AUGUST 2011

Regional Development Australia SYDNEY

REGIONAL PLAN FOR SYDNEY

Regional Development Australia-Sydney brings together people and information to promote collaborative decision making for the sustainable and just economic development of Sydney, with a focus on employment growth.

An Australian Government Initiative

A NSW Government Initiative

The Regional Plan includes inputs from stakeholder consultations and draws information from 87 other existing plans and reports published by the Australian, NSW & Local Governments and other key agencies. It does not represent the 'only' information on Sydney however it provides a unique 'overview' of the entire *Sydney Region*. RDA-Sydney cannot guarantee the currency of the statistical data; therefore users should seek advice prior to utilising information. Last updated August 2011.

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Regional Development Australia (RDA) is a partnership between the Australian, State and Local Governments created to strengthen regional communities. RDA-Sydney is part of a national network of 55 RDA committees. These committees are made up of local leaders who volunteer their time to work with government, business and community groups to grow and strengthen their communities.

RDA-Sydney's purpose is to build partnerships between governments, key regional organisations and stakeholders, local businesses and community groups to provide strategic and targeted responses to economic, environmental and social issues affecting Sydney.

Sydney is gifted with a stunning natural environment characterised by beautiful waterways, national parks and pristine native habitats. It also has the best of business assets – a well-educated, multilingual workforce that underpins its reputation for innovation and enterprise, balanced by one of the highest standards of living in the Asia Pacific Region.

Sydney has recently been ranked fifth in the latest PricewaterhouseCoopers *Cities of Opportunities 2011* after New York, Toronto, San Francisco and Stockholm.

In 2009-10, the Sydney Metropolitan Region recorded an estimated GRP of $256.0 billion, representing 63.1% of the estimated Gross State Product (GSP) for NSW and contributing approximately 20% to the Australian economy. Sydney is the gateway to the global economy. It is the financial centre of the Australian economy and is home to the regional headquarters of numerous multinational corporations. The Region is also home to Port Botany, one of Australia's largest container ports, and Sydney Airport, the nation's largest airport.

HOWEVER, SYDNEY IS CONFRONTED WITH SIGNIFICANT CHALLENGES INCLUDING:

» Global financial crisis and its impact on the Australian economy and consumer confidence;

» Resources boom and the high Australian dollar causing a two speed economy;

» The potential carbon tax debate and its possible impact on the economy;

» Infrastructure backlogs and deficits especially in the mass transport system;

» Sustainable population growth through a *whole of Sydney* planning process;

- Achieving a coordinated approach between the three tiers of government;
- Need for higher priority to building the foundations for economic development opportunities, particularly in centres in rapidly growing regions or in poorer areas with high unemployment;
- Current and future skills shortages;
- An ageing population and workforce;
- Living affordability, particularly housing;
- Homelessness;
- Geographic disparities in year 12 or equivalent and tertiary qualification attainment;
- High unemployment rates for specific groups e.g. youth, Indigenous;
- Recognition of the central role of innovation in the transition to a knowledge economy, in particular the development of smart infrastructure to support innovation and the development of economic and infrastructure planning strategies to support this in Sydney;
- Protecting agricultural lands to ensure food security and sustainability;
- The cost of waste disposal is growing and the availability of land fill is diminishing.

This Regional Plan describes Sydney's attributes, industry, employment base and key advantages. It sets out the economic, environmental and social vision for the region, articulating the drivers of change, identifying strengths, weaknesses and opportunities, and listing priorities for action. It is a 'living' document that will be updated annually and used by the Committee and its Region as appropriate to implement specific strategies.

THE FOCUS AREAS FOR RDA-SYDNEY ACTIVITIES, IN PARTNERSHIP WITH KEY STAKEHOLDERS IN THE NEXT 12 MONTHS WILL BE:

Sustainable Economic Development

- Creating 40 year vision for Sydney;
- Integrated *whole of region* planning models and governance;
- Short term, long term public transport/freight strategies for Sydney;
- Better infrastructure and land-use planning, including urban renewal;
- Ensuring adequate supply and certainty for employment lands;
- Housing affordability;
- More finance, property and professional business support services in outer non CBD centres;
- New emerging industry development in health, community care and life sciences;
- Supporting and developing existing industry clusters e.g. Manufacturing, Aerospace and Defence;
- New technology clusters to drive new Centres of Excellence;
- Urban fringe agriculture;
- Social enterprise sector development.

Skills Development – planning for industry needs in the short to medium term, particularly

- Manufacturing;
- Transport and logistics;
- Health, aged and community care;
- Green jobs;
- Higher education participation rates;
- Labour force participation.

Social Inclusion

- Embedding economic and employment strategies within strategies to provide better access for the disadvantaged and to address homelessness;
- Disadvantaged youth skills and employment;
- Mature workforce participation.

Note: RDA-Sydney has the additional roles of commenting on Federal and State policies, plans and strategies and promoting Federal and NSW Government grants and programs.

INTRODUCTION

Photo: Ian Thorpe Aquatic Centre - Courtesy of City of Sydney ©

INTRODUCTION

WHAT IS REGIONAL DEVELOPMENT AUSTRALIA?

It gives us pleasure to present the RDA-Sydney's *Regional Plan for Sydney 2011*. It outlines our vision and goals as well as the strengths, challenges and opportunities for Sydney. Most importantly, it describes the activities RDA will be undertaking in the next 12 months.

RDA is a partnership between the Australian, State and Local governments created to strengthen regional and urban communities. RDA-Sydney is part of a national network of 55 RDA committees across Australia. The committees are made up of local leaders who volunteer their time to work with government, business and community groups to grow and strengthen their communities.

RDA-Sydney will continue building partnerships between government, key regional organisations, local businesses, community groups and key regional stakeholders, to provide strategic and targeted responses to economic, environmental and social issues affecting Sydney.

ROLES AND RESPONSIBILITIES OF RDA

1. Consultation and Engagement with the Community;

2. Informed Regional Planning;

3. *Whole of Government* Programs;

4. Community and Economic Development.

A key role for RDA committees is to deliver information about programs, services, grant and initiatives for economic, social and environmental development offered across all levels of government to local stakeholders. RDA committees are encouraged to be the first point of contact for government agencies wanted to consult a region.

More information on the roles and responsibilities of RDA is available at www.rda.gov.au

PURPOSE OF THE REGIONAL PLAN

The RDA-Sydney committee is responsible for the development of the *Regional Plan for Sydney*, which describes Sydney's attributes, industries, employment base and key advantages. This *Plan* sets out the economic, environmental and social vision for the region, articulating the drivers of change, identifying strengths, assets, weaknesses and opportunities, and listing priorities for action. The *Plan* is a living document which is updated annually and used by the RDA Committee and its region to implement specific strategies.

REGIONAL PLAN OVERVIEW

The *Plan* includes input and feedback from stakeholder consultations and draws information from our involvement and activities with stakeholders over the past year. The *Plan* also draws information from existing plans, reports and submissions published by the Australian, NSW and Local Government and other key agencies. In the past few months, RDA-Sydney has specifically consulted with key stakeholders from 58 organisations representing:

» Peak Bodies;

» Industry Groups;

» State Government Departments and Agencies;

» Local Councils;

» Regional Organisations of Councils;

» Urban Research Centres;

» Universities;

» Australian Government Departments and Agencies;

» Community Organisations;

» Business Development Organisations;

» Private Companies;

» Think Tanks;

» TAFE NSW;

» Registered Training Organisations;

» Research and Technology Groups.

The consultation process included one-to-one discussions, group workshops and teleconferences.

SYDNEY METROPOLITAN PLAN 2036

GLOBAL SYDNEY
Main focus for national and international business, professional services, specialised shops and tourism. It is also a recreation and entertainment destination for the Sydney region with national significance.

GLOBAL ECONOMIC CORRIDOR
The corridor of concentrated jobs and activities in centres from North Sydney to Macquarie Park and from the City to Airport and Port Botany, will remain the powerhouse of Australia's economy.

REGIONAL CITY
Parramatta, Liverpool and Penrith will provide for more lifestyle and work opportunities close to the growing parts of Sydney.

SPECIALISED CENTRE
Places such as hospitals and business centres that perform vital economic and employment roles across Sydney.

POTENTIAL SPECIALISED CENTRE

MAJOR CENTRE
The major shopping and business centre for the district, usually with council offices, taller office and residential buildings, a large shopping mall and central community facilities.

PLANNED MAJOR CENTRE
These places are currently being planned to become major centres.

POTENTIAL MAJOR CENTRE
These places may grow to take on the role of major centres in the future.

SMDA INITIAL URBAN RENEWAL CENTRE

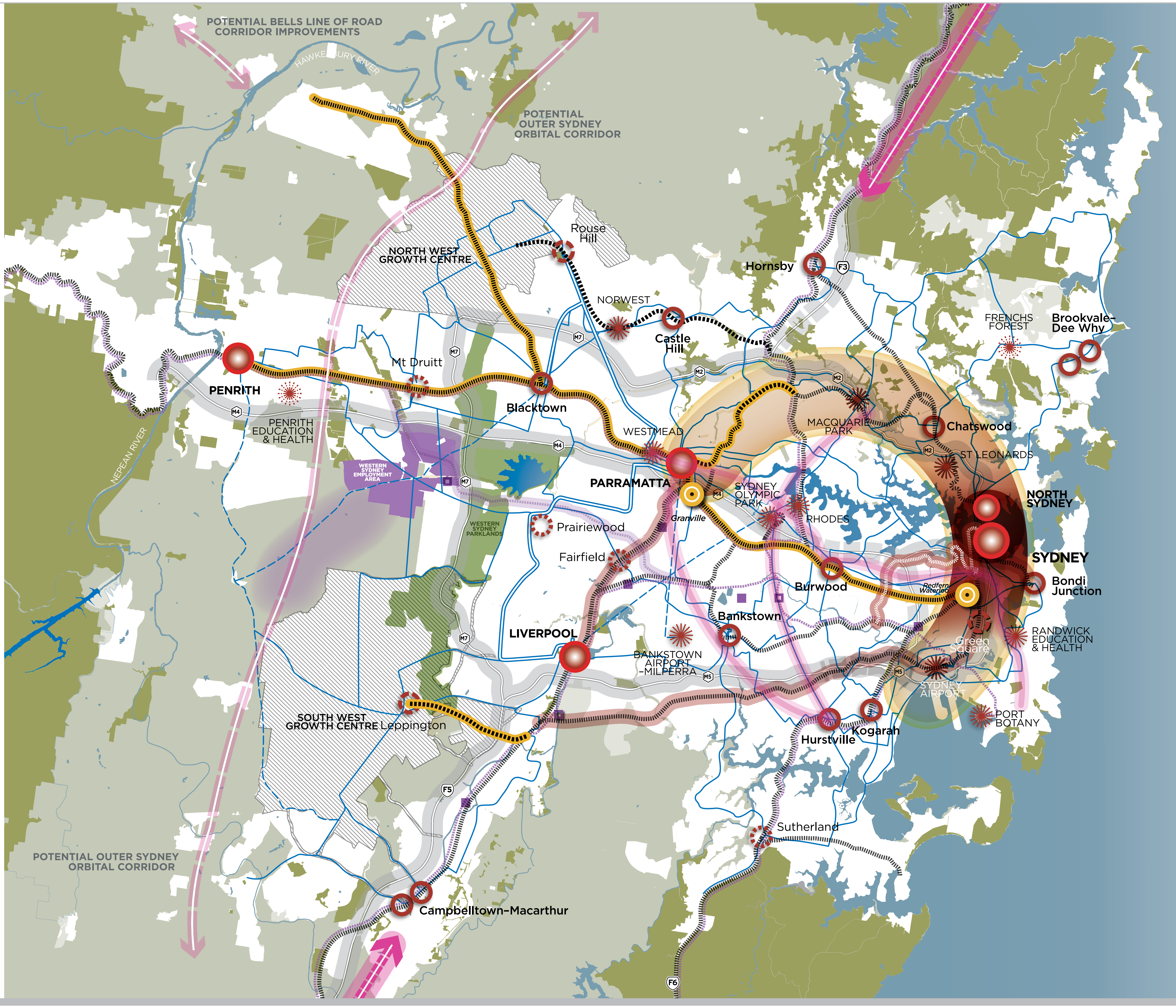
EXISTING HEAVY RAIL

PLANNED HEAVY RAIL LINK
North West Rail Link construction commencing 2017, South West Rail Link operational 2016

CORRIDOR
Areas around transport routes that connect centres, containing related activities. Corridor types: Economic, Renewal, Enterprise

HEAVY RAIL CORRIDOR
with existing and short term capacity to support urban renewal of centres

LIGHT RAIL CORRIDOR



10 YEAR FUNDED HEAVY RAIL PROJECTS

LONG TERM CORRIDORS FOR INVESTIGATION
(Transport and urban renewal)

VERY FAST RAIL FOR INVESTIGATION

BUS TRANSITWAY
Bus based rapid transit system providing fast, efiicient bus services

STRATEGIC BUS CORRIDOR
New direct and frequent bus services linking larger centres across Sydney

FUTURE STRATEGIC BUS CORRIDOR

EXISITING MOTORWAY NETWORK
The motorway and freeway system including the Eastern Distributor, M7, M5, M4, and M2, including the M2 and M5 widening

PLANNED MOTORWAY NETWORK LINKS (M4 Extension, M5 Expansion, M2-F3 Link)

POTENTIAL MAJOR ROAD & INFRASTRUCTURE CORRIDOR

EXISTING FREIGHT RAIL
(Dedicated and shared lines)

POTENTIAL FREIGHT RAIL

EXISTING INTERMODAL TERMINAL

PROPOSED INTERMODAL TERMINAL

WESTERN SYDNEY EMPLOYMENT AREA Contains various employment activities such as factories, warehouses, high tech manufacturing, transport logistics or major storage operations with some associated offices. These places are vital to our economy and abillty to serve the city

WESTERN SYDNEY EMPLOYMENT AREA (POTENTIAL EXPANSION)

WESTERN SYDNEY PARKLANDS

REGIONAL/STATE/ NATIONAL PARK

RURAL/RESOURCE LAND

GROWTH CENTRE
(North West and South West land release areas)

EXISTING URBAN AREA

1. REGION

Image: Lennox Bridge - Courtesy of Parramatta City Council ©

1.1 GEOGRAPHIC PROFILE

Photo: Paul Green - Courtesy of City of Sydney ©

1.1.1 UNIQUE FEATURES OF SYDNEY

Sydney, the capital of NSW, contributes roughly 20% of the nation's GDP and offers Australian and international companies a highly competitive base to expand in the world's fastest growing Asia-Pacific region. Sydney is a vibrant home to over 4.25 million inhabitants, growing by 1.7% per year with nearly 427,000 operating businesses employing over 1.76 million people.

According to Mercer Human Resource Consulting, the publishers of the *2010 Quality of Living Survey*, there are few better places than Sydney (10th place worldwide). As a business location, in 2010 Sydney was ranked 7th in Asia and 28nd in the world for social and economic innovation in the 2thinknow *Innovation Cities Index*. Sydney regularly appears in a variety of global city rankings of liveability and commerce, competing with Melbourne and Auckland for top rankings in Australia and New Zealand.

Sydney is gifted with a stunning natural environment characterised by beautiful waterways, national parks and pristine native habitats. It also has the best of business assets – a well-educated, multilingual workforce that underpins its reputation for innovation and enterprise, balanced by one of the highest standards of living in the Asia Pacific Region.

The city hosts a mature globally connected economy serviced by an extensive road and rail network, as well as Australia's major air and seaports close to the CBD. Both Sydney's rail network and its international airport are the largest facilities of their type in Australia. The recent expansion of the road network gives improved access to the city, its suburbs and surrounds balanced by increase demand due to population growth and housing density.

With the State Government's triple-A credit rating and a strong and diverse economy, Sydney offers the most exciting opportunities for sustainable economic development in the Asia Pacific. However, all cities face challenges. Sydney's are most evident in the area of under investment in transport infrastructure, its public transport system and rising energy costs, although these challenges are not insurmountable and with good governance and political will can be overcome.

1.1.2 CLIMATE

Sydney has a temperate climate with warm summers and mild winters. Rainfall is spread throughout the seasons. The coldest month is July with an average range of 8.0 to 16.2c. The warmest month is January with an average temperature range of 18.6 to 25.8c. According to the Bureau of Meteorology, warmer and drier weather conditions have come back in the 2010 and 2011 summers which recorded above average temperatures.

According to CSIRO, the NSW Government and ABS projections, NSW communities need to prepare for climatic changes that will damage our environment, such as:

» Increase in temperature between 0.4 to 2.0c by 2030;

» Rainfall is projected to decrease;

» Sea level will rise up to 40 cm above the 1990 level;

» Changes in flood patterns that will affect the coast;

» Coastal erosion is likely to occur;

» Frequency of very high or extreme fire risk days is predicted to increase.

Climate changes are likely to have significant impacts on:

Agriculture will be the hardest sector hit by climate change. A hotter and dryer future is predicted caused by the frequency and severity of drought, which will in turn affect water quality and availability, soil quality, the incidence of pests, weeds and fire risk as well as undermining the capacity to grow and produce food. Inadequate winter chilling for some fruit trees may reduce fruit yield and quality. Any reduction of rain fall will put farms under stress, possibly resulting in a more developed and competitive water market. Heavy rain and winds may also contribute to crop damage and soil erosion. These impacts will have a major impact on the Sydney basin which is a hub of intensive horticulture and the third most important area for vegetable production in NSW. Climate change is likely to heighten the need for sustainable farming practices.

Water Supply - A reduction in rainfall and high evaporation rates are likely to lead to less water for streams and rivers in Sydney, which will have downstream consequences for storage and will place strain on the catchment's water resources.

Settlements and Infrastructure – A lack of investment in public transport infrastructure has resulted in a significant increase in greenhouse gas emissions from vehicles. A rise in temperature will also damage infrastructure. The water, building, transport and power sectors stand out as very high risk categories while the telecommunications sector stands out as low risk. Increased frequency and intensity of extreme rainfall, wind and lightning events is likely to cause significant damage to buildings and urban facilities. Buildings and homes near the coast are particularly at risk when storm surges are combined with sea level rise. The Australian Government in its report *Securing a Clean Energy Future* has estimated that coastal assets valued at more than $226 billion are at risk of damage from inundation and erosion by 2100.

Natural Resources Diversity, Health and Ecosystems – According to CSIRO, 149 species, 9 populations and 21 ecological communities in the Sydney metropolitan catchment are classified as threatened or endangered. Climate change is likely to heighten the need for conservation efforts. The implications of climate change include high cost, unemployment and the risk of food insecurity.

1.1.3 LOCAL GOVERNMENT AREAS

RDA-Sydney covers a geographic area that will be termed the '*Sydney Region*' in this plan. The *Sydney Region* is comprised of 41 Local Government Areas (LGAs) and is bounded by Hawkesbury and Hornsby in the north, Blue Mountains to the west, Wollondilly to the south, and the Sydney coastline to the east.

The *Sydney Metropolitan Strategy* groups LGAs with similar issues and challenges into subregions, enabling the broader Metropolitan Strategy to be translated into local strategies at the subregional level. There are 10 subregions in Sydney, as follows:

Table 1: Local Government Areas in Sydney by Subregion

Subregion	Local Government Areas
East	Botany Bay, Randwick, Waverley, Woollahra
Inner North	Hunters Hill, Lane Cove, Mosman, North Sydney, Ryde, Willoughby
Inner West	Ashfield, Burwood, Canada Bay, Leichhardt, Strathfield
North	Hornsby, Ku-ring-gai
North East	Manly, Pittwater, Warringah
North West	Blacktown, Blue Mountains, Hawkesbury, Hills, Penrith
South	Canterbury, Kogarah, Hurstville, Marrickville, Rockdale, Sutherland
South West	Camden, Campbelltown, Liverpool, Wollondilly
Sydney City	City of Sydney
West Central	Auburn, Bankstown, Fairfield, Holroyd, Parramatta

1.1.4 GEOGRAPHIC PROFILE – KEY ISSUES

Climate change is likely to heighten the need for conservation efforts. The implications are cost, unemployment and the risk of food insecurity.

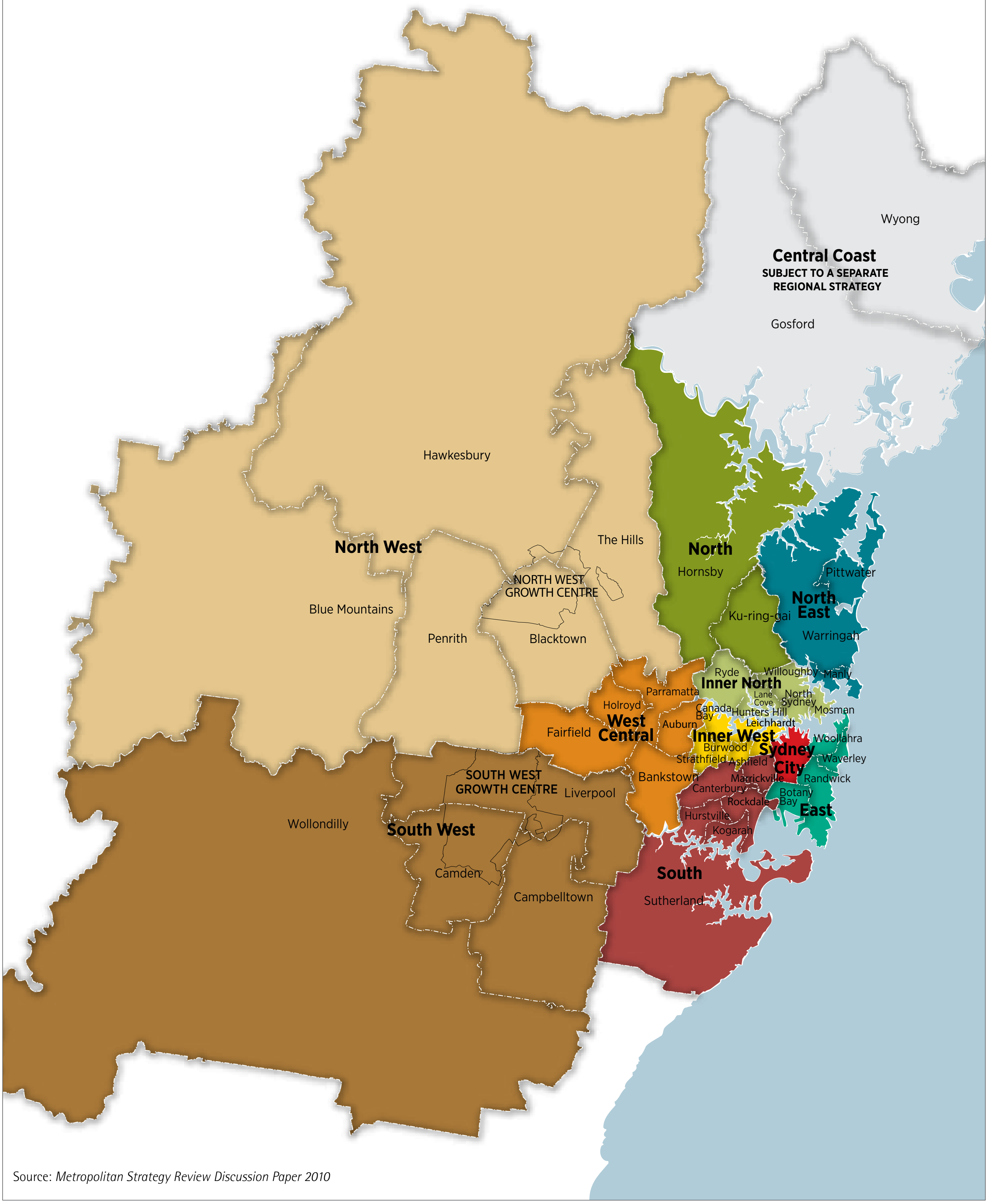
A lack of investment in public transport infrastructure has resulted in significant increases in greenhouse emissions from vehicles. Improved access to public transport is required in conjunction with a true City of Cities Model where there are local jobs for local people.

A multifaceted water management strategy needs to be maintained to ensure a sustainable water supply.

Extreme weather events are likely to cause significant damage to buildings and urban facilities. With this in mind, planning of new developments and renewal of existing infrastructure should incorporate design practices which reduce the risk of damage.

Figure 1: Sydney Subregions

While this Regional Plan for Sydney will occasionally make reference to the subregional framework, the primary point of reference will be to the four RDA-Sydney defined broader economic regions – Central, North, West and South (see Figure 8 on page 29).



Source: *Metropolitan Strategy Review Discussion Paper 2010*

1.2 SYDNEY SOCIAL & DEMOGRAPHIC PROFILE

1.2.1 POPULATION PROFILE AND PROJECTIONS

According to the 2011 RDA-Sydney Economic Baseline Assessment report prepared by the AEC*group*, the *Sydney Region* recorded an estimated resident population of 4,255,817 as of June 2010, adding an additional 71,616 persons from the previous year. This increase represented an annual growth of 1.7 per cent, marginally below the growth experienced by the region the year before.

Fifty per cent of the recent growth occurred in the *West Sydney Region*; a fifth in the *Central* and *North Regions* respectively and the remainder in the *South Region*. ABS figures show that the populations of Blacktown, Hills, Parramatta and Liverpool LGAs grew by nearly 16,000 people in the 12 months to June 2010. However, these suburbs are not well resourced in terms of public transport and employment infrastructure or planning.

