Sydney Freight Corridor Project*
- *Identify and reserve a corridor for the new orbital road link*
- *Provide a Western Sydney Freight Line*
- *Provide a corridor for an Inland Rail Route.*

An additional consideration is that it may be possible for energy and water infrastructure to use this corridor, where it is sensible to do so.

2.12 NSW Long Term Transport Master Plan (2012)

Released in December 2012 the Transport Master Plan is an overarching framework intended to guide subsequent and more detailed transport plans, policy decisions, reforms and funding decisions.

The Plan identifies a planned and coordinated set of actions (reforms, service improvements and investments) to address the state's key transport challenges. It provides a map of future service and infrastructure developments which future decisions will be required to support.

Although part of the broader Sydney metropolitan area, the following 'regional' challenges and actions identified by the Transport Plan are equally relevant to the Wollondilly LGA:

- Delivering better transport links to and within the growing regional cities of Newcastle and Wollongong ... with faster, safer and more frequent rail services.
- Making sure our state roads can support the needs of customers, communities and regional industries through improved road maintenance and safety.
- Initiatives to move regional freight more efficiently, including a Bridges for the Bush program to replace and upgrade bridges to address constraints on Higher Mass Limits (HML) routes.
- Developing Regional Transport Plans with local communities and integrating them with land use plans so that transport services and infrastructure are provided when and where they are needed.

The Long Term Transport Master Plan will be supported by dedicated Regional Transport Plans for each of NSW's 10 regions. These will detail the transport challenges and solutions for each region. Specific strategies are also being developed to improve regional and interstate connections: a NSW Roads Strategy, a Country Passenger Rail Services Strategy and a Major Airports Plan.

Specifically, Chapter 7 of the Master Plan is dedicated to supporting efficient and productive freight. Identified issues include:

- Recognition that NSW's diverse economy means that, while some industries share common transport needs (such as the need to move large volumes of heavy freight along particular routes), others have specific needs that may require fit-for-purpose infrastructure.
- Recognition that freight is particularly critical to the economic development of regions, facilitating the production of goods best suited to specific regions, and enabling larger scale production than would otherwise occur.
- Understanding that to be efficient and effective, and to meet the needs of freight customers, the freight network must operate as a series of integrated end-to-end supply chains. Inefficiencies and poor coordination can arise where there are network disconnections, poor regulation and insufficient capacity. Inefficiencies cause friction and lead to unnecessary costs to industry and consumers.

The Master Plan describes, at a high level, the various needs and 'pinch points' of freight-dependent industries and suggests a number of actions to address these. Relevant to the Wollondilly LGA are the following actions and observations included in the Master Plan:

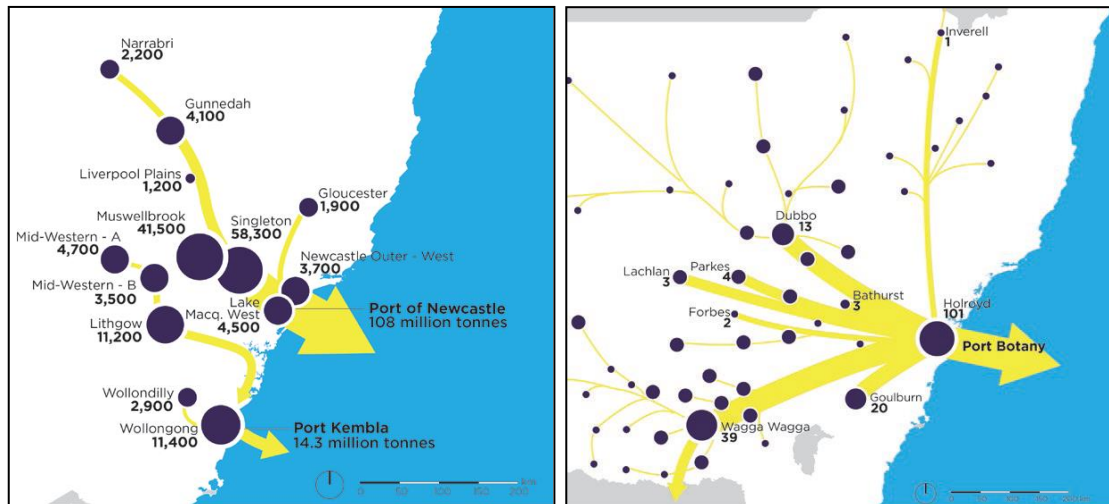
- Identify future demand for network capacity so that revenue streams can be identified to fund expansion of the network or new infrastructure.
- Protect strategic freight corridors to support growing population centres and production regions in NSW.
- Undertake a pilot of next generation Higher Productivity Vehicle (HPV) access on the Hume Highway (M31) aimed at safely managing growing freight volumes on NSW's most heavily used road corridor, and improve last mile access for critical freight journeys.
- Develop Port Growth Plans for NSW Ports with the Port Corporations and the new long term lessees of Port Botany and Port Kembla.

Due to expansion at Port Kembla, further rail freight access planning is required to ensure that landside freight connections are improved and enhanced to service this expansion. Rail access to Port Kembla is increasingly constrained, including the Port Kembla branch line servicing the Outer Harbour where the expansion proposal is focused. Also, while the Southern Sydney Freight Line work will considerably increase the capacity of rail freight in the south of Sydney, there are capacity constraints on the Illawarra Line for freight travelling to and from Port Kembla.

Source: NSW Long Term Transport Master Plan (2012)

The Transport Master Plan depicts the various routes of specific trade products and suggests that further, more detailed investigation of product and industry needs is required to enable decisions that support trade efficiencies.

Figure 4. Coal Export Commodity Flows (left) & Wool Export Commodity Flows (right)



Source: NSW Long Term Transport Master Plan (2012)

Specifically, the Master Plan commits to:

- Improve freight data collection and strategic analysis; and to
- Undertake detailed economic analysis of the impacts of freight transport in NSW.

NSW Long Term Master Plan - The Illawarra Region

Under the Transport Master Plan, the Illawarra region includes Wollongong and the major centres of Shellharbour and Kiama. The Plan identifies logistics and port-related industries at Port Kembla and significant employment sectors such as manufacturing, retail, health and social assistance, and education. The identified major roads include the Illawarra Highway (A48) and Picton Road and the main rail lines are identified as the South Coast Line (freight and passenger) and the Moss Vale to Unanderra Line (freight).

The following actions for the wider Illawarra region are relevant to the Wollondilly LGA.

Short term

- The Growth Centres Roads Program will continue to deliver a road network that supports strong growth. We will continue to improve the F6 (M1), Princes Highway (M1) and Mount Ousley Road to boost capacity, improve travel time, support public transport operations and provide efficient freight connections to Port Kembla.

- *We will upgrade Picton Road to support safer operations.*
- *We will deliver the Port Kembla Growth Plan to plan for Port Kembla's future trade requirements and ensure its long term access (see Chapter Seven).*

Medium to longer term

- *We will seek to establish connections to the South West Growth Centre, The Southern Highlands and the South Coast – with upgrade works to Picton Road, the Princes Highway (A1) and the Illawarra Highway (A48) as required.*

The Transport Master Plan's focus on improved connection to Port Kembla presents a series of opportunities for Wilton Junction, e.g. in accommodating the specific needs of commodity industries.

2.13 Broader WSEA - Draft Structure Plan (2013)

The Broader Western Sydney Employment Area (WSEA) draft Structure Plan has been developed in response to the draft Metropolitan Strategy for Sydney to 2031 (draft Metropolitan Strategy) which sets a target of 625,000 new jobs across Sydney by 2031, 50% of which are intended to be located in Western Sydney.

The Broader WSEA is the single largest new employment space in the metropolitan area and one of nine 'city shapers' identified in the draft Metropolitan Strategy. The draft Strategy sets up a framework to investigate a potential south west expansion of WSEA of up to 10,000 hectares (approximately four times the size of the Wilton Junction study area). The framework seeks to, inter alia,:

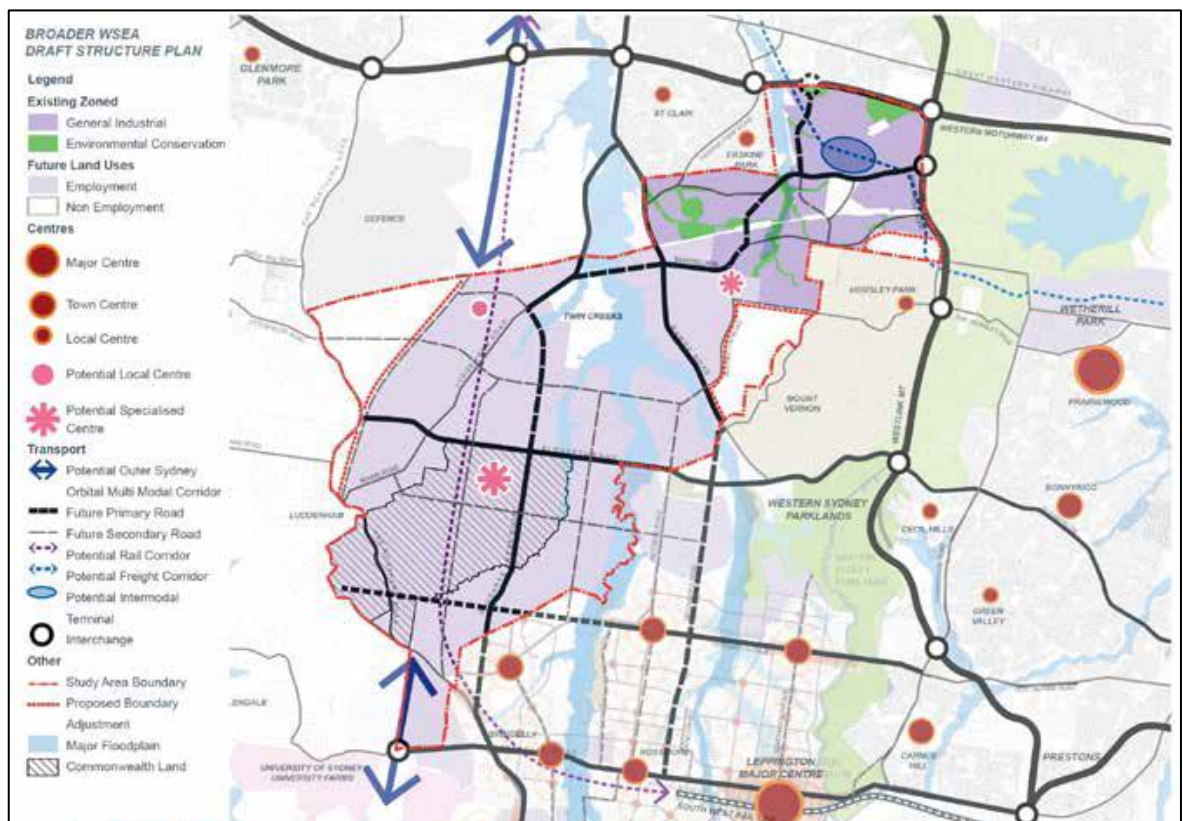
- Encourage critical industries that support the economy's global functioning and promote employment, such as industrial uses, freight, logistics and research and development functions as well as opportunities for agribusiness and food production.
- Identify opportunities to improve transport connections to the area, including protecting a corridor for the Western Sydney Freight Line and completing the Western Sydney Employment Area arterial network.
- Identify and protect opportunities for a major intermodal terminal at Eastern Creek.

The scale and size of the Broader WSEA is equivalent to the area from Parramatta to Liverpool. It is bounded broadly by the M4 Motorway to the north, the M7

Motorway to the east, Bringelly Road to the south and the Northern Road to the west. It is approximately 50 kilometres west of Sydney CBD.

The draft Structure Plan provides a strategic framework for the long term land use, transport and infrastructure planning that will be necessary to deliver the expanded WSEA.

Figure 5. Broader WSEA Draft Structure Plan



Source: DP&I (2013)

The draft Structure Plan proposes employment uses in the majority of the study area. 6,300 hectares of new employment land is identified, initially focused towards the freight and logistics sector, but with potential over time to expand to higher intensity employment sectors.

Whilst the entirety of the study area may not be required for employment purposes, the draft Structure Plan seeks to reserve the bulk of the land for future employment development as demand arises.

The Structure Plan identifies an initial potential for approximately 2,100 hectares for employment within Broader WSEA to 2046, with the potential to generate approximately 57,000 jobs.

Importantly, of relevance to the consideration of employment potential at Wilton Junction, the draft Structure Plan recognises the Outer Sydney Orbital (OSO) as a potential future corridor that can cater for a mix of transport modes including a motorway, a freight rail and passenger rail line.

The Structure Plan notionally identifies possible routes for the Orbital although further studies will be required to determine its final alignment.

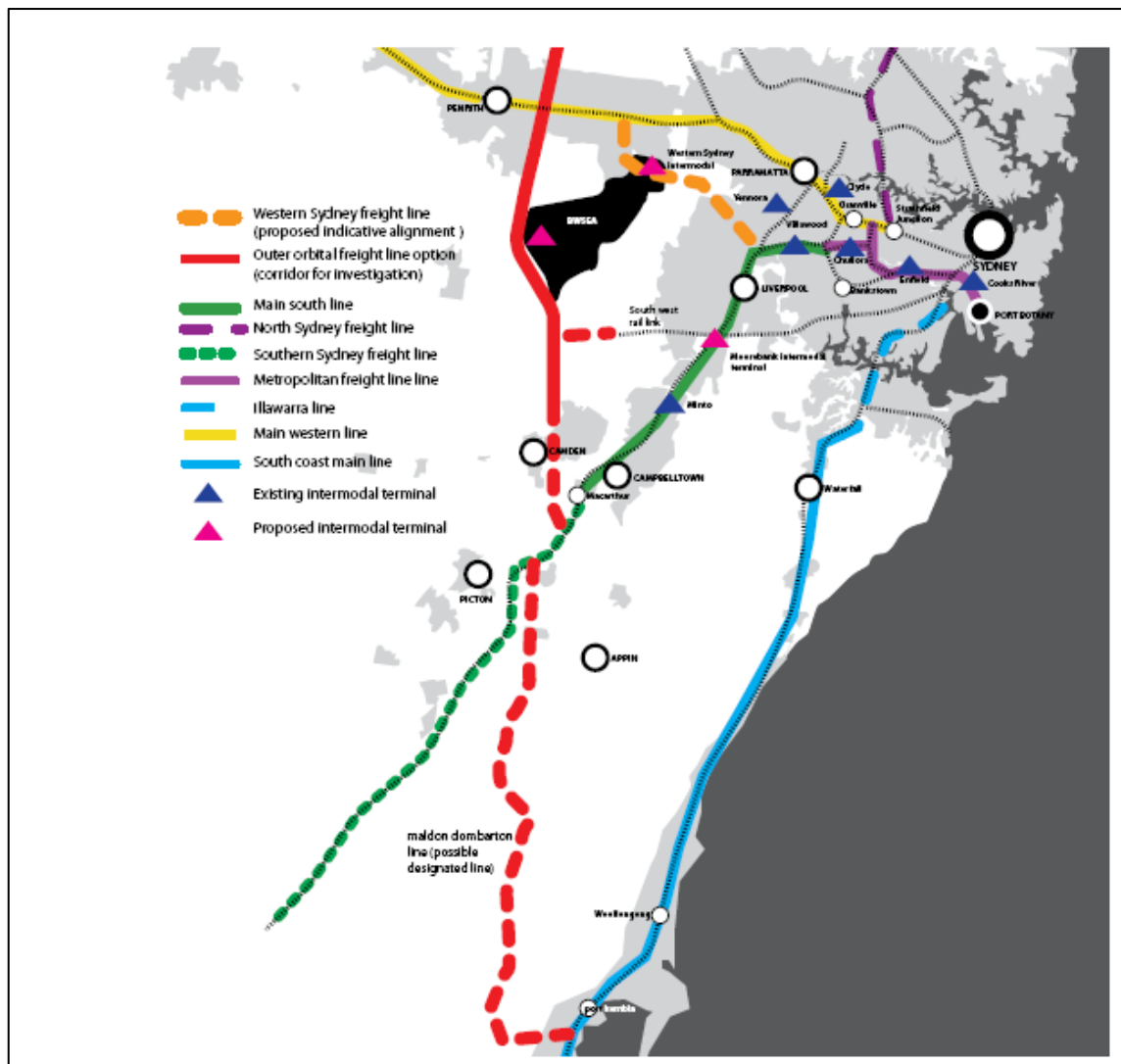
Also, two potential freight rail corridors and two intermodal terminals are identified within the Broader WSEA. One freight corridor may follow the alignment identified in the Draft NSW Freight and Ports Strategy, 2012 through Eastern Creek.

