



# Appendix I

Economic and Employment Strategy

Author: RPS

# ALKIMOS CENTRAL

## Economic and Employment Strategy

Alkimos Central Economic  
and Employment Strategy  
FINALC  
14 September 2021

## REPORT

### Document status

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### Approval for issue

Mark Wallace



14 September 2021

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## SUMMARY

### Introduction

Alkimos Central is a planned major centre in the North West Corridor of metropolitan Perth collocated with major motorway road (Mitchell Freeway Extension) and passenger rail (METRONET Yanchep Rail Line) transport infrastructure and anchoring the Alkimos Eglinton District.

Alkimos Central is the largest activity centre within the District and is recognised as a “Secondary Centre” within the wider Perth Metropolitan activity centre network by State Planning Policy (SPP) 4.2, Directions 2031 and Beyond, Perth and Peel at 3.5m and the North West Sub-Regional Planning Framework.

In particular, the Sub-Regional Planning Framework establishes that:

*Alkimos will support the strategic metropolitan centres with a mix of land uses, including retail, office, high density residential development, entertainment and community services. Alkimos will also be served by an extension of the Joondalup railway line. The centre will require detailed planning to maximise transit-oriented development and sustainable employment opportunities.*

This is the second largest and most prominent centre category within the network, following Strategic Metropolitan Centres like Joondalup and Yanchep (planned).

Key drivers of the local economic health of Alkimos Central include:



**Figure 1 Key Drivers of Economic Health in Alkimos Central**

### Economic and Employment Activity

The future economic potential of Alkimos Central depends on the level of investment in key tertiary education and health facilities, the form and source of this investment and its scale and size.

Three specific economic “scenarios: for the development and growth of Alkimos Central have been assessed in this Strategy:

- **Scenario 1 – Full Economic Potential:** includes full tertiary public and private hospital and/or TAFE/small university campus.
- **Scenario 2 – Private Health and Education Only:** reduced size and scale of tertiary health and education, focused on private hospital only; and
- **Scenario 3 – No Tertiary Health and Education:** health is limited to general health service needs. Education offering in the Centre is school-based only.

These three scenarios reflect the uncertainty that exists on whether public tertiary health and education investment (either direct or indirect) can be secured for the centre, and the flow on impact these investments have on local employment and retail need and capacities in the centre in the long-term.

RPS estimates that the full economic potential of Alkimos Central – expected to be realised in 2042-2052 – will yield over 11,651 jobs. This compares with approximately 10,450 jobs under Scenario 2 and 9,250 jobs under Scenario 3.

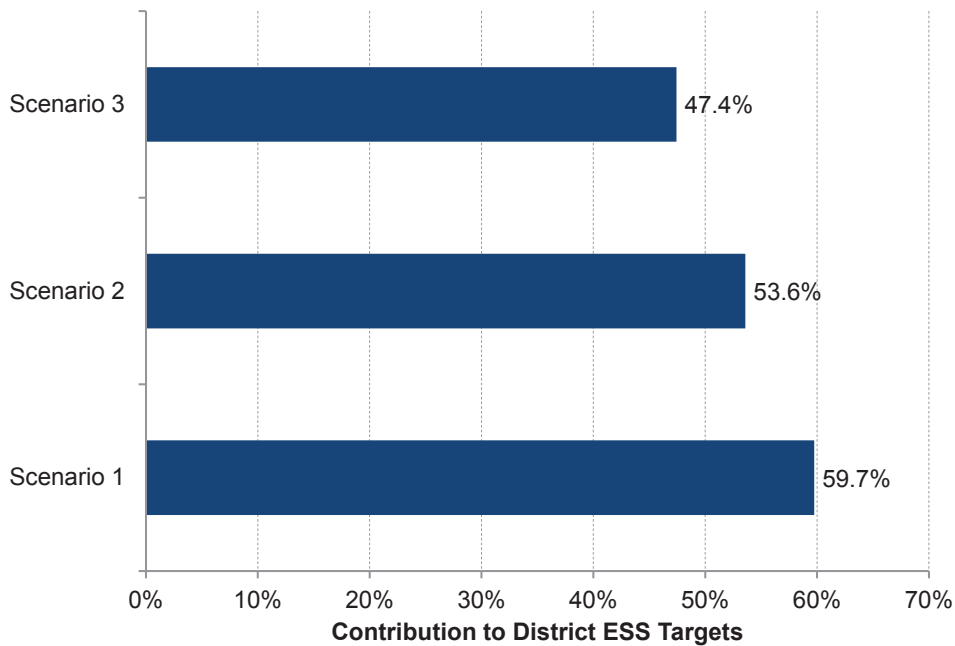
**Table 1 Employment Estimates, by Economic Scenario and Industry, Alkimos Central, 2042-2052**

Industry	Scenario 1	Scenario 2	Scenario 3
Agriculture, Forestry and Fishing	177	177	177
Mining	153	153	153
Manufacturing	107	107	107
Electricity, Gas, Water and Waste Services	67	67	67
Construction	0	0	0
Wholesale Trade	107	107	107
Retail Trade	2,200	2,126	2,053
Accommodation and Food Services	717	717	717
Transport, Postal and Warehousing	92	92	92
Information Media and Telecommunications	270	270	270
Financial and Insurance Services	359	359	359
Rental, Hiring and Real Estate Services	204	204	204
Professional, Scientific and Technical Services	874	765	655
Administrative and Support Services	496	496	496
Public Administration and Safety	782	782	782
Education and Training	1,578	1,093	607
Health Care and Social Assistance	2,129	1,597	1,065
Arts and Recreation Services	159	159	159
Other Services	748	748	748
Home-Based	430	430	430
<b>Total</b>	<b>11,651</b>	<b>10,450</b>	<b>9,250</b>

The Alkimos Eglinton District Structure Plan established a minimum employment self-sufficiency target of 60%<sup>1</sup>. This means that there is to be a minimum of six jobs for every ten workers living in the Alkimos-Eglinton District. Over the course of its development, Alkimos Central is expected to experience a growth in its local employment self-sufficiency rate, reaching between 2.24 and 2.82 jobs per local worker by 2042-2052.

This will see the Centre’s contribution to District wide ESS reach 59.7% under Scenario 1, falling to 47.4% under Scenario 3.

<sup>1</sup> Alkimos Eglinton District Structure Plan (August 2008); page 10



**Figure 2 Alkimos Central Contribution to District ESS Targets (60%), 2042-2052**

**Approach to Economic Development**

The economic intention for Alkimos Central is to create and foster a critical mass of investment, business and employment activity of the Centre and realise the employment self-sufficiency targets of the District.

The proposed employment densities and use mix in the Centre represents a best practice approach to the development of a Secondary Centre within the Perth Metro area. It seeks to learn from the lessons of other Secondary Centres and balance a critical mass of shop retail and population services with regionally significant tertiary health and education that maximise the return on investment by Government in critical enabling transport infrastructure.

The unique economic drivers outlined in Section 2 will underpin the Centre’s principal contribution to the District’s economic health as well as the economic dynamics, sustainability, and resilience of the Corridor. Examples of these features include commitment to a diversified local business and employment base, a shift to Strategic Industry employment and businesses (e.g. commercial office and tertiary health and education) over time and the delivery of critical enabling infrastructure like planned public transport connections.

Economic development will seek to achieve a critical mass of integrated mixed use commercial built form as well as the delivery of supporting services for local workers as well as Corridor, regional and national residents, and visitors. This underpins the belief that for a vibrant and robust local economy to evolve, the growth of small and local business must be supported in tandem with accommodating the needs of larger and emerging business types.

**Strategic Themes**

The economic development of Alkimos Central will be guided by a range of strategic themes. These themes provide an organising framework for economic development actions in the Activity Centre Structure Plan and include:

- Maximising Return on Investment of Enabling Transport Infrastructure
- Attracting Private Investment
- Achieving a Critical Mass of Tertiary Facilities
- Growing Local Business
- Business Connectedness
- Critical Mass of Flexible Retail and Entertainment Services
- Economic Resilience
- Governance and Resourcing

**Conclusions**

Alkimos Central represents a unique economic development opportunity for the City of Wanneroo, Perth Metro and WA. It entails the establishment of a brand-new Secondary Centre, centrally located in a high growth corridor, in line with the early delivery of regionally significant road and rail transport infrastructure. These drivers mean that Alkimos Central has the potential to support over 11,600 jobs by 2042-2052.



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If realised, Alkimos Central will represent a key driver of economic health and strength in the City of Wanneroo and the wider North West Corridor, establishing a critical mass of public and private sector investment and helping to maximise the return on investment to Government, business/industry, and the community of major catalytic transport infrastructure.

# 1 INTRODUCTION

## 1.1 What is Economic Development

Economic development is any effort or undertaking which aids in the growth of the economy. Measures of success are many and varied, which reflects the broad interpretation of 'economic development' activities. These efforts are particularly important for Greenfield locations which lack an existing local economy and therefore require additional investment, facilitation, and support from both private and public sectors.

Primary indicators for the development proponent include:

- Employment yield – both onsite and offsite (Full Time Equivalents or FTEs).
- Short-term and construction employment (FTEs).
- Business expenditure during construction and operational phase.
- Local household wealth and expenditure.
- Level of business attraction (number of businesses, level of investment); and
- Employment self-sufficiency (Percentage).

Typically, strategies for regional economic development aim to:

- Increase the flow of money into the region.
- Improve the efficiency of existing businesses; and
- Improve the recirculation of finance and resources within the region.

If achieved, these aims should result in the growth in value of the regional economy. This is the basis for a region 'moving forward' and meeting the kinds of community aspirations (e.g. housing choice, lifestyle, employment, education, health, security) so often referred to as 'must haves' in modern day Australia.