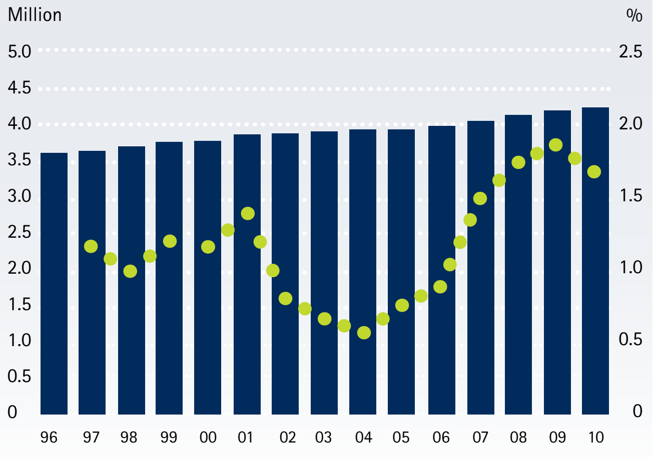
According to the AEC*group* report, the population of the *Sydney Region* is projected to grow to 5,635,209 by 2036, equating to an average annual growth rate of 1.1 per cent. Almost 1.4 million people are expected to be added to the existing population by 2036, which is the equivalent to adding the current population of Adelaide and the Northern Territory. Almost 70 per cent of Sydney's population growth will be due to a natural increase, with around 30 per cent from migration. The highest rate of population increase of 113 per cent will occur in the south west sub-region (Liverpool, Camden, Campbelltown and Wollondilly).

The Australian Government's *Sustainable Population Strategy* released in 2011 provides a framework to ensure changes in population (size, growth rate, composition and location) are compatible with the sustainability of our economy, communities and the environment.

The Strategy outlines the government's commitment to improving the liveability of our urban areas and building stronger regions so as to enhance the well being of Regional Australia, while also absorbing some of the growth being experienced in major cities.

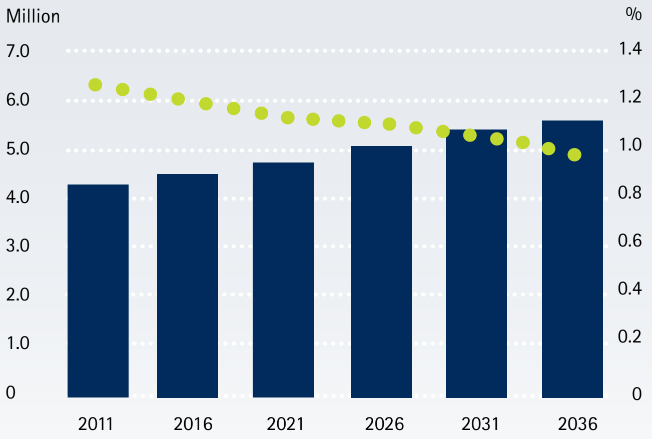
On the other hand the ageing of the population will produce a demographic change that will have an impact on productivity, service provision and the economy. According to the Australian Government between 2010 and 2020 the number of people aged 65-84 is expected to increase by 40 per cent and the number of people aged over 85 is expected to increase by a quarter.

Figure 2: Historical Population Growth - Sydney Region



Source: AEC*group* (2011)
Note: Population figures are as at June end each year

Figure 3: Projected Population Growth - Sydney Region



Source: AEC*group* (2011)

1.2.2 EDUCATION AND TRAINING

Schools

The National Partnership on Youth Attainment and Transition is an agreement between the Federal and State Governments to improve education and transition outcomes for young people. The Partnership has set a target of 90 per cent of all young people to obtain the Year 12 Certificate or its equivalent by 2015. Currently, the Year 12 completion rate for NSW government schools is 69.6 per cent. Comparative rates for Sydney are shown in Table 2

These figures should be treated with some caution as students tend to move between regions and also between public and private schools. In addition, trends into the future will be affected by the new regulation requiring students to stay in school until they are at least 17 years old. Anecdotal evidence suggests that the retention rates for private schools are higher than those for government schools.

Higher Education

Over the last three census periods, there has been a consistent improvement in the proportion of 25 to 34 year olds who hold a higher education qualification (degree level or above). The *Sydney Region* shows an increase from 21 per cent in 1996 to 32 per cent in 2006. The subregions in proximity to the City of Sydney tend to experience the highest proportion, with the Inner North Subregion recording 52 per cent in 2006 and the Inner West 48 per cent. The subregions with the lowest proportions of degree-level graduates include South West (16 per cent), the North West (21 per cent) and West Central (23 per cent), as can be seen in Table 3.

While all subregions show an increase in the proportion of 25 to 34 year olds with higher education qualifications between 1996 and 2006, the absolute rate of increase in the South

Table 2: Year 12 Completion Rate - Sydney Region

Region	2004	2009
Northern Sydney	93.1	95.2
South Western Sydney	70.9	74.6
Sydney	87.1	88.0
Western Sydney	68.6	69.5

Source: National Schools Statistics Collections 2004-9

West and North Subregions was only seven per cent while the Inner West (15 per cent), the Inner North, the North East (14 per cent), and the South (13 per cent) had a much higher rate of increase.

According to the *Review of Australian Higher Education (Bradley Review)*, the quality and performance of higher education will play a key part in determining economic and social progress in Australia. There is a strong link between productivity and the proportion of the population with high-level skills. Australia is ranked ninth out of 30 OECD countries for the proportion of the population aged 25-34 years who have degree level qualifications. However, it has dropped from its seventh place of a decade ago.

The *Bradley Review* reported 29 per cent of 25-34 year old Australians had degree qualifications. But the *Review* recommends a target of 40 per cent by 2020 in order to maintain and increase Australia's competitiveness (note that the NSW Government has set a target of 44% based on NSW already being above the national average). According to the *Review*, efforts should also be made to increase the proportion of students from disadvantaged groups in higher education to 20 per cent by 2020.

Vocational Education and Training (VET)

Skills Australia in its *Skills for Prosperity – A roadmap for vocational education and training* report identifies the need for a more integrated tertiary sector which enables students to progress to university from VET institutions. However more work still needs to be done to maximise the various pathways an individual can take to attain a higher education qualification. For example the NSW Tertiary Education Plan has 10 immediate commitments one of which is supporting TAFE NSW to develop a role as a degree-granting higher education provider.

Apprenticeships and traineeships is a system of applying on the job and off the job training to attaining a formal vocational qualification. The Commonwealth Government released a document called *Apprenticeships for the 21st Century Expert Panel Paper* which advises on reform options for the Australian Apprenticeship system. These reforms will focus on improving the retention and completion rates whilst providing high quality and well respected skill development.

Apprenticeship and traineeship numbers in NSW have risen significantly in recent years, with completion rates showing a greater than proportionate rise. The average annual increase in commencements during the 2005-9 period was 3.4% while completions rose at an average annual rate of 5.8%. Only Western Australia and Queensland showed better improvements in completion rates. Table 4 compares the results for all states and territories for the period 2005-2009.

Table 3: Proportion of 25-34 Year Olds with Higher Education Qualifications by Subregion of Residence

Subregion	1996 %	2001 %	2006 %
East	33	41	46
Inner North	38	46	52
Inner West	33	37	48
North	23	26	30
North East	21	28	35
North West	12	16	21
South	20	24	33
South West	9	12	16
Sydney City	32	44	44
West Central	13	17	23
Sydney Region	**21**	**26**	**32**

Source: ABS Census data 1996, 2001, 2006

Schools Infrastructure in Sydney

According to OurKidz, a community resource website, the *Sydney Region* has in total (both public and independent) 977 primary schools, 125 combined primary and secondary schools and over 600 secondary schools. The South West and North West Growth Centres areas of Sydney will also need new schools and it is projected they will need 59 primary schools and 16 high schools. Some of these may be pre-existing.

There are 17 secondary schools in the *Sydney Region* that have received funding under the Australian Government Trade Training Centres in Schools Program. They are located at Cambridge Park, Burwood, Epping, Kingsgrove North, Emu Plains, Manly Vale, Mona Vale, Richmond, Five Dock, Pagewood, Bankstown, Arcadia, Balgowlah, Narrabeen North, Orchard Hills, Narellan, and Winmalee. In addition, there are 11 Trade Schools in the *Sydney Region* funded by the NSW Government – Campbelltown, Bidwell, Colyton, Penrith, Meadowbank, Picton, Randwick, St George, Sutherland (2) and Wetherill Park.

Tertiary Education Infrastructure in Sydney

There are four major TAFE institutions with 40 TAFE college campuses (plus OTEN) and 195 registered training organisations providing vocational education training in Sydney.

Table 4: Apprenticeships and Traineeships In-training, Commencement and Completion Estimates by State and Territory

In-training	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	AUST
2009	138,500	105,700	89,900	32,000	36,400	11,700	4,000	7,400	425,500
% Change 2008-09	-1.9	-1.7	-4.6	-1.2	-1.4	-10.7	5.3	8.8	-2.4
% Change 2005-09*	3.5	-2.3	3.6	-1.4	4.9	-2.2	5.7	3.7	1.5

Commencements	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	AUST
2009	83,400	71,900	54,600	21,000	23,200	7,400	2,400	4,900	269,000
% Change 2008-09	-7.4	-2.6	-13.3	-2.3	-5.7	-11.9	-11.1	2.1	-6.9
% Change 2005-09*	3.4	-3.0	0.9	-0.8	3.4	-1.3	-2.0	1.0	0.5

Completions	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	AUST
2009	48,000	41,500	34,600	11,600	14,100	5,500	1,100	2,400	158,800
% Change 2008-09	8.8	2.2	2.7	4.5	17.5	5.8	22.2	0.0	5.8
% Change 2005-09*	5.8	-1.4	6.1	4.6	11.0	0.9	0.0	-2.0	3.7

Note: *Average Annual Change Source: NSW DET (2010), State Training Services Based on National Centre for Vocational Education Research Ltd (NCVER) September Estimates.

There are six key universities located in Sydney:

1) ACU (Australian Catholic University) - North Sydney and Strathfield;
2) Macquarie University – North Ryde;
3) University of NSW – Kensington, CBD Sydney, Paddington, Randwick, Coogee, Daceyville, Manly Vale;
4) University of Sydney – Inner City, Lidcombe and Camden;
5) University of Technology Sydney – Broadway and Ku-ring-gai;
6) University of Western Sydney – Bankstown, Nirimba, Campbelltown, Hawkesbury, Parramatta, Westmead, Penrith.

As well as the campuses of the following universities:

7) Charles Sturt University – Parramatta – United Theological College;
8) Southern Cross University – The Hotel School – Sydney;
9) University of Newcastle – Sydney CBD – MBA in Business and Professional Accounting;
10) University of Wollongong – Sydney Business College (Post Graduate), Sutherland;
11) Central Queensland University – Sydney campus;
12) Curtin University - Chippendale campus;
13) University of Notre Dame - Broadway campus;
14) Australian College of Theology – Sydney campus;
15) La Trobe University, Sydney campus (courses conducted by ACN).

Sydney boasts two prestigious non-university higher education providers, namely, the National Institute of Dramatic Art (NIDA) and the Australian Film, Television and Radio School.

NSW universities accounted for:

1) 32.3 per cent of the domestic students enrolled at 39 Australian universities;
2) 25 per cent of overseas students;
3) 30 per cent of completions at the 39 Australian universities;
4) The largest number of completions for higher research degrees of any state or territory in Australia.

NSW universities and higher education providers enrolled a total of 326,407 students in 2009. Six of the ten NSW universities have their primary campus located in Sydney.

Both the Australian and NSW Governments are investing in infrastructure for higher education. The Education Investment Fund is one of the three Nation-building funds managed by the Australian Government. There have been three funding rounds of this program but no new round since the 2010

Regional Plan. In addition, the first budget of the new NSW Government will be released in September 2011 and any education infrastructure in that budget will not be known until this release.

Contextual Factors

1. *Schools:* In general, the need for additional schools is strongly interrelated to population growth and local area demographics. High priority issues are:

» The ageing of the teaching workforce, which according to a NSW DET Performance Audit Report *Ageing Workforce – Teachers*, the NSW Auditor General indicated in 2008 that by 2012, 33 per cent of permanent teachers were eligible for retirement.

» The increased school leaving age to 17 years and strategies to address youth disengagement.

2. *TAFE/RTOs:* The Commonwealth Government is reviewing its $1.4 billion per annum investment in the National Agreement on Skills and Workforce Development to secure reform outcomes and develop a *whole of government* commitment to training. There will be an additional investment of $1.75 billion over five years from 2012 13 under a new National Partnership with the states and territories, conditional on more ambitious reforms to make the VET system more transparent and productive.

3. *Universities:* to remain globally competitive (Australia has slipped from fifth to eighteenth in the World Economic Forum's Global Competitive Index) we need our universities to provide knowledge to fuel the innovation system and the skilled people to drive it. According to the Commonwealth's *Powering Ideas* agenda measures to renew and expand Australia's publicly-funded research workforce, research infrastructure, and machinery for sharing research results will yield high returns. What is vital for Sydney is to build the capacity of our 6 key universities to perform at world class levels with extensive domestic and international collaboration and invest in research infrastructure to enhance this capacity.

To achieve a 44% of 25-34 year old Australians having a degree qualification by 2020 a strategic cross sector approach needs to be developed to ensure access to higher education by all members of the Sydney community. This may also include physical barriers to accessing universities e.g. mode of transport to campuses across Sydney, connectivity through telecommunications infrastructure.

1.2.3 EMPLOYMENT

Participation

"Sydney will require 760,000 additional jobs to support the anticipated population growth by 2036," according to the *Metropolitan Plan for Sydney 2036*. The Metropolitan Plan emphasises that half of these new jobs should be in Western Sydney.

According to Skills Australia, the nation should aim for a workforce participation rate of at least 69 per cent by 2025 in order to provide the required workforce and improve social inclusion. Workforce participation rates are in the 60-70 per cent range for most Labour Force Regions of Sydney, as per Table 5. However, it should be noted that these figures can be unreliable due to volatility from a small sample size.

Unemployment

According to the ABS Detailed Labour Force data, unemployment in the *Sydney Region* was 5.0 per cent in May 2011, compared to the overall NSW figure of 4.9 per cent. In 2010, these rates were 5.2 and 5.3 per cent respectively, indicating a slight improvement. The national unemployment rate in May 2011 was 4.9 per cent so both NSW and Sydney specifically were on par with the national average.

Table 5: Participation Rates by Labour Force Region June 2010-April 2011

Labour Force Region	June 2010 %	Apr 2011 %	Change ppt
Canterbury-Bankstown	54.7	59.6	4.9
Central Northern Sydney	68.1	66.8	-1.3
Central Western Sydney	57.3	60.5	3.2
Eastern Suburbs	65.1	71.3	6.2
Fairfield-Liverpool	55.8	58.1	2.3
Inner Sydney	72.3	72.5	0.2
Inner Western Sydney	65.9	69.6	3.7
Lower Northern Sydney	68.1	70.9	2.8
North Western Sydney	68.9	69.5	0.6
Northern Beaches	71.5	70.7	-0.8
Outer South Western Sydney	69.9	70.2	0.3
St George-Sutherland	67.3	67.5	0.2

Source: DEEWR Labour Force Region Data

Table 6: Unemployment by Statistical Region 2008-2011

Subregion	Unemployment Rate May '08 %	May '09 %	May '10 %	May '11 %
Canterbury-Bankstown	5.5	7.6	9.9	8.0
Central Northern Sydney	2.8	4.2	2.1	2.9
Central Western Sydney	5.0	8.2	6.7	6.6
Eastern Suburbs	2.1	3.8	1.9	3.3
Fairfield–Liverpool	6.6	12.1	7.5	5.7
Inner Sydney	2.9	9.0	4.3	6.1
Inner Western Sydney	2.6	7.0	4.4	6.0
Lower Northern Sydney	3.8	5.1	5.1	4.5
North Western Sydney	6.9	6.9	7.0	6.2
Northern Beaches	1.8	6.0	3.7	2.9
Outer South Western Sydney	6.1	9.2	5.7	5.2
St George–Sutherland	3.4	2.8	5.4	3.6
Sydney Region*	4.2	6.6	5.2	5.0
NSW	4.8	6.5	5.3	4.9

*Sydney Region percentage includes Gosford-Wyong

Source: ABS Labour Force Detailed – Electronic Delivery (6291.0.55.001)

A more detailed examination of unemployment in Sydney, as per Table 6, shows particular issues affecting communities within Sydney with significant local differences in unemployment rate. Within this, there are some groups who are partially or totally excluded from employment opportunities. As previously noted due to sample size, this data can be quite volatile and care should be taken in drawing conclusions.

Youth

The average rate of youth (15-19 years) unemployment is relatively higher than the unemployment rate of the general population. This may be for a number of reasons including high job attrition rates for young people as they move between different jobs in search of better employment opportunities and the fact that employers can tend to place young people on short-term contracts.

Similarly, the youth workforce participation rates are often lower than for the general population, given that a large proportion of the youth are either studying or are actively not seeking employment after the completion of their studies. As can be seen in Table 7, the average youth unemployment rate for the Sydney Major Statistical Region during the year to April 2011 was approximately 17 per cent, reflecting a 3.0 ppt drop since the year to May 2010. Particular areas within the *Sydney Region* recorded much higher unemployment rates than average including Canterbury-Bankstown (29.9%), Fairfield-Liverpool (25.0%) and the Eastern Suburbs (24.8%). These areas also have relatively lower youth participation rates

Table 7: Youth Unemployment and Participation Rates by Sydney Statistical Regions

Statistical Region	Participation Rate %			Unemployment Rate %		
	Year to May 2010	Year to April 2011	Change ppt	Year to May 2010	Year to April 2011	Change ppt
Canterbury-Bankstown	48.7	36.5	-12.3	29.5	29.9	0.4
Central Northern Sydney	48.7	49.6	0.9	14.4	11.4	-3.0
Central Western Sydney	48.4	40.2	-8.2	16.8	16.4	-0.4
Eastern Suburbs	27.5	36.8	9.3	26.1	24.8	-1.3
Fairfield-Liverpool	34.5	32.1	-2.4	21.5	25.0	3.5
Inner Sydney	38.6	36.8	-1.8	22.4	15.6	-6.8
Inner Western Sydney	43.7	39.0	-4.7	25.8	20.9	-5.0
Lower Northern Sydney	42.9	40.1	-2.8	22.0	16.7	-5.3
North Western Sydney	57.3	61.6	4.3	20.6	15.0	-5.6
Northern Beaches	48.7	57.6	8.9	12.8	15.0	2.2
Outer South Western Sydney	62.0	51.1	-10.9	16.8	10.7	-6.1
St George-Sutherland	58.7	51.9	-6.8	17.9	17.9	-0.1
Sydney Major	49.6	46.8	-2.9	19.7	16.7	-3.0

Note: Annual Averages for the year to April 2011 Source: AEC*group* (2011) which may be attributable to a relatively greater proportion of student residents due to cheaper residential accommodation or proximity to educational institutions.

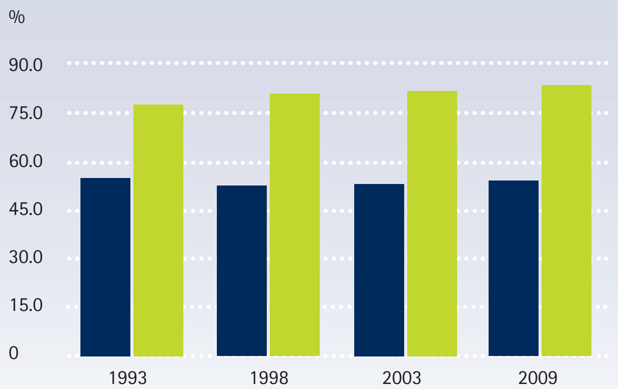
Over the past year, the average rate of youth unemployment has recorded a drop in most Statistical Regions across Sydney, with Inner Sydney and Outer South Western Sydney recording a considerable decline of more than 6.0ppt. However, youth participation rates in the Eastern Suburbs, North Western Sydney and the Northern Beaches Statistical Regions recorded a significant increase over the past year. For a detailed comparison of youth unemployment and participation rates over the past two years please refer to the Table 7.

People Living With A Disability

Approximately a fifth of the Australian population has some kind of disability, with around 6 per cent having severe disability that dramatically limits core activities. During the six years to 2009, the labour force participation rate for people with disabilities has been consistently lower than that for people without a disability. During this period, while the participation rate of the former category has remained somewhat constant at approximately 54 per cent, the participation rate for people without disability has recorded a steady increase reaching 82.8 per cent in 2009, representing a 5.9ppt rise since 1993.

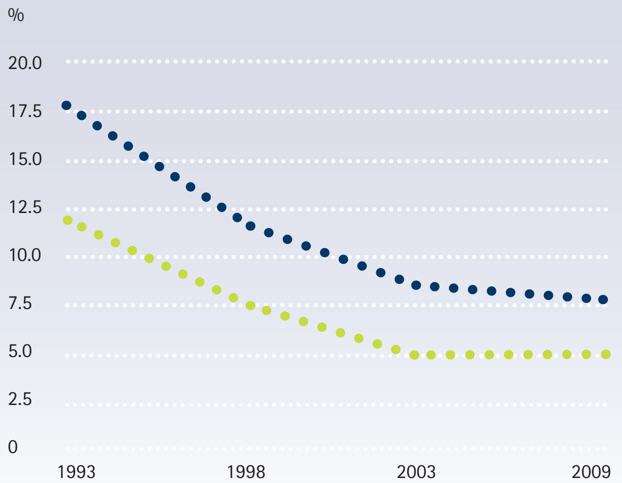
Similar disparities are observed in unemployment rates of people with and without disability. In 2009, around 7.8 per cent of the Australian labour force with some kind disability was unemployed. This was considerably higher than the unemployment rate for people without a disability (5.1 per cent). While the unemployment rates for both segments have significantly declined since 1993, the unemployment rate for disabled people has remained consistently above the unemployment rate for those without disabilities during the six years to 2009.

Figure 4: Participation Rates for People with a Disability – Australia, 1993-2009



People with Disability ■ People without Disability ■
Source: HREOC (2005); AEC*group* (2011)

Figure 5: Unemployment Rates for People with a Disability – Australia, 1993-2009



People with Disability ●● People without Disability ●●
Source: HREOC (2005); AEC*group* (2011)

Table 8: Unemployment and Participation Rates for Mature Age Persons April 2011

Statistical Area	Participation Rate %	Unemployment Rate %
Canterbury-Bankstown	45.8	3.8
Central Northern Sydney	53.4	1.8
Central Western Sydney	41.6	3.5
Eastern Suburbs	58.7	1.7
Fairfield-Liverpool & Outer South Western Sydney	50.6	3.7
Inner Sydney & Inner Western Sydney	52.9	5.1
Lower Northern Sydney	59.9	2.8
North Western Sydney	59.3	4.7
Northern Beaches	56.2	3.1
St George-Sutherland	51.1	4.4
Sydney Metropolitan Region	53.0	3.6

Source: AEC*group* (2011)

Mature Aged

As at April 2011, the *Sydney Region* had an estimated labour force of 808,200 mature aged persons (i.e. people above the age of 44 years). Of this, around 778,800 were employed, resulting in an unemployment rate of 3.6 per cent, in line with the NSW State average (3.6 per cent). More than half (53.0 per cent) of the mature aged persons residing in the *Sydney Region* were either employed or actively looking for work as at April 2011.

The Eastern Suburbs, Lower North and North Western Statistical Regions recorded approximately 60 per cent of their residents over the age of 44 years in the labour force, considerably higher than the *Sydney Region* average of 53.0 per cent. Central Western Sydney (41.6 per cent), followed by Canterbury-Bankstown (45.8 per cent) recorded the lowest participation rates for mature aged persons.

The labour participation rate disparities are also reflected in the unemployment rates across the various subregions within the *Sydney Region*. Less than 2 per cent of the mature aged labour force residing in either the Eastern Suburbs or Central North Sydney Statistical Regions is likely to be unemployed. This is considerably lower than the remaining Statistical Regions within the *Sydney Region* and is reflective of the relatively higher socio-economic demographics of these regions. On the other hand, Inner Sydney and Inner Western Sydney, followed by North Western Sydney and St George-Sutherland recorded significantly higher unemployment rates (for persons over age 44 years) of approximately 5 per cent in April 2011.

Labour Force Characteristics by Gender and Age

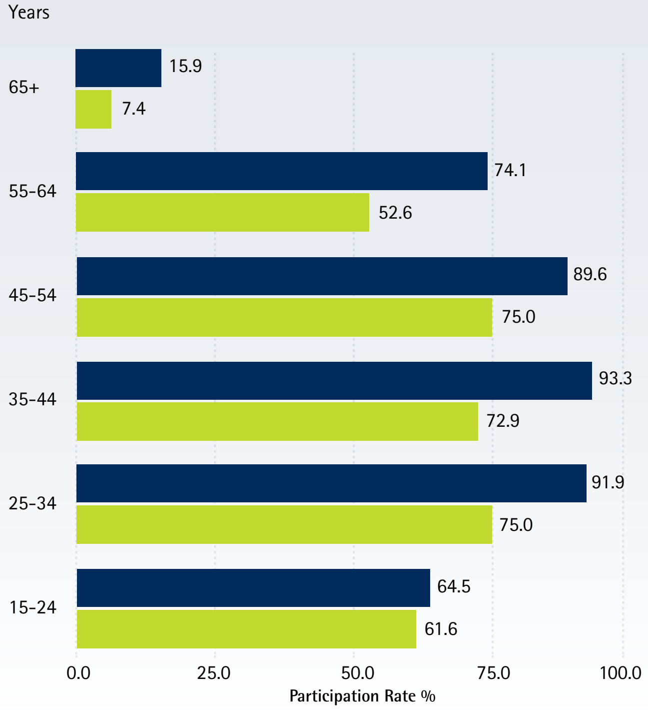
The latest ABS Labour Force Survey conducted in April 2011 provides a breakdown of unemployment and participation rates for males and females, across various age groups, residing in the *Sydney Region*.