A second potential freight corridor may follow the potential OSO Corridor alignment. This option could conceivably link up with the proposed Maldon-Dombarton freight line. A second intermodal facility would be potentially located along the second freight corridor. Further investigations will be required into both freight corridors.

A schematic representation of these options is provided below.

In accordance with the draft Metropolitan Strategy for Sydney to 2031 the draft Structure Plan also investigates opportunities for the extension of the South West Rail Link and North West Rail Link. A potential passenger rail corridor could follow a north-south alignment through the study area. This corridor extends beyond the boundaries of the Broader WSEA and passes through the Commonwealth land at Badgerys Creek.

Figure 6. Broader WSEA Draft Structure Plan – Freight Rail Options



Source: DP&I (2013)

2.14 Other Economic and Employment Strategies

MacroPlan Dimasi has considered a range of local employment strategies from around the country, essentially to understand different approaches taken and to contextualise both the similarities with and differences between the localities examined and Wilton Junction and Wollondilly.

A range of studies and specific local strategies have been examined including:

- *Facilitating Regional Economic Development - Local Government Perceptions and What it Can Do*, Lennon and O'Neil, 2003

- *St Marys Development Employment Development Strategy*, SGS, 2003
- *Practical Handbook on Developing Local Employment Strategies in New Member States and Candidate Countries of the European Union*, European Commission, 2004
- *The Role of Local Government in Economic/Business Development*, Swinburne, 2006
- *Wollongong Local Government Area Economic Development Strategy*, Buchan, 2006
- *Logan City Economic Development Strategy 2008–2012*, Logan Council, 2008
- *Economic Development Strategy 2008-2012*, Redland City Council, 2008
- *Economic Development Strategy, 2008–2011*, Wangaratta Unlimited, 2009
- *Greater Bendigo Economic Development Strategy*, City of Greater Bendigo Council, 2009
- *Local Economic Development Strategic Planning and Practice Casebook*, Swinburn and Murphy, 2010
- *Economic Development and Employment Lands Strategy*, Eurobodalla Shire Council, 2011
- *Employment Strategy*, Sutherland Shire Council, 2013

Relevant take-outs from the review of these strategies include:

- A strong identified tie between business potential and (the need to improve) infrastructure capacity;
- A benefit in approaching business and employment development from a local, regional and broader perspective;
- The benefit of partnerships – at a local, regional and state agency level, particularly those involving private-public relationships; and
- The importance of brand and location awareness.

2.15 Key Literature Review Findings

The above literature review has assisted in shedding light on two important aspects that are relevant to the development of an appropriate and contemporary economic and employment strategy for Wilton Junction:

- Firstly, we are better informed with respect to previous thinking regarding the area's employment potential and what initiatives might assist to drive employment results. Common themes of past recommendations and approaches include:
 - The retention of escape expenditure;
 - Ensuring an ample and affordable supply of employment land;
 - Incentives and partnerships involving business incubators and other support programs, training/education relationships and community employment projects;
 - Marketing Wollondilly's locational and amenity advantages;
 - Establishing a civic and public sector service presence at Wilton;
 - Leveraging from the early delivery of NBN infrastructure;
 - Embracing the health and ageing sectors by pursuing active recruitment of businesses in these areas;
 - Supporting tourism, rural industry and recreational activities;
 - Establishment of specialist industry clusters and support facilities;
 - Pursuing the completion of the Outer Sydney Orbital (M9);
 - Developing the educational capacities of the precinct; and
 - Retaining younger age residents to mitigate a decline in Wollondilly's workforce arising from its ageing demographic.

Secondly, the degree of parallel thinking and correlated planning across State Government infrastructure and investment strategies is telling – transport, employment and port strategies all identify a doubling of the freight task over the next 20 years as a major driver for infrastructure investment and all are aware of future constraints on network capacity. Importantly, current planning strategies seek to coordinate the allocation of land resources and infrastructure investment, with a strong focus on western Sydney, involving both the development of a western Sydney freight line and intermodal terminal.

Importantly, from a Wilton Junction perspective, one of the potential freight corridors being investigated may follow the Outer Sydney Orbital corridor alignment and could conceivably link up with the proposed Maldon-Dombarton freight line.

Section 3: Local, Regional & Planning Context

The purpose of this section is to present the context of Wilton Junction in a local and regional sense and to review the various planning policy directions and frameworks which impact potential employment outcomes at Wilton Junction.

3.1 Wollondilly LGA

The Wollondilly LGA, within which Wilton Junction is located, is 80km from Sydney CBD and 30km from Wollongong City and the Southern Highlands.

The Estimated Resident Population (ERP) of Wollondilly (2011) is:

- **Wollondilly – 44,403 (41,221 at 2006)**

Wingecarribee, the LGA immediately south of Wollondilly, has a similar ERP of 44,396 persons (2011).

No individual town within the Wollondilly LGA holds a population greater than 5,000 people. The largest towns as at Census 2011 are:

- Picton - 4,595
- Tahmoor - 4,505
- Bargo - 4,130
- **Wilton – 1,890**

Picton has the largest share of employment offerings within the LGA. Wollondilly Council's chambers are situated in Picton.

Wilton Junction is expected to accommodate around 35,000 residents upon full development. This population will gradually build up, in sync with land and housing development, until 2041.

Allowing for background growth in Wollondilly's population it is anticipated that, including Wilton Junction, the LGA will have a population approaching 90,000 persons by 2046, i.e. beyond the end of the Wilton Junction project.

3.2 Planning Context

Under the current **Metropolitan Plan (2010)** Wollondilly is part of the South West subregion of Sydney which also includes the LGAs of Liverpool, Campbelltown and Camden.

The ERP (2011) breakdown of the South West subregion is as follows:

- Wollondilly – 44,403 (38,424 at 2006)
- Liverpool – 188,083 (170,915 at 2006)
- Campbelltown – 151,221 (147,440 at 2006)
- Camden – 58,376 (45,454 at 2006)

Wollondilly makes up 76% of the land area of South West subregion but accommodates only a small proportion of its population.

The Metropolitan Plan ascribes a target of 155,000 dwellings (83,000 dwellings in new estate areas) for the South West subregion by 2036.

It is noted that the South West Growth Centre (SWGC), located entirely in the LGAs of Liverpool, Campbelltown and Camden, is one of two major urban release areas in the broader Sydney region and is targeted to eventually accommodate around 110,000 dwellings and 300,000 people.

The Metropolitan Plan seeks to encourage employment across the broader Sydney region, with a specific aim to deliver 50% of new employment in Western Sydney. Primarily, through its process of employment land identification, the Plan seeks to ensure that sufficient capacity is or can be made available for a variety of employment uses.

For the South West subregion the Plan sets jobs growth targets for existing and planned centres (specifically at Liverpool, Campbelltown/ Macarthur and Leppington).

More generally, the Plan seeks to facilitate an additional 141,000 jobs in Sydney's south west by 2036, equating to a 106% rise in its current workforce.

Figure 7. South West Subregion, Metropolitan Plan 2010



Map 1.1: Wilton, Regional Context

Under the current ***draft Metropolitan Strategy for Sydney (2013)*** Wollondilly is again incorporated within the South West Subregion, although the subregion is now proposed to include the LGAs of Bankstown and Fairfield, as well as the previous four LGAs – Liverpool, Campbelltown, Camden and Wollondilly.

The draft strategy sets a housing target of an additional 60,000 dwellings and 64,000 jobs by 2021. The targets increase to an additional 141,000 dwellings and 134,000 jobs by 2031.

From an economic development and employment perspective, the strategy's primary objectives are to:

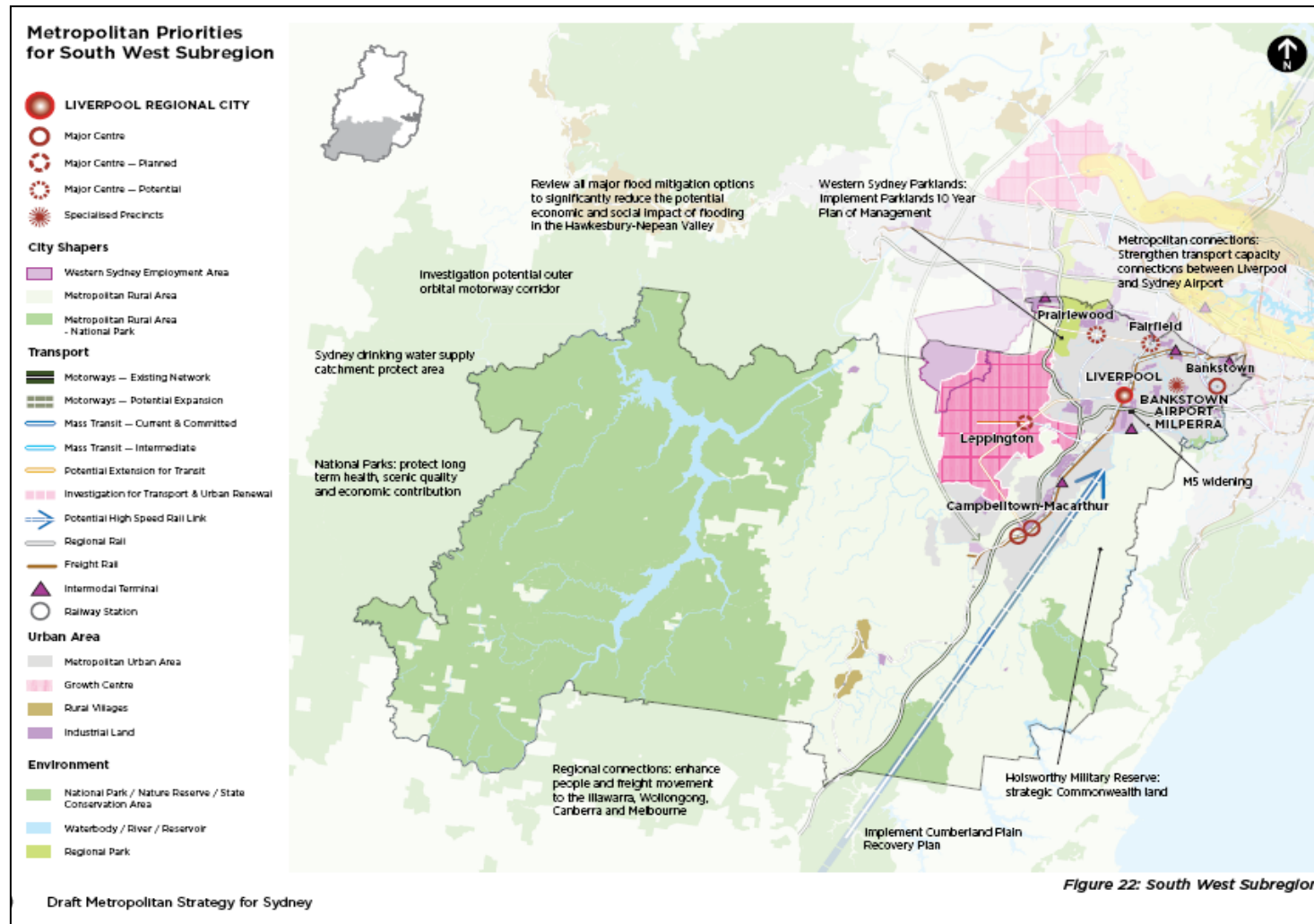
- strengthen the role of Liverpool as the Regional City and economic hub for the subregion through enhanced transport connections to other major centres;
- recognise and intensify the subregion's role in Sydney's manufacturing, construction and wholesale/logistics industries, particularly in Fairfield, Bankstown and Liverpool and, in the future, through Western Sydney Employment Area; and to
- protect metropolitan-significant infrastructure including freight corridors [and] intermodal terminals

The Wollondilly area itself is not mentioned in any strategic sense by the strategy apart from its identification as comprising a series of rural villages and a small industrial precinct (at Maldon).

Notably, the alignment of the proposed Outer Sydney Orbital (M9) road is depicted differently under the latest draft strategy. It was previously shown under the 2010 Strategy as linking with the Hume Highway in proximity to Wilton Junction whereas under the draft Strategy it is shown much closer to Camden/Campbelltown. The Broader WSEA Structure Plan depicts a number of potential alignments and suggests that the final alignment will be subject to further studies and review.

A map extract from the draft Metropolitan Strategy for Sydney (2013) is included overleaf. The extract illustrates the concentration of proposed activity and initiatives for the South West Subregion around Liverpool.

Figure 8. South West Subregion, Draft Metropolitan Strategy (2013)



3.3 Employment Lands Development Program (ELDP)

Designated employment lands are identified under the NSW Government's **Employment Lands Development Program** (updated in 2011).

For the South West Subregion (defined as comprising the four LGAs of Liverpool, Campbelltown, Camden and Wollondilly) the majority of existing and proposed employment lands are located within Liverpool, Campbelltown and Camden LGAs.

Just 9% of the South West subregion's total employment land is located in the Wollondilly LGA.

There are 205 ha of employment land designated to Wollondilly (not including any land included with the Wilton Junction study area). Of this total for Wollondilly, 93 ha of employment land is undeveloped, which represents 18% of the South West undeveloped total.

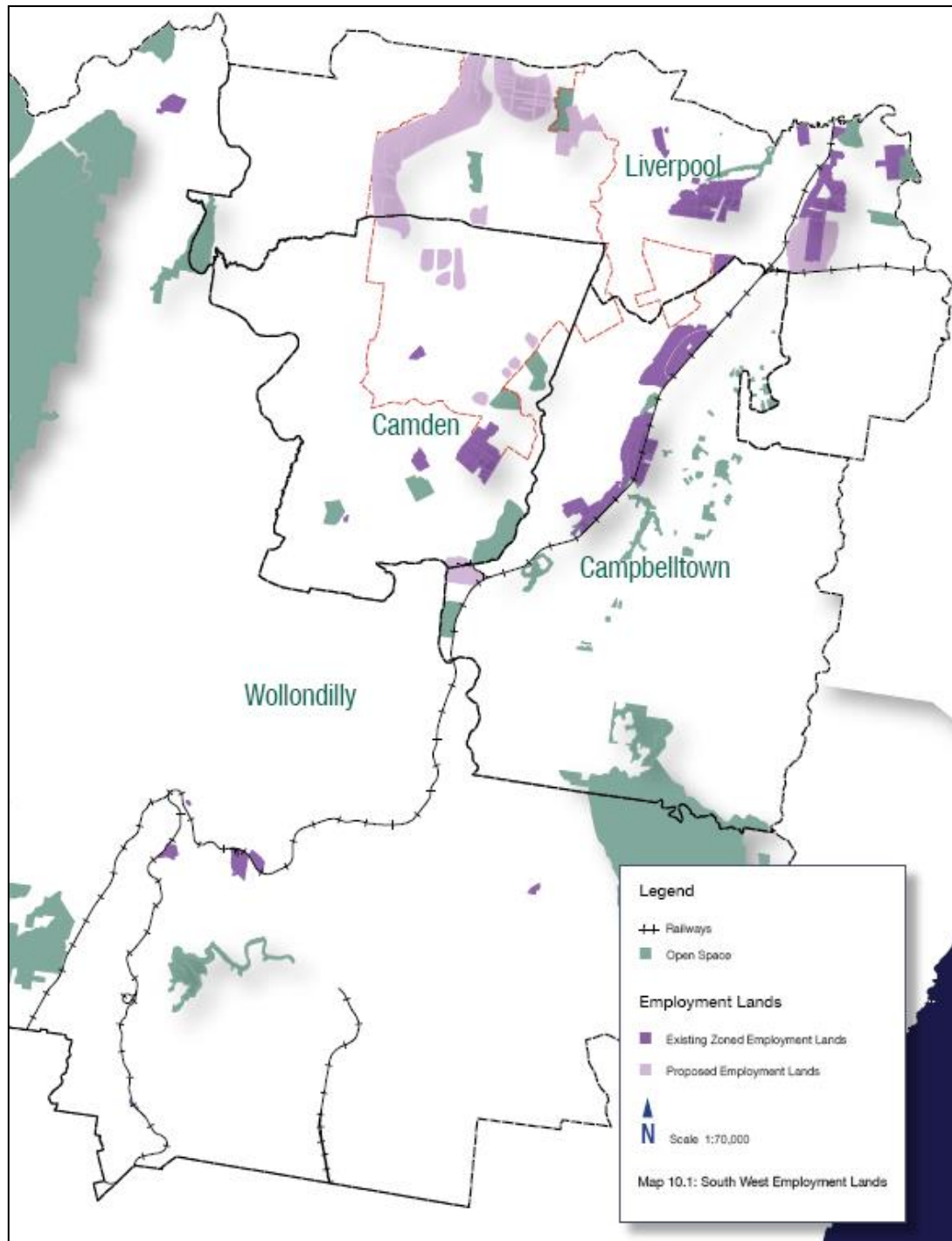
Maldon contains 50% of Wollondilly's employment land supply although is occupied by the large specialised industrial operators, Boral and Allied Mills.