Economic Development is particularly important – and challenging – in Greenfield locations. The lack of an established residential population, enabling infrastructure and business and investment profile all limit the capacity for centres to establish and grow, without significant support and facilitation by Government.

A collaborative approach to economic development, building upon Government's traditional role in facilitating local economies through partnership with private sector organisations, is critical to achieving the economic goals and objectives established for the North West Corridor generally and Alkimos Eglinton District specifically.

## 1.2 Economic Opportunities for Secondary Centres

Alkimos Central is the only Secondary Centre north of Joondalup and is strategically located in the midpoint between two Strategic Metropolitan Centres. It also has the potential to leverage major investments in road and passenger rail transport infrastructure to attract considerable public and private investment in the short-to-medium term.

Secondary centres, as defined in **State Planning Policy 4.2 – Activity Centres for Perth and Peel**:

*“Secondary centres share similar characteristics with strategic metropolitan centres but serve smaller catchments and offer a more limited range of services, facilities and employment opportunities. They perform an important role in the city's economy and provide essential services to their catchments.”*

Secondary Centres such as Alkimos Central have an important focus for passenger rail and/or high frequency bus network and traditionally accommodate a full spectrum of retail offerings (up to 100,000sqm GLAR) including:

- Department store/s
- Discount department store/s
- Supermarkets and

- Speciality shops.

With catchments up to 150,000 people, Secondary Centres are also expected to include a diverse range of non-retail employment land uses including, major offices, professional and service businesses and tertiary level health and education facilities/institutions.

### 1.3 Strategy Purpose

The purpose of this Local Economic Strategy is to define the likely future size, composition, and character of economic activity in the Alkimos Central and provide a framework and strategic themes for stakeholders to facilitate this growth and evolution over time.

The strategy is comprised of the following key sections:

- **Economic and Employment Activity** – including identification of the key drivers of and challenges to the economic health of Alkimos Central and estimates (and scenarios) of projected employment, floorspace and self-sufficiency over the next 30 years (to 2051).
- **Approach to Economic Development** – outlining the approach to be adopted by project stakeholders to facilitate the development of the Centre economy.
- **Strategic Themes** – identification and definition of the strategic themes which will characterise the development of the Centre economy.
- **Conclusion** – summarising the key findings of the Strategy.

### 1.4 Local Strategic Policy Framework

A range of economic, land use planning and other strategy and policy documents provide a policy context and framework for this Strategy. These include:

- City of Wanneroo Strategic Community Plan (2017/18 – 2026/27)
- City of Wanneroo Economic Development Strategy & Action Plan (2016 – 2021)
- City of Wanneroo Advocacy Plan (2021 - 2025)
- City of Wanneroo Tourism Plan (2019-2024)
- City of Wanneroo Local Planning Policy 4.2: Structure Planning

These documents are summarised in **Appendix A** of this report.

### 1.5 Relationship with other Economic and Market Reports for Alkimos Central

In addition to this Economic and Employment Strategy, several other Strategies and Assessments have been undertaken in support of the Activity Centre Structure Plan. These include:

- Alkimos Central Retail and Design Review | October 2019
- Alkimos Central Hospital and Health Need Assessment | September 2020
- Employment Impact of Delayed Delivery of Alkimos Central Bridges - Technical Note | February 2020
- Alkimos Central Retail Need Assessment | September 2021
- Alkimos Central Housing Need Assessment | September 2021

Each of the different sector-specific assessments undertaken by RPS have entailed the use of tailored and targeted methodologies. In the case of retail, housing, and hospital/health assessments, these have primarily been in the form of catchment-based need and demand assessments. Where there are differences between figures included within each report and this Economic and Employment Strategy, the estimates within the individual sector-specific reports take precedence.

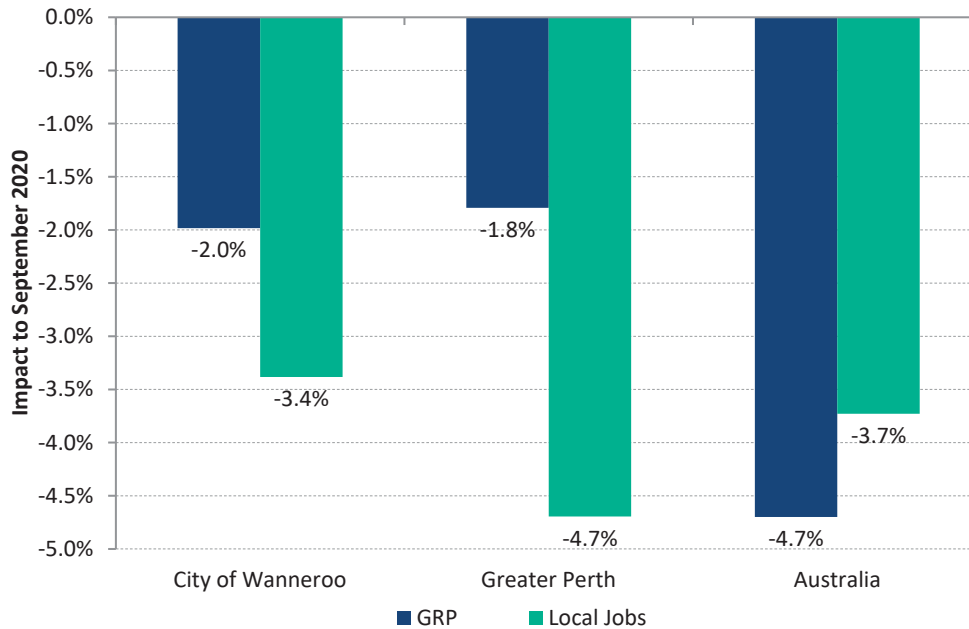
However, where possible, the results of the sector specific reports have been used as evidence and inputs to the development of assumptions in the economic and employment modelling within this Strategy, to ensure the highest degree of alignment possible.

## 1.6 Glossary and Abbreviations

<b>Abbreviation</b>	<b>Definition</b>
DSP	District Structure Plan
ESS	Employment Self-Sufficiency
FTE	Full-Time Equivalent
GFA	Gross Floor Area
GFC	Global Financial Crisis
GRP	Gross Regional Product
LHS	Local Housing Strategy
LNG	Liquefied Natural Gas
PLUC	Planning Land Use Code
SPP	State Planning Policy
sqm	Square Metres
STS	Special Transit System
WA	Western Australia
WWTP	Wastewater Treatment Plant

## 1.7 Implications of COVID19

The majority of analysis for this report occurred during the onset of the COVID19 pandemic. Analysis by Profile.ID for the City of Wanneroo indicates that in the year to September 2020, the Wanneroo LGA experienced a decline of Gross Regional Product of 2.0%, more than Greater Perth of -1.8% but less than Australia of -4.6% (reflecting the larger impact on the NSW and Victorian economies). Despite this, local jobs and employment was less significantly impacted than both Greater Perth (-4.7%) and Australian (-3.7%) economies, with the City of Wanneroo experiencing a decline over the year of only -3.4%.



**Figure 3 Gross Regional Product (GRP) and Jobs Impacts of COVID-19, Wanneroo (C), Greater Perth and Australia, Year to September 2020<sup>2</sup>**

While the economic impacts of COVID-19 are increasingly understood, the long-term implications for consumer and household dwelling preferences are not. It is possible that the pandemic, and associated social distances and travel restrictions, may accelerate emerging trends in areas such as house and amenity/service collocation/integration and Small Office/Home Office (SOHO) type offerings.

At this stage, the advice from State and Federal Treasuries is for analysis on long-term housing, retail, and economic trends to rely upon existing population and economic projections, assuming the impact of COVID19 is contained to the short-term only.

<sup>2</sup> ID (2021) COVID-19 Impact Tool – City of Wanneroo accessed at <https://economy.id.com.au/wanneroo/covid19-quarter-impacts>

## 2 ECONOMIC & EMPLOYMENT ACTIVITY

### 2.1 Alkimos and Alkimos Central

Alkimos Central is the largest activity centre within the District Structure Plan and is recognised as a “Secondary Centre” within the wider Perth Metropolitan activity centre network by State Planning Policy (SPP) 4.2, Directions 2031 and Beyond, Perth and Peel at 3.5m and the North West Sub-Regional Planning Framework.

In particular, the Sub-Regional Planning Framework establishes that:

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This is the second largest and most prominent centre category within the network, following Strategic Metropolitan Centres like Joondalup and Yanchep (planned).

#### 2.1.1 Rail and Road Investments

A key factor requiring an update to retail and economic analysis previously undertaken for Alkimos Central is major proposed and planned transport infrastructure. Namely, this includes:

- The extension of passenger rail infrastructure to Yanchep as part of the METRONET project; and
- the extension of the Mitchell Freeway to Alkimos.

Both transport projects are being constructed concurrently with targeted completion date in 2022-23.

#### Yanchep Rail Extension

The Yanchep Rail Extension is a 14.5km project that will deliver the last proposed section of the Joondalup rail line from Butler to Yanchep, helping to support ongoing growth in the area, as well as reducing road congestion. In the short-term, the Yanchep Extension Project will help develop activity centres by stimulating new employment opportunities in the Yanchep Strategic Metropolitan Centre and supporting higher density land use. In the long-term, the extension will help move the more than 150,000 future Yanchep-Two Rocks residents.

## 2.2 Economic Vision for Alkimos Central

The following economic vision is proposed for Alkimos Central:

*Alkimos Central will be the driver of economic and employment activity in the Alkimos Eglinton District, leveraging a high growth catchment and major road and rail transport infrastructure to realise regionally significant investment in office development and tertiary scale retail, health, community and education activity for the District and wider Corridor.*

## 2.3 Key Drivers of Local Economic Health

The following diagram outlines the key drivers of the economic health of Alkimos Central.