During the year to April 2011, the average participation rate for males in the *Sydney Region* was relatively higher than females across all age groups, with the difference being the largest (over 20ppt) between the 35-44 years and 55-64 years age brackets. The considerably lower participation rate of women in the 35-44 years age group is possibly associated with women being involved in domestic and household duties, particularly child care.

The labour force participation rates across both males and females were highest between 25-54 years of age, with approximately a tenth of the males and around a quarter of the females within this age group not actively looking for work during the 12 months to April 2011.

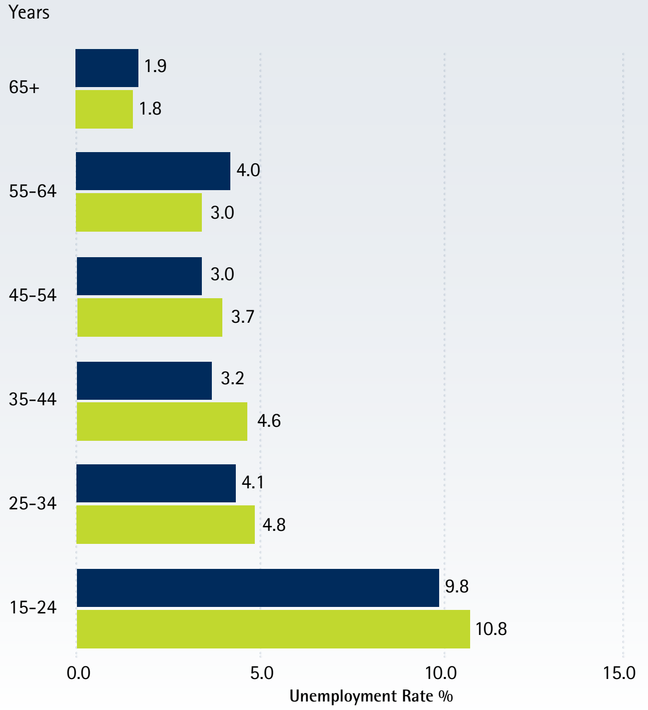
During the year to April 2011, the average unemployment rate for females in Sydney between the ages of 15 and 54 years was relatively higher than for males in the same age bracket. On the other hand, females over the age of 55 years recorded a relatively lower unemployment rate compared to the males. The unemployment rate was the highest for both males and females 15-19 years, with the unemployment rate generally declining as people get older.

Figure 6: Participation Rate by Gender and Age – Sydney Region, 2011*



* Annual averages for the year to April 2011
Male Female Source: HREOC (2005), AEC*group* (2011)

Figure 7: Unemployment Rate by Gender and Age – Sydney Region, 2011*



* Annual averages for the year to April 2011
Male Female Source: AEC*group* (2011)

1.2.4 HOUSING

According to the *Metropolitan Plan for Sydney 2036*, housing production in new released areas has been well below expectations in recent years, while new housing in existing urban areas has almost reached expected levels. From 2005 to 2010 more than 93,000 extra dwellings were added to the Sydney's region's total, with 86 per cent in the existing urban area but only 14 per cent in new released areas.

A key action of the Plan is to locate 80 per cent of all new housing within walking distance of centres of all sizes with public transport, particularly, those with access to transport and infrastructure, that have so far experienced low levels of renewal in the past 10 years.

Although Sydney's population is projected to grow by 40 per cent by 2036 the average household size will fall from 2.6 to 2.5 people, creating demand for more but smaller and more affordable homes. Sydney will need 770,000 additional homes by 2036 – a 46 per cent increase on the current 1.68 million homes.

The ageing of the population is driving growth towards smaller households, in particular single person households which are expected to increase by 60 per cent.

Innovative new housing is needed across the city to provide a well designed mix of types, tenures, prices, sizes, room mix and shapes. Currently about 60 per cent of homes are detached suburban homes. According to the *Metropolitan Plan for Sydney 2036*, Sydney will require significantly more medium density in the right location in an attempt to reduce environmental impacts of travel, increase affordability, reduce congestion and improve the quality of life.

Public Housing

As at 30 June 2010 there were 115,585 public housing rental dwellings in NSW. According to *Metropolitan Plan for Sydney 2036*, Blacktown LGA has the most public rental properties (9,600 properties or 7.9 per cent of all public rental properties) followed by Sydney LGA (8,700 properties or 7.1 per cent).

As of June 2010 there were 60,444 applicants waiting for public housing. According to Shelter NSW, between 2000 and 2010 there was a 7.3 per cent decrease in the supply of public housing (or 9,164 fewer public housing dwellings), and 38.5 per cent drop in the number of people from the waiting list between 2000 and 2010 (or 37,893 fewer).

Housing NSW has been working towards breaking up existing concentration of public housing by introducing private housing. Current housing estates were built in an era when the demographics were different and the current housing portfolio needs to fit in with the changes.

As of June 2010 there were 17,744 community housing dwellings in NSW.

Homelessness

On census night in 2006 there were almost 16,000 homeless people in the *Sydney region*. 1,182 of these were classified as rough sleepers. As many as 4,163 homeless people (133 per 10,000 people), or 26 per cent of Sydney's homeless population were in the city core; 5,221(53 per 10,000 people) were in the inner city ring; 4,277 (22 per 10,000 people) were in the outer city ring and 2,295 (27 per 10,000 people) in the growth corridor. Indigenous people were over represented in all sections of the homelessness population.

A street count by the City of Sydney in February 2011 found that there were 363 people sleeping rough in the city centre or surrounding suburbs.

Much of the homelessness is hidden with 37 per cent living with friends and relatives, 17 per cent in specialist services, 38 per cent in boarding houses and 7 per cent living in improved dwellings.

According to the *Counting the Homeless Report 2006*, the largest sub-group in the population are adults on their own. Most had been homeless for long periods of time. The *Report* says that access to appropriate housing with extended and appropriate levels of support would be required to reduce the number of homeless.

According to Shelter NSW, despite the improvements in the Australian economy, the rate of homelessness has remained steady. In Sydney, the deterioration in the housing market has impacted on subgroups in the homeless population in different ways. Also, the decline of affordable housing has become a major obstacle. Also, the private rental market has deteriorated further since 2006.

In 2009 the NSW Government released *A Way Home: Reducing Homelessness in NSW*. The *NSW Homelessness Action Plan* is the State government's strategy for reforming the homelessness service system. It includes three priorities: preventing homelessness, responding effectively to homelessness and breaking the cycle of homelessness.

Two *Regional Homelessness Action Plans* were released and are being implemented. The plans aim to support the implementation of local priorities and actions and facilitate regional service reform using local approaches and promoting service integration and cross-agency cooperation, in an effort to respond to homelessness, and raise the profile of homelessness in the community.

The Plans include a number of activities and projects for each region. Consultations conducted by RDA-Sydney with homelessness services revealed that employment is a key issue for homeless people and those living in supported housing. There is recognition that housing alone will not end homelessness rather that employment is the best way out of poverty and to reduce recurrence of homelessness.

Consultations showed there is a need to embed employment strategies in the *Regional Homelessness Action Plans*' activities as well as a need to embed employment services within housing and homelessness assistance services.

1.2.5 HOUSING AFFORDABILITY

Housing stress can be measured using a variety of methods. According to the AMP/Natsem report, *The Great Australian Dream – Just a Dream?*, households that are in housing stress are devoting a much larger fraction of their after-tax income to housing than those not in household stress. There are three general ways to measure housing stress:

» The basic '30 only' rule where a household that pays more than 30% of their after-tax income on housing costs is deemed to be in stress. The problem with this is that wealthy households with a high outlay on housing but are also included;

» The '30/40' rule which incorporates households from the bottom 40% of income earners who pay more than 30% of after-tax income on housing costs;

» The '50 rule' is for those in extreme housing stress who pay more than half their income in housing costs.

According to the AMP/Natsem report Sydney is the most stressed city in Australia for mortgage repayments according to all measures. 9.4 per cent of Sydney households pay more than 50% of their after-tax income on housing costs, and 11 per cent of lower income Sydney households pay more than 30 per cent.

In the context of housing affordability, it is convenient to divide Sydney into three areas or rings. The Inner Ring is within 10km of the Sydney CBD, the Middle Ring is 10-19km and the Outer Ring is 19km and beyond. In each of these rings, housing has become markedly less affordable between 2001 and 2011, with the Outer Ring showing the largest overall decrease in affordability, as per Table 10.

Table 9: Proportion of Households in Mortgage Stress 2011

Area	30 Rule %	50 Rule %	30/40 Rule %
Sydney	28.0	9.4	11.0
Balance of NSW	16.0	4.0	9.2
Melbourne	18.0	5.3	7.9
Balance of Victoria	14.0	4.3	6.6
Brisbane	19.0	4.5	7.9
Balance of Qld	22.0	5.6	11.0
Adelaide	16.0	3.5	8.9
Balance of SA	10.0	3.0	6.3
Perth	23.0	7.6	10.0
Balance of WA	15.0	4.7	7.1
Hobart	13.0	5.1	7.3
Balance of Tasmania	9.9	2.3	7.6
ACT/NT	17.0	3.0	5.0

Source: AMP/Natsem (2011) *The Great Australian Dream – Just a Dream?*

Table 10: Sydney Housing Affordability 2001-2011

Ring	Disposable Income $		Median House Price $		Price Growth	Affordability Ratio		Unaffordability Rank
	2001	2011	2001	2011		2001	2011	
Inner	926	1,351	$390,000	$685,000	75.6%	8.1	9.7	1
Middle	785	1,045	$212,750	$401,000	88.5%	5.2	7.4	3
Outer	789	1,137	$249,999	$479,500	91.8%	6.1	8.1	2

Source: AMP/Natsem (2011) *The Great Australian Dream – Just a Dream?*

1.2.6 ETHNICITY

Australia has a diverse and dynamic ethnic mix. We identify with 270 ethnicities that speak more than 260 languages and observe a wide variety of cultures and religions. Today, almost one quarter of people were born overseas and some 44 per cent were either born overseas or have at least one parent who was born overseas. In 2006 Sydney was the capital city with the highest proportion (about one third) of its population born overseas.

In the year 2009-10 about 182,450 new migrants settled in Australia and in 2010-11 the same number of migrants are predicted to settle in the country (113,850 under the Skilled Migration stream, 54,550 under Family Reunion, 300 Special Eligibility and 13,750 under the Humanitarian stream), according to DIAC statistics. As at June 2010, the Skill stream accounted for 64.0 per cent of the total migration program.

The most multicultural Local Government Areas in Sydney are Auburn, Fairfield, Canterbury, Blacktown, Liverpool and Parramatta. However, there has been an increase in non metropolitan settlement. One in every six new permanent arrival is now settling in a non metropolitan area. This is about 70 per cent higher than 10 years ago. The increase in non metropolitan settlement has been driven by skilled migrants.

1.2.7 INDIGENOUS POPULATION

In 2006 there were 37,062 Indigenous Australians living in the Sydney region, or one per cent of the total population who classified themselves as being Indigenous Australians. Over 25 per cent of the Indigenous population of NSW now resides in Sydney with LGAs such as Blacktown, Campbelltown, Liverpool and Penrith recording the highest overall number, as well as the suburbs of La Perouse and Phillip Bay.

According to the *Sustainable Population Strategy* report, the Australian Indigenous population is small but rapidly growing. Between 2001 and 2006 it grew by 2.6 per cent by more than twice the annual average rate of the Australian population as a whole, resulting in a higher Total Fertility Rate, and partly due to an increasing number of people identifying as Indigenous for the first time. According to the ABS, current projections suggest that the number of Indigenous will grow to around 721,000 nationally by 2021. This represents an increase of 39 per cent over the 2006 levels, compared to the projected increase of 24 per cent for the non Indigenous population.

By comparison to the national population, Australian Indigenous are relatively young, with more people in the younger than the older groups. At the 2006 census, the median age was 21 years compared to 37 years for the non-Indigenous population. These different age profiles reflect the higher rates of fertility and higher death rates occurring in the Indigenous population.

Unemployment rates are normally higher among the Indigenous population than the non-Indigenous population and Indigenous people are overrepresented in all sections of the homeless populations.

Most Aboriginal services are located in the inner city suburbs and La Perouse, however services are lacking in the more populated areas such as St Marys, Mt Druitt, Bonnyrigg, Emerton, Kellyville, Minto and Phillip Bay.

1.2.8 SOCIAL AND DEMOGRAPHIC PROFILE – KEY ISSUES

Sustainable population growth can only be achieved through a *whole of Sydney* planning process in which all aspects of governance are incorporated e.g. infrastructure, housing, education, economic development and community services.

Strong linkages between schools, vocational and tertiary education systems and industry are necessary to create an integrated system of education and skills attainment.

Engaging and providing participation opportunities in employment and education for those persons who are currently disengaged will help address the skills shortages that may exist now and into the future.

Modelling subregional areas in such a way that create local employment, education, transport and housing opportunities (no matter where a person lives).

There are high unemployment rates and low participation rates for young people in some areas of Sydney.

1.3 ECONOMIC PROFILE

Photo: Patrick Bingham-Hall - Courtesy of Sydney of City Council©

1.3.1 ECONOMIC OVERVIEW

The RDA-Sydney Region is comprised of 41 LGAs and boasts a large and diverse economy that is arguably the heart of the Australian economy. Sydney is a global city, representing an important hub within the Asia Pacific region and the financial centre of the Australian economy. In 2009-2010, the Sydney Region had an estimated gross regional product (GRP) of $256.0 billion, making it approximately the same size as the Thailand economy, representing 63.1% of the estimated Gross State Product (GSP) for NSW and contributing approximately 20% to the Australian economy.

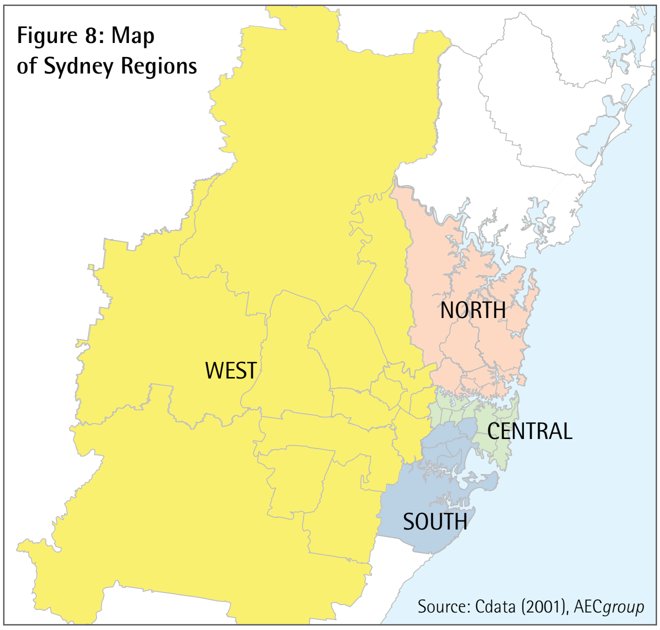
For the purpose of this economic profile, based on the updated 2011 RDA-Sydney Economic Baseline Assessment report prepared by the AEC*group*, the Sydney Region has been divided into four smaller regions, as per Figure 8. Economic analysis has also been provided for the City of Sydney LGA (which is part of the *Central Region*) due to its significance as a commercial centre.

Table 11 outlines the 41 LGAs in the Sydney Region and the breakdown into the four smaller regions.

Using the analysis of GRP by industry for the 2009-2010 period (Table 12) one can make the following observations by industry sector.

The financial and insurance services sector accounts for over one fifth of the Sydney Region's GRP. This strength reflects the significant value add of the financial sector and Sydney's status as a global city and one of the financial hubs of the Asia

Figure 8: Map of Sydney Regions



Source: Cdata (2001), AEC*group*

Table 11: Sydney Regions

Region	Local Government Areas
Central	Sydney, Botany Bay, Randwick, Waverley, Woollahra, Ashfield, Burwood, Canada Bay, Leichhardt, Strathfield
North	Hunter's Hill, Lane Cove, Mosman, North Sydney, Ryde, Willoughby, Hornsby, Ku-ring-gai, Manly, Pittwater, Warringah
South	Canterbury, Hurstville, Kogarah, Marrickville, Rockdale, Sutherland Shire
West	Auburn, Bankstown, Fairfield, Holroyd, Parramatta, The Hills, Blacktown, Blue Mountains, Hawkesbury, Penrith, Camden, Campbelltown, Liverpool, Wollondilly

Table 12: GRP by Industry – Sydney Region 2009-10 ($Million)

Industry	City of Sydney $	Central (a) $	North $	South $	West $	Sydney Region $
Agriculture, Forestry & Fishing	15.4	29.7	67.7	13.7	303.2	414.3
Mining	422.8	457.8	261.7	46.5	1,436.6	2,202.6
Manufacturing	1,440.4	3,346.6	3,104.1	2,424.4	13,392.3	22,267.4
Electricity, Gas, Water & Waste Services	956.7	1,308.5	673.3	237.9	1,702.4	3,922.1
Construction	962.5	2,196.4	2,365.0	1,243.9	4,669.7	10,475.1
Wholesale Trade	1,658.7	3,117.8	3,451.4	1,276.4	5,958.2	13,803.9
Retail Trade	968.5	2,144.7	1,866.2	1,162.9	3,788.7	8,962.5
Accommodation & Food Services	1,188.0	1,913.7	994.2	612.0	1,725.9	5,245.7
Transport, Postal & Warehousing	1,886.1	5,598.1	903.4	1,117.1	4,790.6	12,409.2
Information Media & Telecommunications	5,140.9	6,011.2	4,211.6	441.3	1,923.1	12,587.2
Financial & Insurance Services	26,646.1	29,537.7	6,577.5	2,568.3	7,448.8	46,132.3
Rental, Hiring & Real Estate Services	1,359.8	2,462.2	1,517.3	678.4	2,102.7	6,760.6
Professional, Scientific & Technical Services	9,037.8	11,214.8	7,357.0	1,496.9	4,090.6	24,159.2
Administrative & Support Services	1,766.4	2,393.2	1,329.1	468.5	1,683.8	5,874.6
Public Administration & Safety	2,986.4	4,032.7	1,182.5	1,011.9	3,986.0	10,213.1
Education & Training	1,277.5	2,672.5	2,052.0	1,015.4	3,737.4	9,477.3
Health Care & Social Assistance	1,271.1	2,993.6	2,780.0	1,466.9	4,483.9	11,724.4
Arts & Recreation Services	719.5	1,009.7	388.7	203.8	594.1	2,196.3
Other Services	530.1	1,025.3	811.9	478.7	1,501.6	3,817.5
Non-Classifiable	669.0	942.6	753.6	199.0	822.8	2,718.0
Sub-Total	**60,903.7**	**84,408.8**	**42,648.3**	**18,163.9**	**70,142.4**	**215,363.3**
Ownership of Dwellings & General Government	11,494.0	15,929.9	8,048.7	3,428.0	13,237.5	40,644.2
Gross Regional Product	**72,397.6**	**100,338.7**	**50,697.0**	**21,591.8**	**83,379.9**	**256,007.5**

Note: Current prices. 2006 ANZSIC. (a) Central Region includes the City of Sydney. Source: AEC*group* (2011)

Pacific Region. The majority of this activity is focused around the Sydney CBD, which also comprises a major proportion of the State's activity in the professional services, property and public sectors.

The *Central Region* can be described as Australia's gateway to the global economy. It comprises the Sydney CBD, which is the financial centre of the Australian economy and is also home to the regional headquarters of numerous multinational corporations. The region is also home to Port Botany, one of Australia's largest container ports, and Sydney Airport which is the nation's largest airport.

The *West Region* represents the industrial engine room of the Sydney economy. It is home to a large proportion of the city's manufacturing sectors and it is a strategic distribution hub for goods throughout Australia. It has a significant transport and logistics sector. The region also boasts a strong professional services sector with major commercial centres including Parramatta, Norwest and Penrith. The *West Region* represents the major future growth area for the *Sydney Region* with significant population and employment growth projected over the next 25 years.

The *North Region* has significant information media, telecommunications and professional services sectors, which reflect the major commercial centres located in the region. Major centres including North Sydney, Chatswood and Ryde/ Macquarie Park have attracted a large number of technology and creative based businesses.

The *South Region* comprises a large resident population with a large proportion of people leaving the region each day to work. A major focus of the region's economy revolves around servicing the local population with significant retail trade, health care and social assistance sectors. The region also includes several traditional industrial areas which support a large manufacturing sector.

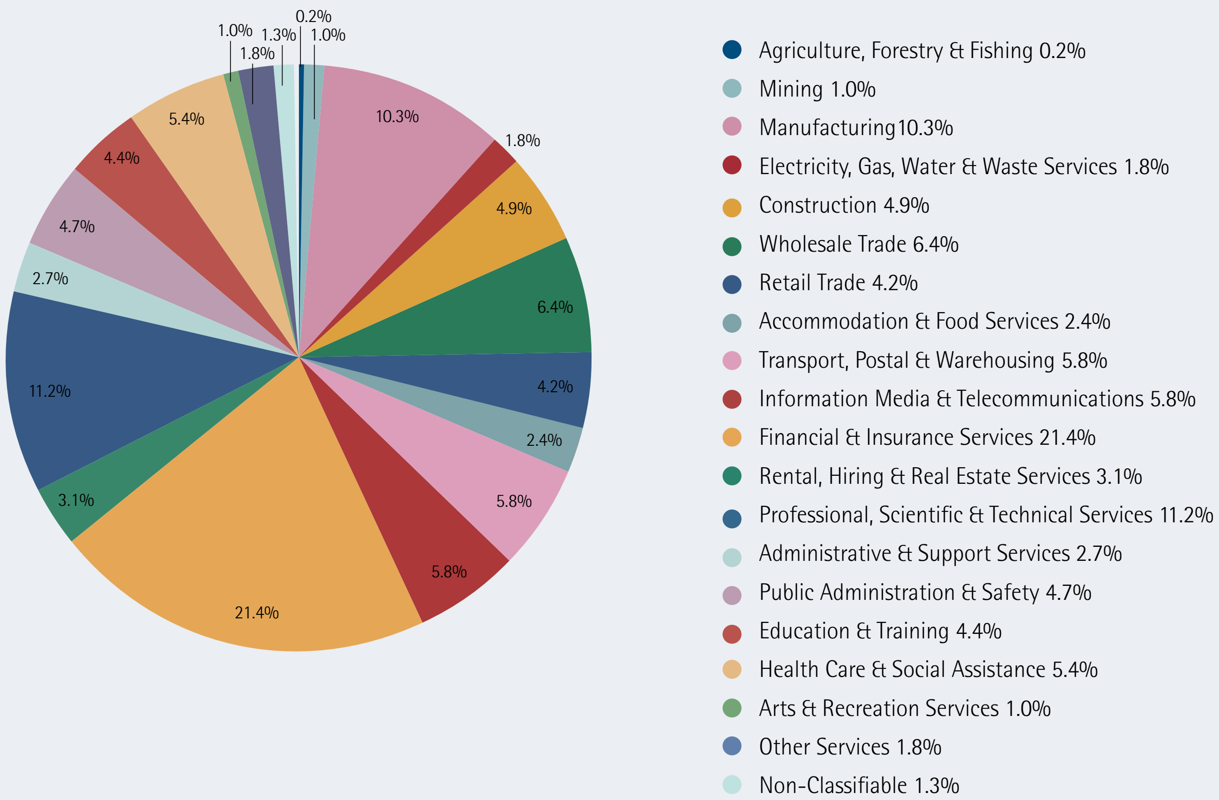
As can be seen in Table 13, there were an estimated 1,745,827 people employed in the Sydney Region in 2011 with the largest industries by employment being retail trade (187,647),

Table 13: Employment by Industry – Sydney Region 2011

Industry	City of Sydney	Central (a)	North	South	West	Sydney Region
Agriculture, Forestry & Fishing	281	511	1,145	228	5,002	6,886
Mining	753	808	419	76	2,203	3,508
Manufacturing	12,510	27,104	24,337	19,328	105,625	176,437
Electricity, Gas, Water & Waste Services	4,005	5,267	2,543	890	6,438	15,140
Construction	9,177	19,630	20,414	10,827	40,227	91,080
Wholesale Trade	13,889	24,589	26,056	9,793	44,927	105,331
Retail Trade	22,170	46,255	38,595	24,271	78,538	187,647
Accommodation & Food Services	25,999	40,206	19,728	12,172	34,377	106,493
Transport, Postal & Warehousing	16,137	44,029	6,998	8,586	37,053	96,737
Information Media & Telecommunications	24,867	28,638	18,111	1,940	8,368	57,023
Financial & Insurance Services	77,348	84,846	17,184	6,656	19,501	128,249
Rental, Hiring & Real Estate Services	7,551	13,041	7,614	3,414	10,563	34,628
Professional, Scientific & Technical Services	68,172	82,955	50,155	10,276	27,821	171,127
Administrative & Support Services	18,286	24,099	12,449	4,383	15,760	56,686
Public Administration & Safety	33,147	43,528	11,868	10,110	40,182	105,741
Education & Training	19,578	38,502	28,811	14,169	51,974	133,440
Health Care & Social Assistance	20,992	46,340	41,651	21,871	67,265	177,087
Arts & Recreation Services	9,121	12,404	4,485	2,357	6,775	26,026
Other Services	10,074	18,468	13,964	8,294	25,841	66,561
Total	**394,057**	**601,220**	**346,527**	**169,641**	**628,440**	**1,745,827**

Note: (a) Central Region includes the City of Sydney. Source: ABS (2007), AEC*group* (2011)

Figure 9: GRP by Industry - Sydney Region 2009-10



Note: Current prices. Agriculture, Forestry & Fishing starts at 12 o'clock on the pie chart with industries going in a clockwise direction.
Source: AEC*group* (2011)

followed by health care and social assistance (177,087) and manufacturing (176,437). The *West* and the *Central Region*s are the largest employers in the *Sydney Region*, each accounting for over a third of the total employment in the *Sydney Region* in 2011.