Notably, the South West subregion has the largest amount of unzoned future employment land consisting of approximately 2,000 ha or 74% of Sydney's future employment land supply. The majority of provision exists within or is earmarked to be provided in the LGAs of Liverpool, Camden and Campbelltown.

Based on ELDP figures, take-up rates for the South West subregion indicate that there is approximately ten years supply of undeveloped zoned employment land.

The stated ELDP figures do not include land within the proposed Broader WSEA Structure Plan, discussed earlier in Section 2.

Figure 9. ELDP Existing and Proposed Employment Lands – South West Subregion



Source: ELDP report 10 2010 (Update 2011)

3.4 Other Employment Land Supply

MacroPlan Dimasi has previously considered the supply of other employment land across Wollondilly. Relevant findings are:

- Commercial land supply is relatively tight. It is located primarily in existing towns, adjacent to retail centres.
- The townships of Picton, Tahmoor, Thirlmere and Appin accommodate the bulk of retail and commercial offerings.
- Health service provision is fragmented throughout the LGA with the most significant offerings at Tahmoor (Wollondilly Health Centre) and Picton (Family Medical Centre).

3.5 Key Findings from Planning Overview

Arising from this overview of key current planning strategies and programs that potentially impact upon the future employment role of Wilton Junction in a metropolitan and regional context, it is clear that:

- There is a current planning focus on Liverpool as a regional city and the infrastructure that will support the movement of freight and passengers to and from south-west Sydney around this point.
- The South West Growth Centre is earmarked to contain the bulk of housing and new employment land servicing the district. Just 9% of the South West subregion's current supply of employment land is located in the Wollondilly LGA. Further supplies are expected out of the WSEA.
- The route corridor of the proposed Outer Sydney Orbital is yet to be determined but will impact positively on the connectedness of Wilton Junction to other employment and population centres.

Notwithstanding this northern focus within the south-west subregion, Wilton Junction will become the major centre of the Wollondilly LGA, comprising almost half of its total population by 2041.

The new township is situated 80km from the Sydney CBD and 30km from Wollongong City and the Southern Highlands and will be serviced, eventually, by the Outer Sydney Orbital, regardless of its final route location. The positional attributes of Wilton Junction as a centre capable of attracting both population-based and external industries (i.e. those that will manufacture or trade to markets beyond the local catchment) cannot be denied.

For this reason, the strategies developed in this report to promote employment outcomes at Wilton Junction reflect its potential as a stand-alone township, capable of supporting its own employment and service needs.

Section 4: Employment Trends & Forecasts

In this section we outline key trends that are likely to impact upon employment in external industry formation at Wollondilly and which therefore will influence the take-up of employment opportunity at Wilton Junction. We also summarise the findings from our separate 'Housing and Employment Needs' report (June, 2013) with respect to Wilton Junction's employment forecasts.

In terms of broad trends, we focus mainly on industrial development or development that would normally occur in external market industries. We do this for several reasons:

1. Manufacturing and construction represent major employing industries for the Wollondilly LGA at present.
2. Industries that are predominantly population driven evolve as population increases and thresholds are met.
3. Industrial and commercial development is primarily not population-based and typically seeks to trade externally. It therefore represents a type of employment that will be required at Wilton Junction to supplement other population and service-oriented businesses.
4. Industrial and commercial development builds on critical mass and business-to-business transactions and presents as a likely candidate for occupation at Wilton junction, particularly given its locational advantages and inter-regional connectedness.

4.1 Major Industrial Projects and Built Form Trends

Although we envisage Wilton Junction developing as a stand-alone township we reference development trends across the metropolitan Sydney to gauge the nature and volume of industry demand and its locational preferences.

We have identified **major industrial projects** across Sydney (greater than 6,000m²) that have commenced since 2008/09. The bulk of the largest identified projects comprised of distribution, logistics and warehouse type development (with accompanying office offer). These buildings were typically developed for one

occupier, with the majority of space utilised for warehousing functions (e.g. storage, loading docks, cool rooms, etc).

Data centres represented the next most popular land use type for new industrial premises (4 projects in total), followed closely by self-storage (2 projects).

Table 2. Major Industrial Projects, Commenced (2008/09 to 2011/12)

Project	Address	Suburb
Interchange Park Warehouse D1	11 Interchange Dr	Eastern Creek
Aldi Distribution Centre	41-43 Ash Rd	Prestons
Kmart warehouse and distribution centre	2 Wonderland Dr	Eastern Creek
Templar Rd Industrial Development	116 Erskine Park Rd	Erskine Park
Ingram Micro Distribution Centre	22 & 24 Wonderland Dr	Eastern Creek
Best & Less Logistics Centre	122 Old Wallgrove Rd	Eastern Creek
Westpark Industrial Estate	116 Erskine Park Rd	Erskine Park
Bagtrans Warehouse	Brabham Dr	Eastern Creek
Nexus Industry Park	15 Lyne Pde	Prestons
DHL Distribution Facility	147-297 Lenore Dr	Erskine Park
Greystanes Data Centre (Fujitsu)	Reconciliation Dr	Greystanes
Britton Street Warehouse	45 Britton St	Smithfield
Swire Cold Facility	59 Jedda Rd	Prestons
Erskine Business Park	1-21 Grady Cr	Erskine Park
Hewlett Packard Data Storage Facility	554 Capicure Dr	Eastern Creek
Bunnings Warehouse	1 Porrende St	Narellan
Woolworths Data Centre	22-24 Peter Brock Dr	Eastern Creek
Clay Place Industrial Development	10 Clay Pl	Eastern Creek
Southern Steel Logistics Centre	Nancy Ellis Leebold Drive	Bankstown
ABC Tissue Products Warehouse	412-424 Victoria St	Wetherill Park
Kennards Self Storage	15-17 Rowood Rd	Prospect
AHG Automotive Precinct	2A Victoria Av cnr Windsor Rd	Castle Hill
Power Street Industrial Development	170 Power St	Glendenning
Beach Street Industrial Development	2 Beach St	Eastern Creek
Hills Self Storage	50 Carrington Rd	Castle Hill
Newton Rd Industrial Development	59 Newton Rd	Wetherill Park
Quarry Rd Industrial Development	50 Quarry Rd	Erskine Park

Source: Cordell Connect, MacroPlan Dimasi

In all sub-regions, warehouses represent the most popular industrial built form option. In value terms, approximately 84% of all industrial approvals in the south west were accounted for by warehouses.

Although less in proportion, warehouses also accounted for the majority of industrial development in the north-west.

Table 3. Sydney Industrial Approvals by Type (2009/10)

Subregion	Industrial Built-form Approvals			Total
	Factories	Warehouse	Other	
South West	13%	84%	3%	100%
North West	28%	68%	4%	100%
West Central	17%	74%	10%	100%

Source: ABS, MacroPlan Dimasi

This record of industrial building activity ties with **observed sectoral trends**.

Clearly, the dominance of warehouse typologies reflects the import/export dominance of industrial demand. Also, a lesser share of factory development reconciles with the relocation of domestic manufacturing to offshore locations.

Rising rents in established industrial regions and greenfield residential development (and hence population growth) have motivated a geographic transition by industrial businesses to the outer metropolitan areas.

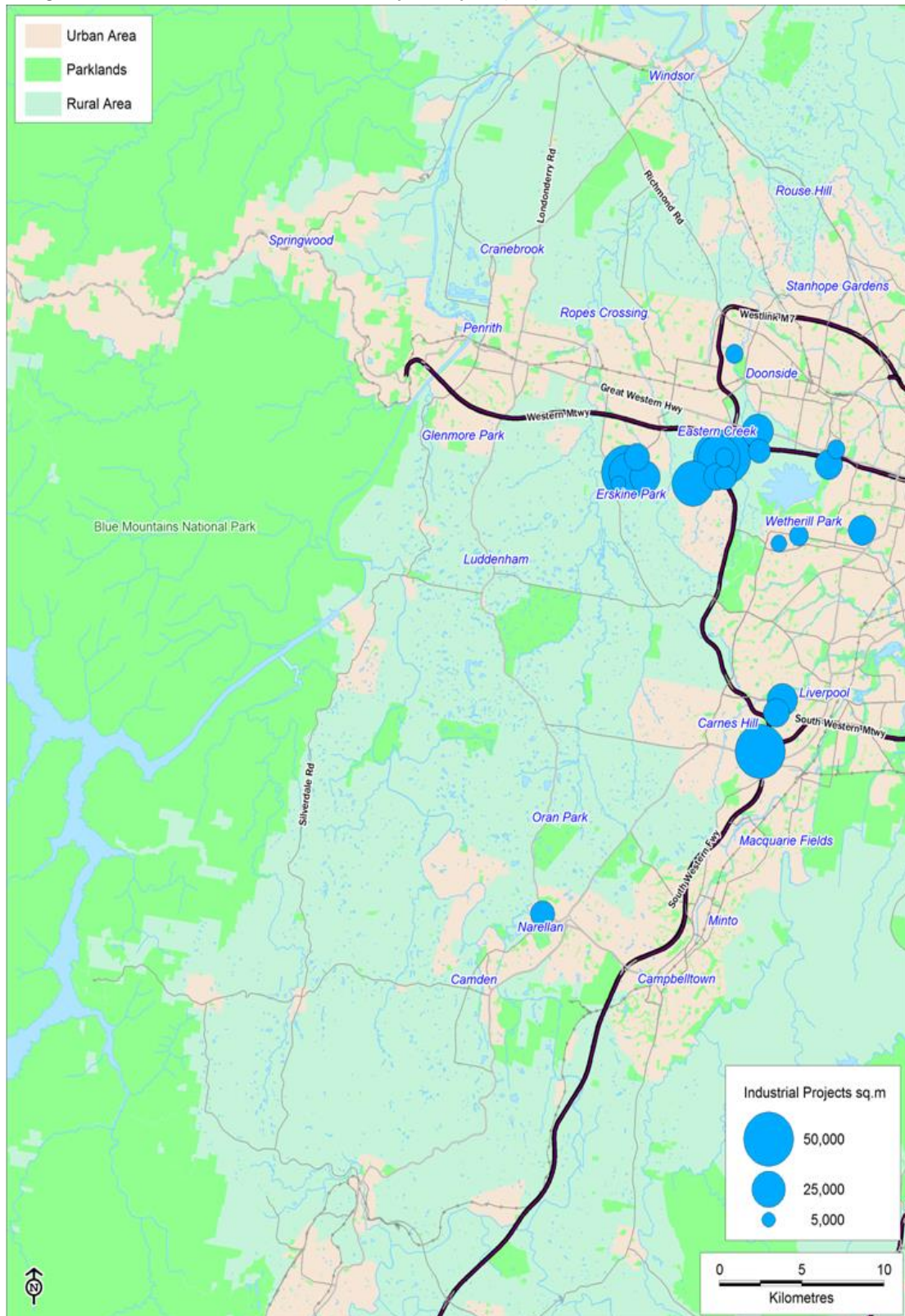
Sydney's need for well-located and accessible freight and logistics hubs has coincided with the State Government's infrastructure investment in Sydney's outer growth areas.

Significant investment in road and freight infrastructure has facilitated this movement. Industrial development has been most pronounced at the intersection of the M4 and M7. More recently, the development front at the M5 and M7 intersection has gathered momentum.

Across the broader region, development at the M4 & M7 intersection has been favoured. Direct connection to Sydney's orbital road system supports movements of containerised trade. Accordingly, businesses that operate in the logistics, warehouse and distribution industry have relocated to this area.

The **locational choice of new development activity** in western Sydney is reflected in industrial building approvals data.

Figure 10. Industrial Commencements by Floorspace (m2), 2008/09 to 2011/12



Source: Cordell Connect, ABS Custom Data, MacroPlan Dimasi

In total, approximately 711,300m² of new industrial space was commenced over the four years to 2011/12. Industrial building activity has been most pronounced in Eastern Creek, with approximately 329,000m² of industrial space commenced over the same period. Prestons (117,000m²) and Erskine Park (95,000m²) represent the next most popular destination.

A key factor for businesses opting for a less centralised location is **the trade-off between travel time and property values**. The table below clearly denotes this trade-off, identifying the comparative rents and land values of all regions.

This market evidence shows why new development is gravitating towards the outer west regions of Sydney. The yields on new projects (rentals relative to land cost) are substantially higher in the outer west. In these regions, rents and land values are most supportive of industrial development.

Given the abundance of zoned and proposed-to-be-zoned employment land within the South West Growth Centre, as well as that proposed within the WSEA, the 'value' competitiveness of outer Sydney is likely to persist for some time.

Table 4. Industrial Face Rents and Land Values by Region, 2012

Region	Grade	Avg. Net face rents (\$/m ²)		Average Land Value (\$/m ²)	
		Low	High	Low	High
North	Prime	160	185	400	900
	Secondary	110	150		
North West	Prime	110	115	240	350
	Secondary	90	105		
South	Prime	130	160	600	1200
	Secondary	100	120		
South West	Prime	95	110	150	350
	Secondary	70	80		
Inner West	Prime	115	135	300	500
	Secondary	95	115		
Central West	Prime	105	115	250	350
	Secondary	85	100		
Outer West	Prime	100	110	175	250
	Secondary	75	90		

Source: Colliers International (2013)

A growing attraction to investors for new industrial development along the Sydney Orbital Road System and in designated growth centres is a significant regional industrial development trend. Characteristics of this trend include:

- Over the three years to 2009/10, take-up of industrial space in Sydney averaged 163 hectares per annum, primarily concentrated in the north-west region, representing 111 hectares.
- Eastern Creek is the current epicentre for industrial development in western Sydney. Development at the M4/M7 intersection is favoured.
- These locations deliver benefits from access to transport, a relative price advantage, large consolidated lots and access to road infrastructure.
- Warehouses represent the most popular industrial built form option.

Key attributes of the outlook for industrial land demand include:

- There are approximately 3,175 hectares of undeveloped zoned employment land in Sydney's growth centres.
- At current take-up rates, both the north-west and south west regions have ample land supplies.
- Locations with access to the M7 will continue to be prioritised for industrial development.
- The impact of road and port investment is expected to stimulate industrial development in the south-west around the juncture of the M5/M7.
- Construction of the proposed Moorebank IMT in particular is expected to significantly improve the efficiency of freight distribution throughout Greater Sydney.
- In the short term, road freight will continue as the main mode for distribution and logistics of containerised goods. This will continue to support demand for warehouse space and distribution facilities at locations in proximity to the M4/M7 and M5/M7 Sydney Orbital intersections.
- From 2017, the Moorebank IMT will become the dominant driver for warehouse and logistics trade. Consequently, the centre of gravity for industrial development will move away from the M4, along the M7 and towards the south-west intersection of the M7 and M5.

In our view the south-west areas centred around Liverpool and the M5/M7 juncture will remain a popular industrial development front for some time. The earmarked expansion of the WSEA consolidates this outlook.