**Figure 4 Key Drivers of Economic Health in Alkimos Central**

These key drivers include:

- **Collocation with major passenger rail transport and highway** and secondary road infrastructure with the Centre.
- **Centrality in a high growth corridor** – Alkimos Central Secondary Centre is centrally located between Joondalup and Yanchep Strategic Metropolitan Centres, supporting the next two to three decades of corridor growth.
- **Critical mass of district and wider catchment population**, driving demand for regionally significant retail, health, community, and education services.
- **Opportunities for commercial office, mixed business activity, employment** and a focus for entertainment, recreational, cultural, and social activity.
- **Strong potential for Government and private investment**, including almost \$300 million invested in local infrastructure, open space, and services.

These economic drivers, if successfully captured and delivered, will underpin the economic health of Alkimos Central, facilitate the realisation of its economic potential as a Secondary Centre and support the creation of a dynamic business, investment and employment environment in the District and wider Corridor.

## 2.4 Proposed Locations of Economic Activity

The Alkimos Central will be in the south east of the Alkimos Eglinton District Structure Plan Area, in the suburb of Alkimos and north Trinity Alkimos LSP. The identified economic nodes and activities for Alkimos Central include:

- Town Centre/Retail Core collocated with the planned Alkimos Central Rail Station
- Mixed Industry and Business Areas along Romeo Road
- Home-based business and employment
- Tertiary level health and education institutions
- Retirement and aged care offerings.

## 2.5 Methodology and Scenarios

### 2.5.1 “Top Down” Approach

RPS has estimated the local future employment and floorspace potential of Alkimos Central within the North West Corridor and District Structure Plan area using a “top down” approach. This approach is regarded as most appropriate for a Secondary Centre as its role and function (and therefore economic potential) are linked to the prospects of the wider Corridor and District, rather than local population triggers.

Additionally, Secondary Centres traditionally provide land use planning and zoning flexibility hence the opportunity exists for greater development intensity to evolve over time compared to District and Neighbourhood level centres. As such, it is possible for the same zoned parcel to accommodate varying levels of employment density, particularly as the local economy evolves over time.

This approach models future growth potential and trends in the North West Corridor (drawing on State and Federal Government employment and population projections) utilising Corridor-wide population-to-job ratios (by industry and occupancy breakdown). Local servicing rates are then applied to get District level employment estimates. These jobs are then allocated and assigned employment activity to the District based on population growth shares and activity centre distribution.

RPS then identifies and quantifies the role and function of Alkimos Central in District employment across each industry category.

These steps are illustrated below.



**Figure 5 “Top Down” Approach to modelling Alkimos Central Employment and Floor Space Potential**

Industry-based employment categories are then concorded with different land uses, in line with the Department of Planning Land Use Codes (PLUC). Floor space is converted into employment utilising City of Wanneroo results from the 2015-2017 Land Use and Employment Survey by the Department of Planning.

Key assumptions utilised in this assessment are captured in **Appendix C**.



## 2.5.2 Development Scenarios

The future economic potential of Alkimos Central depends on the level of investment in key tertiary education and health facilities, the form and source of this investment and its scale and size.

Three specific economic “scenarios: for the development and growth of Alkimos Central have been assessed in this Strategy:

- **Scenario 1 – Full Economic Potential:** includes full tertiary public and private hospital and/or TAFE/small university campus.
- **Scenario 2 – Private Health and Education Only:** reduced size and scale of tertiary health and education, focused on private hospital only; and
- **Scenario 3 – No Tertiary Health and Education:** health is limited to general health service needs. Education offering in the Centre is school-based only.

These three scenarios reflect the uncertainty that exists on whether public tertiary health and education investment (either direct or indirect) can be secured for the centre, and the flow on impact these investments have on local employment, housing and retail need and capacities in the centre in the long-term.

## 2.6 Employment Estimates for Alkimos Central

RPS estimates that the full economic potential of Alkimos Central – expected to be realised in 2042-2052 – will yield over 11,651 jobs. This compares with approximately 10,450 jobs under Scenario 2 and 9,250 jobs under Scenario 3.

**Table 2 Employment Estimates, by Economic Scenario and Industry, Alkimos Central, 2042-2052**

Industry	Scenario 1	Scenario 2	Scenario 3
Agriculture, Forestry and Fishing	177	177	177
Mining	153	153	153
Manufacturing	107	107	107
Electricity, Gas, Water and Waste Services	67	67	67
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Financial and Insurance Services	359	359	359
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Other Services	748	748	748
Home-Based	430	430	430
<b>Total</b>	<b>11,651</b>	<b>10,450</b>	<b>9,250</b>

<sup>3</sup> Note that construction employment has been excluded from the analysis. Construction is a temporary form of employment from the perspective of the Alkimos Central and the required floor space.

A review of job estimates by PLUC highlights the central role that the Health/Welfare/Community Services (HEL) Land Use is expected to play in employment generation across all three scenarios, but specifically under Scenario 1 – Full Economic Potential. This highlights the important role that State Government investment in tertiary health and/or education in realising the full employment and economic potential of Alkimos Central. Full PLUC descriptions can be found in **Appendix C**.

**Table 3 Employment Estimates, by Economic Scenario and PLUC, Alkimos Central, 2042-2052**

PLUC	Scenario 1	Scenario 2	Scenario 3
PRI	0	0	0
MAN	115	115	115
STO	135	135	135
SER	401	401	401
SHP	2,522	2,412	2,303
ENT	409	409	409
RET	493	479	464
OFF	3,749	3,562	3,376
HEL	3,343	2,453	1,563
RES	430	430	430
UTE	54	54	54
<b>Total</b>	<b>11,651</b>	<b>10,450</b>	<b>9,250</b>

### 2.6.1 Timing and Staging

To indicate the likely timing and growth profile at Alkimos, RPS has modelled employment estimates for Scenario 2 in 10 year stages from 2022 to 2052. Expectations are that employment generation will be slower in the initial stages of the development and focus primarily on local and district population servicing, but that more regionally focused and strategic industry employment growth will accelerate in the latter part of the assessment period.

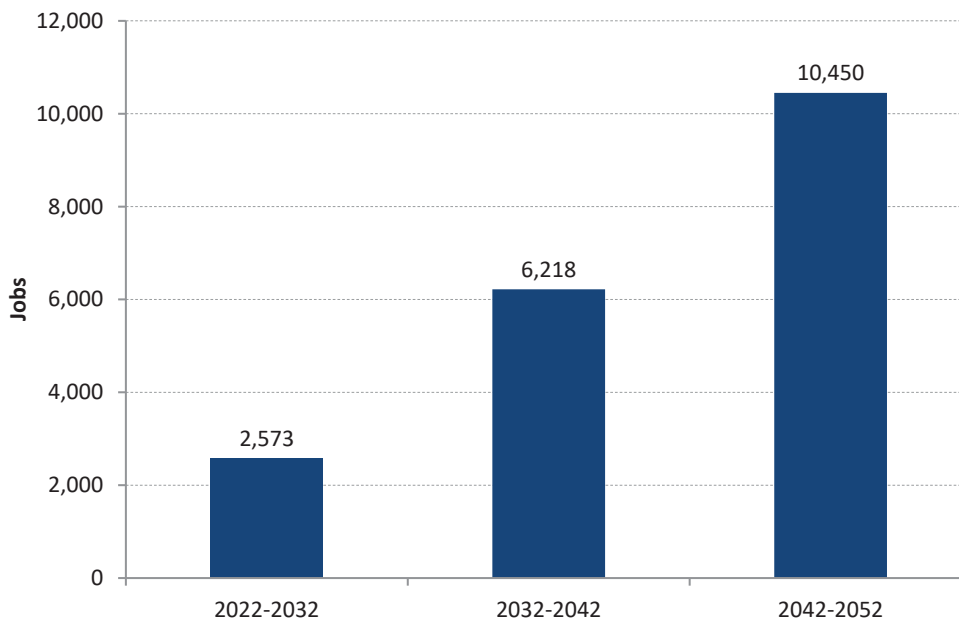
This is in line with the growth and economic maturity of major centres, as they establish, over time, a recognised “brand” in the market as a preferred business and investment destination. It also reflects the impact of the growth of the northern part of Alkimos Central’s population and service catchment.

The following outlines the potential growth profile of employment in the Centre, based on local market and economic factors.

**Table 4 Cumulative Employment Estimates, Scenario 2 and PLUC, Alkimos Central, by 10 Year Stages**

PLUC	2022-2032	2032-2042	2042-2052
PRI	0	0	0
MAN	29	69	115
STO	34	81	135
SER	100	240	401
SHP	965	1,930	2,412
ENT	164	327	409
RET	191	383	479
OFF	356	1,425	3,562
HEL	613	1,472	2,453
RES	108	258	430
UTE	14	32	54
<b>Total</b>	<b>2,573</b>	<b>6,218</b>	<b>10,450</b>

This profile is illustrated below.



**Figure 6 Employment Estimates, Scenario 2, Alkimos Central, by 10 Year Stage**

Employment growth is expected to continue to occur post 2042-2052 as Alkimos Central continues to evolve and mature as an employment, business, and economic centre in the North West Corridor. This will likely involve a change in the mix of uses, as office/commercial and regional servicing sectors continue to grow, and local and district level population services slow as the District and wider catchment reaches residential completion.

## 2.6.2 Local & District Employment Self-Sufficiency

The Alkimos Eglinton District Structure Plan established a minimum employment self-sufficiency target of 60%<sup>4</sup>. This means that there is to be a minimum of six jobs for every ten workers living in the Alkimos-Eglinton District. Self-sufficiency means that these jobs are not necessarily filled by local workers (that is employment self-containment), though it is expected that the provision of a diversified range of high order local employment will be a major driver in residential settlement and therefore enhance the levels of economic-based travel containment over time.