There were an estimated 426,262 actively trading businesses in the *Sydney Region* in June 2007. Almost one third were involved in the property and business services sector, followed by construction (15.0 per cent) and retail trade (10.4 per cent). It is estimated that around half of Australia's top 500 companies and two-thirds of regional headquarters of multinational corporations are located in NSW, with the majority in Sydney.

The Sydney Region and its subregions have a strong economy, as identified by the economic baseline assessment, providing a solid platform for future growth.

Gross Regional Product

Over the past year, the overall economic structure of the *Sydney Region* has remained largely unchanged. Similar to the previous year, the financial and insurance services sector continues to account for over a fifth of the Region's GRP, reflective of the significant financial sector and Sydney's status as one of the global financial hubs of the *Asia Pacific Region*. The majority of this activity is focused around the Sydney Central Business District (CBD).

Other key industries in the Sydney Region include the professional and technical services (11.2%) and manufacturing (10.3%) sectors, individually contributing to over a tenth of the Region's GRP. While the financial services sector GRP contribution (as a percentage of the total) has witnessed a decline (0.9ppt) over the past year, the above two industry sectors have recorded an increase of 1.5ppt and 0.1ppt respectively.

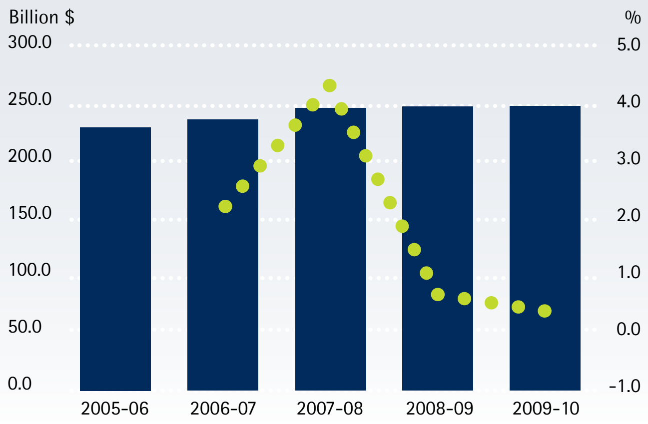
In 2009-10, the *Sydney Region* recorded marginal real GRP growth of 0.3%. Industries recording the highest growth included wholesale trade (3.2%) professional, scientific and technical services (3.1%) and accommodation and food services (3.1%) while industries recording a decline included other services (-4.2%), administrative and support services (-2.6%) and arts and recreational services (-0.4%).

Table 14: GRP by Industry – Sydney Region

Industry	Value Add ($Million) 2008-09 (Revised)	2009-10	% of Total (2009-10)
Agriculture, Forestry & Fishing	456.5	414.3	0.2
Mining	2,440.0	2,202.6	1.0
Manufacturing	21,726.5	22,267.4	10.3
Electricity, Gas, Water & Waste Services	3,868.2	3,922.1	1.8
Construction	10,289.2	10,475.1	4.9
Wholesale Trade	13,087.1	13,803.9	6.4
Retail Trade	8,932.9	8,962.5	4.2
Accommodation & Food Services	5,118.5	5,245.7	2.4
Transport, Postal & Warehousing	12,633.6	12,409.2	5.8
Information Media & Telecommunications	12,296.3	12,587.2	5.8
Financial & Insurance Services	47,579.9	46,132.3	21.4
Rental, Hiring & Real Estate Services	7,029.8	6,760.6	3.1
Professional, Scientific & Technical Services	20,692.9	24,159.2	11.2
Administrative & Support Services	6,381.9	5,874.6	2.7
Public Administration & Safety	10,398.1	10,213.1	4.7
Education & Training	9,253.7	9,477.3	4.4
Health Care & Social Assistance	11,820.8	11,724.4	5.4
Arts & Recreation Services	2,172.1	2,196.3	1.0
Other Services	3,988.1	3,817.5	1.8
Non-Classifiable	2,677.4	2,718.0	1.3
Sub-Total	**212,843.4**	**215,363.3**	**100.0**
Ownership of Dwellings & General Government	37,925.6	40,644.2	
Gross Regional Product	**250,769.0**	**256,007.5**	

Note: Current Prices. AEC*group* in preparation of the GRP data for 2009-2010 have incorporated updated ABS State Accounts data and population data necessitating revision of the 2008-2009 data using their AEC*group* GRP model (See RDA-Sydney Metropolitan Economic Baseline Assessment 2011) Source: AEC*group* (2011)

Figure 10: Real GRP Growth – Sydney Region



GRP $ Billion ■ % Growth ●●
Note: Chain volume. Due to the revision of ABS data, GRP estimates and growth rates for previous years differ from the 2010 Sydney EBA. Source: AEC*group* (2011)

The industries with the highest value-add per employee are generally professional services such as financial and insurance services ($365,752), information media and telecommunications ($223,474) and rental, hiring and real estate services ($198,286). These high value adding sectors provide significant value to the economy, which tends to flow to other sectors and fuel economic growth.

The mining ($635,659) and electricity, gas, water and waste services ($263,620) sectors also have high value add per employee though employment in the Sydney Region is comprised primarily of office staff for companies operating in these industries.

The industrial sector (including manufacturing, wholesale trade and transport, postal and warehousing) provides average value add per employee of approximately $130,000, which is above average. This represents the significant value to the economy of these industries.

The majority of sectors that are geared towards providing residential services (such as public administration, education, health care and community services, retail trade and accommodation and food services) provide lower than average value add per employee. This demonstrates that these sectors, while important for the community, do not provide as much economic value to the region as other industries.

Table 15 provides detailed industry breakdown of value add per employee for 2008-09 and 2009-10. While these figures provide a general indication of how value add per employee has changed over the past year, these figures are not directly comparable given that they are expressed at current prices.

Industries can be categorised by the key demand drivers that lead to growth. The three broad categories include:

» *Leading industries:* Primarily driven by competitive advantages of a region such as available factors of production (e.g. agriculture, mining, manufacturing and electricity, gas and water generation).

» *Industry/business led:* Sectors that respond to industry and business growth and look to support these operations (e.g. construction, wholesale trade, transport, postal & warehousing, professional, scientific & technical services and financial & insurance services).

» *Population led:* Support industries that look to service the local population and are driven primarily by population growth (i.e. retail trade, accommodation, health care & social assistance, education & training and arts & recreational services).

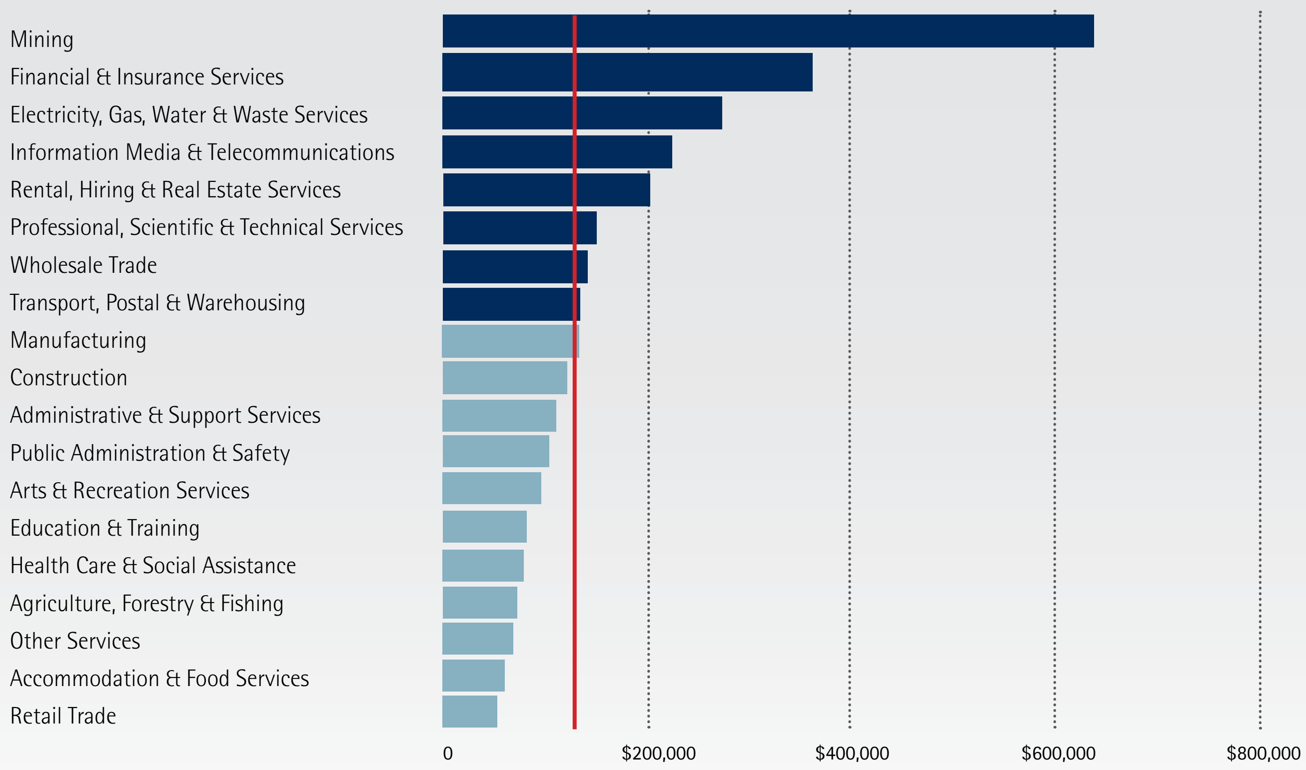
The graph below highlights the industries that record value add per employee above the average. It can be seen that the industries recording the highest value add per employee are generally those that are leading industries or industry/business led.

Table 15: Value Add Per Employee by Industry - Sydney Region 2009-10

Industry	2008-09 $ (Revised)	2009-10 $
Agriculture, Forestry & Fishing	66,157.6	61,580.7
Mining	683,480.4	635,659.1
Manufacturing	124,085.7	128,092.3
Electricity, Gas, Water & Waste Services	259,512.9	263,620.1
Construction	113,671.2	116,909.3
Wholesale Trade	124,840.0	132,948.1
Retail Trade	48,012.9	48,584.6
Accommodation & Food Services	49,212.2	50,085.4
Transport, Postal & Warehousing	131,114.5	130,462.0
Information Media & Telecommunications	222,969.6	223,474.2
Financial & Insurance Services	392,720.8	365,752.2
Rental, Hiring & Real Estate Services	206,731.8	198,286.3
Professional, Scientific & Technical Services	125,393.1	143,279.5
Administrative & Support Services	115,876.5	105,236.3
Public Administration & Safety	101,397.9	98,107.5
Education & Training	70,261.3	72,238.0
Health Care & Social Assistance	67,482.9	67,201.5
Arts & Recreation Services	86,141.4	85,761.8
Other Services	60,669.9	58,275.7
Average	**$124,251.3**	**$125,318.1**

Note: Current prices. Due to the revision of ABS data, GRP estimates and growth rates for previous years differ from the 2010 Sydney EBA. Source: AEC*group* (2011)

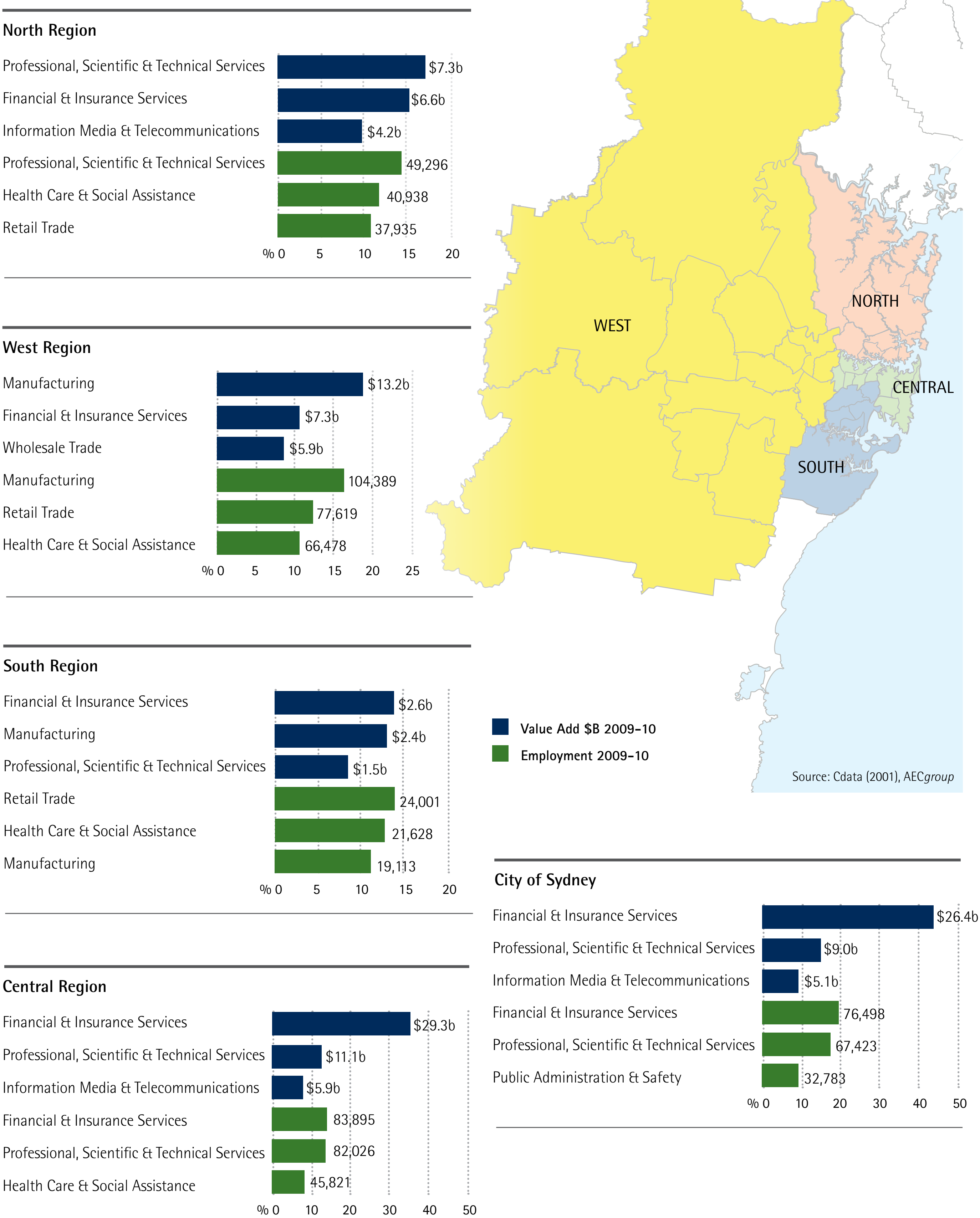
Figure 11: Value Add Per Employee by Industry – Sydney Region 2009-10



Note: Current prices. Source: AEC*group* (2011)

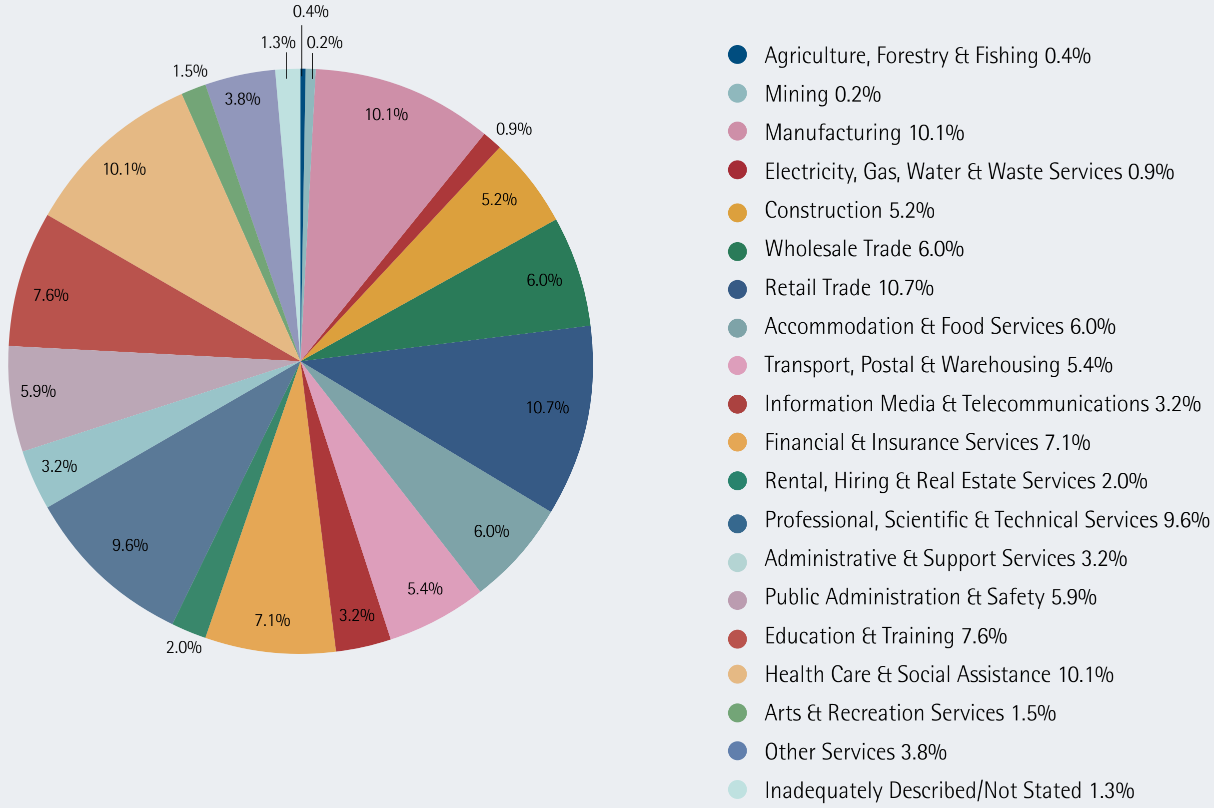
Figure 12 provides an indication of the three key industries in each region that account for the highest proportion of value adds and employment. The industries recording the highest proportion of employment do not always account for the highest proportion of value add due to the different value add per employee for the different industries.

Figure 12: Value Add and Employment by Industry – Sydney Regions



Source: AEC*group* (2011)

Figure 13: Employment by Industry - Sydney Region 2011



Note: Based on place of employment. Agriculture, forestry and fishing industry starts at 12 o'clock on the pie chart with industries going in a clockwise direction.
Source: AEC*group* (2011)

Employment

According to the latest employment estimates developed by the AEC*group*, more than 1.7 million people were employed in the *Sydney Region* at March 2011. This represents an annual increase of 1.6% (additional 27,294 employees) compared to March 2010. The increase in employment numbers is largely driven retail trade, manufacturing, professional and scientific services, and health care sectors.

The *Sydney Region* has a highly diversified employment base with strengths across a variety of sectors such as retail trade (10.7%), health care (10.1%), manufacturing (10.1%) and professional, scientific and technical services (9.6%).

According to the Department of Education, Employment and Workplace Relations (DEEWR), the *Sydney Region* recorded an unemployment rate of 5.0% in the December Quarter 2010. This represented a drop of -1.0ppt since the December Quarter 2009, indicative of the region's economy recovering from the global economic downturn.

The *Sydney Region* recorded participation rate of 61.1% at the time of the 2006 Census, representing a decrease of 0.9% from time of the 2001 Census. The drop in the participation rate can be associated with a number of reasons including older employees retiring earlier, young people entering the workforce later (perhaps due to studying longer) or many other social factors stretching across all age groups.

Table 16: Employment by Industry – Sydney Region

Industry	2010	2011	Change
Agriculture, Forestry & Fishing	6,728	6,886	158
Mining	3,465	3,508	43
Manufacturing	173,839	176,437	2,598
Electricity, Gas, Water & Waste Services	14,878	15,140	262
Construction	89,600	91,080	1,480
Wholesale Trade	103,829	105,331	1,502
Retail Trade	184,472	187,647	3,175
Accommodation & Food Services	104,736	106,493	1,757
Transport, Postal & Warehousing	95,117	96,737	1,620
Information Media & Telecommunications	56,325	57,023	698
Financial & Insurance Services	126,130	128,249	2,119
Rental, Hiring & Real Estate Services	34,095	34,628	533
Professional, Scientific & Technical Services	168,616	171,127	2,511
Administrative & Support Services	55,823	56,686	863
Public Administration & Safety	104,101	105,741	1,640
Education & Training	131,196	133,440	2,244
Health Care & Social Assistance	174,466	177,087	2,621
Arts & Recreation Services	25,609	26,026	417
Other Services	65,508	66,561	1,053
Total	**1,718,533**	**1,745,827**	**27,294**
Annual Employment Growth % 2010-11		**1.6 %**	

Note: Employment figures are as at March each year. Source: AEC*group* (2011)

Table 17: Unemployment Rate – Sydney Region

Period	Unemployment Rate %
December Quarter 2009	6.0
December Quarter 2010	5.0
Change ppt	-1.0

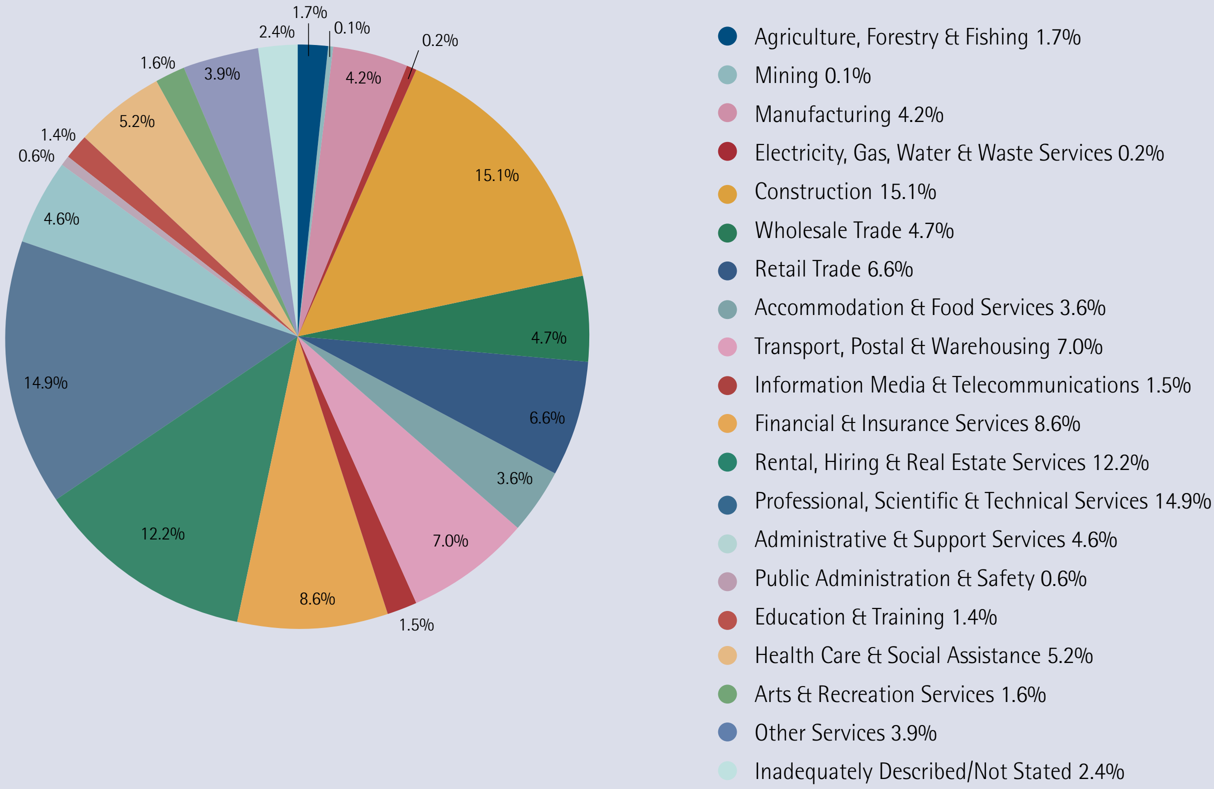
Source: AEC*group* (2011)

Table 18: Participation Rate – Sydney Region

Period	Participation Rate %
2001	62.0
2006	61.1
Change	-0.9

Source: AEC*group* (2011)

Figure 14: Businesses by Industry – Sydney Region June 2007



Note: Actively trading businesses. 1993 ANZSIC. Organisations in the government administration and defence industry have not been included. Agriculture, Forestry & Fishing starts at 12 o'clock on the pie chart with industries going in a clockwise direction. Source: AEC*group* (2011)

Businesses

The numbers of businesses have been estimated based on data from the ABS Counts of Australian Businesses. This data is broken down by industries as classified by the old 1993 ANZSICs, which is different to the GRP and employment data in this report which uses the new 2006 ANZSICs. As such, caution must taken when comparing business data to the GRP and employment estimates.