4.2 Major Commercial Development Trends

Commercial development (offices) tends to be attracted to specific centres that are close to a large labour force and well connected to either public transport or easily accessible by private transport and which provide a business-to-business capacity. It does not typically follow population growth, concentrating instead at fewer centres or business parks.

Slower workforce growth (through reduced net overseas migration and an ageing population) and changing industry composition (through a retraction in Financial Services and Public Administration employment) is expected to dampen overall demand for new office space.

Office development in Sydney over the past decades **has gravitated toward suburban areas** due to:

- Industry's desire to reduce overhead costs;
- The ability to, relatively cheaply, provide on-site car parking facilities;
- Superior access to road infrastructure for both staff and goods; and
- The desire for companies to consolidate their workforce (into a single floor or building).
- Current and emerging capacity constraints in established centres, which are likely to provide a further affordability incentive for suburban locations.

Notably, business parks have tended to accommodate a high proportion of smaller businesses seeking affordable strata office property with higher car park to floorspace ratios. At Norwest, for instance, almost half of the available office space is strata office space.

New outer Sydney business parks have commenced or are planned to commence at Marsden Park, Greystanes, Gregory Hills and Moorebank.

The Barangaroo precinct will deliver a set of substantial additions to Sydney's office stock and is likely to place downward pressure on face rents for non-premium office space in the CBD. An expansion of centre-based commercial opportunity is also planned at Parramatta, Penrith and other established centres throughout Sydney's west.

This could reduce the comparative affordability advantage of suburban business parks, which would slow the rate of movement by businesses from the CBDs into these suburban areas.

4.3 Specific Regional Employment Trends

Other 'closer to home' observations and trends that influence recent employment conditions at Wollondilly include:

- The high share of workers engaged in the manufacturing and construction industries is consistent with our observations for other south-west Sydney LGAs. A high representation of mining workers is expected given the nearby coal mining operations of Illawarra Coal.
- As at Census 2011, Wollondilly's most prominent industries of employment are 'Mining' and 'Manufacturing', accounting for 14% of working residents each, 'Construction' (11%), 'Education & Training' (8%), 'Retail Trade' (8%) and 'Health Care & Social Assistance' (6%).
- Not including construction, **recent business growth in the Wollondilly LGA, however, has been dominated by service and professional related industries.** This contrasts with south west Sydney, where growth has been concentrated amongst traditional industrial business types.
- Wollondilly has **21,295 employed residents. It has 9,334 local jobs, 5,728 of which are held by local residents**, representing a 62% employment self-sufficiency rating.
- **Approximately 72% of Wollondilly's employed residents work outside the LGA**, representing a job containment measure of just 28%. Campbelltown and Liverpool are major employment destinations.
- The largest sectors of labour 'export' relate to 'Financial & Insurance Services' (85%), 'Public Administration & Safety' (85%) and 'Information, Media & Telecommunications' (83%).
- The export of white collar labour exceeds that for blue collar occupations.
- An **export of Wollondilly's labour resources is partly a natural consequence of scale economies.** Larger populations will tend to be favoured by businesses. Over time, the growth in Wollondilly's population will make more and more businesses viable within the local area.
- The advent of **a 35,000 township at Wilton Junction, representing almost a doubling of the LGA's population, will alter the employment characteristics of the LGA.**

4.4 Employment Forecasts

From our separate employment needs report, the projected employment outcome for Wilton Junction is summarised as follows:

Table 5. Population and Jobs In Wilton Junction (2041)

	Count
Total Residents	34,955
Employed Residents	12,000-13,200
Jobs in Wilton Junction	10,440-11,770
Employed residents working in WJ	8,400-9,240
- Work from home & not fixed	1,566-1,766
- Work in designated EL	6,834-7,474

Source: MacroPlan Dimasi (2013)

We project that almost 60% of the expected employment will be in the form of service-based industries that cater to the needs of Wilton Junction's population growth.

Other 'external' industries are also expected to be attracted to the area for its specific trade and locational benefits, allowing these businesses to trade beyond the LGA. Such attraction will build over time as the population and labour force base of Wilton Junction develops.

We recognise a likely three-phase growth in employment, involving:

1. **Population (predominantly) Induced Employment** - comprising early retail and community-based development to service population growth;
2. **Household Service and Transport-related Industry** – involving those industries which service households or which can benefit from improved transport (road) infrastructure and the possibility of passing trade; and
3. **Operators that Benefit from Business-to-Business Trade** - industries that service other businesses (business-to-business) are likely to evolve following the second phase of development.

Based on this sequencing of employment opportunity the following employment projections are provided.

Table 6. Persons Employed & Resident Population, Wilton Junction (2016-41)

	2021		2026		2031		2036		2041+	
	Lower	Upper	Lower	Upper	Lower	Upper	Lower	Upper	Lower	Upper
Employment	1,805	2,060	4,065	4,601	6,304	7,131	8,577	9,690	10,440	11,770
Non-WJ residents working in WJ	353	443	794	989	1,232	1,533	1,676	2,083	2,040	2,530
Self contained jobs	1,452	1,617	3,270	3,612	5,072	5,598	6,901	7,607	8,400	9,240
Work from home & not fixed location	271	309	610	690	946	1,070	1,286	1,453	1,566	1,766
Employed residents in WJ employment lands	1,181	1,308	2,661	2,922	4,126	4,529	5,614	6,153	6,834	7,475
Predominantly Population Driven										
Retail Trade	345	360	920	960	1,380	1,440	1,840	1,920	2,300	2,400
Education and Training	113	120	375	400	525	560	675	720	750	800
Health Care and Social Assistance	240	280	480	560	720	840	960	1,120	1,200	1,400
Electricity, Gas, Water and Waste Services	25	50	50	100	75	150	100	200	100	200
Public Administration and Safety	180	204	360	408	480	544	600	680	600	680
Arts and Recreation Services	42	60	84	120	112	160	126	180	140	200
Other Services	120	156	240	312	360	468	480	624	600	780
Financial and Insurance Services	24	30	48	60	96	120	128	160	160	200
Rental, Hiring and Real Estate Services	13	20	23	36	33	52	43	68	50	80
External & Other										
Manufacturing	70	79	140	158	315	356	525	593	700	790
Construction	64	68	160	170	288	306	480	510	640	680
Wholesale Trade	150	158	300	316	450	474	600	632	750	790
Accommodation and Food Services	75	84	150	168	275	308	400	448	500	560
Transport, Postal and Warehousing	105	119	245	277	420	474	595	672	700	790
Information Media and Telecommunications	10	18	20	36	30	54	40	72	50	90
Administrative and Support Services	125	138	225	248	325	358	425	468	500	550
Professional, Scientific and Technical Services	105	117	245	273	420	468	560	624	700	780
Total	1,805	2,060	4,065	4,601	6,304	7,131	8,577	9,690	10,440	11,770

Source: MacroPlan Dimasi (2013)

Given the development of an intermodal facility at Moorebank (Liverpool LGA), the proximate abundance of existing and planned employment land and the lack of clarity pertaining to future rail and road infrastructure that is expected to impact directly on the Wollondilly LGA (e.g. the Maldon-Dombarton line, planned upgrades to Picton Road and the final alignment and commencement of the M9 outer-Sydney road orbital), our employment forecasts for Wilton Junction are not tied specifically to its development as a strategic freight and logistics centre.

This does not mean that Wilton Junction does not have capacity in a logistics sense, but that a reliance on it becoming a strategic freight centre for the purpose of employment projections might not be prudent.

Necessarily, of course, Wilton Junction's potential freight responsibilities, either in direct freight handling or related to the specific needs of trade industries, ought still be investigated.

Presently, our employment forecasts are derived in a manner that reflects the unique locational attributes of Wilton Junction as a stand-alone township, separate from south west Sydney and able to support its own employment and service needs and to attract industry that seeks to trade beyond its local borders.

Section 5: Employment Strategy

The creation and generation of employment opportunities at Wilton Junction is a principle keystone in support of the subject land's release for urban development.

Local employment opportunity is an important foundation for ensuring the delivery of a vibrant and employment generating township.

Achieving sustainable employment outcomes requires:

1. An ongoing working commitment to the identification and encouragement of employment initiators;
2. The promotion of Wilton Junction in a local and regional sense; and
3. The formation of productive partnerships between relevant levels of government and private enterprise.

This section of the report seeks to:

- Align an employment strategy for the new township of Wilton Junction with the long term economic objectives of the Wollondilly LGA.
- Present the key building blocks for enhancing employment opportunity in the township.
- Identify partnership prospects that will assist in the development of the skills and educational base of the town's residents and in the fulfilment of their career aspirations.
- Outline specific initiatives and actions needed to address current and future employment requirements for the area.

5.1 Employment Challenges & Strategy Responses

Understanding the current and likely future challenges in generating real employment opportunity and growth at Wilton Junction enables the identification of relevant policy responses.

Our key findings and observations in this regard are outlined as follows:

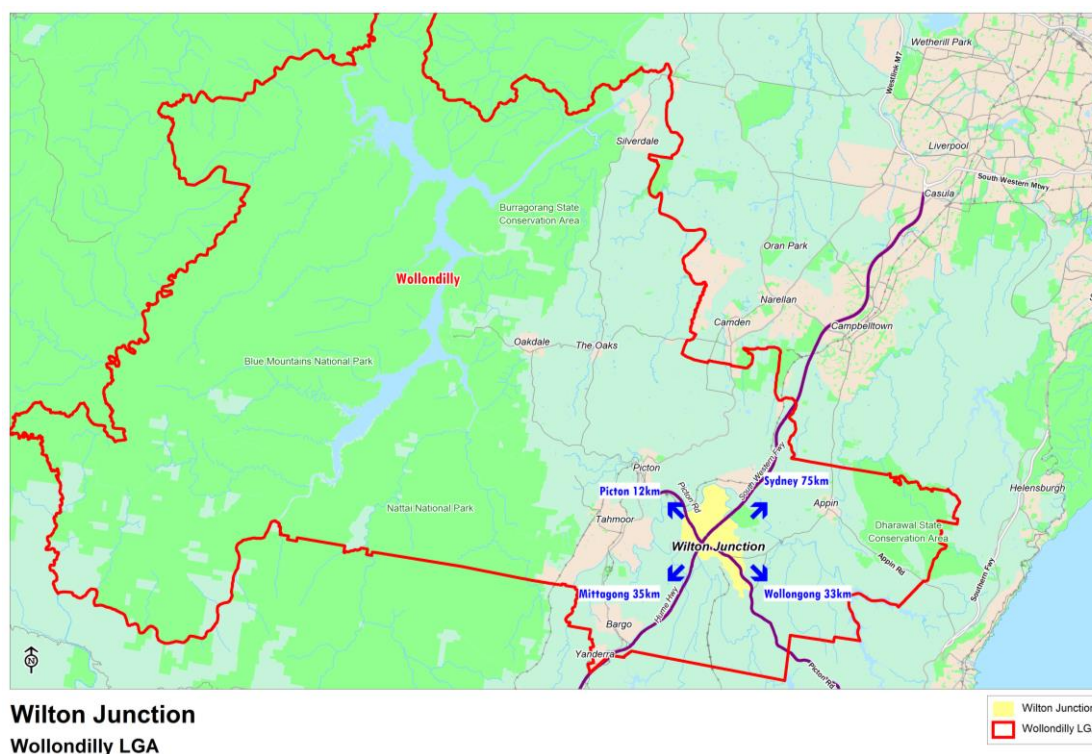
1. A Competitive Industry Environment

- The majority of employment activity in the south-west sub-region is concentrated around existing centres and industrial estates at the M5/M7 juncture or earmarked to occur within the nearby South West Growth Centre and/or the expanded Western Sydney Employment Area.
- This concentration is supported in a policy sense and by a significant investment in road and freight infrastructure. It will be further augmented by the completion of the Moorebank IMT which will become a dominant driver for warehouse and logistics trade and reinforce the employment centre of gravity around the M5/M7 juncture.
- We know also from our observations of development trends that commercial/office investment tends to gravitate to particular locations. Suburban business parks have emerged to challenge the dominance of town centres. Several new business parks are planned or underway.
- The presence of these business parks and a major employment hub at the M7/M5 juncture presents a direct competitive challenge to Wilton Junction.

Strategic Response: *Wilton Junction's location in proximity to a major employment and infrastructure hub at the northern extremity of the south-west subregion does not mean that a responsible and achievable employment presence cannot be established at Wollondilly. To the contrary, a new township at the juncture of major road infrastructure that provides access to established and growing markets presents as a distinct locational advantage. Identifying and trading to Wilton's natural advantages, including its direct connectedness to Sydney, Wollongong and to markets further south, will be required to compete with these offerings.*

Building upon this regional connectedness therefore becomes an important strategic action that is required to alert industry attention to the potential at Wilton Junction. Such an approach should consider the success of other peri-urban towns such as Gisborne, Victoria; and similarly positioned employment hubs located outside of their major cities such as Somersby at Gosford, NSW and Yatala, outside Brisbane.

Figure 11. Wilton Junction's Regional Connectedness



The promotion of Wilton Junction as a centre for business success should:

- Focus on **Wilton Junction's gateway credentials** – central to Sydney, Wollongong and the Southern Highlands.
- Include **postcode and locational specific strategies** – similar to the 'Postcode 3000' campaign that successfully grew Melbourne's inner city population, a '**www.southerngateway**' awareness campaign that highlights the new township's attributes or those of the region, focusing on Wollondilly, Wingecarribee and Wollongong (www). As at 2011 the combined regions had a 75,000-strong workforce and a Gross Regional Product of \$15.65b.
- Include a '**best of both worlds**' awareness campaign, highlighting the significant aesthetic values of the area, providing a healthy business environment at the doorstep of two major cities (Sydney and Wollongong).
- Involve the preparation of a **Business Prospectus**, containing information about the locational attributes of the site, land prices and estate amenity, market catchments, workforce skills and the range of supporting initiatives available to new businesses.

Planning & Government Policy: Postcode 3000 Program

Operating between 1992 and 1995, the Postcode 3000 Program was designed to facilitate and support residential development in and around Melbourne's central city or 'Central Activities Centre'. The core goal of the initiative was to revitalize Melbourne's centre.

The specific objectives of the Postcode 3000 program included:

1. Save the development industry time and money
2. Help residential projects succeed in the market place
3. Substantially shorten the development approval process
4. Promote the city as a place to live
5. Provide specialist advice on building conversions and new residential or mixed use development.

The objectives of the program were achieved through four main initiatives or incentives, namely:

1. Financial incentives
2. Technical support
3. Street level support
4. Promotion

FINANCIAL INCENTIVES 1. Fee Relief 2. Re-assessment of City of Melbourne rates , for the construction period of residential development in the CAD 3. Automatic Incentives to designated Postcode 3000 projects	TECHNICAL SUPPORT 1. Building & Planning Service Centre 2. Streamlined approvals 3. 'Building Recycling Guidelines for Residential and Mixed Uses' 4. Use of City of Melbourne Housing Preference Register 5. Production of housing preferences summary reports
STREET LEVEL SUPPORT 1. Limited capital works at street level 2. Off-street, residential rate parking scheme for selected buildings and operators	CITY OF LIVING PROMOTIONS 1. Public relations and media program to support program initiatives and city living 2. Project newsletters to registrants on the Housing Preference Register 3. Information packs and advice for key groups including financial institutions, investment groups, property owners, developers and prospective residents. 4. Demonstration projects by private sector and the City of Melbourne

Figure 12. Wilton Junction – ‘www.southerngateway.com’ Opportunities



Wilton Junction - LGAs

LGA Boundary

Business Prospectus: Geelong Ring Road Employment Precinct

The City of Greater Geelong Council in conjunction with land owners, issued a business prospectus on the Geelong Ring Road Employment Precinct (GREP). This document promotes the region's 'strategic' location, highlighting that it as an ideal place for industrial businesses to operate in. Essentially, the business prospectus is a marketing document, which presents the advantages and opportunities associated with operating from Geelong.