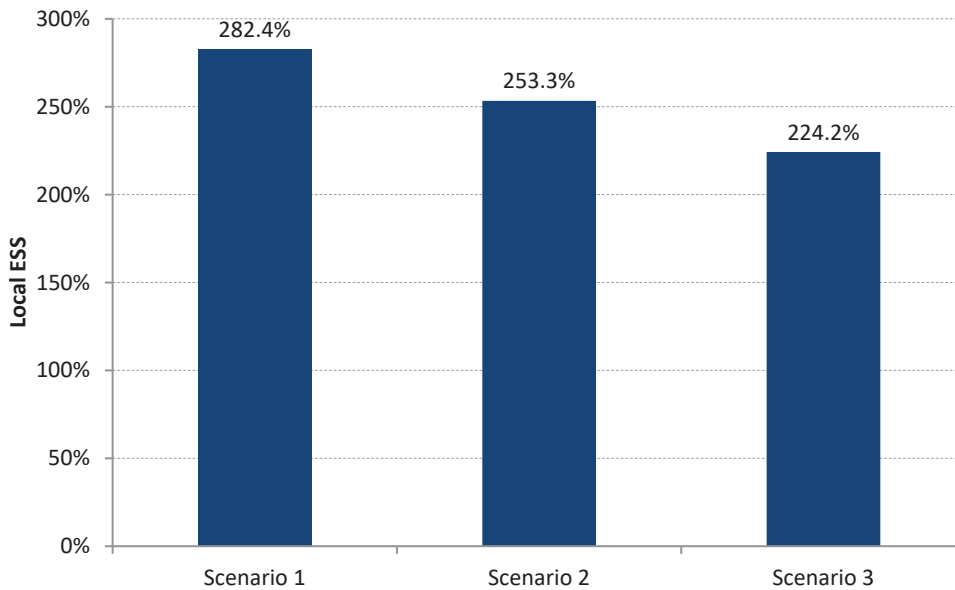
Assuming a workforce share of total residential population of 50% (in line with corridor averages and accounting for the demographic breakdown of the population) and the 60% employment self-sufficiency rate, there will need to be approximately 19,500 jobs provided within the Alkimos Eglinton District (and 33,000 in the broader Catchment). This is detailed in the table below.

**Table 5 Alkimos Eglinton District and Catchment Employment Requirement**

Measure	AE District	Catchment
Population	55,000 to 65,000	90,000 to 110,000
Labour Force	32,500	55,000
Jobs Required (60% ESS)	19,500	33,000

Analysis of the employment and residential development potential of Alkimos Central indicates that local Employment Self-Sufficiency is expected to range between 224.2% and 282.4% (local jobs as a ratio of local workers living in the Centre). This high ESS reflects the employment, business, and industry focus of Alkimos Central within the wider District. This staging is illustrated in the figure below.

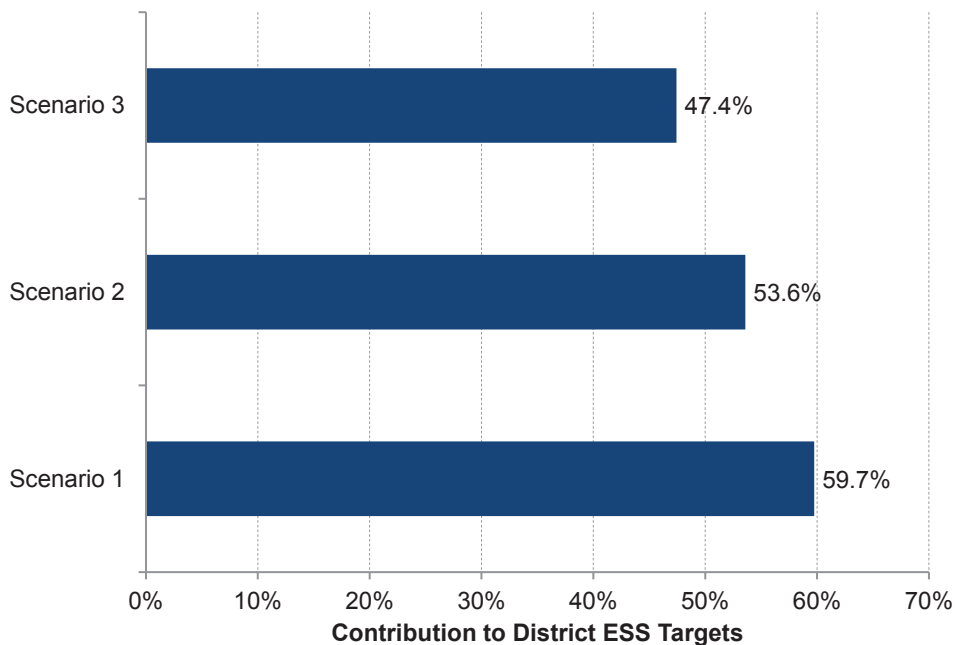
<sup>4</sup> Alkimos Eglinton District Structure Plan (March 2016); page 14



**Figure 7 Employment Self-Sufficiency, by Scenario, Alkimos Central**

An effective way to analyse the appropriateness of employment generation of an area is to assess its contribution to meeting District employment self-sufficiency targets. By 2042-2052, Alkimos Central is expected to contribute 59.7% of the jobs required in the Alkimos Eglinton District under Scenario 1, falling to approximately 47.4% under Scenario 3.

Previous analysis by RPS suggests that a Secondary Centre should contribute approximately two-thirds of the total employment generation within a District area. Scenario 1 broadly meets this threshold. Conversely, Scenario 2 represents a sub-optimal option but does realise significant economic and employment potential for the centre. Finally, Scenario 3 represents the lowest contribution to local employment self-sufficiency and would not see the economic potential of the Centre being realised.



**Figure 8 Alkimos Central Contribution to District ESS Targets (60%), 2042-2052**

### 2.6.3 Employment Diversity

It is expected that population-serving industries will dominate early employment generation, responding to the growth of both local and District population catchments and associated expenditure levels and service demand. Strategic Industry employment however is expected to grow over time and represent a substantial share of total employment in Alkimos Central by 2042-2052.

For this assessment, Strategic Industries are those which do not service a local area, have a high propensity towards knowledge intensive industries and are more likely to export to other parts of Australia or the world. Manufacturing, Health, Office, and Service PLUC are the most likely to accommodate Strategic Industries. As such, the growth of these sectors over time influences the total share of Strategic Industry employment. Based on Scenario 1, RPS estimates that the share of Strategic Industry employment in Alkimos Central will increase from 30.2% of total in 2022-2032 to 50.2% in 2042-2052.

**Table 6 Strategic Industry Employment, Scenario 1, Alkimos Central, by 10 Year Stage**

PLUC	2022-2032	2032-2042	2042-2052
PRI	0	0	0
MAN	23	55	92
STO	3	8	13
SER	35	84	140
SHP	0	0	0
ENT	0	0	0
RET	0	0	0
OFF	356	1,425	3,562
HEL	307	736	1,226
RES	54	129	215
UTE	0	0	0
<b>Total</b>	<b>778</b>	<b>2,437</b>	<b>5,250</b>
<b>Strategic Industry Share</b>	<b>30.2%</b>	<b>39.2%</b>	<b>50.2%</b>

## 2.7 Economic Floor Space

Applying standard workspace ratios to the employment by PLUC (extracted from the Land Use and Employment Survey results for the City of Wanneroo), RPS estimates that Alkimos Central has the potential to accommodate between 426,000 and almost 590,000sqm of floor space (GFA).

**Table 7 Floor Space, by PLUC, Alkimos Central, 2042-2052**

PLUC <sup>5</sup>	Scenario 1	Scenario 2	Scenario 3
MAN	17,211	17,211	17,211
STO	26,983	26,983	26,983
SER	32,063	32,063	32,063
SHP	75,649	72,362	69,075
ENT	16,374	16,374	16,374
RET	29,605	28,725	27,845
OFF	112,477	106,875	101,273
HEL	267,401	196,239	125,077
UTE	10,817	10,817	10,817
<b>Total</b>	<b>588,579</b>	<b>507,648</b>	<b>426,718</b>

<sup>5</sup> Refer to Appendix C for PLUC definitions

## REPORT

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As expected, the largest category in Scenario 1 is in the Health/Welfare/Community Services, owing to its PLUC including both hospitals as well as tertiary education institutions. This category also has significant variation across the three scenarios, going from the largest amount of floor space under Scenario 1 to the third highest under Scenario 3.

The floorspace GLAR for Shop Retail in this economic model broadly aligns with the results of the Retail Need Assessment, reflecting a combination of both economic and population/household drivers of demand.

Office floor space capacity is expected to be around 100,000sqm GFA in the long-term, while both service and storage floor space is expected to be significant, though this will be heavily influenced by the built form of both land uses.

## 3 APPROACH TO ECONOMIC DEVELOPMENT

### 3.1 Approach

The realisation of Alkimos Central's potential, aspirations and objectives will rely on a long-term cooperative partnership between State and Local Government agencies and private developers, investors, and businesses.

DevelopmentWA (and potential project developer partners) will need to play a leading role through its commitment to and delivery of key components within its sphere of influence. It is understood that for Alkimos Central to fulfil its role and function as defined in the SPP 4.2 as a Secondary Centre, the broader District and Corridor will also need to be successful.

To this end, the intent should be to ensure that the key deliverables of Alkimos Central complement and benefit the surrounding region. This cooperative approach is highlighted by the need for the Alkimos Eglinton District Structure Plan (DSP) area to "aim for a minimum 60% employment self-sufficiency"<sup>6</sup>.

### 3.2 Philosophy

The economic intention for Alkimos Central is to create and foster a critical mass of investment, business and employment activity of the Centre and realise the employment self-sufficiency targets of the District.