According to the latest ABS data, there were approximately 427,000 business entities actively trading in the *Sydney Region* as at June 2009. This represented an average annual increase of 0.1% since June 2007.

The *Sydney Region* has a diversified range of businesses, with strengths in construction (15.1%), professional and technical services (14.9%), and rental, hiring and real estate services (12.2%).

The aforementioned sectors jointly represent over 40% of the businesses within the *Sydney Region* and account for around 17% of the total employment, thereby indicating a large number of self employed or smaller companies with a small tier of major companies.

On the other hand, the manufacturing sector represents approximately 4.2% of the businesses within the region, however contributes to over 10% of the region's employment. In other words, there were an estimated 18,055 manufacturing businesses in the *Sydney Region* in June 2009 employing over 170,000 people. This indicates that the average sizes of manufacturing businesses are considerably larger than service sector businesses.

Table 19: Change In Business Count – Sydney Region 2007-09

Period	Business Count
June 2007	426,261
June 2009	426,996
Annual Average Growth 2007-09 %	0.1

Source: AEC*group* (2011)

Table 20: Businesses by Industry – Sydney Region June 2007

Industry	Businesses	% of Total
Agriculture, Forestry & Fishing	7,572	1.8
Mining	669	0.2
Manufacturing	21,939	5.1
Electricity, Gas & Water Supply	408	0.1
Construction	63,789	15.0
Wholesale Trade	22,062	5.2
Retail Trade	44,169	10.4
Accommodation, Cafes & Restaurants	10,737	2.5
Transport & Storage	26,706	6.3
Communication Services	6,474	1.5
Finance & Insurance	34,773	8.2
Property & Business Services	136,536	32.0
Education	4,362	1.0
Health & Community Services	21,477	5.0
Cultural & Recreational Services	12,444	2.9
Personal & Other Services	12,144	2.8
Total	**426,261**	**100.0**

Note: Actively trading businesses. 1993 ANZSIC. Organisations in the government administration and defence industry have not been included. Source: ABS (2008)

1.3.2 MAIN ECONOMIC DRIVERS

Sydney is a global city, representing an important financial hub within the Asia Pacific region and the financial centre of the Australian economy. It is a key gateway for Australia to the global economy. The finance and insurance services sector (with GRP $47.7 billion) accounts for over one fifth of the Sydney Region GRP.

The *Central Region*, which includes the City of Sydney (CBD) generated nearly 40% ($100 billion) of Sydney's GRP. The City of Sydney itself (with GRP $72 billion) generates almost 30 per cent of the GRP for the entire Sydney Region with the finance and insurance services sector comprising 45 per cent of this GRP (GRP $26.6 billion), and professional, scientific and technical services (GRP $9.0 billion). Retail, tourism and overseas education are also three key industries within the city. Botany Bay and Mascot are home to Sydney's major port facilities and Sydney's international airport, auxiliary transport and logistics industries. Randwick has a major health and education precinct. At Ultimo and Camperdown there are two universities, a major hospital complex, professional services and creative industry hubs.

The *West Region* (with GRP $83 billion) generates 33 percent of Sydney's GRP and represents the industrial engine room of the Sydney economy. It is home to a large proportion of the city's manufacturing sectors (with $13.4 billion out of Sydney's $22.2 billion manufacturing sector, and NSW's total $33 billion). Western Sydney is also the strategic distribution hub for goods on the eastern seaboard of Australia with a significant transport and logistics sector (with wholesale sector $6.0 billion out of $13.8 billion, and transport, postal and warehouse sector $4.8 billion out of $12.4 billion respectively).

The *West Region* also represents one of the fastest growing economies in Australia with 70 per cent of Sydney's population growth expected to occur in Greater Western Sydney from 1.93 million in 2011 to 2.97 million in 2036. Parramatta, as Sydney's second CBD, is now close to the centre of the city geographically. Parramatta (with GRP $14.4 billion) now boasts a new commercial centre, major new government offices and a legal precinct. Norwest and Sydney Olympic Park are also growing as new commercial centres. Other significant regional city centres lie within Blacktown, Bankstown, Penrith, Liverpool, and Campbelltown LGAs.

The *North Region* of Sydney (with GRP $51 billion) boasts a significant finance and insurance sector (GRP $6.6 billion out of Sydney's GRP $46.1 billion), a strong information media and telecommunications sector (GRP $4.2 billion out Sydney's GRP of $12.6 billion), and GRP $7.3 billion out of the $24.2 billion professional, scientific and technical services sectors. North Sydney has a strong finance, insurance, media, engineering and professional services base. Chatswood is a major retail precinct with a strong financial services and commercial base. The Macquarie Business Park at Ryde has progressively become the head office in South East Asia for many major IT, engineering, defence, medical and life science technology companies.

The *South Region* (with GRP $21.6 billion) is home to a large resident population and has significant manufacturing, retail trade, health care and social assistance sectors. Kurnell and Cronulla within Sutherland Shire have manufacturing centres, with local regional city centres at Hurstville, Rockdale, and Sutherland.

1.3.3 RECENT ACTIVITIES IN THE JOB MARKET

According to the latest DEEWR figures, there were an estimated 1,745,827 people employed in the Sydney Region in 2011 with the largest industries by employment being retail trade, health care and social assistance, manufacturing and professional scientific and technical services.

In Sydney, as for the rest of Australia, there has been a trend towards part-time and casual employment. In 1992, 70 per cent of all jobs in Australia were full-time, but in the period from 1992-2005 total employment rose by 32 per cent but the number of full-time jobs only rose by 19 per cent. There has been a trend away from full-time permanent work towards alternatives such as casual and part-time work. This trend has been exacerbated by the global financial crisis, where over the past two years it has been reported that the growth in part-time work has been at its highest rate for the past two decades.

A comparison of the type of employment by industry for new jobs shows that the property and business services, retail and health generated 59 per cent of new positions nationally. Approximately half of the new jobs in these sectors were part-time and casual. In construction, only 10 per cent of jobs were part-time and casual. Manufacturing saw a five per cent decline in full-time permanent employment over the above period. Changes in employment type may be due to a variety of reasons including structural changes in the industry, demand for part-time or casual employment, and economic conditions. Whatever the cause, the key issue is that planning for the development of industry in Sydney should take into account the context of the local population and type of employment that industry is likely to provide.

1.3.4 ISSUES SURROUNDING LACK OF SKILLS

In an Australian-wide 2010 survey with a particular focus on the manufacturing, construction and services sectors, the Australian Industry Group (AIG) found that businesses are very concerned about the possible impact of skills shortages in both the short and longer-terms. The survey revealed that despite active recruitment processes, over 27 per cent of vacancies over the preceding six months had not been filled, primarily due to the lack of specialised skills required for the job, lack of applicants' skills and experience, and a general lack of applicants.

According to the same survey, recruitment activity was expected to remain very strong until 2011, as business picks up after the global economic downturn. Of most concern to employers is the difficulty involved in filling vacancies in skilled occupations due to the length of time needed to develop those skills.

The NSW Government targets include an additional 550,000 jobs in Sydney by 2036 on top of the current workforce of 1.7 million. In addition to these new jobs, many existing jobs will change due to structural changes in the economy, new technologies and rapid change. It is forecast that there will be greater demand for skilled workers, multi-skilled workers and those with higher education qualifications.

There are on-going concerns that economic growth will be constrained due to skills shortages, and the ageing population is a major contributor to this scenario. According to Skills Australia, the labour force participation rate needs to increase substantially in order to replace the ageing labour force and provide the additional labour needed for the economy to grow. In the Sydney Region, this will entail making attempts to increase labour force participation both in general and for specific groups with low participation rates.

The Bradley Higher Education Review maintains that Australia needs to aim for 40 per cent of 25-34 year olds to gain a higher education degree in order to meet both current and future workforce demands. In particular, the Review highlighted the need to substantially engage more young people from disadvantaged backgrounds in higher education courses.

Many businesses are faced with the issue of who will take over once current owners and employers retire. Succession planning is a key concern due to the large number of people planning to sell their businesses in the next 10 years.

1.3.5 COMMUNITY CONCERNS ABOUT THE LOCAL ECONOMY

Community consultations highlighted the following major concerns about the Sydney economy:

- The potential carbon tax debate and its possible impact on the economy are having a very divisive impact on the community;
- Consumer confidence - Consumers are very concerned about the continuing global financial crisis and the potential impact on their job, their superannuation and their life savings. Consumers are saving more and consuming less. This is impacting on retail sales and investment as a whole;
- The resource boom and the high Australian dollar are causing a two speed economy. NSW unlike WA and QLD is not benefiting from the resource boom. Sydney's retail, manufacturing, tourism and overseas education sectors are being particularly affected;
- If housing is not affordable for key workers, it has the potential to distort the economics of an area by increasing the cost of business;
- The need to address Sydney's infrastructure issues, particularly transport, but also water, electricity and telecommunications;
- The need for a freight strategy for Sydney that would strategically plan and facilitate freight movements in order to minimise delays and optimise economic benefits;
- Transport services should be equitable and address current issues of locational disadvantage and social isolation;
- Sustainability criteria should be given equal standing with economic and social criteria in any decision-making processes concerning infrastructure development.

1.3.6 EMPLOYMENT MIX

Employment growth in the Sydney area over the decade 1996 to 2006 shows a shift towards the knowledge-based economy, with around 95 per cent of net new jobs in advanced skill occupations – administrators and managers, professionals and associate professionals. In this context, advanced skill occupations are those involving substantial time in training and level of experience.

According to Australian Workforce Futures, the specific occupations which will experience the highest growth to 2025 include welfare associate professionals (assisting health professionals in the provision of patient care in hospitals, nursing homes and other health care facilities), growing at 2.8 per cent p.a.; Carers and aides (2.6 per cent p.a.); University and vocational teachers (2.3 per cent p.a.); Computing professionals (2.0 per cent p.a.); And process workers and elementary clerks (1.9 per cent p.a.).

The key industries of employment in the Sydney Region, as shown in Table 21 below, are retail trade (10.7 per cent), health care and social assistance (10.1 per cent), manufacturing (10.1 per cent) and professional, scientific and technical services (9.6 per cent). The industries with the largest absolute increase in employment over the four years to 2010 are professional, scientific and technical services, retail trade, and health care and social assistance.

Table 21: Employment by Industry – Sydney Region

Industry	2006	2011	Change
Agriculture, Forestry & Fishing	6,431	6,886	455
Mining	3,320	3,508	188
Manufacturing	165,494	176,437	10,943
Electricity, Gas, Water & Waste Services	14,011	15,140	1,129
Construction	85,254	91,080	5,826
Wholesale Trade	98,522	105,331	6,809
Retail Trade	175,332	187,647	12,315
Accommodation & Food Services	98,922	106,493	7,571
Transport, Postal & Warehousing	89,185	96,737	7,552
Information Media & Telecommunications	52,852	57,023	4,171
Financial & Insurance Services	117,189	128,249	11,060
Rental, Hiring & Real Estate Services	32,228	34,628	2,400
Professional, Scientific & Technical Services	158,584	171,127	12,543
Administrative & Support Services	52,586	56,686	4,100
Public Administration & Safety	97,708	105,741	8,033
Education & Training	124,537	133,440	8,903
Health Care & Social Assistance	165,597	177,087	11,490
Arts & Recreation Services	24,064	25,026	962
Other Services	62,130	66,561	4,431
Total	**1,623,946**	**1,745,827**	**121,881**

Note: 2006 ANZSIC. Source: AEC*group* (2011)

1.3.7 ECONOMIC VULNERABILITY

Sydney's strong economic position is currently facing a number of key threats including:

» Global financial crisis particularly in Europe and the US has had a significant impact on the Australian stock market and the financial industry as a whole. This could influence the planned expansion of the financial sector at Bangaroo in the CBD;

» The potential carbon tax debate and its possible impact on the economy are having a very divisive impact on the community;

» Consumer confidence - Consumers are very concerned about the continuing global financial crisis and the potential impact on their job, their superannuation and their life savings. Consumers are saving more and consuming less. This is impacting on retail sales and investment as a whole;

» The resource boom and the high Australian dollar are causing a two speed economy. NSW unlike WA and QLD is not benefiting from the resource boom. Sydney's retail, manufacturing, tourism and overseas education sectors are being particularly affected;

» The high Australian dollar is causing more consumers to buy imported goods and services overseas, buy more goods online, and take holidays overseas rather than in Australia;

» Major multinational and Australian manufacturing companies because of the high Australian dollar and the perceived impact of the carbon tax are intending to close some Australian operations and import the same goods;

» Infrastructure constraints - particularly in transport infrastructure. Transport congestion affects both passengers and freight and has economic, social and health costs;

» Freight movements – the continuous growth of freight movements in Sydney is putting pressure on Sydney's infrastructure. Despite the substantial increase in freight movements, Sydney still lacks a freight strategy;

» Housing affordability is an important determinant of economic growth and productivity. If high skilled migrants and local professionals can't get into the housing market, they will be more likely to look for opportunities to work in more affordable areas. If key workers such as teachers, nurses and police can't afford to live close to their workplaces, they will be forced to commute long distances, contributing to congestion and reducing the productivity of the city economy;

» Skilled workers – the rapidly evolving economy demands a labour force that is appropriately qualified and trained to match the needs of industry. Sydney, along with the rest of Australia, is faced with the pressure of an ageing population and the need to lift labour force participation rates and educational attainments in order to maintain positive economic growth and competitive advantage;

» Local jobs – it is important for Sydney to generate jobs closer to where people live in order to reduce congestion on roads and public transport and improve liveability. If left up to market forces, it is uncertain whether a balanced geographic distribution of industry will occur and as a result it may require targeted policy intervention;

» Industry mix – it is also important that there be a mix of industries in any local area, providing an array of jobs and work conditions that are suited to the needs and expectations of the local population;

» According to the *Metropolitan Plan for Sydney 2036* and reinforced by the Property Council of Australia, at the very least 4,000 to 7,500 hectares of new employment land will need to be identified, re-zoned, serviced and developed to satisfy Sydney's employment growth;

» According to the UDIA and the Property Council of Australia, employment lands are lands zoned for heavy and light industrial uses and commercial development which are not located in a CBD or regional centre location. Their uses range from warehousing, distribution centres and manufacturing to business parks and research facilities. The planning of employment lands should be incorporated into a holistic planning process for Sydney which should be packaged with such infrastructure as roads, transport, water and electricity all being delivered concurrently;

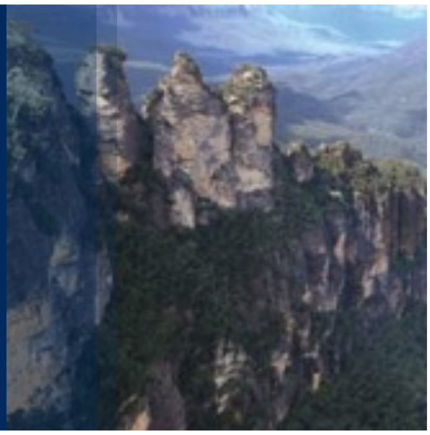
» Sustainability – Sydney is growing and it is vital that the region has the capacity to absorb an increased population and has the resources required to drive and sustain this growth. The impact of climate change needs to be managed in the context of this growth;

» Social inclusion – while the growing economy and the current social inclusion strategies are providing opportunities for access to employment and services. There is also the potential threat that a substantial number of people may be left behind resulting in long-term unemployment, homelessness, and other forms of social exclusion.

1.3.8 CURRENT ECONOMIC DEVELOPMENT STRATEGIES

- The *National Urban Policy - Our Cities, Our Future*
- The *Metropolitan Strategy 2036* (including Sub-regional Strategies)
- The *Indigenous Economic Development Strategy* (draft – Australia wide)
- The *Council and ROC Economic Development Strategies*
- The *Western Sydney Business Growth Plan*

1.4 ENVIRONMENTAL PROFILE



1.4.1 PARKS

Sydney is fortunate to have 22 national parks, nature and/or conservation reserves located within its boundaries. Most notable are the Ku-ring-gai and Lane Cove National Parks in the north, the Royal National Park in the south and Blue Mountains World Heritage National Park in the west. There are 11 designated major parklands including Western Sydney Parklands, Bicentennial Park in the central west and Centennial Park in the east.

Western Sydney Parklands although initially conceived in 1969 is the recent culmination of development by successive State Governments to create a 27km, 5,280 hectares park-land, as comparison Centennial Park near Sydney's CBD is 220 Hectares. Stretching from Dean Park in the NW of Sydney to Leppington in the SW will provide Western Sydney with a world class recreation resource balanced by conservation of this largely undeveloped area on Sydney's urban fringe that includes security for this unique environment and key water supply as well as employment and training opportunities in tourism, agriculture, conservation and community facilities.

1.4.2 CULTURAL HERITAGE

Sydney is one of the most culturally diverse cities in the world. Australian Indigenous tribes are diverse: the Eora, Darug, Gadigal, Gundungarra, and Tharawal people may have been living in Sydney for as long as 70,000 years.

The other source of cultural diversity is immigration. Today Australia takes migrants and refugees from all over the world. More than 100,000 skilled migrants, around 13,000 refugees and 56,000 people under the Family Reunion Stream come to our shores every year, as well as smaller numbers of migrants under other migration categories. Specific health, settlement and language services assist newly-arrived refugees settle into the new community and culture.

Multiculturalism was adopted by the Government in the 1970s. It is a concept that is hotly contested and used in a wide range of discourses with different meanings, different strategic purposes and effects.

Lately there has been a shift in government focus to the economic significance of multiculturalism. Cultural diversity brings many opportunities for the economy. It could be argued that it is Australia's greatest comparative economic advantage and businesses are encouraged to tap into the large reserves of immigrant human capital.


Photo: Courtesy of Parramatta City Council ©


Photo: Courtesy of Ingvars Birznieks ©

1.4.3 WATER RESOURCES

According to the 2010 *Metropolitan Water Plan*, Greater Western Sydney water supply is secured until 2025. Most drinking water will continue to be sourced from the network of 11 major dams and reservoirs that collect runoff from our river catchments. This network is interconnected and water is transferred between the dams when needed.

Currently, Sydney's average demand is 600 billion litres per year, (based on a 10 year average, when drought restrictions were not in place). Currently, households consume about 73 per cent of all water used in greater Sydney. It is interesting to note that Sydney is now using a similar amount of water as in the early 1970s, despite a population increase of about 1.4 million people. Over the past 19 years, demand has dropped from 506 litres per person a day in 1990-91 to 314 litres per person a day in 2009-2010.

This reduction is attributed to water conservation measures, such as recycling schemes (which provide 12 per cent of the greater Sydney current water needs, or 70 billion litres per year, until 2015); desalination (with capacity to supply 15 per cent of water needs, or 90 billion a year); water efficiency programs (which reduce by 24 per cent, or 145 billion litres, households and businesses' demand for water) and a number of other measures.

However, according to the *Plan*, many of Sydney Water's water efficiency programs, while highly effective, are reaching maturity and will have less impact in reducing water use over time.

Challenges such as population growth and demographic trends, changes in the housing mix, droughts, expansion of urban areas and new technologies are placing more pressure on water resources. The 2010 *Metropolitan Water Plan* will continue to focus on four main areas to secure our water for life: dams, recycling, desalination and water efficiency.

Water needs to be efficiently allocated to its highest value uses in order to improve both economic and environmental outcomes. To achieve this, some believe the solution lies in the introduction of water markets, as they provide effective mechanisms for ensuring that scarce resources are efficiently allocated. It is believe that water markets could improve economic outcomes through providing price signals that allow water to flow to its highest value and encourage investment in water saving infrastructure.

1.4.4 ENERGY

Over the next few years Australia and by inclusion Sydney will see major changes in the cost of energy supply and consumption. As of July 1st 2012 the Australian government propose to apply a carbon tax as part of a clean energy future initiative to power generators that will pass down in the form of higher retail prices to the consumer.

In many cases cost rises to consumers will be balanced by tax cuts, welfare payments and subsidies to key industries groups. Additionally changes brought about due to the privatisation of the energy generators by the NSW Government is likely to cause upward pressure on energy prices as new management look to realise return on their $5.3bil investment.

Until 2011, the NSW Government has owned and operated the network and retail parts of EnergyAustralia, Integral Energy and Country Energy. The NSW Government has sold its interest in the retail parts of its electricity businesses - EnergyAustralia, Integral Energy and Country Energy and they are now known as Ausgrid, Endeavour Energy and Essential Energy. The sale was announced on 14 December 2010 and took effect on 1 March 2011.

The majority of Australia's electricity generation is supplied by steam turbine plants (utilising coal and natural gas as fuels). 83 per cent is generated from coal and 10 per cent from natural gas. So 93 per cent of electricity comes from greenhouse gas / carbon price effected sources. According to Siemens, *Picture the Future: Australia Energy*, this particular mix of energy sources and high rates of energy consumption has implications for the environment, including greenhouse gas emissions, resource depletion and other pollution associated with the production and consumption of energy.

Most of Australia's black coal fuelled generation capacity is located in NSW and Queensland. However, about 96 per cent of conventional gas production is sourced from three petroleum basins: the Gippsland Basin in Victoria, the Carnarvon Basin in Western Australia and the Cooper Basin in Central Australia. Most of the natural gas supplying the Sydney market comes by pipeline from Central Australia. Liquefied petroleum gas, however, is shipped from Victoria. The soon to be built QSN Link pipeline will transport gas from Queensland into NSW, making NSW dependent on other states for conventional gas.

The establishment of the National Electricity Market (NEM) in 1998 allowed market determined power flows across NSW and other eastern states. NEM operates as a wholesale spot market in which generators and retailers trade electricity through a given pool managed by the Australian Energy Market Operators (AEMO), who aggregate and dispatch supply to meet demand. The NEM is linked by seven major transmission interconnectors. They link the electricity networks in the Eastern states.

NSW is the largest electricity market in Australia with roughly three million residential customers and 350,000 business customers. There were three electricity networks across the state, all of which were previously owned by the NSW Government: Energy Australia, Integral Energy and Country Energy now Ausgrid, Endeavour and Essential Energy. The recent ownership changes have resulted in the creation of new retail companies such as TRUenergy and transfer of retail customers between existing retail providers, most notable between Integral and Country energy divesting their retail customers to Origin Energy.

In the last decade Australia's electricity use increased by an average rate of 2.8 per cent per year. Nationally, the major energy using sectors of electricity are transport, followed by the manufacturing, mining, residential and commercial sectors.

Given that households account for 30 percent of total electricity use in NSW, improvements in household energy efficiencies are critical to reducing greenhouse gas emissions. According to the NSW State of the Environment Report, the electricity consumption of the average Australian household ranges from 4500 to 7000 kWh per annum. In 2006, the average household consumption in Sydney was 7,645 kWh. A recent report suggests that Australian houses are the world's largest. From the early 1980s energy consumption in households experienced high rates of growth.

Australia has poor energy efficiency and contribution of renewable sources by developed world standards with no carbon capture and storage in operation as yet. Renewable generation provides only seven per cent of electrical energy, mainly from hydro power, although wind and solar generation is beginning to grow.

According to AECOM Solar Bonus Scheme report for NSW Department of Industry and Investment (Oct 2010) Solar PV connections have doubled between 1st January 2010 and 30th June 2010 to 52.4 MW to a total of 28,513 connections across NSW. The strong take-up of PV has been influenced by government policy, such as the NSW Solar Bonus Scheme and Federal Solar Credits, and external factors such as declines in PV system prices.

Gross electricity generation is projected to rise from 907 petajoules (252 TWh) in 2004-05 to 1468 petajoules (408 TWh) in 2029-30. This represents an increase of 62 per cent over the projection period and an average rate of growth of 1.9 per cent a year, according to the ABARE's report on Australia Energy National and State projections to 2029-30.

The main projected change in the sector's fuel mix is an increase in the share of electricity generated from gas from 14 per cent in 2004-05 to 23 per cent in 2029-30. A corresponding decrease is projected in the share of electricity generated from coal from 77 per cent in 2004-05 to 68 per cent in 2029-30. The share of renewables is projected to increase slightly to eight percent by the end of the projection period.

Solar, wind and biomass energy are projected to account for the majority of the increase in electricity generation from renewable sources over the projection period. This expansion in non-hydro renewable reflects falling investment costs and the impact of a number of government policies.

There is a need to supplement and replace our coal and gas fired power plants with renewable electricity generators. Heavy reliance on fossil fuels makes Australia one of the highest per capita emitters of greenhouse gases in the industrialised world thus impacted by a price on carbon. Growth in renewable energy will be achieved by a mix of wind and large scale solar generation with a contribution from technologies such as geothermal and ocean power. Developing the electricity transmission networks of the eastern states and the separate Western Australia network will be a key enabler for integrating power from remotely located wind, solar and geothermal plants into the electricity sector.