Described as a 'unique combination of value, services and location', the prospectus nominates the following key advantageous features and attributes associated with GREP:

1. Proximity to Melbourne and access to national markets
2. Access to all forms of transport modes (rail, road, sea and air)
3. Competitively price land
4. Designed to meet business needs
5. Provision of infrastructure and services to facilitate development
6. Access to a skilled and large pool of employment resources
7. Quality of lifestyle

A website (www.grep.com.au) is being hosted to supplement the business prospectus. Its purpose is to also raise awareness and market land in the GREP. However, given the dynamic nature of land development and that the business prospectus is static in form, the website is also used as a medium to inform potential investors of recent updates and developments.



2. Facilitating Industry Growth

- Employment at Wilton Junction is expected to derive from a combination of population-based industry; that which trades beyond the local catchment and is not population-driven; and other sources (e.g. work from home occupations). Understanding the specific needs of these industries is critical to enabling their employment potential.
- Most population-based employment is expected to occur in sync with actual population growth at the new township - provided sufficient zoned and serviced land is available to accommodate market need.
- External industry is that which trades beyond its local population base. At Wilton Junction it is anticipated that up to 4-5,000 external-market jobs will be required to meet the employment needs of a 35,000-strong town.
- Our employment projections also estimate that there will be opportunity for almost 2,000 workers to operate either from home or from no fixed employment address.

Strategic Response: *Responding to the sequential needs of specific employment sectors requires a coordinated effort on behalf of planning authorities and in terms of the staging of development allowed for under the master plan. Recommended actions include:*

- **The early consideration and delivery of employment land.** *As new housing is delivered it is important to plan for the creation of new employment opportunity to ensure that its service needs are accommodated. A logical sequencing of development therefore is to provide for development around the proposed town centre and near to the juncture of Picton Road and the Hume Highway, where most employment activity is expected to occur.*
- **Allow for the capture of retail markets and other early employment opportunities** - *through the provision of high order, convenience and bulky goods and related offerings. The master plan for Wilton Junction incorporates provision for a range of retail offerings, based on projections of need generated by the new population. The timely delivery of retail land is necessary to address the shopping needs of the new township residents. This would be expected to occur in sync with the release of residential land.*

- The **sequential delivery of supportive retail (bulky goods etc) and other employment land** that services the needs of a growing population (e.g. school sites and health services) is also required. School catchments are important feeders of local economic activity. Consideration could be given to the temporary early location of school activities in a town centre environment, enabling other services to initially congregate at a central location.
- Securing the **potential level of 'work-from-home' job participation** is in part dependent upon the continued roll-out and assumed availability of the **National Broadband Network (NBN)** service and upon the concomitant development of digital enterprise awareness amongst the Wilton Junction township, e.g. via a specific digital enterprise capacity program. It is understood that Wilton Junction will be developed as a 'connected community' and that internet enterprise awareness and training will be offered at the new township. The early delivery of such capacity would assist in establishing these fundamentals and could also assist in the initial activation of a town centre focus. The delivery of NBN services to early residential land releases is also important.

3. Sector-specific Approaches & Target Industries

- The identification and targeting of particular industry types will be required to harness employment opportunity. Even for population-based employment, which is expected to occur over time in response to the resident population's needs, it is necessary to facilitate particular outcomes, particularly if the early activation of this potential is sought.
- Specific focus will also be required to seek, attract and secure new 'external industries' that choose to locate at Wilton Junction and to trade beyond its immediate population catchment.

Strategic Response: Specific development types present as viable candidates to locate at Wilton Junction/Wollondilly. Recommended sector-specific partnership and employment strategies are presented for the following industries:

- **Health enterprises** – required to service Wollondilly’s ageing population, current facility and service shortages and new township resident needs.
- Healthcare has been a key sector for jobs growth across the state over the past decade, and growth is projected to accelerate over the next decade. Healthcare is expected to account for 25% of all jobs created over the next five years. Healthcare services have a closer alignment with population distribution, as demand for such services is correlated with population. Additional demand for health services is expected to be drawn from the ageing dynamic of the broader Wollondilly population.
- Proximity to Campbelltown, Camden and Wollongong hospitals and private hospitals in Bowral, Campbelltown and Wollongong is expected to underpin demand for office/industrial space from health service operators. Key candidates for such demand include health equipment and prosthetics providers, as well as allied health and specialist healthcare providers (dietitians, orthotists, prosthetists, audiologists and clinical psychologists).
- The healthcare sector includes service providers who undertake community and residential care, where services tend to be provided at client homes. For these services, employees are mobile, which would make Wilton Junction an attractive location as an access point to south-western Sydney and the Illawarra and Southern Highlands districts. A candidate business, for example, is Southern Cross Care which provides short and long term care at all levels from domestic assistance to highly skilled clinical care across NSW and the ACT, but is presently not represented in the district.
- There are also forms of health care businesses that might require warehouse space in an industrial offering where they would:
 - Service the supply & logistics required for consumer goods; and
 - Undertake sales and maintenance of health care equipment.
- There are comparatively few businesses from the health care sector operating in Wollondilly or the Southern Highlands, although there are equipment providers in Ingleburn (Aidacare, AdMed), Campbelltown (Ride Scooters), Minto (Air’N’Lite) and Camden (Hearing Aid Clinic). The logistics of health care products tend to be managed in a similar way to supermarket products. They can be kept in large scale warehouses, with relatively low handling, and are preferably located close to or within easy access to markets.

- *Developing the health care sector at Wollondilly will require the formation of **business partnerships** with the South Western Sydney Local Health District, the region's private hospitals and care providers, as well as specific aged care and home care providers and health equipment manufacturers and distributors. The Wollondilly Strategic Health Forum initiated by Wollondilly Shire Council is a good start but may need to be expanded to realise the broader employment potential of this sector.*

Health Case Study: Oran Park Medical Precinct

In 2011, Landcom and the University of Western Sydney (UWS) signed a Memorandum of Understanding to jointly deliver a medical precinct as part of the Oran Park Town Centre release.

The precinct, to be delivered by 2025 would service the future residents of Oran Park, as well as residents from nearby estates. The medical precinct will also facilitate movement of older residents to Oran Park and adjoining estates. In addition, the health precinct is expected to deliver employment opportunities for local residents.



Home & Community Care Case Study: Mercy Care

Mercy Health is a Catholic community benefit organisation founded by the Sisters of Mercy to deliver health care, aged care community services. Health services offered include acute and subacute hospital care, aged care, mental health programs, specialist women's healthcare, early parenting support, palliative care, home and community care and health worker training and development.

Mercy Community and Health Care provides a variety of care and nursing services to assist people to live a safe and independent life in their home and community. More specifically, Mercy Health offer:

- Home nursing
- Home care
- Personal care
- Shopping and transport
- Socialising and companionship
- Overnight care
- Respite care
- 24 hour live in care

At present, home and community care is offered throughout three states and territories; Melbourne (Parkville and McKinnon), regional Victoria (Barwon), Sydney (Kogarah), regional NSW (Albury and Young) and the Australian Capital Territory (Belconnen). Mobile health services are provided through a network of nodal centres, with each centre attending to a patient catchment.



- **Educational partnerships** – including private schools, TAFEs and potentially involving industry training partnerships and/or enterprise partnerships with nearby facilities at UWS Campbelltown and the University of Wollongong.
- It is not expected that Wilton Junction would compete in the provision of higher order education given the proximity of tertiary facilities at Campbelltown and Wollongong, but a targeted educational offer focused on the development of trade skills and applied research should be considered.
- An educational presence, similar to Wollongong’s Innovation Campus, but related specifically to local industry needs would engender strong business relations and help to create a unique sense of business place for existing and start-up enterprises.
- A specific objective of the NSW Transport Master Plan, for example, is to maintain the state’s freight workforce through initiatives that attract and retain skilled workers in the industry.
- Key target sectors for Wilton Junction would include primary industries (e.g. grain is already a major user of the nearby Port Kembla facilities), new trade industries (those expected to make greater use of Port Kembla’s facilities) and freight and logistics management and regulation (offering training for the implementation of the NSW Transport Strategy).
- Transport for NSW has established the Bureau of Freight Statistics to streamline freight data collection and strategic analysis and provide a single, reliable source of data for analysing the freight network – there is opportunity to work with freight industries to ensure their needs are understood and accommodated and that the necessary industry skills are developed. Further applied research in freight management will also be required to support emission reduction measures (e.g. in adopting alternative fuels and vehicle technologies and in reducing road and rail freight noise).
- **Educational training and business partnerships** will need to be created with benefitting and supporting industries, relevant tertiary institutions and state agencies responsible for the delivery of respective strategies (e.g. NSW Transport).

Educational Case Study

The inaugural '**Green Light Day**' was held in August 2011 and aimed to support and promote careers in the transport and logistics industry. The day saw over 230 students from 23 schools participating in four events across Sydney. The launch event at the MLC Centre in Martin Place saw attendance by enthusiastic students, teachers, government and industry representatives from 25 state, national and international organisations coming together to celebrate the importance of the transport and logistics industry.

Concurrent with these events, open days were held at Axima Logistics in Smithfield, RAAF Base at Richmond and Qantas Centre of Service Excellence at Alexandria with the support of local MPs, TAFE and the Australian Trucking Association. The events exposed students to potential careers in transport and logistics and provided them with an opportunity to gain valuable insight from industry members.

The second Green Light Day took place in August 2012 and consisted of events and open days featuring selected secondary students from metropolitan Sydney in 'meet and greet' and mentoring sessions with industry leaders. Through these interactive and informative sessions, students learnt about the diverse opportunities that a career in the transport and logistics industry can provide.



- **Construction employment** – the construction sector is a primary source of industrial tenancies across south-west Sydney.
- Construction activity generates demand from machinery & equipment companies who supply the construction sector through plant for buildings and engineering services. Consequently, the level of construction activity has a widespread impact on demand for industrial space.
- We have separately estimated construction related employment that will derive from the development of a 35,000-strong new township.
- In addition to the direct and indirect employment effects of development, a solid construction outlook spanning two and a half decades is likely to generate interest from construction supply companies to locate at Wilton Junction, eager also to take advantage of its proximity to broader development fronts at the South West Growth Centre and in Wollongong.
- A candidate business could be MetroMix Quarries, with its head office at Parramatta and a transport servicing unit and plant at Wetherill Park (and at other locations including Alexandria, Katoomba, Cromer, Seven Hills and Silverwater). This supplier of concrete and quarry products is not presently represented at Wollondilly, the Southern Highlands or the Illawarra.
- Another candidate construction industry supplier could be WesTrac – an equipment management company that services the construction, mining and transport industries across WA, NSW, the ACT and north-east China.
- WestTrac Cat has its head office at Holroyd. This company is an authorised Caterpillar dealer and also provides parts and maintenance services. WestTrac Cat has majority ownership of National Hire. As part of Seven Group Holdings Ltd, WesTrac also has strong alliances with other leading Australian businesses, including the Seven Network, Coates Hire and SITECH.
- There is a WesTrac branch at Penrith and Wollongong but not in south-western Sydney or the Southern Highlands.
- With over 4,000 staff nationally WesTrac is also committed to the long term training of its nearly 500 apprentices who are enrolled in its accredited training institutes in both NSW and WA.
- This type of vertically integrated company which provides for the training of its own staff and incorporates construction equipment supplies with domestic supplies (Coates Hire) and construction technology systems

(SITECH) is a type of external industry that could be attracted to Wollondilly given its regional connectedness.

- The identification of appropriate construction companies that might benefit from a southern Sydney regional location will require a specific and intensive dialogue with potential candidate businesses.
- This task could be undertaken by Wollondilly Council but may also require active participation from relevant state agencies (e.g. NSW Trade and Investment).

Construction Equipment Case Study: WesTrac Institute

The **WesTrac Institute** is a comprehensive training centre for those looking to enter the heavy equipment industry. As one of the largest employers of apprentices in Australia, WesTrac developed the WesTrac Institute as part of its initiative to establish a National Skills Training Centre of Excellence, with facilities in both the east and west of Australia.

The WesTrac Institute services the construction, transport and mining industries providing flexible, timely and efficient training packages. The New South Wales WesTrac Institute at Newcastle, New South Wales, has the capacity to train up to 350 apprentices at any one time. The facility is made up of 14 general classrooms, two computer labs, a large 9-bay workshop and a smaller 5-bay workshop. The NSW Institute will also facilitate training of up to 4,000 students in post-trade courses annually.

The WesTrac Institute **is a registered Training Organisation** and is the preferred provider for all of WesTrac's training needs including pre-trade and post-trade training (Automotive Heavy vehicle mechanics only), machine operations, Occupational Safety and Health (OSH), and management training.



- **Transport, postal and warehousing** – an obvious industry choice given the regional connectedness of Wilton Junction via established road networks. Importantly, the NSW Transport Master Plan seeks to develop regional intermodal terminals at strategic locations in collaboration with councils and industry. There is obvious potential for land around Maldon to be identified as a strategic intermodal location, accommodating best practice terminal development with noise mitigation and heavy vehicle access.
- Notwithstanding Maldon's potential as a strategic logistics centre, Wilton Junction still offers key locational advantages for industries and warehouses that are able to trade off the township's existing access credentials and which would be further attracted by the proximity of an able and willing local workforce.
- Examples of similarly situated industrial parks include the Somersby Industrial Estate, located on the F3 north of Sydney, and the smaller 26ha Gisborne Industrial Estate, located between Melbourne and Bendigo, serviced by the Calder Freeway. The credentials of the Somersby Estate are discussed below. Major tenants at Gisborne include Macedon Ranges Auto, Macedon Ranges Freight Services and Eco-master Insulation. The estate is currently being extended to incorporate a further 15ha of land.
- The delivery of an industrial estate similar to Somersby or Gisborne is highly appropriate for Wilton Junction. It will require the allocation of suitable land and significant marketing to attract those businesses which have the potential to benefit from a southern Sydney regional location.

Somersby Industrial Estate / Kariong Business Park – Gosford, NSW

Somersby Industrial Estate and Kariong Business Park are located adjacent to the Gosford exit of the Sydney-Newcastle Expressway. Combined, the estates cover 420ha of land, offering sites ranging from 4,000m² to 10 ha in size.

Both estates have excellent road access, being accessible from a diamond interchange with the F3 Freeway. The estates are situated close to the major centre of Gosford and are approximately 50 minutes from Sydney's CBD.

Somersby/Kariong is similar to Wilton Junction in terms of its location on a major freeway heading out of Sydney but relatively close to a major population centre (the Central Coast). Current tenants include Baltimore Aircoil, CSR Hebel, Sullo (bins), Sapphire Aluminium Industries, Alushapes, Delta Laboratories, Rimex, Borg Manufacturing, Thiess Services and a range of other smaller manufacturers and industrial service providers.

The Coles Myer Distribution Centre is also situated at Somersby, servicing all of the company's distributions north of Gosford and south to Sydney and offering significant local employment opportunity.



Image: Thesis Services at Somersby Industrial Estate, Gosford

- **Tourism and recreation** – a key employment sector for the Southern Highlands but a relatively untapped industry at Wollondilly. Further development of the role of tourism was identified as a long term goal by Elton Consulting in its preliminary employment strategy for Wilton Junction.
- Council has already developed a Tourism Business Plan (2002-2011) based around nature tourism, adventure tourism, ecotourism and companion activities and building on the strategic location and natural assets of the LGA. Council has also established a Visitor Information Centre at the "Old Picton Post Office" at Picton.
- Despite these efforts overall visitor numbers have declined over the decade and further work is required to rejuvenate Wollondilly's tourism offer.
- Given current State Government efforts through Destination NSW to double the state's overnight visitor expenditure by 2020 and the coordination of regional funding through this office, it is clear that Wollondilly's strategy and pitch for tourism funding must be revitalised.
- The development of such a strategy is beyond the scope of this current brief but should be given some urgency by Council and the Shire's tourism dependent industries.
- The development of a local tourism partnership between Council and respective businesses would seem essential if tourism is to be promoted and pursued as an important employing industry. This course of action would seem an appropriate candidate for regional development funding allocated by the Federal Government.