The proposed employment densities and use mix in the Centre represents a best practice approach to the development of a Secondary Centre within the Perth Metro area. It seeks to learn from the lessons of other Secondary Centres and balance a critical mass of shop retail and population services with regionally significant tertiary health and education that maximise the return on investment by Government in critical enabling transport infrastructure.

The unique economic drivers outlined in Section 2 will underpin the Centre's principal contribution to the District's economic health as well as the economic dynamics, sustainability, and resilience of the Corridor. Examples of these features include commitment to a diversified local business and employment base, a shift to Strategic Industry employment and businesses (e.g. commercial office and tertiary health and education) over time and the delivery of critical enabling infrastructure like planned public transport connections.

Economic development will seek to achieve a critical mass of integrated mixed use commercial built form as well as the delivery of supporting services for local workers as well as Corridor, regional and national residents, and visitors. This underpins the belief that for a vibrant and robust local economy to evolve, the growth of small and local business must be supported in tandem with accommodating the needs of larger and emerging business types.

### 3.3 Government Support & Investment

Government support and investment is critical to the economic potential of Alkimos Central being realised and District and Corridor level employment self-sufficiency targets being achieved. DevelopmentWA plays a key role as a State Agency, being the master planner and master developer of Alkimos Central, having originally procured the land in the 1990's to facilitate a major economic activity centre to support the growth of the corridor (following on from DevelopmentWA's earlier and similar role in the development of the Joondalup City Centre). Government plays a fundamental role in Western Australia's economic growth and prosperity by:

- Providing a regulatory framework conducive to private sector investment (regulator).
- Procuring goods and services from the private sector (customer).
- Delivering a range of community services (service provider); and
- Investing in enabling infrastructure that supports economic and business growth and employment generation (investor).

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<sup>6</sup> Alkimos Eglinton District Structure Plan (August 2008); page 10

In the case of Alkimos Central, the growth of the centre will benefit from the early delivery of major regionally significant transport infrastructure including:

- **Mitchell Freeway Extension** - The extension of Mitchell Freeway is a \$232m<sup>7</sup> project, forming part of a group of infrastructure improvements, which will support the expansion of Perth's fast-growing outer northern suburbs of Butler, Yanchep, Alkimos, and Eglinton. This project will extend a critical transport link and provide many benefits to the local community, including improved access and travel times. As part of the Mitchell Freeway Extension, and relevant to Alkimos Central, the State Government will:
  - Extend Mitchell Freeway from Hester Avenue to Romeo Road, with two traffic lanes in each direction
  - Connect Romeo Road from Wanneroo Road to Marmion Avenue, with signal modifications at the Marmion Avenue intersection, an intersection upgrade at Wanneroo Road, and a new intersection at Benenden Avenue
  - Duplicate Wanneroo Road from south of Romeo Road to Trian Road
  - Build a Principal Shared Path on the western side of the freeway

With Romeo Road being located at the end of the freeway until 2031 or beyond; Romeo Road and Marmion Avenue will function as key linkages to growth areas north of Alkimos, with likely benefits being high exposure and accessibility for early investors in Alkimos.

- **Yanchep Rail Line Extension** - the Yanchep Rail Extension, a \$531.7m<sup>8</sup> project, will deliver the last proposed section of the Joondalup Line from Butler, 14.5km north to Yanchep to help support ongoing growth in the area and reduce congestion. The project will help develop activity centres by stimulating new employment opportunities in the Alkimos secondary centre, Eglinton district centre and Yanchep Strategic Metropolitan Centre and supporting higher density land use for residential and commercial purposes. The extension will give more than 150,000 future Yanchep-Two Rocks residents another transport option to travel around Perth. With stations planned at Alkimos, Eglinton and Yanchep, early designs show how stations will fit within the planned development areas and cater for passengers on day one of operations. In December 2019, the NEWest Alliance was announced as the successful Alliance to deliver the Yanchep Rail Extension. The NEWest Alliance consists of CPB Contractors and the Downer Group. Early works for the project have been completed by RJ Vincent. The NEWest Alliance team is currently developing the detailed design, consulting stakeholders and undertaking procurement. Construction is currently underway for the Yanchep Rail Extension with the completion of major construction and train service operations scheduled for 2022-23.

New Secondary Centres (and equivalent sizes) across Australia are rarely established with the delivery of such catalysing regionally significant transport infrastructure in place in the short-term. This presents an opportunity for the full economic potential of Alkimos Central to be realised, leveraging its central location in the North West Corridor between two Strategic Metropolitan Centres.

Major investments (or planning and approvals support) by Government to facilitate the realisation of local and District economic potential include:

- Support for major tertiary health facilities, either directly through a new public hospital or indirectly through support for major private hospital investment.
- Investment in the establishment of tertiary level education capacity, either in the form of a TAFE or boutique university campus.
- Decentralisation of State and Local Government administration offices to Alkimos Central to anchor commercial office development.
- Support for investment in retirement village and aged care residences within and adjacent to the Centre.

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<sup>7</sup> Department of Infrastructure, Transport, Regional Development and Communications (2021), Mitchell Freeway Extension. Accessed at [https://investment.infrastructure.gov.au/projects/ProjectDetails.aspx?Project\\_id=097098-17WA-NP](https://investment.infrastructure.gov.au/projects/ProjectDetails.aspx?Project_id=097098-17WA-NP)

<sup>8</sup> Department of Infrastructure, Transport, Regional Development and Communications (2021), METRONET: Yanchep Rail Extension. Accessed at [https://investment.infrastructure.gov.au/projects/ProjectDetails.aspx?Project\\_id=097098-17WA-NP](https://investment.infrastructure.gov.au/projects/ProjectDetails.aspx?Project_id=097098-17WA-NP)



- Support for primary and secondary school provision in the centre, either in addition to or as a stage for tertiary education provision
- Support and approval for major regionally significant retail and entertainment facilities.
- Support for local car parking and public transport networks to facilitate ease of movement to and within the Centre and wider District.
- Support for the construction of key community facilities at Alkimos, including, an Aquatic and Recreation Centre (\$60m), Regional Library (\$7.4m) and a District Community Centre (\$5.6m)

The absence of effective Government investment and facilitation will significantly constrain the economic potential of Alkimos Central, reduce its employment generation capacity and severely impact the achievement of employment self-sufficiency targets into the District and broader Corridor.

### 3.4 Ongoing Monitoring

To ensure employment is continually monitored and measured, it is recommended project stakeholders actively contribute to formal modelling of local employment creation.

In response to the need for a robust and credible methodology for estimating and forecasting employment figures within a defined local area, current developers in the Alkimos Eglinton District have partnered with economic consultants, to develop customised and peer-reviewed tools for tracking and monitoring employment generation within local areas.

Reporting should be undertaken every two years during the development phase of the project after which time it will convert to a 5-yearly timeframe, in line with Australian Bureau of Statistics Census periods.

It is proposed that this information be made available to the local economic development committees and other key Government stakeholders in order to evaluate past performance and help set the best strategies and targets for future development activities.

Additionally, it is recommended that a range of other measures be monitored over time:

- Residential and non-residential building approvals (and values) by sector and type.
- Local businesses registration by industry.
- Day trip and overnight visitation levels.
- Home-based business formation and operation rates.

Tracking changes in these indicators in the medium-term will allow for key future investment decisions to be made at appropriate times, while ensuring the development is sufficiently flexible to respond to changing conditions.

## 4 STRATEGIC THEMES

The economic development of Alkimos Central will be guided by a range of strategic themes. These themes provide an organising framework for economic development actions within the Activity Centre Structure Plan. These strategic themes are outlined in the table below.

**Table 8 Strategic Themes**

Strategic Theme	Description
Maximising Return on Investment of Enabling Transport Infrastructure	Economic development actions will be focused on maximising the return on investment to Government, the community and local, District and Corridor economy of major investments by the State Government in enabling road and rail infrastructure. The general layout of the Centre, the degree integration of economic activity with key transport nodes and the promotion and facilitation of built form density are critical to achieving this return.
Attracting Private Investment	Proactive attraction of investment will drive the development of Alkimos Central as an integrated, dynamic and sustainable Secondary Centre and major node of economic activity in the Corridor. Effective marketing and branding of the Centre, particularly to investors and businesses will enhance the contribution of the Alkimos Central development to the Western Australian economy.
Achieving a Critical Mass of Tertiary Facilities	The case for major public sector investment in tertiary education and/or health facilities will be undertaken by project stakeholders. This advocacy will promote the strategic opportunities of Alkimos Central in both hospital and tertiary education networks in the North West Corridor, including strong student and key worker accessibility owing to the early delivery of enabling transport infrastructure.
Growing Local Business	Sustainable economic activity and growth requires medium and long-term growth of local businesses. The transition of local home-based and small businesses into medium and large employers helps to generate a critical mass of employment in the Alkimos-Eglinton District over time. Focus will be afforded to encouraging the establishment of home-based and micro-businesses by local residents, including emphasis on fostering a culture of entrepreneurship, innovation collaboration and communication. This will include dedicated built form facilities to “incubate” local businesses, so they graduate to local commercial market accommodate as well as the encouragement of research and business partnerships with major tertiary education and health facilities to further enhance the strength of the local economy.
Business Connectedness	The strength and resilience of the local economy will be contingent on the degree of connectedness among the local business community. This is a natural extension of the “Growing Local Business” theme. Promotion of connections between businesses through regular programs and events and guiding the establishment of a local business association are fundamental to reinforcing the beneficial interrelationships that exist between local businesses in successful and vibrant economic centres.
Critical Mass of Flexible Retail and Entertainment Services	A critical mass of shop retail and entertainment uses will be encouraged and promoted for Alkimos Central, reflecting its role as a Secondary Centre within the wider Activity Centre network. Emerging trends in retail and entertainment mean that greater levels of flexibility in shop retail floor space planning is required in order to ensure long-term sustainability and resilience in the sector. In the short-term this includes providing greater entertainment share of total uses as well as encouraging centre layouts and floor plates that can adapt over time to changes in business models (particularly in Discount Department Stores and Department Stores as well as the integration of online retail offerings).
Economic Resilience	The economic environment at the time of this Strategy (namely the impacts of COVID19) highlights the need for increased focus on short and long-term resilience in local economies. As such, static and inflexible economic planning frameworks and design guidelines have the potential to not only endanger the sustainability of local economic activity, but also reduce its capacity to respond quickly to external shocks and crisis. Flexibility in both planning and design, to enhance the longevity of the land use and built form environment is, therefore, a priority.
Governance and Resourcing	Managing, resourcing and monitoring the evolution of local economies is essential. The volatility of the economic environment, not only necessitates a greater focus on flexibility and resilience but also sufficient monitoring to know when tailored, targeted interventions are required.