1.4.5 AIR QUALITY

Air quality in the *Sydney Region* has improved substantially since the 1980s, according to the Department of Environment and Climate Change. This improvement is due to policy initiatives, including the *NSW Government's 25-year Air Quality Management Plan, 'Action for Air'* .

Photochemical smog and particle pollution are the two types of air pollution that are of most concern in Sydney currently. Photochemical smog is due to the action of sunlight on ozone and nitrogen oxides, with 80 per cent of nitrogen oxides coming from motor vehicle emissions. Nitrogen oxide emissions from industry in Sydney increased 49 per cent from 2003 to 2008.

Particle pollution is comprised of airborne particles, of which approximately 24 per cent are from motor vehicles.

According to the *NSW State of the Environment Report 2009*, the forecast growth in the state's population and in private and commercial vehicle travel will require an ongoing focus on motor vehicles from the perspectives of both ambient air pollution and greenhouse gas reduction.

The Bureau of Infrastructure, Transport and Regional Economics (BITRE) estimates that the health costs of air pollution at the levels applying in the Greater Metropolitan Region in 2005 were estimated to be $4.7 billion or $893 per head of population. Motor traffic pollution is estimated to result in health costs of $3.3 billion per year in the country's capital cities with Sydney's share at $1.5 billion.

1.4.6 WASTE AND RESOURCE RECOVERY

Waste disposal in Sydney is a strategic issue for a number of reasons:

» Shortage of landfill capacity and the logistics of transporting waste to sites with adequate capacity;

» Recycling of waste as a means to reduce dependence on traditional disposal methods and as a way to re-use resources;

» Potential for entrepreneurial initiatives around recycling activities, in particular.

Waste disposal in Sydney in 2008-9 decreased to 4 million tonnes from 4.6 million tonnes in 2004-5. Over the same period, recycling rates have increased to 62 per cent of waste from 49 per cent. The NSW Waste Avoidance and Resource Recovery Strategy 2007 and its predecessor, the 2001 Strategy, have been key policy frameworks contributing to the reduction of waste disposal and the promotion of waste recycling.

There are only 3 remaining sites for the disposal of general waste, commonly referred to as putrescent waste, for the *Sydney Region*. These are Eastern Creek, Lucas Heights and the Woodlawn Waste Recovery Centre (located at Goulburn but a key site for Sydney).

There is approximately 40 million tonnes landfill capacity available, which would accommodate Sydney's for around 20 years at the current disposal rate. However, the capacity is not evenly distributed nor is it necessarily readily accessible.

1.4.7 ENVIRONMENT – KEY ISSUES

Sydney's multiculturalism is economically significant and provides a comparative advantage in world terms. A more strategic approach is required to tap into the large reserves of immigrant human capital.

There are ongoing challenges for Sydney's water supply. Climate change impacts, droughts and uncertain rainfall patterns and higher temperatures put pressure on water resources. The ongoing implementation of the Metropolitan Water Plan is essential with further exploration into more innovative strategies such as water markets.

There is a need to supplement and replace over time our coal and gas-fired plants with renewable electricity generation systems. Coupled with this is the need to change the usage patterns and habits of the population and industry in such a way that it sustains liveability and the economy.

To improve air quality in Sydney we need to get people out of their cars and into mass transport systems. To do this, adequate planning and investment in transport infrastructure is required on a long term basis. Also the travel to work patterns need to be changed where a diverse range of employment opportunities are located within close proximity to the majority of the population.

It is imperative we develop and utilise Alternate Waste Technologies as part of a sustainable waste strategy.

1.5 HEALTH

1.5.1 HEALTH INFRASTRUCTURE PROFILE

There are 41 public and 30 private hospitals in the Sydney Region, with total bed numbers averaging approximately 15,000. There are six Local Health Districts covering the Sydney Region – Nepean Blue Mountains; Northern Sydney; South Eastern Sydney; South Western Sydney; Sydney; Western Sydney. In addition, two specialist networks will focus on Children's and Paediatric Services, and Forensic Mental Health. A third network will operate across the public health services provided by three Sydney facilities operated by St Vincent's Health: these include St Vincent's Hospital and the Sacred Heart Hospice at Darlinghurst and St Joseph's at Auburn.

Major upgrades of public hospitals currently underway are shown in Table 22.

The expansion of hospitals correlates with the projected population increases particularly in relation to the South West and North West Growth sectors (Liverpool, Blacktown and Nepean Hospitals). As with the higher education agenda, there is now a greater focus placed on research and innovation in particular to life sciences. This often involves partnerships between leading universities and teaching hospitals.

Table 22: Major Health Infrastructure Projects

Hospital/Facility	Estimated Cost of Project ($ Millions)
Blacktown Hospital Staged Redevelopment	125.0
Hornsby Ku-ring-gai Hospital Staged Redevelopment	50.0
Northern Beaches Hospital - Commencement	125.0
Westmead Millennium Institute Redevelopment	25.0
Children's Medical Research Institute Redevelopment	25.0
NSW Office of Preventative Health (located South West Sydney)	n/a
Telehealth Technology Centre – Nepean Hospital	2.0
Nepean Hospital Upgrade and Expansion, Clinical School and Redevelopment Stage 3	36.4
Liverpool Hospital Redevelopment	396.0
Ingham Health Research Institute, Liverpool	46.9
Royal North Shore Capital Works	980.5
St George Hospital Emergency Department	10.0
Garvan St Vincent's Campus Cancer Centre	70.0
Lifehouse at Royal Prince Alfred Hospital	100.0
Blacktown Hospital Clinical School, Research and Education Centre; Cardiac Catheterisation Laboratory and Simulation Centre	9.0
Sydney Olympic Park (SOP) Hospital	50.0
Auburn Hospital	129.7
Centre for Obesity, Diabetes and Cardiovascular Disease, Camperdown	350.0

Source: Planning NSW; NSW Government Budget Papers 2010-11; Department of Health and Ageing

1.5.2 HEALTH, AGED AND COMMUNITY CARE CONTEXTUAL FACTORS

According to the Centre for Health Innovation and Partnership current funding and service delivery arrangements for Health and Aged Care services will become unaffordable in the medium- to longer-term if the current siloed, uncoordinated, unintegrated approach remained in place. The facts are indisputable - Australia's population is ageing. Between now and 2050 the number of older people (65 to 84 years) is expected to more than double and the number of very old people (85 and over) is expected to more than quadruple. As we are living longer and due to changes in lifestyle over the past 20 years there is an epidemic of chronic diseases which is responsible for around 80% of the burden of disease in Australia and accounts for 70% of expenditure.

National Health Reform – the Commonwealth Government is aiming to shift the centre of gravity of the health system from hospitals to primary health care.

A National Health Reform Agreement was signed by all governments on 2 August 2011. The intention of the Australian Government and state and territory governments is to work in partnership to improve health outcomes for all Australians.

Key components of this reform are:

- A new framework for funding public hospitals and an extra $19.8 billion for public hospitals through to 2019-20;
- A focus on reducing emergency department and elective surgery waiting times;
- Increased transparency and accountability across the health and aged care system;
- A stronger primary health care system supported by joint planning with states and territories and Medicare Locals *(WentWest Ltd. Selected as the Western Sydney Medicare Local, further announcements due in 2012 for other parts of Sydney)*; and
- The Australian Government becoming directly responsible for funding basic community care in most states and territories. *(Stage 1 started 1 July 2011 – direct funding*

starts 1 July 2012.)

Health Workforce Australia – was established in 2010 in response to the Council of Australian Government's National Partnership Agreement on Hospital and Health Workforce Reform. This body operates across both the health and education sectors and jurisdictional responsibilities in health to devise solutions to integrated workforce planning, policy and reform. *(A Greater Western Sydney Partnership is facilitating Large Scale Workforce Development Projects to Secure and Sustain the Benefits of Collaborative Service Innovation, Redesign and eHealth Technologies – this partnership has membership from health, aged, community care and the education sectors.)*

Productivity Commission's Inquiry report *Caring for Older Australians*. Recommendations regarding a new delivery model for aged residential and community care. This also has workforce implications and integration with the overall health care system.

Personally Controlled E-Health Record: development of the critical national infrastructure for e-health records as a key element of the national health reform agenda. This will enable better access to important health information currently held in dispersed records around the country. It will mean that patients will no longer need to unnecessarily repeat their medical history every time they see a doctor or other health professional. In NSW, the Greater Western Sydney e-Health Consortium has received Federal money to focus on high-priority consumer groups. Its project includes secure messaging, electronic referrals and a medical imaging repository.

COAG National Partnership Agreement on Preventative Health: has been established to address the rising prevalence of lifestyle related chronic diseases. The Centre for Health and Innovation based in Western Sydney and NSW Government funded works with multiple sectors to develop and promote large scale, community orientated preventive initiatives, along with specific, school and workplace programs.

1.5.3 HEALTH - KEY ISSUES

A high rate of innovation and technological change which requires a high level of ongoing learning for both the existing and future workforce to develop flexibility and adaptability in the workplace.

The ageing of the workforce and current workforce shortages in critical areas.

Maximising research and innovation capacity in all parts of Sydney.

The importance of coordinated plans for the health sector that take into account the policies and inputs from both the State and Australian Governments.

Increase in demand for care as a result of an ageing population.

Requirements for increasing diversity of care and increasing acuity is expected in both residential and community settings.

1.6 SIGNIFICANT REGIONAL PROJECTS

Plan for Parramatta Civic Place - Courtesy of Parramatta City Council ©

1.6.1 CONFIRMED REGIONAL PROJECTS

The NSW Government has identified a number of major regional assets in both public and private ownership within the respective subregional plans. For the purposes of RDA-Sydney's *Regional Plan*, a list of significant regional projects has been identified and defined by the contribution they make to the overall economic value of the region and the opportunity to leverage these assets for future economic development and growth (see Table 23). This is not intended to be a comprehensive list, but rather a sample of projects either planned or underway.

It should be noted that major capital infrastructure projects planned for the region will account for significant growth in construction jobs. However, it is the social infrastructure and commercial investment that will provide the majority of long-term employment opportunities.

Major Projects in the NSW Government 2010 Infrastructure Australia Updated Submission include:

» Northern Sydney rail freight corridor;

» Dedicated rail freight line between Yennora and a proposed intermodal terminal at Eastern Creek;

» North West Rail Hills District Line;

» M5 East expansion;

» Further priority projects in the submission include the F3 – M2 link, M4 expansion, and the Epping to Parramatta rail link.

Table 23: Sample of Major Projects Subject to Determination for Sydney Region August 2010 – June 2011

Confirmed Projects	Estimated Value ($M)	Operational Jobs	Construction Jobs
Barangaroo - Various Projects	809	9160	2030
Discovery Point Precinct, Wolli Creek (Concept Plan)	419	459	6000
Warriewood Residential Development and Childcare	276	15	800
Rhodes - Building Construction	210	10	400
Wahroonga Estate Redevelopment	198	TBC	TBC
Rhodes Residential Development	197	TBC	TBC
Westmead Health Campus Research Hub	190	400	300
Macquarie Park - Mixed Use Development	180	20	1000
Royal Randwick Racecourse Construction/Refurbishment	169	225	675
North Sydney Mixed Use Development	157	2500	850
Inner West Light Rail Extension	150	10	450
Ultimo Global Switch Site	150	46	200
Chatswood Carpark	147	TBC	TBC
Chatswood Mixed Use Development	132	TBC	TBC
Eastern Creek Hewlett Packard Facility	119	5	200
Cardinal Freeman Village Ashfield	110	15	85
Huntingwood Employment Lands	107	600	100
Sydney Opera House Vehicle and Pedestrian Safety	95	0	300
North Sydney Zone Substation Redevelopment	76	TBC	40
Redevelopment of Sydney Showground Main Arena	73	200	150
Coca Cola Warehouse and Distribution Centre, Eastern Creek	50	24	50
Penrith Health Campus	42	TBC	104
Cruise Passenger Terminal - White Bay	37	700	80
Prince of Wales Hospital Precinct	27.7	TBC	TBC
Carlton United Breweries Site Modification	1,286	5,457	1,200
Barangaroo Modification	500	6,600	1,000
Star City Casino Redevelopment	349.2	1,000	750
Hoxton Park Airport Redevelopment	133	740	1,400

Note: These sample projects have been taken from the Planning NSW Major Projects Register as at August 2011. There is currently changes with respect to Part 3A and Part 4 of the EP&A Act. See http://majorprojects.planning.nsw.gov.au

2. CONSULTATION

2.1 CONSULTATION STRATEGY

Stakeholder consultation is an important principle in the planning and decision making process of RDA-Sydney. RDA-Sydney believes that quality consultation and engagement are essential foundations of good governance. With effective communication, dialogue and increased involvement of stakeholders, RDA-Sydney will be better positioned to make informed decisions about issues affecting the Sydney Region.

A consultation strategy was prepared in the process of updating this Regional Plan. The purpose of the consultation was to hear first hand stakeholders' views about the priorities for the Sydney region, the actions required to progress them and the role RDA-Sydney should play in the priority areas mentioned.

Consultations were held using two main methods – a public forum, mainly with local councils and regional organisations of councils and face-to-face meetings with a variety of organisations. All discussions were documented, consolidated and used to update the *Regional Plan*.

Ninety two people from 58 organisations participated in the consultations including:

» 16 Peak organisations;

» 38 Local councils;

» 7 TAFE;

» 7 State Government representatives;

» 6 Federal Government representatives;

» 4 Community peak bodies;

» 3 Business/Professional services;

» 7 ROCs;

» 2 Universities;

» 2 Research Institutes.

2.2 SUMMARY OF ISSUES – STAKEHOLDER FEEDBACK

Photo: Courtesy FJMT (Francis-Jones Morehen Thorp) / City of Sydney©

The comments below are those of stakeholders grouped under common themes and do not necessarily reflect the view of RDA-Sydney.

PLANNING

» **A 40-year vision for Sydney needs to be developed** in order to develop integrated, long-term planning: the development of a Vision 2051 for Sydney, with identified actions up to 2036 should focus on a sustainable Sydney, identifying needs for social interaction, environmental impacts and economic development. The alignment of already existing plans represents the first step towards this shared vision.

» Planning should incorporate the use of 3D modelling to develop concepts to test future scenarios.

» **Improved planning is needed for transport infrastructure** built around a long-term vision (currently it is reactionary). Embedding workforce access to transport must be a priority in the planning process.

» **Strategies to live and work locally** should be high in the planning agenda. There is a need to increase the number of suburban jobs by making existing precincts more attractive for people to live and work there, and build new ones with capacity to increase the flow of businesses to move there. Such precincts should contain a diversity of industries that complement and strengthen the region.

» **The preservation of corridors for future transport infrastructure** must be part of the planning process.

» **To identify and deliver employment lands** with some certainty of delivery of infrastructure commensurate with the potential for growth in the region.

INFRASTRUCTURE

There was broad consensus that infrastructure is a high priority for Sydney. Most stakeholders believe that:

» **Various elements of the nation's infrastructure are in serious disrepair**, if not in crisis. Roads, railways, telecommunications, electric power, sea and airports are struggling to cope with the demands of today's economy;

» **High level investment is needed** for the completion of projects under way and the construction of new ones. The backlog in investment in water, energy and land transport is estimated conservatively at $50-$100 billion, requiring immediate attention. However, the creation of Infrastructure NSW is seen as a positive step forward. Infrastructure Australia developed a national list of infrastructure priorities. However Sydney and NSW have missed out because a *whole of Sydney* business case wasn't adequately presented.

It was suggested Government should consider the privati sation of the remaining energy generation assets and should invest the capital in major infrastructure projects;

» **An audit of State's infrastructure and a long-term infrastructure plan** are currently needed, as well as the creation of a new approval pathway. The identification and delivery of infrastructure projects should be carried out using the *COAG Criteria for Cities* and the sustainability indicators outlined in the *Sustainable Population Policy*;

» **Productivity enhancement infrastructure should be a high priority.** Strong evidence exists that infrastructure investment has in fact a positive and permanent effect on economic output. According to CEDA, a 1 per cent increase in infrastructure spending increases output by between 0.17 and 0.39 per cent. As a result, infrastructure investment generates higher returns than investments in other sectors. However, investment needs to be complemented by appropriate policies on pricing and access regimes;

» Australia's federal system of government imposes unique complexities and constraints on infrastructure investment, compared to many other countries. These need to be overcome. We also need to **examine the current political approaches** to infrastructure building - how we use PPPs and how they fit into the infrastructure policy;

» **Community infrastructure is lacking with a major current backlog of projects.** Councils don't allocate enough space or resources to it. There is a need to sustain this type of infrastructure, as it has been neglected for some time now and has a direct benefit to the attraction of appropriately skilled labour to a region and to the wellbeing of communities;

» Access to high standard **health facilities across** the region are needed as well as recreation facilities (walking and cycling);

» **Increased focus on urban consolidation near transport –** Transport Oriented Developments and less focus on fringe development. Higher population densities near public transport are needed;

» Business incentives could be used to establish centres of **excellence and e-cities**;

» Government must ensure infrastructure is adaptable to potential changes in Australia's regulatory market and community needs.

TRANSPORT INFRASTRUCTURE

Transport was seen as one of the highest priorities for Sydney. Those consulted indicated that:

» **An integrated approach to organising and managing transport** is crucial, as is prioritising major transport projects and ensuring connectivity between different modes of transport.

The integration of land use and transport planning is essential, also, the need to construct critical infrastructure corridors that will also allow co-location of major linear infrastructure such as water, electricity, gas and communications;

» **A NSW Freight Strategy** must be developed to overcome congestion and the impact it will have on the future economic development of Sydney. The siting and use of intermodal terminals is critical to increase the use of rail within the tripling of the freight movement task to 2051. Sites such as Badgerys Creek should be considered and costed to a scale and timeframe as to provide certainty, security and financial return to PPP investment partners.

In fact there is a need to look at all current and future potential options for intermodals (Enfield, Moorebank, Eastern Creek), as to how they will work together with respect to future industrial and residential development of Sydney;

- There is a need for an analysis of **links into the CBD** and **missing links in motorways** as well as **road linkages with intermodal hubs**;
- The **transport improvements** that will support a sustainable Sydney consist of two systems on the rail network. 1) a metro-style- single-decker, frequent service trains linked with state-of-the-art signalling. 2) double-decker lines; an underground rail route from Sydney CBD to Westmead, and the continuation of the 4 tracks that currently exist from St Marys on to Penrith;
- Also, **priority should be given** to the North West Rail Link, completion of South West Rail Link; Western Express and City Relief Line, M5 East, expansion of M5 South Western Motorway; F3-M2 link and M4 East. State Government needs to duplicate the rail line from Port Botany to Clyde, then to Liverpool and Campbelltown;
- **Congestion will increase. It has already become an obstacle to economic development.** Congestion charging is needed. The Motorways Managed Study was seen as a positive initiative to improve the current system;
- We should aim to change the public transport mode split over the next 10 years, from 80 per cent car and 20 per cent public transport, to 75 per cent car and 25 per cent public transport;
- **Expanding rail in Western Sydney is high priority.** Population growth is not matched by expansion of transport infrastructure. Transport has deep implications for housing and communities. It has an impact on the future of those communities and the potential to leverage other outcomes;
- Some stakeholders suggested that a decisive action be taken about a **second airport for Sydney.** Any decision taken should include a 50-100 year Vision of Greater Sydney including the potential development of Sydney, Hunter, Central Coast and Illawarra region.

SUSTAINABILITY

- **Sustainability in the built environment is seen as a high priority.** To what extent we are preparing and adapting cities to forecast climate change. Environmental criteria are rarely considered equally with economic and social criteria in decision-making processes, in relation to infrastructure development. There isn't much emphasis being placed on the sustainability of supply chains either. Stakeholders suggested all Government decision making processes must incorporate sustainability.
- A transition to **low or lower carbon technologies** is needed.
- Encourage increased use of public transport to avoid congestion.
- **The cost of waste disposal is growing and the availability of land fill is diminishing.** Governments need to develop programs to reduce consumption and have a coordinated approach to waste minimisation. There is a need to recycle waste in larger quantities. There is an environmental and economic argument to recycling and we need to have a full understanding of the cost of not doing so.
- We need **an appropriate population policy with well targeted migration quotas.** The number of people the basin can sustain is questionable. There is not enough emphasis on economic or business development in the Sustainable Population Strategy.

GOVERNANCE

- **Governments need to work with the private sector** and the community to develop a shared vision for Sydney, which needs certainty. They need to be consistent and fulfill their promises. The cost of decision changes is too high in terms of dollars, time wasted and loss of faith in governance. Planning policies need to be depoliticised.
- **Are procurement methods as streamlined and effective as they could be** to deliver the projects on time? In delivering those plans governments need to ensure they have the bureaucratic systems in place: Procedures, policies and processes.
- **High level expertise is needed** in engineering and science to get appropriate advice to improve our resources (electricity, water management, sustainability).
- Need to look at **new ways of financing infrastructure** and new ways to invigorate state revenue.
- **There is a need for better coordination and governance of planning activities across all levels of government.** The need to find new governance structures to consolidate all existing plans/strategies into one broad plan for Sydney, including funding for its implementation, delivery and management. A shared vision and understanding is needed of what the priorities are and why.
- **We need a more collaborative/coordinated structure for integrating local government activities and services in Sydney. Reform in local government is inevitable.** Stronger, more empowered and better resourced councils are needed covering a larger geographical area. We need a model to achieve that. Currently, councils should explore ways of working together through projects and find alternative sources of revenue, apart from GST and federal grants.

EDUCATION AND EMPLOYMENT

- The need to ensure universities are able to **meet the research and higher education/training needs of the growing population.**
- Universities need to play a key role in **raising higher education participation rates** in Sydney, so as to meet the Federal Government's target by 2020 that 40 per cent of the population aged 25 to 34 years has a higher education qualification. Meeting these aspirations requires substantial and growing commitments to the aggregate capacity of the universities in parallel with ongoing attention to the composition of the universities' activities and services.
- **On-going investment in campus development** across some Sydney sites is needed. These investments have major planning implications ranging from the need for building and planning approvals, to issues of campus access through multiple modes of transport, and issues of connectivity through telecommunications infrastructures.

- **Workforce development in its full context needs to be addressed.** A holistic and integrated approach is needed, rather than the current piecemeal system. The Workforce Productivity Development Agency might fill current gaps as it will have a more unified approach to skills development. Establishing skills taskforces between State Training Services and different industry sectors might be needed to identify where and what training should be delivered.
- **Better quality labour market data is needed.** The lack of accurate information on the labour market makes it difficult to plan adequately for courses and resources. The big question facing RTOs is what does the economy need? Labour market trends can change in unpredictable ways. There is a need to develop professional and scenario based models of future workforce demand so as to better align training to industry needs.
- **Workforce development is particularly needed for industries with high employment demand.** The focus should be on those industries with high value-add and high levels of employment (advanced manufacturing, biotechnology, professional scientific and technical, construction, health and community care). Also the focus should be to improve business capability, productivity and sustainability, strengthen key industry networks and client relationships.
- **Flexibility in training delivery:** Accelerated apprenticeships, improved skills utilisation, improved levels of literacy and numeracy among workers. These present problems that need to be dealt with as soon as possible, otherwise they will become obstacles to productivity. There is a need to build the capability of employers as well so that they recognise the skills of their own workforce as well as the skills gaps so as to address them.
- **Improvement of learning outcomes** is needed as well as enhancing articulation to further study and pathways to employment in order to address the constant unmet demand for trade based skills. A national workforce literacy strategy is needed.
- **The creation of job and training opportunities for overseas qualified people** should be a high priority. A small investment in language training and professional advice and orientation is needed.
- **Streamlining the process of implementing State and Federal Government projects to reduce silos** is necessary, as is developing and exploring community care future scenarios in order to look for opportunities to address the demand for skills in this growth sector in a sustainable way.
- **Promotion of education in outer Sydney areas such as South West Sydney** is a priority as the region has a lower participation in education and the economy.
- **Current government assistance to industries is far too complex and piecemeal.** Too many programs, impediments and much accountability, makes the process too difficult particularly for small businesses. As a result, they miss out. Brokers should be working with businesses to enable them to access this assistance.

HOUSING AND HOMELESSNESS

- We need to seriously explore new **affordable housing models** for rental properties as implemented by other states. Lower income earners or people receiving income support cannot get into the public housing waiting list and the private market is too expensive. Sydney has the largest gap in low cost private rental dwellings in Australia.
- The supply of public housing has been reduced by 30 per cent. Most new housing being built in blue collar areas seems more appropriate for white collar workers. **More affordable housing is needed.** Developers are not contributing to affordable housing outcomes in high land value locations. This needs to be regulated adequately.
- **An urban renewal strategy for Sydney is needed.** It would in turn attract capital and investment.

ECONOMIC DEVELOPMENT

- The need to identify and zone appropriate land use within employment lands and strategic centres. Supply for infrastructure should be planned and delivered to match economic growth.
- **The development of regional business centres and centres of excellence** were seen as a high priority, as well as the coordination of economic development initiatives in and around assets, in order to facilitate the integration of business activities.
- There is a need to plan and identify new employment and **workforce development for the transition to a green economy.**
- There is a need to better connect the Global Arc to the rest of Sydney particularly to industries with potential to grow.
- **Development of industry clusters** (medical, education, IT, biotechnology manufacturing, transport and logistics, manufacturing).
- Better business management education and more succession planning are needed.
- Attracting key staff to a business is critical to location for a business. In particular availability of lower paid workforce who might not be able to afford to live in the region.
- There is a need to create an environment suitable for the attraction of higher skilled key workers to the South West Growth Centre. Professional organisations need to go west.