The 'Experience Economy': Tourism

Dubbed by Joseph Pine and James Gilmore (1998) as the 'fourth economic offering', the Experience Economy has grown rapidly in the second millennium on the back of consumer's desire for an 'experience'. However, to distinguish from the provision of a 'service' or 'good', an experience generally uses a service as 'the stage' and a good as 'the prop' to engage and deliver a memorable event.

Naturally, the tourism sector is well placed to provide an 'experience' as such. Events such as Tough Mudder, Spartan Race and the Steven's Bikes Husky 100 Mountain Bike Marathon require large open areas and are usually held at regional locations. As well as providing an 'experience' to participants, these events support tourism-denominated industries and promote the regional areas in which they are held.

The Experience Economy: Tourism

Tough Mudder: 18-20 km obstacle courses designed by British Special Forces to test all around strength, stamina, mental grit, and camaraderie. Generally, the event requires 300+ acres, ponds, hills and parking facilities to run the event. In total, Tough Mudder is run in five locations throughout Australia (Perth, Adelaide, Sydney, Sunshine Coast and Townsville). In Sydney, two events are held each calendar year.



Spartan Race: Spartan Race is a global obstacle race series, with over 50 events held across America, Canada, Europe and Australia (Sydney, Brisbane, Canberra, Adelaide and Perth). Four formats of varying lengths and difficulty (i.e. Spartan Sprint, Super Spartan, Spartan Beast and the Ultra Beast) are offered for contestants. Scheduled for the 2nd of November, the next event is to be held in Picton (Wollondilly).

Steven's Bikes Husky 100 Mountain Bike Marathon: Since its inception in 2010, the Steven's Bikes Husky 100 has developed into the most enjoyable, laid-back, and achievable marathon on the Australian MTB calendar. It is held annually in the township of Callala Beach (Jervis Bay).



- **Agribusiness** – supporting primary production either in a research, training, trading or manufacturing capacity. Several research institutions are already based in outer metropolitan Sydney and are at the forefront of innovation in the agricultural industry.
- The Elizabeth Macarthur Agricultural Institute (EMAI), located at Menangle, is the NSW Department of Primary Industries' (DPI) Centre for Animal and Plant Health. Sydney University and the University of Western Sydney also have campuses, in Camden and Hawkesbury respectively, with a focus on agricultural research.
- Export markets in Asia represent an opportunity for agribusinesses in the region, particularly as Asia becomes more open to food imports. Numerous businesses in outer Sydney already successfully trade with Asian countries.
- As agricultural land in the outer Sydney area becomes more scarce, opportunities for research into more intensive farming operations including greenhouse and hydroponic production are also expected to increase.
- NSW Department of Primary Industries is dedicated to the continuing development of cooperative alliances with universities, Cooperative Research Centres (CRCs) and other state and national agencies. It has several industry corporation investment partners, with major investment also from the Australian Centre for International Agricultural Research, Biofirst, Natural Heritage Trust, National Action Plan for Salinity and Water Quality (NAP), and the Murray-Darling Basin Commission. These arrangements enhance the pace of innovation and achieve economies in the use of human and capital resources for research.
- Consideration could be given to the establishment of a research cooperative at Wilton Junction that is related to available expertise and facilities at both UWS Campbelltown and UOW Wollongong. The connection between better production techniques, greenhouse reduction and travel hardness of grain products would be worthy of research at Wollondilly.
- Several existing large agribusinesses in Sydney's south-west will be encroached by urban development and could be attracted to relocate to Wollondilly given its superior regional connections and its available and growing workforce – examples include Inghams Enterprises at Hoxton Park and Badgerys Creek, Flora International at Leppington, NuFlora International at Cobbity and Andreasens Green at Kemps Creek.

- *Food product manufacturing could also be investigated as a type of industry that could be attracted to Wollondilly given the area's access to large populations, port facilities and viable agricultural land and its proximity to technological innovation potential in the form of universities and existing DPI alliances in the region. We note that a similar concept of attracting food manufacturing industries only at the Wellsford Estate at Bendigo has recently been revoked by Bendigo Council to allow the estate to diversify. Whilst industry clusters might be attracted to Wollondilly it should not be at the expense of other possible types of employment.*

4. Catalytic Employment Projects

- The identification and targeting of specific catalytic employment projects would assist in either establishing an early town centre presence or would operate to attract other industries that could benefit from co-location with a major service or particular infrastructure facility.

Strategic Response: *Catalytic employment projects for Wilton Junction ought to be identified and pursued. Examples could include:*

- *The early establishment of a **district medical and allied health service**.*
- *The potential relocation of **Council's administrative centre**.*
- ***National distribution facilities, similar to those established at the Gosford/F3 juncture** which offer the dual benefit of access to a Sydney market as well as an out-of-city location for distribution convenience.*
- ***A data centre** would represent a significant provision of technological infrastructure, appealing to a range of complementary businesses and potentially attracting businesses with specific data storage and cloud computing needs.*

Catalyst development: Data Centre Case Study

iseek is an IT (Information Technology) enterprise specialising in the provision of premium data network, internet and infrastructure hosting products and services. Established in 1998, iseek specialises in resilient data networks, mission-critical internet services and managed colocation facilities.

Since establishment within the Gore Hill Technology Business Park (former ABC site), Artarmon, a number of other companies have located to the business park to leverage off iseek's services. As a result of its establishment, both IT-related (e.g. Data People, ASE IT) and non-IT (e.g. ASX and FOX sports) companies have relocated to the Gore Business Park.



5. Infrastructure Delivery

- From a location perspective, it is clear that Wilton Junction is at a strategic junction of two major roads (Hume Highway and Picton Road) and that, geographically, it would function as a significant employment hub with the right policy settings and commitment to infrastructure provision.
- A key focus of NSW Long Term Transport Master Plan is to complete the missing links of broader Sydney's motorway network. The Plan identifies the potential for motorway upgrades to better integrate regional towns with Sydney and to support increased trade and productivity.

Strategic Response: Major potential motorway projects that would positively enhance Wilton Junction's trade and employment competitiveness through improved linkages include:

- Outer Sydney Orbital (M9)
- Widening of the M7
- M5 West and East widening
- F6 connection corridor and
- Stronger connections to Sydney south

- *Development of the above road infrastructure is consistent with the Sydney-Canberra Corridor Strategy and would unlock significant development opportunity that can build upon Wilton Junction's access to Sydney, Wollongong, Port Kembla and the Southern Highlands.*
- *The identification and pursuit of such investment ought to be a priority position taken by Wollondilly Council and supporting businesses.*
- *The development of rail infrastructure also could significantly alter the employment attractiveness of the area.*
- *The Maldon-Dombarton freight link provides an alternative to the existing Illawarra and Moss Vale-Unanderra line for the transport of freight to and from Port Kembla and offers the potential to improve transport efficiencies for the region's primary industries.*
- *Similarly, the Brisbane-Melbourne fast train would obviously elevate the strategic importance of the east coast economic corridor and would be expected to impact positively on Wollondilly.*

6. Local/Regional Partnerships and Business Support

- A key theme of current global economic conditions is the need to identify and establish a comparative advantage that distinguishes a specific region from others and which presents a 'region-to-the-world' business approach.
- Wollondilly is favourably located in this respect and is able to capitalise on the proximate location of major industry (logistics, coal, port and university related) and the infrastructure that supports it.
- Developing partnerships with existing and potential industries will harness entrepreneurial activity and will assist in understanding the specific needs of the various industry sectors.
- Partnerships also assist in strengthening vertical and horizontal relationships within industries such that both input (labour, materials, innovation and skills) and output (transport, speed to market and trade) opportunities are better identified.
- Specific partnership approaches have been discussed in the above commentary on sector-specific initiatives. Other pursuits could seek to facilitate and promote start-up businesses or to focus on those industry sectors from which recent business registrations have been generated.

- At Wollondilly, not including construction, recent business growth has been dominated by service and professional related industries e.g. Health Care & Social Assistance, Education & Training and Retail Trade.

Strategic Response: *Local and regionally based partnership initiatives may attract business interest and can assist in harnessing local talent as well as private ownership and investment.*

Specific approaches that could be adopted for Wilton Junction include:

- *A regular survey of new and existing local businesses to ascertain the main issues facing business growth. A survey had been undertaken*
- *The establishment of a local Economic Development Partnership (EDP) that provides a platform for key stakeholders to co-ordinate economic development initiatives. The EDP could include representatives from the public, private and voluntary sectors.*
- *The creation of Employment and Skills Centre, as a focal point for the delivery of employment advice and training services in partnership with local schools and TAFE colleges. Such a facility could be incorporated into the early provision of retail and other space as part of the Wilton Junction town centre.*

St Marys Skilling Centre

The Skilling and Employment Centre at St Marys was established in 2005 in conjunction with the release of land for urban development at the ex-ADI site at St Marys in Sydney's west.

The centre offers free services to jobseekers, including:

- Computers, printer, facsimile, photocopier and telephones;
- Internet access linked to the job search websites
- Assistance with job application and development of CV's
- Workshops on job seeking and interview skills
- Coordination of site specific training and custom designed courses for the site or local employers

The Centre works closely with local employers to identify their specific training needs.



- *An example of such a facility is the St Marys Skilling Centre provided and operated in conjunction with the release of land at the ADI site in Sydney's west.*
- *Making start-up business space available – either by utilising existing community buildings or by drawing on resources from private businesses or state agencies to establish a new incubator space within or adjacent to the Wilton Junction town centre.*
- *Business incubation seeks to improve the growth prospects of new businesses and to reduce the rate of business failure. The availability of business incubator space could assist in:*

- *supporting the identification of necessary skill sets and training opportunities;*
- *the creation of business networks;*
- *the commercialisation of business technologies; and*
- *providing an advisory service for those workers who choose to work from home or who travel to various locations to undertake work and therefore do not have the necessary support structures in place to help grow their business (e.g. trade workers and sub-contractors).*

Economic Development Advisory Group (EDAG) Business Survey

In May 2013, the Wollondilly LGA Economic Development Advisory Group (EDAG) had undertaken a survey targeting 650 businesses operating in the Wollondilly Local Government Area (LGA). The core purpose of the survey was to identify reasons why businesses were leaving Wollondilly.

From the 101 returned surveys, 11 key factors were ascertained, including:

1. Lack of growth in the residential and commercial sectors
2. Competition from other locations (Macarthur and online sales)
3. DA processing inefficiency, inflexible land use zoning and insufficient supply of suitably zoned land (e.g. industrial land)
4. Rents or cost of purchasing a property
5. Direct access to freeway (not through township), infrastructure too far from highway and inadequate rail infrastructure
6. Assistance from Wollondilly Council (reduced DA fees and rates assistance), State and Federal governments, and greater business advice and services
7. Local environment (make area more attractive)
8. Greater retail diversity
9. Skills shortage
10. Greater tourism promotion and awareness
11. Poor quality internet and inadequate phone line provision.



South West Sydney Business Enterprise Centre

The South West Sydney Business Enterprise Centre (BEC) is a Not-For-Profit Organisation established to assist new and existing business ventures in the Liverpool and Macarthur regions of Sydney.

The BEC offers business support services, networking opportunities and guidance for small and medium sized businesses with the aim of facilitating business growth and employment in the local economy.



Business Development Centre (BDC) (incubator) – The South West Sydney Business Enterprise Centre currently has a purpose built facility in Smeaton Grange. The BDC offers light industrial units and office suites. Tenants can lease premises for up to two years (incubation period) with no rental rises to assist in the development and growth of new businesses. Post incubation, rental increases of 10% per annum are phased in to encourage these businesses to vacate premises and free-up capacity for new businesses. The BEC also provide business services and advice to tenants, and through co-location at the hub, an opportunity to interact and network with other businesses at their inception.



Image: Macarthur Business Development Centre

Penrith Business Alliance

The **Penrith Business Alliance (PBA)**, which was re-formed by Penrith City Council in December 2008, is run by an independent Board of Directors. The aim of this alliance is to achieve Penrith's economic and employment objectives through to 2031, the creation of an additional 40,000 jobs in the local economy by 2031.

More specifically, the imperatives of the alliance are:

- Establish and market Penrith Business Alliance as the first port of call for investment and development in the Penrith Valley Region
- Promote the region's differential advantages (lifestyle, employment and business opportunities)
- Proactively influence government and its agencies to invest in the region
- Assist businesses to become established in the Region
- Actively assist businesses to compete and grow in the Region
- Provide high-level, expert advice on economic development to Penrith City Council

This is achieved via the formation of business alliances, the provision of economic modelling (for a fee), information on government based funding/scheme and tenders, details on training schemes/incentives, potential business partners and services.



5.2 Summary and Conclusion

A summary of the various recommended employment strategies relevant to Wilton Junction is provided at **Appendix A** to this document. A list of current government grants, incentives, schemes and online tools is provided at **Appendix B**.

Key to the successful implementation of these strategies will be the preparedness of state agencies and business forums to develop strong partnerships in pursuit of a sustainable employment future for the LGA.

Much success will also depend on the ability to secure funding for the initiatives and to target specific industry types identified as possible candidate industries that could be attracted to Wollondilly.

Other matters that will drive the success of the strategies relate to:

- The quality and inventiveness of specific marketing material;
- Appropriate implementation structures and arrangements; and
- The ongoing ownership and refinement of the initiatives.

Appendix A: Employment Strategy Summary

TASK	ISSUE & STRATEGIC RESPONSE	WHO, WHEN & HOW
1	<p>A Competitive Industry Environment</p> <ul style="list-style-type: none"> Identifying and trading to Wilton's natural advantages, including its direct connectedness to Sydney, Wollongong and to markets further south, will be required to compete with other existing and planned employment offerings. Such an approach should consider the success of other peri-urban towns such as Gisborne, Victoria; and similarly positioned employment hubs located outside of their major cities such as Somersby at Gosford, NSW and Yatala, outside Brisbane. <p>Strategic Response</p> <ul style="list-style-type: none"> <i>Preparation of a Business Prospectus – focusing on Wilton's gateway credentials and its comparative advantages.</i> <i>Development of 'postcode' and location specific strategies and a 'best of both worlds' awareness campaign.</i> <i>Creation of the Wilton Junction Economic Technical Working Group</i> 	<p>WHO – Wilton Land Owners Group, Wollondilly Council & local Economic Development Partnership (EDP) involving representatives from the public, private and voluntary sectors. A technical working group comprising of Council representatives, economic (MacroPlan Dimasi) and planning (Elton Consulting) consultants and business advice and service organisations (South West Sydney Business Enterprise Centres & NSW Business Chamber) has been formed to discuss ongoing responsibilities that stem from this analysis.</p> <p>WHEN - a business prospectus, website and marketing material should be developed to coincide with the initial release of town centre and employment land.</p> <p>FUNDING – possibly involving the Wilton Land Owners Group with assistance from Wollondilly Council, but with ongoing consideration by the working group.</p>
2	<p>Facilitating Industry Growth</p> <ul style="list-style-type: none"> Population-based employment is expected to occur in sync with actual population growth but requires the timely provision of zoned and serviced land to meet market need. Other industry will require assistance in terms of infrastructure provision e.g. home-based employment. <p>Strategic Response</p> <ul style="list-style-type: none"> <i>Early consideration and delivery of employment land. A logical sequencing is to provide for development around the proposed town centre and near to the juncture of Picton Road and the Hume Highway.</i> <i>Timely delivery of retail land to address the shopping needs of the new town ship residents.</i> <i>Sequential delivery of supportive retail (bulky goods etc) and other employment land (e.g. schools and health services).</i> <i>Continued roll-out and early access to the National Broadband Network (NBN) service and development of digital enterprise awareness amongst the Wilton Junction township, e.g. via a specific digital enterprise capacity program.</i> 	<p>WHO – Wilton Land Owners Group as part of the Master Plan process and in an ongoing capacity as joint-developers of the estate. Development sequencing will largely be coordinated by the joint owners.</p> <p>WHEN – the timely release of employment and retail land will need to be managed on an ongoing basis.</p> <p>FUNDING – normal subdivision development costs will be incurred by the Wilton Land Owners Group. Under the newly elected Coalition Government it is intended that fibre will generally be deployed to new 'greenfield' housing estates unless there are particular commercial reasons not to do so. Private builders/operators of fibre networks in new estates will be offered a financial incentive that reflects any net cost savings that their investment generates for NBN Co, provided such networks meet specified standards and are available on non-discriminatory terms.</p>
3	<p>Sector-specific Approaches & Target Industries</p>	<p>WHO – the development of specific industry sector initiatives and partnerships will largely be the responsibility of Wollondilly</p>