A series of actions are expressly identified for implementation in the Activity Centre Structure Plan.

## 5 SUMMARY & CONCLUSION

Alkimos Central represents a unique economic development opportunity for the City of Wanneroo, Perth Metro and WA. It entails the establishment of a brand new Secondary Centre, centrally located in a high growth corridor, in line with the early delivery of regionally significant road and rail transport infrastructure. These drivers mean that Alkimos Central has the potential to support over 11,500 jobs by 2042-2052.

This employment will help the wider Alkimos-Eglinton District and Corridor meet their employment self-sufficiency targets and help to provide significant, diverse and high value employment opportunities. However, this level of employment is contingent on the economic potential of Alkimos Central being realised, including:

- major investments by all levels of Government in the development of the Centre and in facilities and services to support the region;
- support for regionally significant retail and entertainment activity of a scale commensurate with the Secondary Centre role of Alkimos Central; and
- the attraction and growth of businesses and private investment, including a strong cluster of mixed industry and commercial office based business in the long-term.

If realised, Alkimos Central will represent a key driver of economic health and strength in the City of Wanneroo and the wider North West Corridor, establishing a critical mass of public and private sector investment and helping to maximise the return on investment to Government, business/industry and the community of major catalytic transport infrastructure.

## Appendix A Related Strategies

A scan of government and key stakeholder departments identified a number of important documents that will influence economic development initiatives and outcomes in the region and at Alkimos Central.

The following provides a summary list of primary and related documents with respect to economic development within Alkimos Central. Also included under the primary documents are the key themes which must be acknowledged when planning and implementing economic development initiatives at Alkimos.

### **City of Wanneroo Strategic Community Plan (2017/18 – 2026/27)**

Four (4) key aspirational pillars have been outlined:

- Society – Healthy, safe, vibrant and connected communities.
- Economy – Progressive, connected communities that enable economic growth and employment.
- Environment – A healthy and sustainable natural and built environment; and
- Civic Leadership – Working with others to ensure the best use of our resources.

### **City of Wanneroo Economic Development Strategy & Action Plan (2016 – 2021)**

The City identified five (5) economic delivery programs for implementation:

- Industry diversification.
- Employment locations.
- Investment attraction and advocacy.
- Business support and workforce development; and
- Regional economic development.

### **City of Wanneroo Advocacy Plan (2021- 2025)**

Three (3) key themes to support COVID-19 recovery:

- Liveability – improving quality of life
- Sustainability – finding the right balance of economic, environmental and societal outcomes
- Productivity – improving regional productivity through job creation and economic opportunities

**City of Wanneroo Tourism Plan 2019-2024**

The City of Wanneroo (the City) Tourism Plan (the Plan) has been developed in collaboration with a broad and diverse group of stakeholders representing industry, government and the broader community.



Four (4) broad Action Themes are identified in the Plan. These include:

- Theme 1: Product Development.
- Theme 2: Marketing, Promotion and Events.
- Theme 3: Business Development and Governance; and
- Theme 4: Other.

These Themes support the wider goals and objectives of the Plan.

**City of Wanneroo Local Planning Policy 4.2: Structure Planning**

This Policy requires the preparation of a Local Economic Strategy. The Strategy is to include the following elements:

- Demographic, planning, economic, infrastructure and land use context.
- Floorspace modelling addressing shop retail, industrial and public purpose floorspace, including health, education, and leisure, as defined by the Western Australian Planning Land Use Categories; and
- Economic strategies detailing floorspace distribution, land uses, infrastructure, employment density, employment self-sufficiency targets and employment staging.

This document is considered to meet the required elements as detailed in the Policy.

- City of Wanneroo Employment Policy (December 2004)
- City of Wanneroo Smart Growth Strategy 2005
- Alkimos - Eglinton District Structure Plan March 2016 (Amendment 01)
- Alkimos Eglinton District Structure Plan. Appendix 6. Retail Assessment. October 2006 (IBECON)

- Directions 2031 and Beyond (August 2010)

### **City of Wanneroo Corporate Business Plan (2020/21 – 2023/24)**

The Corporate Business Plan (CBP) defines four years of priorities, services, projects, and actions the City will implement to achieve the Strategic Community Plan 2017/18–2026/27. The CBP is supported by resourcing plans to enable implementation. Each outcome and action are aligned to one of their four strategic themes: Society, Economy, Environment and Civic Leadership. Two key initiatives that they have included for the first time in the CBP 2020/21 – 2023/24 are:

- implementing and completing a Community Recovery Plan and;
- a COVID-19 Economic Recovery Plan, which can be found under the Society and Economy outcomes respectively.

### **City of Wanneroo Place Framework (2018)**

The City of Wanneroo established a Place Framework in 2018 which forms part of the City's Integrated Planning and Reporting Framework (IPRF). The framework informs future policy work, strategic planning and provides general guidance on the City's Place Approach. The City has seven Place Management Areas that act as focal points for deployment of the City's Place Approach. This allows the City to develop a distinctive vision for each area and recognise the communities of interest. These Place Management Areas have been identified as part of the City's Land Use Vision 2008 – 2030, which takes into consideration key factors of land use planning and development goals for the City. The seven Place Management Areas and the suburbs they cover are as follows:

- Transitional Coastal
- Emerging Coastal
- Established Central
- Established Coastal
- North East Rural
- Transitional Rural
- Established Southern

### **City of Wanneroo Transport Strategy (2019/20)**

The City's Transport Strategy 2019/20 has been developed to meet the community's aspiration for a sustainable transport future outlined through the City's Strategic Community Plan. It is a long-term, overarching document that outlines eight broad principles to achieve the goal of 'Creating a balanced and sustainable transport future'. These principles will inform the City's Local Planning Strategy (LPS) which will form the strategic basis for its new Local Planning Scheme. The eight guiding principles to achieve the vision of 'Creating a balanced and sustainable transport future' are:

- Place-based land use and transport planning - aligning land use, development, and transport in communities;
- Pedestrian-first environments - establishing urban environments that prioritise pedestrians;
- Prioritised cycle network - establishing a cycle network that is fast, direct, and as safe as possible;
- Convenient public transport - improving the convenience of public transport to make it a competitive option;
- Effective freight network - alleviating road capacity to prioritise the efficient movement of freight;
- Well-connected employment precincts - developing precincts that are connected by a range of transport options;
- Travel behaviour change - encouraging a change of mindset about using a range of transport options; and
- Embracing technological change - embracing new technologies to provide innovative alternatives to private cars

### **City of Wanneroo Northern Coastal Growth Corridor Community Facilities Plan (2020)**

The northern coastal growth corridor (NCGC) of the City of Wanneroo extends north along the coast from Butler through to Two Rocks. It is made up of four distinct areas:

- Alkimos,
- Eglinton,
- Yanchep and
- Two Rocks.

The intent of the Plan is to provide an evidence base, which will assist Council in their decision-making process regarding the funding and timing of the identified projects. This report focuses primarily on regional and district level facility needs within the northern growth corridor, including neighbourhood facility requirements where appropriate and noting that local needs will be determined as part of the Activity Centre Structure Planning process and where required considered within the City's Long Term Financial Plan.

## Appendix B

# Wanneroo Economic Profile

The following information was sourced from the City of Wanneroo website (economy.id) and ABS data. It is considered current at the time of writing this document<sup>9</sup>.

### Economic Highlights

Indicator	Value
Headline Gross Regional Product	\$7.28 billion (2020) 2.46% of Western Australia's Gross State Product
Employment	54,108 people work in the City of Wanneroo (2020)
Businesses	13,269 registered businesses (2020)
Industry	Largest by employment (2020): Construction (8,474) Largest by value added (2020): Manufacturing \$841 million Largest by output (2020): Manufacturing \$2,976 million
Population	Estimated Resident Population 212,768 (June 2020) 2.87% growth per annum (over 10 years)
Unemployment	8.6% compared to 6.7% in Western Australia (December 2020)

### Gross Regional Product

The Gross Regional Product (GRP) of the City of Wanneroo was \$7.28 billion for the year ended June 2020. This represented 2.46% of WA's Gross State Product. The City of Wanneroo's GRP has grown at a healthy rate of 2.6% per annum over a 10-year period to June 2020.

The City of Wanneroo has 13,269 registered businesses in the region. Construction represents nearly one-third of the businesses in the region, whilst the next highest proportion of businesses being in Transport, Postal and Warehousing and the Professional, Scientific and Technical Services sectors (with 11% and 10% respectively).

Businesses in the region are predominantly small, in reference to employment. Of the 13,269 registered businesses in the City of Wanneroo, 12,996 employ 19 or less workers, with many of these businesses operating as sole traders. Medium sized businesses (20-199 employees) account for 265 businesses whilst large-sized businesses (200+ employees) make up a small proportion with only 8 registered businesses.