INNOVATION

- Innovation requires stimulus at all levels. It has become the essential determinant of long-term economic performance.
- Develop further the **Global Connect Project – Innovation Centre** for Sydney.
- Better industry technology innovation and commercialisation outcomes are needed by more encouragement and support provided by Government/Industry into 'Best Practice' commercialisation models.
- The Innovation Review Steering Group believes the following areas of focus will provide enhanced opportunities for Australia to improve innovation outcomes across the economy over the longer term.

  1. Transforming culture by showcasing innovation;

2. Leveraging the Australian broadband opportunity;
3. Building and embedding professional innovation skills;
4. Developing new models and incentives for research business collaboration;
5. Re-examining the role of Government procurement in fostering innovation;
6. Using corporate venturing to improve access to finance for innovation;
7. Streamlining access to government programs and support.

» Strong links between local businesses, government and research and learning institutions is needed to promote innovation.

» Potential synergies between key institutions in the precincts need to be leveraged in order to facilitate innovation, particularly in the field of medical research. Co-location of research institutions in teaching hospitals is an option.

» The need for brokers to bring R&D into implementation and coordinate and liaise with employers and government.

AGRICULTURE

» The **use of arable land for housing** will present problems in the long term. We need to protect agricultural land to ensure food safety and sustainability by identifying fertile areas that are significant agricultural sites or within the 1 in 100 year flood plain for agricultural use.

» We need to think about the appropriate types of urban agriculture that will be needed to become more self sufficiency in the future. Need to produce more with less land using hydroponics.

YOUTH

- There is a need for projects that promote and foster and encourage innovation and a passion for learning for young people.
- **Alternative, flexible, educational courses** are needed for early school leavers at risk of becoming disadvantaged.
- **Schools need more flexibility** to deal with the students that don't fit into the current paradigm. They should work together to pull resources to benefit young students and should partner with other schools to leverage existing resources. A more flexible way of interfacing with schools is needed.
- **Leadership and capacity building programs** are needed as well as mentoring combined with physical programs. There needs to be consistency of standards.
- Encourage TAFE Outreach to subsidise courses for disadvantaged youth.

SOCIAL INCLUSION

Social Inclusion considerations must be an intrinsic element of the planning process and must be aligned within all policies and programs. Investment is needed for programs that will assist marginalised and vulnerable groups (homeless, Indigenous, people with disabilities, disadvantaged youth, refugees) to live independently and participate in social and economic life.

- **Developing the skills of disadvantaged groups** early is a priority so that they can gain employment and self-sufficiency. Additional funding and flexibility in service provision are needed. Funding granted for strategic programs can save future costs. In some cases Government can promote employment for these groups through employment arrangement built into procurement services.
- Increasing the number of **Indigenous workers** in the disability, aged care, and youth sectors is needed.
- **There are significant pressures challenging the ability of current services system to respond to the increasing needs of older people** (particularly acute care services), of people with a disability and their carers. Increased funding will be needed in the future in health and community services, as the population ages and the demand for services increases. A paradigm shift is necessary in social planning for the future.
- **Adopting place-based strategies** in order to focus comprehensive efforts on the most disadvantaged communities is needed, rather than the broad-base solutions approach.
- **Access to employment and training for the most disadvantaged tenants of social housing estates** is seen as a priority. Regeneration programs are not sufficient to address the needs of this target group. Social enterprises need to be fostered as a transitional model into employment.

3. STRATEGIC FRAMEWORK

3.1 STRENGTHS OF THE SYDNEY REGION

Economic Capacity

	Australia's gateway to the global economy.
	Contributes approximately 20 per cent to Australia's economy.
	Half of Australia's top 500 companies and two thirds of regional headquarters of multinational corporations are located in NSW, with majority in Sydney.
	5/26 Pricewaterhouse Coopers, Cities of Opportunity, 2011.
	10/221 Mercer's Cities Worldwide Quality of Living Index 2010.
	10/35 Mori Memorial Foundation (2010) World Major Cities Global Power City Index.
	World renowned research facilities especially in life sciences.
	Finance and insurance sector contributes 21.4 per cent to Sydney's GRP.
	The manufacturing sector contributes 10.3 per cent to Sydney's GRP.
	The professional, scientific and technical services sector contributes 11.2 per cent to Sydney's GRP.
	North Sydney, Chatswood and Ryde/Macquarie have attracted a large number of technology and creative based industries.
	Major business parks e.g. Norwest, Macquarie and Australian Technology Park.
	426,996 actively trading businesses.

Workforce & Employment	
	Sydney's 1.75 million skilled workforce.
	Reasonably low unemployment rates with relatively stable participation rates.
	32 per cent of 25-34 year olds have a higher education qualification. This has been increasing through three census periods.
Educational Assets	
	More than a dozen teaching hospitals.
	Six universities with some having world renowned research partnerships.
	34 TAFE campuses providing vocational and educational training.
	Over 1,700 primary and secondary schools in Sydney.
Infrastructure	
	75 per cent of work trips to the Sydney CBD are by Public Transport.
	Largest railway system in Australia – something to build on.
	Extensive road system – something to build on.
	Current investment in major projects and the jobs created.
Magnet Infrastructure	
	Sydney Airport with approximately 36 million passengers in 2010-11.
	Port Botany handled 1.855 million containers (2010/11).
	Sydney Harbour and Sydney Opera House as major tourist attractions.
Environment	
	Waterways, beaches and national parks.
	Climate.

3.2 CHALLENGES FOR THE SYDNEY REGION

Governance/Planning

- Lack of a bipartisan 40-year vision for Sydney.
- Number of plans and strategies and their lack of integration.
- Lack of one overarching authority for the social, economic and environmental planning of Sydney.
- Number and size of councils.

Population, Settlement & Workforce

- Demographics of the population e.g. One in six over 65 by 2036.
- Housing affordability.
- Concentration of households facing economic and social problems.
- Homelessness.
- Retirement of teaching, health and other workforces.
- Number of youth unemployed, disengaged and/or homeless.
- Comparable high unemployment rates for specific groups.
- Food security and the need to maintain agricultural lands.
- Shortage of landfill for solid waste.

Economic	
	Development strategies for outlying regional city and strategic centres.
	Creating new centres of excellence and job opportunities.
	Greater representation of the business support sector in outlying Sydney regions.
	Attraction of magnet higher order businesses to new growth areas.
	Creating jobs closer to where people live.
	Encroachment on available agricultural lands due to housing development.
Infrastructure	
	Congestion and transport bottlenecks affecting investment and livelihood.
	Availability of suitably developed employment lands.
	Retooling and retrofitting existing infrastructure in built up areas.
	Lack of identified future transport corridors.
	Extension of intermodal plan to Eastern Creek.
	Road and rail system inadequate for circumferential travel around Sydney.
	Heavy car reliance in the West due to lack of connectivity.
	Backlog of infrastructure and how to pay for it.
	Not knowing where and if Sydney will have a second airport.
	More certainty in the long term planning and funding of major infrastructure.
	Maintain adequate water supply for rapidly growing population.
	Capacity to generate enough energy for sustainable growth.
	Need for literacy and life skills training from an enterprise perspective.
	The low rate of 25 to 34 year olds with higher education qualifications in some areas.
	Low year 12 Certificate or equivalent attainment rates in some areas.
Education & Training	
	Capability and capacity of skills in key industries to sustain future growth.
	Encouraging all six universities to have a presence in Western Sydney e.g. operating and managing research facilities or outreach campuses.
	Completion rates for apprenticeships/traineeships.
	Pockets of relatively high unemployment, particularly for youth, mature age and specific groups in the community.
Environment	
	Lack of sustainable economic development plan for Sydney.
	The impact of rising sea levels on infrastructure and habitation.

3.3 OPPORTUNITIES FOR THE SYDNEY REGION

Governance/Planning
There is a need to:

	Develop a long term (40 year) bipartisan vision and concept plan for Sydney.
	Develop new governance structure to integrate all agencies into planning for hard and soft infrastructure for Sydney.
	Development of an integrated economic, social and environmental data system for planning.
	Adopt and develop COAG Strategic Planning best practice model, National Criteria for Cities.
	Development of a mapping system for agricultural lands and corridors.
	Develop and adopt a new long-term freight strategy for Sydney.
	Development of telecommuting models.
	Locational strategies for highly disadvantaged groups and/or communities.
	Adoption of best practice strategies for greenfield sites.
	Diversify existing communities – housing, industry mix, specialisation development, employment and services.
	Create better interchange systems for public transport including connectivity to Public Transport.
	Create access to public transport with a fair fare system.
	Development of Liverpool, Penrith and Parramatta as true Regional Cities.
	Develop multidisciplinary input to new Employment Lands Taskforce.

Economic

	Expand Sydney's role in the global market in terms of promoting specialisation.
	Build on existing research capacity and broaden geographical coverage.
	Develop new 'Centres of Excellence' opportunities in new growing areas of Sydney – and provide supporting infrastructure.
	Promote careers in key industry sectors through clear career pathways.
	Development of innovative waste recycling technologies to reduce challenge of shortage of landfill.
	Explore and enhance innovative sustainable technologies and systems that reduce the carbon footprint.

Education

	Create opportunities for disadvantaged communities to build bridges to higher education and employment.

Environment

	Development of strategies to reduce the impact of climate change.
	Development of sustainable economic development and jobs creation strategy for Sydney.

4. MISSION STATEMENT & GOALS

4.1/4.2 MISSION STATEMENT & GOALS

4.1 MISSION STATEMENT: To bring together people and information to promote collaborative decision making for the sustainable and just economic development of Sydney, with a focus on employment growth.

4.2 GOALS

1	**Develop effective community consultation and engagement.**	The aim is to create an understanding of critical regional industry and community issues which provide an impetus for Sydney to develop place based solutions.
2	**Develop a more collaborative *whole of city* regional planning process for Sydney.**	The aim is to identify the critical challenges and opportunities facing the *Sydney Region* which may impact on its economic growth and job creation capacity.
3	**Facilitate and promote a whole of government approach to key issues.**	The aim is to foster strategies and projects that engage a *whole of government* approach to key issues that impact on the economic growth and job creation of Sydney, including social inclusion, access to infrastructure and sustainability.
4	**Enhanced awareness of government program.**	The aim is to be a point of reference for Federal, State and Local government programs which have key relevance to economic development and job creation in Sydney.
5	**Community and economic development.**	The aim is to ensure an equitable and sustainable economic growth in Sydney by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability objectives.
6	**Developing an effective organisation with a high and respected public profile.**	RDA-Sydney's aim is to be known as having an expertise in regional issues with a strong network of stakeholders that work collaboratively in resolving economic and jobs growth issues for Sydney.

4.3 ACTION PLAN

GOAL 1: DEVELOP EFFECTIVE COMMUNITY CONSULTATION AND ENGAGEMENT CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
To achieve this RDA-Sydney will give priority to activities that: » Maintain and extend key consultation networks that allows us to engage in constructive dialogue with a diversity of stakeholder organisations; » Create understanding of key industry and Government stakeholder priorities; » Ensure a well-informed provision of information back to Government.	**Engagement:** Maintain and develop partnerships with a diverse range of stakeholders which enables and facilitates debate.	Local economic and social forums; Sydney wide planning forums; industry sector development, infrastructure, innovation, homelessness and housing, skills development forums. Continue face-to-face individual consultations.	On-going	Facilitate formation of 3 collaborative forums, resulting in follow-up action plans and working groups.

GOAL 1: DEVELOP EFFECTIVE COMMUNITY CONSULTATION AND ENGAGEMENT CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
To achieve this RDA-Sydney will give priority to activities that: » Maintain and extend key consultation networks that allows us to engage in constructive dialogue with a diversity of stakeholder organisations; » Create understanding of key industry and Government stakeholder priorities; » Ensure a well-informed provision of information back to Government.	**Leadership and debate:** Enable, facilitate debate and provide leadership where appropriate in progressing solutions to issues and create an understanding of key industry government and community priorities.	Face-to-face individual consultations and participate. Participate and initiate forums/ workshops.	On-going	Initiate/participate in 20 community consultations.
	Feedback: Provide well informed feedback to all levels of government.	Initiate and participate in forums. Utilise formal letters and submissions to Government.	On-going	Initiate/participate in 30 forums. Write 6 submissions.

GOAL 2: DEVELOP A MORE COLLABORATIVE *WHOLE OF CITY* REGIONAL PLANNING PROCESS FOR SYDNEY

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to identify the critical challenges and opportunities facing Greater Sydney which may impact on its economic growth and job creation capacity. To achieve this RDA-Sydney will give priority to activities that: » Help develop a more collaborative planning process across all levels of Government; » Create a brokering opportunity for RDA in bringing about a long-term Regional Plan for Sydney; » Provide a statement of key issues facing Sydney on built and social infrastructure.	*Whole of Sydney* vision: Develop a bi-partisan, *whole of Sydney* vision by encouraging debate on 'Vision 2051' and the future of Sydney, including potential governance models; Encourage use of 2D/3D virtual city models; Assist establishment of 'Virtual Australia' project in NSW.	Facilitate and participate in workshops. Assist Infrastructure NSW, Infrastructure Australia, NSW Planning and Major Cities Unit and 10,000 Friends of Sydney on the National Urban Policy Framework implementation; Facilitate a 2D/3D Virtual City Models workshop.	On-going	Facilitate/participate in 2 workshops with the aim of establishing a Sydney work group to progress agenda.

GOAL 2: DEVELOP A MORE COLLABORATIVE *WHOLE OF CITY* REGIONAL PLANNING PROCESS FOR SYDNEY CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to identify the critical challenges and opportunities facing Greater Sydney which may impact on its economic growth and job creation capacity. To achieve this RDA-Sydney will give priority to activities that: » Help develop a more collaborative planning process across all levels of Government; » Create a brokering opportunity for RDA in bringing about a long-term Regional Plan for Sydney; » Provide a statement of key issues facing Sydney on built and social infrastructure.	Freight Strategy: Facilitate with partners a freight forum which will focus on developing long-term freight transport/congestion strategies for Sydney; Encourage 40 year freight modelling concepts for inter-modal terminal and infrastructure strategies.	One-on-one consultations with key stakeholders. Freight modelling workshop. Freight Forum. Submissions to NSW Government. Input into the 20 year National Freight Strategy.	June 2012	2 forums and a response to the NSW Government's Freight Strategy. Ongoing input promoting *whole of Sydney* planning for infra-structure to promote better movement of freight.
	Western Sydney Business Growth Plan: Assist in the implementation of WS Business Growth plan, (subject to direc-tions set by new State Government).	Participate in GWS Economic Development and Environmental Regional Manager Cluster to develop new update on the Western Sydney Business Growth Plan. Develop economic data. Run economic develop-ment forums.	June 2012	Production of 4 economic profiles for RDA's Economic Profiles. Production of a maximum of 13 industry capability profiles. Facilitate 2 EDO/LGA/ ROC forums.
	Infrastructure priorities: Identify infrastructure issues/priorities for Sydney - engage in ongoing discussions with Infrastructure NSW and Infrastructure Australia and their strategies and programs; Implementation of the Australian Government's National Urban Policy.	One-on-one consultations. Provide input to Infrastructure NSW, Infrastructure Australia about economic, social issues for Sydney. Initiate, participate in workshops. Support activities aligned to programs.	Sept 2011 On-going	Priority listing of infra-structure priorities to be provided to Infrastructure Australia and Infrastructure NSW.

GOAL 2: DEVELOP A MORE COLLABORATIVE *WHOLE OF CITY* REGIONAL PLANNING PROCESS FOR SYDNEY CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to identify the critical challenges and opportunities facing Greater Sydney which may impact on its economic growth and job creation capacity. To achieve this RDA-Sydney will give priority to activities that: » Help develop a more collaborative planning process across all levels of Government; » Create a brokering opportunity for RDA in bringing about a long-term Regional Plan for Sydney; » Provide a statement of key issues facing Sydney on built and social infrastructure.	Centres Planning: In partnership with NSW Planning and Infrastructure engage in discussions with key stakeholders regarding the development of Penrith, Liverpool and Parramatta as the three regional centres of Sydney.	Develop cluster groups: Local Government Economic implementation; Employment Lands Taskforce; *Metropolitan Plan for Sydney 2036* imple-mentation; Initiate and participate in key workshops such as 10,000 Friends of Greater Sydney *Strategy for Shaping Sydney as Liveable city towards 2051*; Target activities to assist NSW State Plan; Liveable Cities and Urban Renewal Program; Suburban Jobs Program; Sustainable Population Strategy and National Urban Policy.	June 2012	Facilitate/participate in 8 workshops.
	Urban Development: Engage in ongoing discussions regarding developments in Sydney e.g. Greenfield sites, public transport, mass transport corridor allocations and the provision of urban de-velopment and renewal strategies, employment lands, sustainable waste management.	Attend, engage and participate in key workshops. Participate in Employment Land Taskforce. Investigate success-ful models such as SE Queensland Strategic Plan; *Making Bus Transit Ways Work.*	On-going	Facilitate/participate in 2 workshops. Provide ongoing input/ support resulting from workshop outcomes.
	South West Sydney Strategy: Explore the feasibility of a South West Sydney Economic Strategy and its role in the greater Sydney economy.	Run South West Sydney Infrastructure Forum. Work with key stakeholders. Consultations with Planning NSW, Major Cities Unit, ROCs and DTIRS.	Jan 2012 June 2012	Run 1 forum. Strategy options consid-ered and recommendations developed.

GOAL 2: DEVELOP A MORE COLLABORATIVE *WHOLE OF CITY* REGIONAL PLANNING PROCESS FOR SYDNEY CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to identify the critical challenges and opportunities facing Greater Sydney which may impact on its economic growth and job creation capacity. To achieve this RDA-Sydney will give priority to activities that: » Help develop a more collaborative planning process across all levels of Government; » Create a brokering opportunity for RDA in bringing about a long-term Regional Plan for Sydney; » Provide a statement of key issues facing Sydney on built and social infrastructure.	Urban Argriculture: Participate with the Department of Trade and Investment and its Primary Industries Division and industry stakeholders, as part of the Agricultural Reference Group, in agricultural initiatives as outlined in the *Metropolitan Plan for Sydney 2036.*	Participation on the Agricultural Reference Group; Mapping of agri-cultural lands and riparian corridors. Identify sectoral col-laboration and interaction opportunities between industry, NSW and Local Governments. Help develop and update NSW urban agriculture strategies.	On-going	Participated in updated NSW Urban Agriculture Strategy revision. (These initiatives may be subject to change once the *NSW State Plan* is developed).
	High Speed Broadband: Support initiatives for the development and/or access to high speed broadband.	Participate in high speed broadband targeted forums, ensuring access, and seeking support for activities to develop e-technologies for the future.	On-going	Participate in high speed broadband debate. Monitor 'Riverstone Pilot Project'.

GOAL 3: FACILITATE AND PROMOTE A *WHOLE OF GOVERNMENT* APPROACH TO KEY ISSUES

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to foster strategies and projects that engage a *whole of Government* approach to key issues that impact on the economic growth and job creation of Sydney, including social inclusion, access to infrastructure and sustainability. To achieve this RDA-Sydney will give priority to activities that: » Identify and facilitate and broker demonstration projects; » Promote *whole of Government* best practice projects; » Encourage the sharing of information and lessons learnt.	Comment on current policies and input on Federal and State policy. Comment on current Federal and State policy papers, plans, reports and public inquiries. Ensure sustainable, social and economic development considerations are integrated into other dimensions such as planning. Encourage a *whole of Government* approach is taken.	Utilise current government consultation protocols. Identify potential demonstration projects. Promote *whole of Government* approach in our projects. Make submissions.	June 2012 On-going On-going On-going	6 submissions per year. Identify and facilitate one (1) critical pilot demonstration project.

GOAL 4: ENHANCED AWARENESS OF GOVERNMENT PROGRAMS

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is a point of reference for Federal, State and Local Governments programs which have key relevance to economic development and job creation in Sydney. To achieve this RDA-Sydney will give priority to activities that: » Develop a web-based clearinghouse system for the dissemination of information; » Create communication systems that allow for dialogue between stakeholders; » Provide assistance to *whole of region* RDAF projects.	**Government grants and programs:** Promote Government grants, programs, resources available via website.	Promote through calendar of programs on website.	On-going	Hits on website.
	Communication systems: Create communication systems that allow for dialogue with stakeholders.	Newsletter, press releases, website feedback and 360⁰ feedback.	On-going	Effective Communication system in place (360⁰ Feedback).
	Regional Development Australia Fund: Provide assistance developing *whole of region* Regional Development Australia Fund projects; Administer endorsement process of RDAF projects.	Communicate RDAF endorsement process via website and forum presentations. Engage in consultative process for Project Development.	On-going	RDAF process well understood by potential applicants.
	Scoping new programs: Provide input into scoping of program design. E.g. Suburban Jobs Program.	Engage in consultative process for Program Development. Identify opportunities for input.	On-going	Input into scoping of at least two programs.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Workforce development: Manufacturing and Transport and Logistics Co–facilitate with key stakeholders Workforce Development Strategies in particular to identify and address current and future skills gaps in the *transport and logistics* and *manufacturing and engineering sectors*. This will be achieved through a taskforce arrangement. Partnership with State Training Services to establish communication forum with Industry to identify where training should take place and what is needed. Input into key policy changes and their impact on the economic and social growth. Participate in NSW Transport and Logistics Workplace Advisory Group (TLWAG).	Facilitate/support of the Taskforces and Industry Groups. National Workforce Development Fund including the Critical Skills investment Fund. Establishment of the National Workforce and Productivity Agency. Review of the National Agreement on Skills and Workforce Development. Reform of the Australian Apprenticeship system. In Partnership with NSW State Training Services 3 Industry Forums (manufacturing, transport and logistics and health, aged and community care) identify where and what kind of training should be funded. In conjunction with industry and training stakeholders, develop a workforce environmental scan at the Sydney level with scenario modelling 10 years into the future conducted. Reform of vocational education and training.	On-going	Development of a 10 year workforce development strategy. Environmental scan for Sydney or part thereof investigated – initial stages commenced; Created linkages between labour supply agencies, training and industry representatives.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT....

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Workforce Development: Health and Community Services Continued partnership and participation on the *Western Sydney Health, Aged and Community Care Working Group*. Partner with key stakeholders to extend Working Group activities to South West Sydney. Encourage and support an environmental scan for Sydney (or part thereof) in the health, aged and community care sectors for current status and with scenario modelling 10 years into the future. Assess the potential for promotion and development of health – education precinct models around existing and planned health and education facilities. Assess with partners potential benefits of e-health technologies in the context of improving the quality of health, aged and community care interventions and developing new, more sustainable models of care and its implications to skills development and business opportunities.	Consultations and workshops: CSH Industry Skills council annual environmental scan; National Workforce Development Fund; Productivity Commission recommendations – Caring for Older Australians; National Preventative Health Workforce Audit; Penrith Health and Education Precinct (as a model); RDA Sunshine coast, Sustainable Jobs Program; NBN Rollout, Personally Controlled Health Record pilot (Western Sydney). Build in health, aged and community care initiatives into broader economic development discussions with key stakeholders.	June 2012	Environmental scan for Sydney or part there of investigated – initial stages commenced. Created linkages between labour supply agencies, training and industry representatives. Investigated health precinct opportunities co-facilitated 2 workshops with key stakeholders to develop possible project concept. Engaged in school to work and jobseeker labour force attraction activities. Developed concept for wellness precincts in one new area. Participate in effective strategies and discussion.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Workforce Development: Education and Training Support actions that improve articulation between VET in Schools, TAFE and universities. Support activities that aim to improve higher order education participation rates.	Assist/support tertiary education workshops/discussions; Participate in Skilling Australia and DEEWR.	On-going	Participate in 1 workshop and 2 submissions.
	Workforce Development: Youth Continue support for Re-engineering Australia F1 in School program, encouraging interest in maths, science and technology subjects. Support Local Employment Coordinators and JSA providers and industry to develop new youth skills and training initiatives in disadvantaged areas, in particular focusing on early school leavers.	Promote new projects, support events. Local Solutions Fund – building integrated service delivery and trialing innovative ways to help disadvantaged locations. Participate and/or facilitate working locally to assist young people.	On-going	Two new projects with stakeholders.
	Workforce Development Mature Age: Develop mature workers re-skilling (up-skilling) employment strategies, promotion of careers.	More help for mature workers federal government initiatives; newly released Australian Apprenticeships mentoring package.	June 2012	One project with stakeholders.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT....