	<ul style="list-style-type: none"> The identification and targeting of particular industry types will be required to harness employment opportunity. Specific focus will also be required to seek, attract and secure new 'external industries'. Even for population-based employment which will occur in response to the resident population's needs, it is necessary to facilitate particular outcomes, particularly if the early activation of this potential is sought. 	<p>Council, although its task could be assisted by a local Economic Development Partnership (EDP), involving representatives from the public, private and voluntary sectors. Ongoing responsibilities are to be the subject of further discussions with council and other parties.</p>
	<p>Strategic Response</p> <ul style="list-style-type: none"> Health Sector - formation of business partnerships with the South Western Sydney Local Health District; the region's private hospitals and care providers; as well as specific aged care and home care providers, preferably early in the residential precinct development cycle. Business partnerships with health equipment manufacturers and distributors. Education Sector – establish business partnerships with private schools, TAFEs and potentially involving industry training partnerships and/or enterprise partnerships with nearby facilities at UWS Campbelltown and the University of Wollongong. Educational focus on local industry needs and trades sector e.g. work with NSW Transport to implement its Master Plan objective to maintain the state's freight workforce through initiatives that attract and retain skilled workers in the industry. Work with the Bureau of Freight Statistics to streamline freight data collection and strategic analysis, e.g. by liaising with freight industries to ensure their needs are understood and accommodated and that the necessary industry skills are developed, or through applied research in freight management. Construction Sector – identification of candidate construction supply companies eager to locate at Wilton Junction to take advantage of its proximity to broader development fronts at the South West Growth Centre and in Wollongong. Work with specific supply industries to understand their training needs and partner with education providers to create Wilton as a place of trade learning. Transport, Postal and Warehousing – maximise the broader appreciation of Wilton Junction's natural advantages in terms of its connectedness to Sydney, Wollongong and other regions. Ensure the allocation of suitable land and simultaneous marketing to attract those businesses which have the potential to benefit from a southern Sydney regional location. Identification and targeting of specific logistics businesses. Tourism and Recreation – work with Council's toward the review and implementation of its Tourism Business Plan. Align current objectives to Destination NSW's agenda to double the state's overnight visitor expenditure by 2020 in order that regional funding may be obtained. Develop local tourism partnership between Council and respective businesses – and seek regional development funding from the Federal Government. Agribusiness - supporting primary production in a research, training or trading capacity. Tap into the presence of research institutions to encourage Wollondilly as a centre for innovation in the agricultural industry and/or for food production and manufacturing. Identify existing agribusinesses in Sydney's south-west that will be impacted by encroaching urban development to pursue their relocation to Wollondilly e.g. Inghams Enterprises, Flora International, NuFlora International and Andreasens Green. 	<p>State agencies will also play a key role in coordinating the potential delivery of health, education and other services (e.g. tourism). Initiatives for other sectors (e.g. construction, agribusiness, warehousing) will primarily be coordinated privately through the identification of particular needs and means of addressing these, involving targeted partnership arrangements.</p> <p>Council and the Economic Development Partnership (EDP) will be largely responsible for the targeting of specific industries that could be attracted to Wollondilly. Several candidate businesses for each of the key sectors identified are nominated in this report.</p> <p>The Wollondilly Strategic Health Forum initiated by Wollondilly Shire Council may be expanded to help realise employment potential of this sector.</p> <p>WHEN – sector-specific strategies should be developed as a matter of priority to coincide with the first release of development land.</p> <p>FUNDING – funding for the development of sector-specific strategies may be available under the Coalition Government's Stronger Regions program or through the current Regional Development Australia (RDA) program.</p>
4	<p>Catalytic Employment Projects</p> <ul style="list-style-type: none"> The identification and targeting of specific catalytic employment projects would assist in either establishing an early town centre presence or 	<p>WHO – Wollondilly Council & the local EDP would likely resume responsibility for targeting specific catalytic industries and</p>

	<p>would operate to attract other industries that could benefit from co-location with a major service or particular infrastructure facility.</p>	<p>pursuing their potential interest in locating at Wilton Junction.</p> <p>Wollondilly Council will, in due course, consider the potential of moving its administration offices to Wilton Junction as the major population centre of the LGA.</p> <p>WHEN – an early decision on potential catalytic employment projects and then developing a targeted action plan would assist in the activation of non-population driven employment generation in Wilton Junction. It would also encourage development of other employment generating uses.</p> <p>FUNDING – possible federal/ state government grant monies might be available; otherwise consideration will need to be given by Wollondilly Council & the recommended local EDP as to other potential funding sources.</p>
	<p>Strategic Response</p> <ul style="list-style-type: none"> • Pursue specific catalytic employment projects for Wilton Junction, such as: <ul style="list-style-type: none"> ○ District medical & allied health services ○ The relocation of Council's administrative centre ○ State Distribution facilities (e.g. Myer at Somersby) ○ A data centre 	
5	<p>Infrastructure Delivery</p> <ul style="list-style-type: none"> • The completion of major motorway projects would increase Wilton Junction's trade and employment competitiveness. • The development of rail infrastructure also could significantly alter the employment attractiveness of the area. 	<p>WHO – Council and business groups/chambers would be expected to work together to pursue State and Federal Government funding for key projects. Subdivision infrastructure will be provided by the Land Owners Group.</p> <p>WHEN – such action is required on a current and ongoing basis.</p> <p>FUNDING – State and Federal Government funding is necessary to complete major infrastructure projects.</p>
	<p>Strategic Response</p> <ul style="list-style-type: none"> • The identification and pursuit of such investment ought to be a priority position taken by Wollondilly Council and supporting businesses. 	
6	<p>Regional Partnerships and Business Support</p> <ul style="list-style-type: none"> • Developing partnerships with existing and potential industries will harness entrepreneurial activity and will assist in understanding the specific needs of the various industry sectors. • Seek to facilitate and promote start-up businesses or to focus support for those industry sectors from which recent business registrations have been generated. 	<p>WHO – Wilton Land Owners Group, Wollondilly Council & the recommended local Economic Development Partnership (EDP) involving representatives from the public, private and voluntary sectors.</p> <p>WHEN - A business prospectus, website and marketing material should be developed to coincide with the initial release of town centre and employment land.</p> <p>FUNDING – the new Federal Coalition Government's 'Stronger Regions Fund' may be able to be accessed to fund the establishment of local Economic Development Partnership (EDP) to co-ordinate economic initiatives for the LGA.</p> <p>The current RDA program may also be able to be utilised to help establish the framework of a regional employment platform, including the creation of a local business incubator and an Employment & Skills Centre.</p>
	<p>Strategic Response:</p> <ul style="list-style-type: none"> • A survey of new and existing local businesses to ascertain the main issues facing business growth. • The establishment of a local Economic Development Partnership (EDP) that provides a platform for key stakeholders to co-ordinate economic development initiatives. The EDP could include representatives from the public, private and voluntary sectors. • The creation of Employment and Skills Centre, as a focal point for the delivery of employment advice and training services in partnership with local schools and TAFE colleges. Such a facility could be incorporated into the early provision of retail and other space as part of the Wilton Junction town centre. • Making start-up business space available – either by utilising existing community buildings or by drawing on resources from private businesses or state agencies to establish a new incubator space within or adjacent to the Wilton Junction town centre. 	

Appendix B: Incentives, Grants & Initiatives

AUSTRALIAN FEDERAL GOVERNMENT GRANTS

Department of Industry, Innovation, Science, Research & Tertiary Education

Enterprise Connect

An offshoot of the federal Department of Industry, Innovation, Science, Research and Tertiary Education, Enterprise Connect offers comprehensive, confidential advice and support to eligible Australian small and medium businesses (SME) to help transform and reach their full potential.

Business improvement services are offered to businesses in the manufacturing, clean technology, resources, defence, tourism, creative, information and community technology, transport (freight) and logistics and professional service industries.

Services include Business Reviews delivered at no charge to businesses, grant assistance to implement recommendations flowing from the Business Review, and a range of tailored innovation services to meet individual business needs.

Featured grants/incentives include:

1. The *Researchers in Business Grant* provides 50% of salary costs, to a maximum of \$50,000, for university researchers to work on new idea within a business for between two and 12 months.
2. The *Tailored Advisory Service Grant*, which covers up to 50% of costs (to a limit of \$20,000) associated with engaging a business improvement consultant.

AusIndustry

Clean Technology Innovation Program (abolished)

The Clean Technology Innovation Program has since been abolished by the Coalition. Targeted at micro start-up enterprises, the previous \$200 million Clean Technology Innovation Program aimed to support the development and research of nascent clean tech projects. Grants, on matched funding basis, were available, ranging from \$50,000 to \$5 million. The spectrum of eligible technologies was diverse, including wind, solar and wave technologies, waste management and energy efficiency.

Department of Resources, Energy and Tourism

TQUAL Grants

Administered by the Department of Resources, Energy and Tourism, TQUAL Grants are designed for both large and small businesses in the tourism industry intent on creating projects to develop tourism, economic development and employment, for “innovative” ideas to improve economic development and employment.

There are two streams of funding available:

1. Tourism Quality Projects - Funding of between \$15,000 (plus GST) and \$100,000 (plus GST) is available on a matched funding basis.
2. Strategic Tourism Investment Grants – Grants of up to \$1 million to fund a small number of larger scale projects to support indigenous tourism and/or economic development/tourism employment.

Tourism Industry Regional Development Fund (TIRF) Grants

TIRF is for regional tourism businesses looking to improve their tourism offerings. It is a competitive merit based grants program designed to enhance the quality of tourism products in regional areas to encourage repeat visitation and longer stays by domestic and international visitors.

Grants of between \$50,000 and \$250,000 are available on a fund matching basis. Applicants will need to demonstrate how their project is market responsive, improves the attractiveness of the destination, fits with the region's tourism experience and will meet long-term industry objectives.

Visitor Profile and Satisfaction Program (VPS)

Tourism Research Australia (branch of Department of Resources, Energy and Tourism) provides research information that supports improved decision making, marketing and tourism industry performance. The aim of the Visitor Profile and Satisfaction Program is to provide the opportunity for regional tourism destinations to undertake research surveys specific to the destination and assist informed decision making to support growth of sustainable tourism products.

NEW SOUTH WALES GOVERNMENT GRANTS

Department of Education and Communities

Vocational development & training funding

Funding is available for vocational development and training which:

- Targets specific industries and equity groups
- Is available for jobseekers and existing workers or
- Meets the New South Wales' economic priorities and strategies e.g. in areas where skills shortages are apparent.

This funding pays for the services available to businesses. In some cases businesses are expected to contribute to training and the development of resources.

Innovation Funding

New South Wales (Department of Education and Communities) and Federal Government agencies (e.g. AusIndustry) offer advice, guidance and some funding for:

- Research and development
- Planning

- Workplace and systems reorganisation
- Customised vocational training

State Training Services Managers are appointed to provide advice and assistance to gain access to the most appropriate grants and training programs based on particular business needs.

Government assistance could include:

Environmental regulation Working with other partners	Help in identifying environmental regulation requirements and how to address them; possible funding assistance to work with other partners in developing and implementing a system that can be used by other businesses. Department of Environment, Climate Change and Water
Energy efficiency training packages	Funding of energy efficiency training packages; negotiating training to meet the new business needs. Funding is available through the Energy Efficiency Training Program in partnership with DECCW. Department of Education and Communities
New technology Assistance to purchase equipment Marketing	Possible funding assistance towards the new technology based on number of people to be employed; non financial and financial assistance to purchase equipment and market the new product or process. Industry & Investment NSW
New product develop	Research assistance with new product development. AusIndustry

Trade and Investment

Innovate NSW Program

Innovate NSW connects technology SMEs and businesses in *key sectors* of the NSW economy to develop globally competitive business-to-business (B2B) solutions that address compelling needs. The program focuses on rapid development of business-driven solutions that use '*enabling technologies*'.

The key sectors include: e-health, advanced manufacturing, energy technologies and services, online & interactive education, and transport, logistics &

infrastructure. Submissions will also be considered from other sectors where the applicant can demonstrate the value of the solution to the NSW economy.

There are three funding components available for Innovate NSW:

1. **Minimum Viable Product (MVP)** grants provide matched funding up to \$15,000 to assist technology SMEs to engage with a *potential business customer* to demonstrate an idea, prove a concept, develop a prototype or customise a B2B solution that addresses a high growth opportunity or challenge for a key sector.
2. **TechVouchers (TV)** grants provide up to \$15,000 in matched funding for technology SMEs to collaborate with a NSW research organisation to overcome a specific technical challenge or test a new technology.
3. **Collaborative Solutions (CS)** provides grants of up to 25% of project costs (to a maximum of \$100,000), for consortia to develop an innovative solution that addresses a high growth opportunity or challenge in a key sector

NSW Technology Voucher Program (TechVouchers)

The NSW Government may provide support of up to \$15,000 (per project) through the NSW Technology Voucher Program (TechVouchers) to NSW small to medium enterprises (SMEs). Only one grant will be provided to any one SME.

The TechVouchers program is designed to increase access by SMEs to the State's research and development (R&D) infrastructure, facilitate business expenditure on R&D, and to promote collaborations between industry, the university and public research sector and TAFE.

Regional Industries Investment Fund (RIIF)

The Regional Industries Investment Fund (RIIF) has been established to drive economic growth in regional NSW as well as enhancing the attractiveness of regional areas. Financial assistance is available under this Fund for projects across regional NSW, (excluding the Greater Sydney Metropolitan area) that result in or promote economic outcomes for the State.

The RIIF targets three main project categories:

1. Business Investment Projects

Assistance is available for investment projects that contribute to regional population growth through the creation of new jobs, or in special circumstances the retention of existing jobs in a regional location. The RIIF aims to encourage business growth by helping businesses overcome impediments to investment projects that will lead to the creation of new jobs in regional NSW.

Applicants must demonstrate:

- The long term viability of the project
- Cost impediments delaying or preventing the project from proceeding
- A significant new investment in operations
- A planned substantial increase in new jobs as a result of the project

2. Local Infrastructure Projects

Support is available for local infrastructure projects that are linked with employment generation investments and deliver industrial projects that have the potential to benefit more than one firm. The RIIF aims to address infrastructure barriers impeding business investment and job creation for specific projects in regional locations. Assistance is directed toward offsetting the costs of specific critical infrastructure required for business establishment, expansion or relocation in regional NSW.

Applicants must demonstrate:

- The business infrastructure is directly linked to development of actual business investment and employment creation opportunities at the location
- The extent the business infrastructure will be “common” i.e. has the potential to benefit other business users and industries (current or future)
- An estimated timetable by which the infrastructure will be required (connected).
- How funding will be a catalyst for infrastructure outcomes which would not otherwise be achieved

- Substantial commitment of contributions from other sources (e.g. local government, private sector, Commonwealth and NSW government agencies).

Eligible applicants include:

- Local Councils
- Infrastructure providers
- The private sector.

3. Economic Development Projects

Funding is available for projects that build capacity in local regional industries and/or have the potential to generate economic benefits such as employment, business or industry development/growth. This program does not provide assistance for community events or tourism initiatives.

Applicants must demonstrate that the project has:

- Broad support from stakeholders or that the project is aligned with a local, regional or industry plan
- Potential to create economic benefits for the broader area/region rather than being of specific benefit to a single enterprise.

Eligible applicants include:

- Local councils
- Incorporated associations including business, industry and community organisations
- Regional development organisations including Regional Development Australia committees.

Technical and Further Education (TAFE)

There are several financial incentives available to encourage businesses to employ apprentices and trainees, including:

1. Employers who hire mature age workers (over age 45) in skill shortage areas may attract a special *Mature Age Worker Commencement Incentive* of \$750 and a *Completion Incentive* of \$750

2. Employers in regional and rural Australia who employ an apprentice in an eligible national skills needs area may be eligible for a special commencement incentive of \$1,000
3. Employers may be eligible for incentives to offset training costs when undertaking an Existing Worker Traineeship
4. Employers may be eligible to receive a subsidy of \$104 per week plus up to \$5,000 for workplace modification under the *Disabled Australian Apprenticeship Wage Support* program.