<sup>9</sup> CoW (2014) Accessed at <http://economy.id.com.au> and <http://www.wanneroo.wa.gov.au/Business/Statistics> and <http://employment.gov.au/>



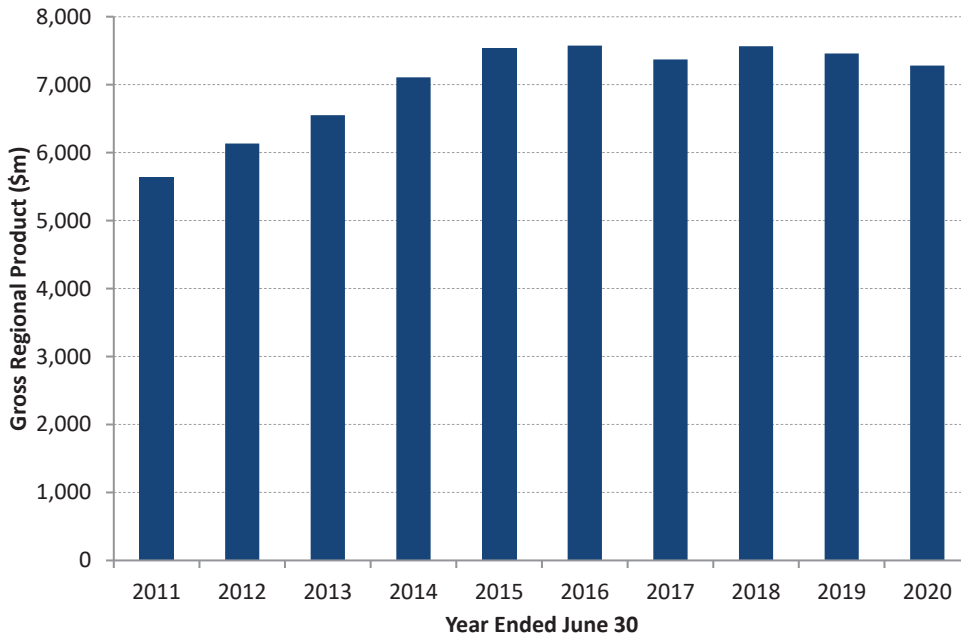


Figure 1 City of Wanneroo Gross Regional Product, 2011 to 2020

**Employment by Industry Sector**

Employment within the region was 41,367 during 2016, with employment in Construction (16.8%), Retail Trade (13.4%), Education and Training (12.4%) and Manufacturing (9.9%) the dominant industries by total employment. In comparison to employment proportions in Greater Perth, these particular sectors represented a larger proportion in the City of Wanneroo.

Employment in Health Care and Social Assistance (8.8%), Professional, Scientific and Technical Services (3.9%) and Public Administration and Safety (3.4%) sectors displayed the most notable, lesser proportions, compared to Greater Perth.

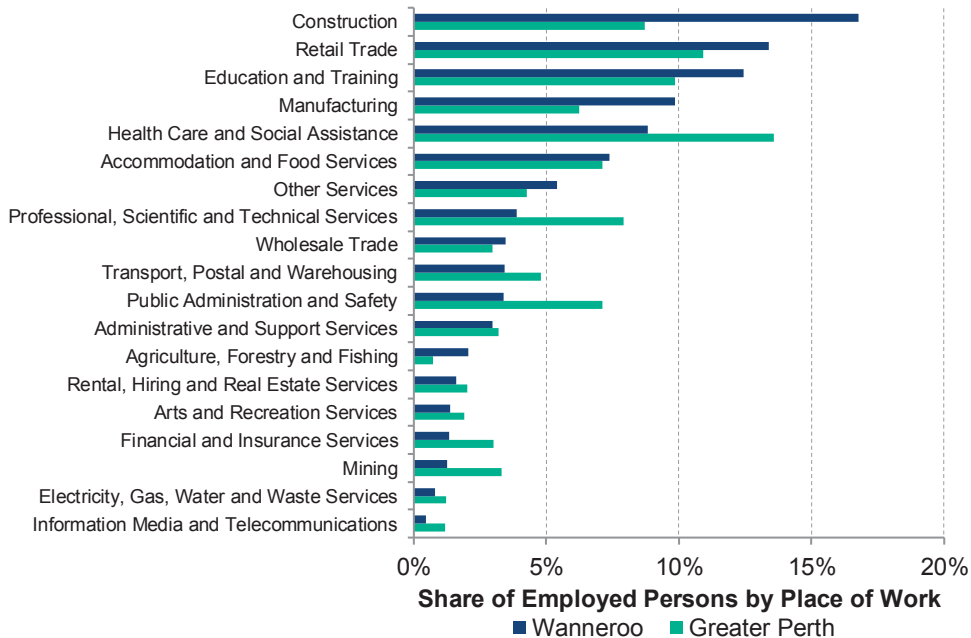


Figure 2 City of Wanneroo Employment by Industry Sector

**Changes in Employment by Industry Sector**

Construction employment continues to outpace the other industry sectors, in terms of growth over a five-year period (2011 to 2016). Construction jobs increased by 2,130 over the period, with the next largest increase in the Education & Training sector, with an additional 1,454 jobs added over the same period. Wholesale Trade and Manufacturing are the only two sectors to experience a decline in the number of jobs, with reductions of 158 and 464 jobs, respectively.

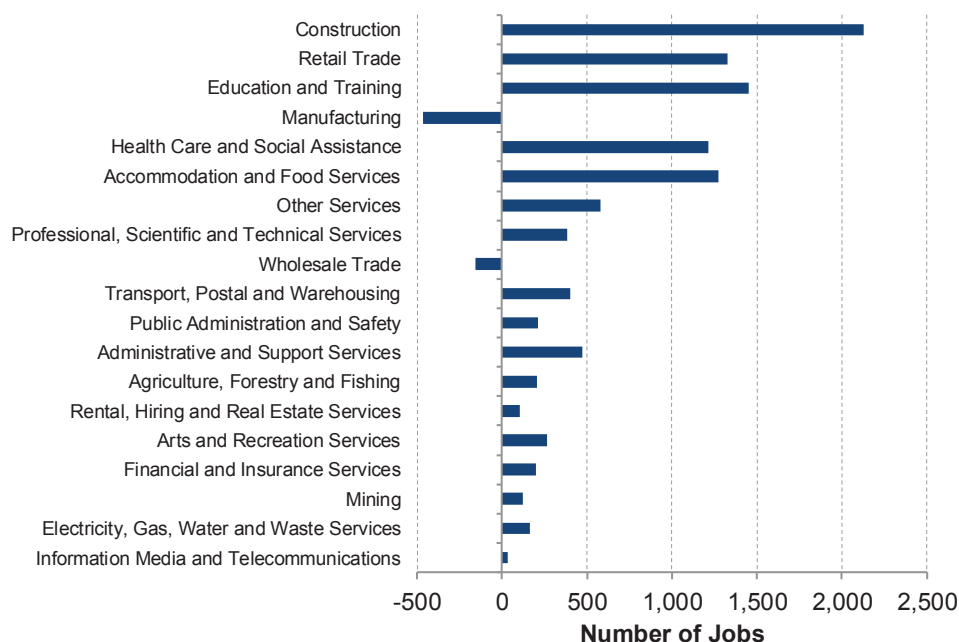


Figure 3 City of Wanneroo Changes in Employment by Industry Sector, 2011 to 2016

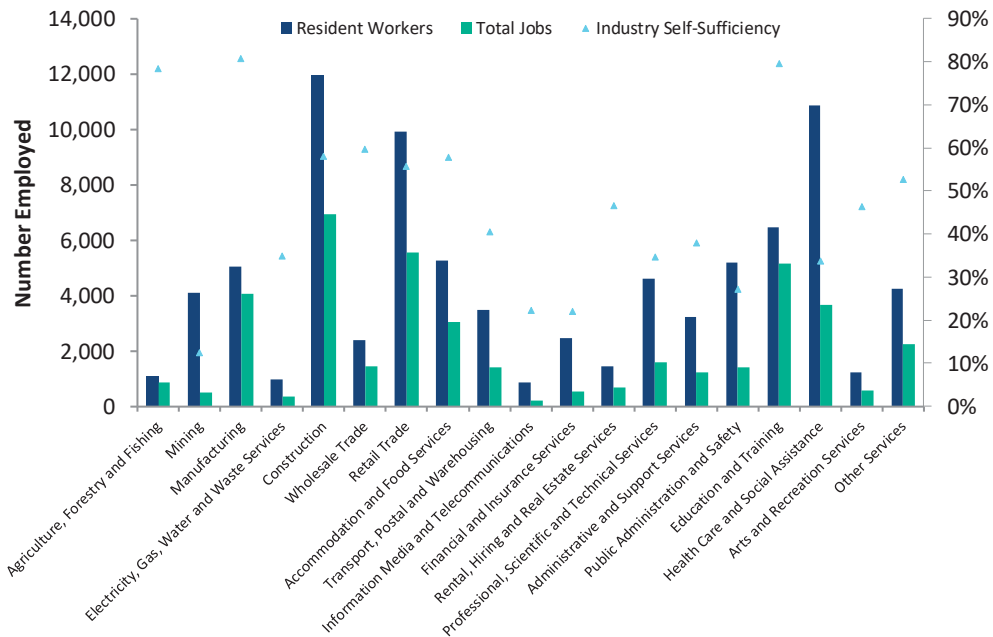
### Industry Self Sufficiency

The employment self-sufficiency ratio within the City of Wanneroo (2016) is 49.44%, as calculated in the table below:

Table 9 City of Wanneroo Employment Self-Sufficiency Comparison

	City of Wanneroo (2006)	City of Wanneroo (2016)	City of Joondalup (2006)	City of Joondalup (2016)	Perth NW Corridor (2006)	Perth NW Corridor (2016)	Perth Metro (2016)
<b>Resident Workers</b>	50,358	88,055	80,614	78,345	130,972	166,400	911,101
<b>Total Jobs</b>	23,484	43,531	32,753	45,621	56,237	89,152	841,880
<b>Employment Self-Sufficiency</b>	46.63%	49.44%	40.63%	58.23%	42.94%	53.58%	92.40%

The above illustrates that the City of Wanneroo area has jobs available equivalent to 49.44% of the resident workforce. This ratio is up from 46.63% since 2006, indicating that jobs growth has increased faster than population growth in the past decade. The neighbouring Local Government Area of the City of Joondalup experienced a more significant increase in employment self-sufficiency, from 40.63% in 2006 to 58.23% in 2016. Overall, the Perth metropolitan northwest corridor (Joondalup and Wanneroo combined) experienced an increase in employment self-sufficiency of over 10% during the period.