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Workforce Development: Homelessness Work with key stakeholders to embed employment and economic development strategies within the existing *Regional Homelessness Action Plans for Sydney*. Mount an economic argument around homelessness. Add value to already existing or new employment initiatives assisting tenants living in social housing estates. Participate in discussions regarding community renewal initiatives, best practice in housing development and new affordable housing models for rental properties.	Participate in workshops/ forums; Wentworth Community Housing Project 40; NEAMI's Way2Home; Regional Homelessness Action Plans and implementation strategies.	June 2012	2 pilot employment intervention model developed for people who are homeless, and for supported housing tenants. Economic argument researched and report.
	Industry Development: Finance, Property and Professional Business Services As a result of research conducted in 2010-11 regarding the availability of finance, property & professional business services across the whole-of-Sydney, facilitate consultation workshops to encourage businesses within the sector to relocate to outer centres of Sydney, to create a more geographically balanced provision of services to businesses and to create more jobs closer to home.	Progressively complete desktop research and targeted workshops across Sydney.	Oct 2012	Research completed and used as a planning instrument. Eight workshops conducted from 2010-2012. Creation of local employment strategies championed by key stakeholders within each region.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT…

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Industry Development: Manufacturing Proactive interchange and innovation in Sydney through communication and leadership among the manufacturing sector.	In partnership with Trade and Investment organise NSW Manufacturing Week on a yearly basis to discuss current issues and solutions. Facilitate/participate in innovation forums and workshops.	May 2012	Two manufacturing events per year.
	Industry Development: Aerospace/Defence Develop/expand new Sydney Aerospace Defence Interest Group (SADIG), with key industry stake-holders. Improve collaboration in supply chain, skills and innovation opportunities.	Create new website Run workshops and targeted events.	Sept 2011	Industry group formally established. New website completed. Improved connectivity/ collaboration in place to resolve issues and for additional supply chain business opportunities.
	Industry Development: Industry Cluster Support industry cluster projects and productivity networks.	Support the development of new CEO industry networks.	June 2012	2 pilot projects supported.
	Innovation: Commercialisation of Advanced Technologies Establish Sydney wide technology *Global CONNECT SYDNEY* Cluster, as part of the worldwide CONNECT network which has evolved out of UCSD San Diego and is now operating in over 24 countries.	Conduct initial workshop with universities, govern-ment, venture capitalists and entrepreneurs to foster innovation in high tech-nologies so as to establish a Sydney wide Technology Cluster – Global Connect Project for Sydney.	Dec 2011	Scoping workshops completed; Feasibility study com-pleted and business model developed.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT....

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Innovation: New Centres of Excellence Identify & support new 'Centres of Excellence' and precincts in outer areas of Sydney.	One-to-one consultations and workshops with key potential stakeholders.	On-going	Identify 2 new potential 'Centres of Excellence'.
	Innovation/Productivity: Social Enterprises Support the development of best practice in fledging and established social enterprises through: Cross regional strategy development opportunities (Illawarra, Sydney & Central Coast); Creating a focus on government social procurement opportunities for social enterprises.	Assist where appropriate key stakeholders with the proposed Sydney Social Enterprise network. Participate in the Social Enterprise Sydney Public Sector Reference Group.	Jun 2012	One project.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT...

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	**Innovation: Sustainability OECD/ LEEDs Green Jobs Project** In conjunction with OECD LEEDS Sustainability Jobs Project Partners: Establish a new partnership which supports and implements initiatives to increase employment and skills based to support the growth of a low carbon economy in Sydney; Collaborate and seek support from industry and government for the development of an action based Sustainable Economic Strategy for Sydney; Work with Government, industry and unions to establish sustainable industry networks in Metropolitan Sydney among small medium enterprises in selective industries.	OEDC/LEED's synthesis of key findings and recommendations from Sydney's and other global international cities project reports. Initiate/Participate in targeted forums/workshops and events.	June 2012	Partnership established. OECD/LEED Worldwide Report and OECD/LEED Report for Sydney to be launched in Sydney December 2011. Initiate/participate in 3 forums/workshops/events.
	Investment/Employment Growth – Infrastructure Advocacy: Enable/participate Regional Organisations of Councils (ROCs) and Local Government infrastructure forums; advocate priorities to State and Federal Governments from a *whole of Sydney* perspective.	Seek out and participate widely in consultations/ workshops with ROCs and LGAs on infrastructure issues. Encourage debate on 'long term' effect for Sydney with a *whole of Sydney* economic, equitable and sustainable perspective.	June 2012	Co-ordinate 2 ROC/LGA forums per year. Write three submissions per year.

GOAL 5: COMMUNITY AND ECONOMIC DEVELOPMENT CONT....

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to ensure an equitable and sustainable economic growth by developing regional economic projects with key stakeholders which take into consideration the broader social inclusion and sustainability projects. To achieve this RDA-Sydney will give priority to activities that: » Support employment growth through retention and growth of existing industries; » Increase employment and investment through innovation and productivity growth; » Support investment and employment growth through advocacy of infrastructure development; » Support strategies for investment attraction by profiling and positioning the region and its capabilities.	Cross Regional Agenda Collaboration: Assist in agency collaboration (Federal, State and Local Governments) on cross-regional issues e.g. Transport, transit way development.	One-to-one consultation cross agency/working group meetings. Targeted submissions and reports.	On-going	Initiate 2 workshops on cross-regional issues.
	Employment Lands Taskforce: Participate in the NSW Employment Lands Taskforce discussions. Participate in housing affordability and land use policy discussions.	Participate/support activities of employment Lands Taskforce with economic/industry/community input. Participate with UDIA, Property Council, NCOSS, AHURI, Housing NSW in forums/workshops.	June 2012	Provide RDA *whole of Sydney* broader economic input. Feasibility in developing and adopting 'other' housing affordability models in Sydney with stakeholders.
	Investment attraction: Produce set of whole-of-Sydney economic profiles to support industry investment attraction and development. Produce industry capability profiles for key industries in Sydney.	Align RDA-Sydney activities to NSW Government Trade and Investment and Tourism activities. Provide and support Sydney regional profile data to other key industry groups such as Austrade, Sydney Chamber of Commerce, UDIA, Property Council. Provide and support ROCs and EDOs from Local Government with profiles, economic data and ongoing input on development of strategies as required.	June 2012	Production of 4 economic profiles. Production of a maximum of 13 industry sector capability profiles. Circulated information to key stakeholder industry groups and government agencies. Input provided.

GOAL 6: DEVELOPING AN EFFECTIVE ORGANISATION WITH A HIGH AND RESPECTED PUBLIC PROFILE

Action to be undertaken	Activities/Outcomes	Initiatives that can be engaged	Time-frames	Key Performance Indicators (KPIs)
Our aim is to be known as having an expertise in regional issue with a strong network of stakeholders that work collaboratively in resolving equitable, sustainable economic and jobs growth issues for Sydney. Activities: » Ensure well researched economic data and government policy information; » Contribute to the development of a Regional Plan and an economic development and job creation strategy for Sydney; » Build a business case for national and international investment in Sydney.	Communications Tools: Development and maintenance of a reputable communication tools and website for Sydney's future sustainable, equitable economic development of Sydney. Research and Publications: Provision of up to date research and media comment on current issues/publications. Sustainable Economy and Job Strategy: Initiate preliminary discussion for a economic and job creation strategy. Initiate/participate in targeted *whole of Sydney* forums, bringing a whole range of stakeholder groups together wherever possible. *Whole of Sydney* forums: Enabling *whole of Sydney* forums.	Media releases, reports, submissions, forums, one-on-one consultation, workshops. Produce Regional Plans, economic data, submissions/reports on key issues. Use updated *NSW State Plan, Metropolitan Plan 2036*, OECD/LEED Sustainability Partnership and the LEC partners to develop initial Economic and Job Creation Strategy concept.	On-going	360^0 Review with key stakeholders. Four newsletters per year. 10 media releases. Production of one Regional Plan, four economic profiles and 13 industry capability profiles. 2 workshops with draft concept produced. Enabled 2 forums.

5. SUMMARY OF KEY REGIONAL ISSUES & PRIORITIES

5.1 SUMMARY OF ISSUES

Courtesy of Parramatta City Council ©

This section provides a summary of the key issues raised in this document; these issues were identified through an extensive and ongoing consultation process and desktop research.

PLANNING

- Sustainable population growth can only be achieved through a *whole of Sydney* planning process in which all aspects of governance are incorporated e.g. infrastructure, housing education, economic development and community services.
- A 40 year vision for Sydney needs to be developed in order to develop integrated, long term planning; planning should incorporate 3D modelling to develop concepts to test future scenarios.
- Modelling subregional areas in a way that creates local employment, education, transport and housing opportunities.
- An urban renewal strategy is needed for the *whole of Sydney*.
- We need to protect agricultural land to ensure food safety and sustainability by identifying fertile areas that are significant agricultural sites or within the 1 in 100 year flood plain for agricultural use.
- Preservation of corridors for future transport infrastructure must be part of the planning process.
- To identify and deliver employment lands with some certainty of delivery of infrastructure commensurate with the potential for growth in the region.

INFRASTRUCTURE

- An integrated approach to organising and managing transport is crucial, as is prioritising major transport projects and ensuring connectivity between different modes of transport. The integration of land use and transport planning is essential, also, the need to construct critical infrastructure corridors that will also allow co-location of major linier infrastructure such as water, electricity, gas and communications.
- A NSW Freight Strategy must be developed to overcome congestion and the impact it will have on the movement of future economic development of Sydney.
- There is a need to look at all current and future potential options for intermodals as to how they will work together with respect to future industrial and residential development for Sydney.
- Community infrastructure is lacking with a major current backlog of projects.

EDUCATION, TRAINING AND EMPLOYMENT

- Strong linkages between schools, vocational and tertiary educations systems and industry are necessary to create an integrated system of education and skills attainment.
- Better quality labour market data is needed.
- The need to identify and plan workforce development and new employment opportunities for the transition to a green economy.
- The need to ensure universities are able to meet research and higher education/training needs of the growing population.
- Meeting the aspiration of raising higher education participation rates requires substantial and growing commitments to the aggregate capacity of universities in parallel with ongoing attention to the composition of the universities' activities and services.
- Workforce development in its full context needs to be addressed, particularly for industries with high employment demand.
- The pending changes in service delivery in the Health, Aged and Community Care sector requires a strategic approach to workforce and skills development.
- Flexibility in training delivery – e.g. Accelerated apprenticeships, improved skills utilisation, improved levels of literacy and numeracy among workers.
- Engaging and providing participation opportunities in employment and education for those persons who are currently disengaged will help address the skills shortages that may exist now and into the future.
- Addressing the high unemployment rates and low participation rates of young and mature aged persons in identified areas of Sydney.
- Sydney's multiculturalism is economically significant and provides a comparative advantage in world terms. A more strategic approach is required to tap into the large reserves of immigrant human capital.

ECONOMIC DEVELOPMENT

- Global financial crisis particularly in Europe and the US has had a significant impact on the Australian stock market and the financial industry as a whole. This could influence the planned expansion of the financial sector at Barangaroo in the CBD. The potential carbon tax debate and its possible impact on the economy are having a very divisive impact on the community.
- Consumer confidence – Consumers are very concerned about the continuing global financial crisis and the potential impact on their job, their superannuation and their life savings. Consumers are saving more and consuming less. This is impacting on retail sales and investment as a whole.
- The resource boom and the high Australian dollar are causing a two speed economy. NSW unlike WA and QLD is not benefiting from the resource boom. Sydney's retail, manufacturing, tourism and overseas education sectors are being particularly affected.
- The high Australian dollar is causing more consumers to buy imported goods and services overseas, buy more goods on-line, and take holidays overseas rather than in Australia.
- Major multinational & Australian manufacturing companies because of the high Australian dollar and the perceived impact of the carbon tax are intending to close some Australian operations and import the same goods.
- Housing affordability is an important determinant of economic growth and productivity. If high skilled migrants and local professionals can't get into the housing market, they will be more likely to look for opportunities to work in more affordable areas. If key workers such as teachers, nurses and police can't afford to live close to their workplaces, they will be forced to commute long distances, contributing to congestion and reducing the productivity of the city economy.
- Skilled workers – the rapidly evolving economy demands a labour force that is appropriately qualified and trained to match the needs of industry. Sydney, along with the rest of Australia, is faced with the pressure of an ageing population and the need to lift labour force participation rates and educational attainments in order to maintain positive economic growth and competitive advantage.
- Industry mix – it is also important that there be a mix of industries in any local area, providing an array of jobs and work conditions that are suited to the needs and expectations of the local population.
- According to the *Sydney Metropolitan Strategy 2036* and reinforced by the Property Council of Australia, at the very least 4,000 to 7,500 hectares of new employment land will need to be identified, re-zoned, serviced and developed to satisfy Sydney's employment growth.
- Social inclusion – while the growing economy and the current social inclusion strategies are providing opportunities for access to employment and services. There is also the potential threat that a substantial number of people may be left behind resulting in long-term unemployment, homelessness, and other forms of social exclusion.

HOMELESSNESS AND HOUSING AFFORDABILITY

- The need to embed employment and economic development strategies within existing Regional Homelessness Action Plans.
- We need to seriously explore new affordable housing models for rental properties as implemented by other states.
- Most new housing being built in blue collar areas seems more appropriate for white collar workers. More affordable housing is needed.

ENVIRONMENT AND NATURAL RESOURCES

- Climate change is likely to heighten the need for conservation efforts. The implications are cost, unemployment and the risk of food insecurity.
- A transition to low or lower carbon technologies is needed.
- The cost of waste disposal is growing and the availability of land fill is diminishing.
- A lack of investment in public transport infrastructure has resulted in significant increases in greenhouse emissions from vehicles. Improved access to public transport is required in conjunction with a true *City of Cities Model* where there are local jobs for local people.
- A multifaceted water management strategy needs to be maintained to ensure a sustainable water supply.
- Extreme weather events are likely to cause significant damage to buildings and urban facilities. With this in mind, planning of new developments and renewal of existing infrastructure should incorporate design practices which reduce risk of damage.
- There are ongoing challenges for Sydney's water supply. Climate change impacts, droughts and uncertain rainfall patterns and higher temperatures put pressure on water resources. The ongoing implementation of the Metropolitan Water Plan is essential with further exploration into more innovative strategies such as water markets.
- To improve air quality in Sydney we need to get people out of their cars and into mass transport systems. To do this, adequate planning and investment in transport infrastructure (including connectivity) is required on a long term basis. Also travel to work patterns need to be changed where a diverse range of employment opportunities are located within close proximity to the majority of the population.
- The challenge is to reduce the level of electricity coming from greenhouse gas producing sources by developing sectors which can produce alternative energy supplies. Coupled with this is the need to change the usage patterns and habits of the population and industry in such a way that it sustains liveability and the economy.

5.2 SUMMARY OF PRIORITIES FOR 2011 RDA-SYDNEY'S REGIONAL PLAN

SUSTAINABLE ECONOMIC DEVELOPMENT

- Creating 40 year vision for Sydney.
- Integrated *whole of region* planning models and governance.
- Short term, long term public transport/freight strategies for Sydney.
- Better infrastructure and land-use planning, including urban renewal.
- Ensuring adequate supply and certainty for employment lands.
- Housing affordability.
- More Finance, Property and Professional business support services in outer non CBD centres.
- New emerging industry development in health, community care and life sciences.
- Supporting and developing existing industry clusters e.g. Manufacturing, Aerospace and Defence.
- New technology clusters to drive new Centres of Excellence.
- Urban fringe agriculture.
- Social Enterprise Sector development.

SKILLS DEVELOPMENT – PLANNING FOR INDUSTRY NEEDS IN SHORT TO MEDIUM TERM, PARTICULARLY

- Manufacturing.
- Transport and Logistics.
- Health, aged and community care.
- Green jobs.
- Higher education participation rates.
- Labour force participation.

SOCIAL INCLUSION

- Embedding economic and employment strategies within strategies to provide better access for the disadvantaged and to address homelessness.
- Disadvantaged youth skills and employment.
- Mature workforce participation.

Note: RDA-Sydney has the additional roles of commenting on Federal and State policies, plans and strategies as required and promoting Federal and NSW Government grants and programs.

6. GOVERNMENT STRATEGIC CONTEXT

STRATEGIC CONTEXT

Plan Title	Priorities	Supporting Regional Plan for Sydney Goals
Council of Australian Governments national criteria for cities	Capital city strategic planning systems should: 1. Be integrated; 2. Provide for a consistent hierarchy of future oriented and publicly available plans; 3. Provide for nationally – significant economic infrastructure; 4. Address nationally – significant policy issues; 5. Consider and strengthen the networks between capital cities and major regional centres, and other important domestic and international connections; 6. Provide for planned, sequenced and evidence – based land release and appropriate balance of infill and Greenfield development; 7. Clearly identify priorities for investment and policy effort by governments, and provide an effective framework for private sector investment and innovation; 8. Encourage world-class urban design and architecture; 9. Provide effective implementation arrangements and supporting mechanisms.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.

Plan Title	Priorities	Supporting Regional Plan for Sydney Goals
Our Cities, Our Future – A National Urban Policy for a Productive, Sustainable and Liveable Future (Australian Government; 2011)	» Productivity. » Liveability. » Sustainability. » Links between these three (productivity, liveability and sustainability).	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.
Sustainable Australia – Sustainable Communities (Australian Government; 2011)	» Ensure that the necessary policy settings and governance arrangements to deliver improvements in our wellbeing, at the local, regional and national level into the future. » Specifically the strategy is supported by the following four new measures: • Suburban Jobs; • Sustainable Regional Development; • Measuring Sustainability; • Promoting Regional Living.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues.
Metropolitan Plan for Sydney 2036 (released 2010)	» Strengthening a city of cities. » Growing and renewing centres. » Growing Sydney's economy. » Tackling climate change and protecting Sydney's natural environment. » Transport for a connected city. » Housing Sydney's population. » Achieving equity, liveability and social inclusion.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.

Plan Title	Priorities	Supporting Regional Plan for Sydney Goals
Western Sydney Business Growth Plan (NSW Government; 2010)	» Improve transport and grow jobs in regional cities and strategic centre. » Supporting growing industry sectors in Western Sydney. Focus on: • Property, business and financial services; • Health, life science and community services; • Transport and logistics. » Create, attract, develop and retain skills in the region.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.
NSW Metropolitan Transport Plan: Connecting the City of Cities (NSW Government; 2010)	» Commute to work easily and quickly. » Transport and services accessible to all members of the community. » An efficient, integrated and customer focused public transport system. » Revitalise neighbourhoods with improved transport hubs.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney.
National Land Freight Strategy Discussion Paper (Australian Government; 2011)	Tangible, long term goals for a national land freight network are: » Improved economic, social and safety outcomes; » High productivity vehicle capability and access; » Modern operating procedures and application of smart technologies; » Appropriate separation of personal transport and freight; » Infrastructure and operational performance indicators.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney.
National Ports Strategy (Australian Government; 2011)	» Planning for relevant ports. » Ensuring plans can be executed. » Improving landside efficiency, reliability, security and safety of container ports. » Promoting clarity, transparency and accountability.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues.

Plan Title	Priorities	Supporting Regional Plan for Sydney Goals
Skills for Prosperity – A roadmap for vocational education and training (Skills Australia; 2011)	» Putting learners and enterprises at the forefront of service. » Enabling skills use and productivity in enterprises. » Supporting communities » Aspiring to excellence in VET. » Ensuring better pathways across education sectors. » Securing prosperity through sustained and balanced investment. » Creating a simpler system.	Goal 5: Community and economic development.
Building Australia's Future Workforce (Australian Government; 2011)	» Improving incentives in the tax system. » Investing so more young Australians are earning or learning. » Rewarding and supporting single parents to engage in work. » Supporting very long-term job seekers. » More opportunities for people with disability. » A new approach to addressing entrenched disadvantage in targeted locations.	Goal 5: Community and economic development.
NSW Tertiary Education Plan	» Increasing participation and attainment in tertiary education to boost productivity. » Developing a highly educated and skilled workforce to support economic growth, innovation and social inclusion. » Supporting regional development and sustainability. » Supporting education and research infrastructure initiatives. » Facilitating research and development and innovation. » Attracting international students and enriching their Australian experience.	Goal 5: Community and economic development.
Apprenticeships for the 21st Century (Australian Government; 2011)	» A model of skills formation. » The leadership of the system. » The sustainability of the system. » Interaction with modern awards and workplace relations legislation.	Goal 5: Community and economic development.

Plan Title	Priorities	Supporting Regional Plan for Sydney Goals
National Health Reform Agreement (Australian Government; 2011)	» Sets out the shared intention of the Commonwealth, State and Territory (the States) governments to work in partnership to improve health outcomes for all Australians and ensure the sustainability of the Australian health system. » Introduces new financial and governance arrangements for Australian public hospital services and new governance arrangements for primary health care and aged care.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.
Caring for Older Australians (Australian Government; 2011)	» Improve the wellbeing of the community as a whole. » A simplified gateway to the aged care system. » Care that meets the needs of older Australians. » Opening up the supply of care and accommodation to enhance choice. » Sustainable funding model.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.
National Preventative Health Strategy – the Roadmap for Action (Australian Government; 2009)	» Drive environmental changes throughout the community to increase levels of physical activity and reduce sedentary behaviour. » Drive change within the food supply to increase the availability and demand for healthier food products, and decrease the availability and demand for unhealthy food products. » Embed physical activity and healthy eating in everyday life. » Encourage people to improve their levels of physical activity and healthy eating through comprehensive and effective social marketing. » Reduce exposure of children and others to marketing, advertising, promotion and sponsorship of energy-dense nutrient-poor foods and beverages. » Strengthen skill and support primary healthcare and public health workforce to support people in making healthy choices. » Address maternal and child health, enhancing early life and growth patterns. » Support low-income communities to improve their levels of physical activity and healthy eating. » Reduce obesity prevalence and burden among Indigenous Australians.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.

Plan Title	Priorities	Supporting Regional Plan for Sydney Goals
National Digital Economy Strategy (Australian Government; 2011)	» Online participation by Australian households. » Online engagement by Australian businesses and not-for-profit organisations. » Smart management of our environment and infrastructure. » Improved health and aged care. » Expanded online education. » Increased teleworking. » Improved online government service delivery and engagement. » Greater digital engagement in regional Australia.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 3: Facilitate and promote a *whole of government* approach to key issues. Goal 5: Community and economic development.
Powering Ideas – An Innovation Agenda for the 21st Century (Australian Government; 2009)	» Public research funding supports high-quality research that addresses national challenges and opens up new opportunities. » Australia has a strong base of skilled researchers to support the national research effort in both the public and private sectors. » The innovation system fosters industries of the future, securing value from the commercialisation of Australian research and development. » More effective dissemination of new technologies, processes, and ideas increases innovation across the economy, with a particular focus on small and medium-sized enterprises. » The innovation system encourages a culture of collaboration within the research sector and between researchers and industry. » Australian researchers and businesses are involved in more international collaborations on research and development. » The public and community sectors work with others in the innovation system to improve policy development and service delivery.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney. Goal 5: Community and economic development.
Way Home: Reducing Homelessness in NSW - The NSW Homelessness Action Plan (NSW Government; 2009)	» Preventing homelessness: to ensure that people never become homeless. » Responding effectively to homelessness: to ensure that people who are homeless receive effective responses so that they do not become entrenched in the system. » Breaking the cycle: to ensure that people who have been homeless do not become homeless again.	Goal 2: Develop a more collaborative *whole of city* regional planning process for Sydney.

7. REVIEW

REVIEW UPDATES

The Plan will be reviewed progressively by the RDA Committee on an ongoing basis. It will be closely linked to the RDA-Sydney Business Plan and it's Key Performance Indicators (KPIs). Performance of RDA-Sydney is also monitored by its funding bodies – the NSW Department of Trade and Investment, Regional Infrastructure and Services and the Federal Department of Regional Australia, Regional Development and Local Government.

The Regional Plan is a 'Living Plan' that is to be revised and reviewed annually. This revision will incorporate discussions both one-on-one and through forums with key stakeholders.

We also envisage having informal input through day to day discussions with our partners and other stakeholders.

Feedback is always welcome and can be supplied by phoning RDA-Sydney on (02) 9890 7804.

8. GLOSSARY & REFERENCES

Photo: Courtesy Laurence Sterling ©

GLOSSARY

ABS	Australian Bureau of Statistics
AEMO	Australian Energy Market Operators
AHURI	Australian Housing and Research Institute
AIG	Australian Industry Group
ANZSIC	Australian and New Zealand Standard Industrial Classification
BITRE	Bureau of Infrastructure, Transport and Regional Economics
BVET	Board of Vocational and Educational Training
CEDA	Committee for Economic Development of Australia
COAG	Council of Australian Governments
DIAC	Department of Immigration and Citizenship
DTIRS	Department Trade and Investment, Regional Infrastructure and Services
DEEWR	Department of Education, Employment and Workplace Relations
DET	NSW Department of Education and Training
DoP	NSW Department of Planning
EDO	Economic Development Officer
GDP	Gross Domestic Product
GFC	Global Financial Crisis
GRP	Gross Regional Product
GSP	Gross State Product
GST	Goods and Services Tax
GWS	Greater Western Sydney
HREOC	Human Rights and Equal Opportunity Commission
LGA	Local Government Area
LEED	Leadership in Energy and Environment Design
Natsem	National Centre for Social and Economic Modelling
NBN	National Broadband Network
NCOSS	Council of Social Service of NSW
NCVER	National Centre for Vocational Education Research
NEM	National Electricity Market
OECD	Organisation for Economic Co-operation and Development
PDM	Project Development Manager
PPT	Percentage Points
R&D	Research and Development
RDA	Regional Development Australia
RDAF	Regional Development Australia Fund
RDC	Regional Development Council
ROC	Regional Organisation of Councils
RP	Regional Plan
RTO	Registered Training Organisation
SADIG	Sydney Aerospace Defence Interest Group
TLWAG	NSW Transport and Logistics Workplace Advisory Group
TOD	Transport Oriented Development
UDIA	Urban Development Institute of Australia
VET	Vocational Education and Training

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