Destination NSW

Regional Visitor Economy Fund (RVEF)

Managed by Destination NSW, the Regional Visitor Economy Fund (RVEF) supports investment in the regional New South Wales visitor economy on a matched dollar-for-dollar basis. Applications may be submitted for product development and marketing activities that will contribute to the NSW Government objective of doubling overnight visitor expenditure by 2020 for regional tourism businesses looking to improve their tourism offerings.

Regional Flagship Events Program (RFEP)

The Regional Flagship Events Program supports the marketing of events that play an important role in bringing visitors to regional NSW. Events must have demonstrate tourism potential and reflect the character and culture of an area. The events act as a 'flagship' for their region.

Since 1996, more than \$5.1 million in funding has been allocated to support more than 235 events in regional NSW. Destination NSW provides funding in \$10,000 one-off grants or triennial funding of \$20,000 per year for 3 years to event organisers to support the marketing and advertising of events.

International Business Development Program (IBDP)

The IBDP is designed to support New South Wales product suppliers and destination promoters by providing financial support for trade familiarisation and educational visits, Destination NSW missions to market, trade workshops,

nominated Tourism Australia missions and events, and other international trade events. It has replaced the Incentive Funding Program and will run for a two-year duration from July 2012 to June 2014.

Austrade (Australian Trade Commission)

Export Market Development Grants (EDMG)

The EDMG scheme is a key Australian Government financial assistance program that seeks to encourage small and medium sized aspiring and current exporters. The scheme supports a wide range of industry sectors and products, including inbound tourism and the export of intellectual property outside Australia.

The scheme reimburses up to 50% of eligible export promotion expenses above \$10,000 provided that the total expenses are at least \$20,000, with up to seven grants available for each proponent. To access the scheme at first, businesses need to prove that \$20,000 has been spent over two years on eligible export marketing expenses.

Department of Infrastructure & Regional Development

Regional Development Australia Funding (RDAF)

The Regional Development Australia Fund (RDAF) supports the infrastructure needs of regional Australia. The program funds capital infrastructure projects which are identified as priorities by local communities and not-for-profit corporations; it is designed to assist development in regional locations. The program is administered by the Department of Regional Australia, Local Government, Arts and Sport (the Department).

In order for an applicant to obtain funding, the Minister must choose the project. Prior to this section, proponents must successfully complete the eligibility criteria at the EOI stage and comply with all the mandatory requirements during the full application stage (if invited to proceed). Grants of between \$500,000 and \$15 million are allocated to each successful applicant.

Liveable Communities Program (LCP)

The Liveable Communities Program has been developed to support State/Territory and local governments in meeting the challenges of improving the quality of life in our capitals and major regional cities. The Program comprises of a total allocation of \$20 million (over two years), and encompasses two funding streams:

1. Planning and Design Projects with a maximum Australian Government funding contribution of up to \$500,000 per project; and
2. Demonstration Projects with a maximum Australian Government funding contribution of up to \$4 million per project.

Office of State Revenue

Payroll Tax Rebate Scheme – 'Job Action Plan'

The Jobs Action Plan is designed to give NSW businesses the incentive to employ new workers and expand their enterprises in both metropolitan and non-metropolitan areas. Under the plan, businesses that increase the number of full-time equivalent (FTE) employees receive a payroll tax rebate following the employment of each additional employee in a position that is a new job.

To be eligible for the rebate scheme, you must be registered as an employer and paying payroll tax under the Payroll Tax Act 2007. Forty per cent of the new jobs will be prioritised for non-metropolitan areas of NSW with the remaining sixty per cent in metropolitan areas.

This scheme has been extended to 30 June 2015 and the rebate increased from \$4,000 to \$5,000 for new jobs created after 1 July 2013.

The rebate applies to the employment of an additional employee in a new job and will be paid in two parts:

- \$2,000 will be paid at the end of the first year of employment; and
- \$3,000 will be paid at the end of the second year of employment.

For part-time employees the rebate will be pro-rated based on full time equivalent hours of employment.

Other NSW Government Grants/Incentives

Name of grant	Description	Administering agency
Aboriginal Growth Program	Provides financial assistance of up to 75% of costs for an eligible Aboriginal business to access an experienced business person for business mentoring.	Department of State and Regional Development (DSRD)
Aboriginal Business Link Program - Trade Show Participation	Provides financial support for Aboriginal business' participation in industry Trade Shows.	Department of State and Regional Development (DSRD)
Aboriginal Business Mentor Program	The program offers business skills training workshops, group mentoring sessions, one-on-one mentoring and two networking opportunities to help Aboriginal businesses better equip staff.	Department of State and Regional Development (DSRD)
Arts Funding Program	Supports organisations and venues to deliver performances or exhibitions, business or audience development projects, and arts and cultural infrastructure and activities for people in NSW.	Department of the Arts, Sport and Recreation
BioBusiness Program - BioFirst Biotechnology Precinct	A dedicated biotechnology precinct that can house and support start-up companies in state of the art laboratory facilities.	Department of State and Regional Development (DSRD)
BioBusiness Program	Subsidises the cost of pitch training and presentation	Department of

- Fostering Connections between Investors and the Biotechnology Sector	workshops for biotechnology companies, and facilitates access to domestic and international forums where NSW companies can pitch to potential investors and strategic partners.	State and Regional Development (DSRD)
BioBusiness Program - High Growth BioBusiness	Accelerates the growth of established biotech firms by assisting with costs such as market development, skills development, and planning.	Department of State and Regional Development (DSRD)
BioBusiness Program - Non Research Establishment Costs	Funds start-up businesses for growth costs such as market development, intellectual property protection and legal costs.	Department of State and Regional Development (DSRD)
BioBusiness Program - Professional Leadership and Development	Programs for both start-ups and established biotech businesses to assist with the development of business skills.	Department of State and Regional Development (DSRD)
BioBusiness Program - Proof of Concept	Complements the federal Biotechnology Innovation Fund (BIF) by co-investing to help reduce the cost of demonstrating proof of concept for new biotech initiatives.	Department of State and Regional Development (DSRD)
Business Advisory Services	Provides free assistance, seminars, workshops and networking opportunities for people starting and operating a business to plan their growth and development.	Department of State and Regional Development (DSRD)
Business Clusters Program - Business Clusters Funding	Provides funding for an industry cluster of businesses or a cluster of geographically concentrated businesses, for specialised assistance towards projects which would enhance the cluster's growth during its formation and development stages.	Department of State and Regional Development (DSRD)
Business Clusters Program - Business Networks Funding	Provides funding for NSW businesses or companies which have chosen to work together to develop a specific commercial opportunity.	Department of State and Regional Development (DSRD)

<u>Business Drought Assistance - Payroll Tax Relief</u>	Businesses that support the farm industry sector may be eligible to receive payroll tax relief if they can show a decrease in business over a set period of time.	Department of State and Regional Development (DSRD)
<u>Community Strategic Projects</u>	This program offers grants or loans for the delivery of NSW heritage focused products and services.	Department of Planning & Environment - Heritage Branch
<u>Developing Regional Resources</u>	This program provides funding to help regional organisations, industry associations or alliances of regional firms, investigate and pursue new economic/business development opportunities.	Department of State and Regional Development (DSRD)
<u>Drought Transport Subsidies</u>	Provides rebates of 50% of the transport costs for movements of water for domestic use, water and fodder for stock, stock to and from agistment, stock to sale or slaughter to drought-affected primary producers.	NSW Department of Primary Industries
<u>Exceptional Circumstances Interest Rate Subsidy - Primary Producers</u>	Assists financially struggling farmers in areas of NSW who have been affected by exceptional drought circumstances with loan interest subsidies.	NSW Rural Assistance Authority
<u>Exceptional Circumstances Interest Rate Subsidy - Small Business</u>	Provides loan repayment assistance to small businesses who are reliant on farming activities carried out in exceptional drought circumstances areas, leading to financial difficulty.	NSW Rural Assistance Authority
<u>Film and TV Industry Attraction Fund (FIAT)</u>	Provides a rebate to approved productions in order to stimulate film and television production, generate new employment, increase state industry market share, enhance industry skills, and facilitate the introduction of new film-related technologies in NSW.	NSW Film and Television Office
<u>Home-based Business and Micro Business Networks and Workshops</u>	Provides regional links through networks and workshops for home-based and other types of businesses.	Department of State and Regional Development (DSRD)

Home Building Grants Program	Funds organisations for the provision of education and research projects relating to the home building industry and building trades.	NSW Office of Fair Trading
Illawarra Advantage Fund	This fund aims to create additional sustainable employment in the Illawarra region by stimulating investment in this region.	Department of State and Regional Development (DSRD)
Indigenous Business Advisory Service	Business start-up advice for Aboriginal people wishing to start a small business or who already are operating a business in NSW.	Department of State and Regional Development (DSRD)
Industry and Audience Development (IDA) Program	Provides grants to screen-based organisations that develop and encourage an innovative and sustainable screen media industry.	NSW Film and Television Office
Industry Capability Network - New South Wales (NSWICN)	Provides assistance to the manufacturing, engineering and service sectors to increase access to importing and exporting opportunities, facilitate local industry participation in major projects, and identify competitive Australian industry capability for import replacement, local sourcing and business matching for Australian and overseas purchasers.	Industry Capability Network (ICN)
Innovation Services	Provides planning, advice and self-assessment assistance to promote the adoption of innovation in business.	Department of State and Regional Development (DSRD)
Medical Research Support Program (MRSP)	The MRSP promotes excellence in health and medical research for health and medical research groups in NSW. Infrastructure grants are awarded to research institutes on a competitive basis.	NSW Office for Science and Medical Research (OSMR)
New Export Opportunities Program	This program helps rapidly growing small businesses to undertake export preparation and develop export market entry strategies.	Department of State and Regional Development (DSRD)

<u>New Market Expansion Program for Regional Enterprise</u>	This program assists regional firms to develop the confidence and skills to pursue and take up new markets.	Department of State and Regional Development (DSRD)
<u>NSW Exporters Network</u>	The NSW Exporters Network provides members with access to information and advice from companies currently exporting internationally, DSRD trade services staff and other members of the network, through a website.	Department of State and Regional Development (DSRD)
<u>NSW Government Business grants</u>	List of grants available to small businesses, including cultural grants, funding for community projects, information technology grants and petroleum subsidies.	New South Wales Government
<u>NSW Government Programs</u>	The NSW Small Business website provides a list of programs available for small business.	Department of State and Regional Development (DSRD)
<u>NSW Trade Promotion Program</u>	This program offers NSW export-ready companies with support to participate in trade missions, trade shows and networking events.	Department of State and Regional Development (DSRD)
<u>On Ground Interpretation Works</u>	Dollar for dollar funding for interpretation for major NSW heritage sites with strong links with heritage tourism.	Department of Planning & Environment - Heritage Branch
<u>Petroleum Products Subsidy Scheme</u>	Pays subsidies in five northern NSW zones to ensure that NSW sellers of eligible petroleum products are able to compete fairly with Queensland re-sellers.	Office of State Revenue
<u>Property Services Grants Program</u>	Provides funding or loans to eligible organisations to provide or undertake education or research projects relating to the property services industry.	NSW Office of Fair Trading
<u>Regional Economic Transition Scheme</u>	This scheme provides assistance to businesses wanting to start or grow in regional communities and towns experiencing hardship due to business closures, industry restructuring and global economic change.	Department of State and Regional Development (DSRD)

<u>Regional Export Advisory Network</u>	Export Advisers give advice and encourage and assist companies based in regional NSW to take full advantage of international market opportunities.	Department of State and Regional Development (DSRD)
<u>Regional Women in Business Program</u>	Offers businesswomen in a regional area the opportunity to network, develop business skills, be mentored and gain an understanding of business assistance and support available locally.	Department of State and Regional Development (DSRD)
<u>Safety Solutions Rebate Program</u>	The Safety Solutions Rebate Program offers small business owners and sole traders up to \$500 for identifying and implementing safety solutions in the workplace.	WorkCover NSW
<u>Spinal Chord Injury and other Neurological Conditions Research Grants Program</u>	Provides financial assistance for research programs, research projects and travel scholarships to researchers in key areas of spinal cord injury and other neurological conditions.	NSW Office for Science and Medical Research (OSMR)
<u>Stepping Up - Mentoring Program</u>	This program will match you to an experienced business person or mentor to help you in developing your business.	Department of State and Regional Development (DSRD)
<u>Tractor Power Take-off Rebate (PTO)</u>	A one-off rebate of up to \$200 is available for farmers who purchase PTO guarding for their tractors and equipment.	WorkCover NSW
<u>Women in Business Mentor Program</u>	Helps women business owners grow their business by linking them with experienced business people.	Department of State and Regional Development (DSRD)

Other Funding Sources

Western Sydney Business Employment Fund (Penrith Business Alliance)

The Western Sydney Business Employment Fund (WSBEF) aims to encourage business growth and support new employment creation. The fund aims to offset business costs including payroll tax, in order to for businesses to create employment through establishment or expansion of operations in Western Sydney.

The WSBEF aims to encourage small to medium businesses to:

- Create new employment opportunities
- Establish or expand their operations
- Diversify and strengthen their business

Financial assistance will be available to offset costs impeding the establishment or expansion of operations, where new employment will result.

Assistance may be in the form of:

- Payroll tax rebates; and/or
- Direct grants; and/or other business cost offsets (for example, initial capital costs, costs of pursuing diversification or other growth opportunities).

The level of assistance offered for a project will take into account:

- Direct new employment generated
- Value of payroll tax being paid
- The skill level of new jobs

Online Search Tools

Business.gov.au – Grants and Assistance Finder

The *Grants and Assistance Finder* can assist in identifying Federal and State grants and assistance programs that are relevant to businesses operating in Australia. Searching can be undertaken on a wide variety of grants, throughout many categories (e.g. developing your business, innovation and education).

Main grants identified by this website include:

- Technology Showcase
- Business clusters
- Industry Capability (encouraging use of local products)
- Mentoring Programs
- Multicultural Partnership Grants
- NSW Trade Missions and Exhibitions
- Small Biz Connect
- Small Business Rebate
- Elsa Dixon Aboriginal Employment Program (EDAEP)
- NSW Film and TV Industry Attraction Fund (FIAF)
- Advanced Development and Marketing Program
- Arts Funding Program
- Community Strategic Products and Services
- Conservation Management Documents
- Country Passenger Transport Infrastructure Grants Scheme (CPTIGS)
- Early Stage Development Fund
- Emerging Filmmakers Fund
- Festival Travel
- Industry and Audience Development
- Minor Cashflow Loan
- NSW Film and TV Industry Attraction Fund (FIAF)
- On Ground Interpretation Works
- Producer Extension Placement Program
- Production Finance Fund
- Production Loan Finance Fund
- Regional Filming Fund (RFF)
- Slate Loan Fund

Business.gov.au – Advisor Finder

It is an online search tool that identifies advice and support services offered by the Australian Government for your business. Advice services on many facets of business are provided, including:

1. Commencing and growing a business
2. Obtaining funding
3. Employing people
4. Environmental management
5. Exporting
6. Fair trading
7. Franchising
8. Grants & assistance
9. Home-based industries
10. Importing
11. Insurance
12. Intellectual property
13. Market research and statistics
14. Occupational health & safety
15. Online businesses
16. Registration and licences
17. Taxation
18. Tenders and contracts
19. Emergency management and recovery
20. Innovation

Australian Government - Program Qualification Online Tool

<http://www.australiangovernmentgrants.org/grants-loans-calculator/grant-finder.php>

An online tool, it identifies applicable government grants, incentives and loans for small businesses operating in Australia.



Melbourne

Level 4
356 Collins Street
Melbourne VIC 3000
(03) 9600 0500

Gold Coast

Suite 5
492 Christine Avenue
Robina QLD 4226
(07) 5562 0767

Sydney

Level 4
39 Martin Place
Sydney NSW 2000
(02) 9221 5211

Perth

Ground Floor
12 St Georges Terrace
Perth WA 6000
(08) 9225 7200