**Figure 4 Industry-Specific Employment Self-Sufficiency, City of Wanneroo, 2016**

Employment self-sufficiency rates in 2016 were highest for Manufacturing, Education and Training and Agriculture with Wholesale Trade, Construction, Accommodation and Food Services, Retail Trade and Other Services all also above 50%. Information Media and Telecommunications, Financial and Insurance Services and Public Administration and Safety all have low ESS levels. These sectors require significant focus for economic development activity in the future. The Mining industry has the lowest level of employment self-sufficiency, though this is due to geographical constraints and the ‘fly-in, fly-out’ nature of the industry.

The State Government has aspirational targets in regards to self-sufficiency in the North-West corridor. Therefore, a coordinated strategy will be required to increase the local self-sufficiency or to maintain the current 53.58% ratio. Neglecting the regional employment self-sufficiency may have economic, social and environmental costs. This may potentially lead to higher local unemployment, lower median household income, road congestion, pollution, higher transport costs and reduced family/quality time.

# Appendix C

## Employment and Floor Space Assumptions Tables

Table 10 PLUC Code Definitions

PLUC Code	Jobs	Description
PRI	Primary-Rural	Land use activities which usually involve the use of large areas of land, including mining, agriculture, fishing and nature conservation. The function of many of these activities is to make use of, or extract from, the land in its natural state. Since such activities are the first step in the production process they are quite distinct from the other categories
MAN	Manufacturing/Processing/Fabrication	This category includes land use activities involving the manufacture, processing and fabrication of all general goods. Both the scale and associated environmental impact of these activities separate them from other land use categories.
STO	Storage/Distribution	Any land use activity which involves the storage, warehousing or wholesaling of goods usually conducted from large structures, or involving large bulk goods, but does not include activities that attract the general retail trade activities.
SER	Service Industry	This category includes service industries offering a range of services. The scale and environmental impact of such activities require their separation from other land uses. These services include film processing, cleaning, motor vehicle and other repair services, and other servicing activities, including some construction activities.
SHP	Shop/Retail	Any activity which involves the sale of goods from a shop located separate to, and/or in, a shopping centre other than those included in Other Retail.
ENT	Entertainment/Recreation/Cultural	Activities which provide entertainment, recreation and culture for the community and which occur in buildings and/or on land, such as passive and active sports venues, museums, amusements and gambling services.
RET	Other Retail	Many of these activities are not normally accommodated in a shopping centre. By virtue of their scale and special nature the goods of these activities separate them from the Shop/Retail category (for example car sales yard or carpet showroom).
OFF	Office/Business	Administrative, clerical, professional and medical offices are activities which do not necessarily require the land area/floor space or exposure of other land uses. Although offices require building and parking facilities, these needs are quite distinct from those of commercial uses and service industries.
HEL	Health/Welfare/Community Services	Government, government-subsidised and non-government activities that provide the community with a specific service, including hospitals, schools, personal services and religious activities.
RES	Residential	Includes all types of residential land use ranging from single housing to nursing homes for the aged, residential hotels, motels, other holiday housing, institutions and religious housing.
UTE	Utilities/Communications	All forms of local, state, national and international communication, transportation and other utilities (for example, electricity, gas, water, sewerage, roads, parking and other transport or communications related activities) covering the public and private sectors.

Table 11 Workspace Ratios, by PLUC

PLUC	SQM/Job
PRI	0
MAN	150
STO	200
SER	80
SHP	30
ENT	40
RET	60
OFF	30
HEL	80
RES	0
UTE	200

Table 12 Jobs per 1,000 Residents, by Industry and Occupation, North West Corridor

Job to Population Ratio	Managers	Professionals	Technicians and Trades workers	Community and personal service workers	Clerical and administrative workers	Sales workers	Machinery and operators and drivers	Labourers	Total
Agriculture, Forestry and Fishing	0.9	0.1	0.2	0.0	0.2	0.1	0.2	0.9	2.6
Mining	0.4	0.5	0.4	0.0	0.3	0.0	0.4	0.2	2.2
Manufacturing	2.6	1.0	4.4	0.3	1.9	1.3	1.8	2.4	15.7
Electricity, Gas, Water and Waste Services	0.4	0.4	0.5	0.0	0.7	0.0	0.4	0.2	2.5
Construction	4.7	1.7	16.8	0.1	5.5	1.1	1.9	3.9	35.6
Wholesale Trade	1.8	0.8	0.6	0.0	1.4	1.5	1.0	0.8	7.8
Retail Trade	5.7	1.4	2.3	0.4	2.7	24.7	1.4	4.4	43.0
Accommodation and Food Services	3.1	0.3	2.6	5.8	0.6	3.6	0.5	4.5	21.0
Transport, Postal and Warehousing	0.5	0.2	0.2	0.1	1.5	0.2	3.7	0.4	6.8
Information Media and Telecommunications	0.6	1.4	0.8	0.1	0.5	0.7	0.0	0.3	4.4
Financial and Insurance Services	0.7	2.3	0.1	0.0	2.5	0.2	0.0	0.0	5.8
Rental, Hiring and Real Estate Services	0.6	0.3	0.2	0.1	1.3	2.6	0.1	0.2	5.4
Professional, Scientific and Technical Services	1.8	8.0	2.2	0.0	3.3	0.3	0.1	0.3	16.0
Administrative and Support Services	1.0	0.7	1.0	0.7	1.9	0.2	0.2	4.1	9.7
Public Administration and Safety	1.4	3.0	1.2	3.6	3.9	0.1	0.5	0.7	14.3
Education and Training	2.5	20.0	1.2	7.4	3.0	0.1	0.1	1.3	35.6
Health Care and Social Assistance	1.8	13.2	1.7	14.0	6.2	0.3	0.2	1.7	39.0
Arts and Recreation Services	0.8	0.9	0.3	1.3	0.7	0.3	0.0	0.2	4.7
Other Services	1.1	1.0	6.1	2.6	1.5	0.3	0.1	1.0	13.7
Total	32.3	57.1	42.9	36.5	39.5	37.8	12.7	27.2	286.0

Table 13 Alkimos Central Share of Alkimos Eglinton Job Mix – Scenario 2

Centre Share of District Jobs	Managers	Professionals	Technicians and Trades workers	Community and personal service workers	Clerical and administrative workers	Sales workers	Machinery and Operators and drivers	Labourers	Total
Agriculture, Forestry and Fishing	100%	100%	100%	100%	100%	100%	100%	100%	100%
Mining	100%	100%	100%	100%	100%	100%	100%	100%	100%
Manufacturing	10%	10%	10%	10%	10%	10%	10%	10%	10%
Electricity, Gas, Water and Waste Services	40%	40%	40%	40%	40%	40%	40%	40%	40%
Construction	0%	0%	0%	0%	0%	0%	0%	0%	0%
Wholesale Trade	20%	20%	20%	20%	20%	20%	20%	20%	20%
Retail Trade	75%	75%	75%	75%	75%	75%	75%	75%	75%
Accommodation and Food Services	50%	50%	50%	50%	50%	50%	50%	50%	50%
Transport, Postal and Warehousing	20%	20%	20%	20%	20%	20%	20%	20%	20%
Information Media and Telecommunications	90%	90%	90%	90%	90%	90%	90%	90%	90%
Financial and Insurance Services	90%	90%	90%	90%	90%	90%	90%	90%	90%
Rental, Hiring and Real Estate Services	55%	55%	55%	55%	55%	55%	55%	55%	55%
Professional, Scientific and Technical Services	80%	80%	80%	80%	80%	80%	80%	80%	80%
Administrative and Support Services	75%	75%	75%	75%	75%	75%	75%	75%	75%
Public Administration and Safety	80%	80%	80%	80%	80%	80%	80%	80%	80%
Education and Training	65%	65%	65%	65%	65%	65%	65%	65%	65%
Health Care and Social Assistance	80%	80%	80%	80%	80%	80%	80%	80%	80%
Arts and Recreation Services	50%	50%	50%	50%	50%	50%	50%	50%	50%
Other Services	80%	80%	80%	80%	80%	80%	80%	80%	80%

Table 14 ANZSIC to PLUC Concordance

Job to Population Ratio	PRI	MAN	STO	SER	SHIP	ENT	RET	OFF	HEL	RES	UTE
Agriculture, Forestry and Fishing								100%			
Mining								100%			
Manufacturing	85%			15%							
Electricity, Gas, Water and Waste Services	35%							65%			
Construction											
Wholesale Trade			40%	10%			50%				
Retail Trade					80%		20%				
Accommodation and Food Services					65%	35%					
Transport, Postal and Warehousing			100%								
Information Media and Telecommunications								80%			20%
Financial and Insurance Services					10%			90%			
Rental, Hiring and Real Estate Services								100%			
Professional, Scientific and Technical Services								100%			
Administrative and Support Services								100%			
Public Administration and Safety								100%			
Education and Training					5%			5%	90%		
Health Care and Social Assistance					5%			10%	85%		
Arts and Recreation Services						100%					
Other Services				50%	10%			25%	15%		



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