

Northern Beaches Hospital –
Planned Precinct

Part 3 Report

Precinct Employment Strategy

November 2020

Macroplan

MELBOURNE

Level 16

330 Collins Street

Melbourne VIC 3000

(03) 9600 0500

BRISBANE

Level 15

111 Eagle Street

Brisbane QLD 4000

(07) 3221 8166

PERTH

Level 1

89 St Georges Terrace

Perth WA 6000

(08) 9225 7200

SYDNEY

Level 10

580 George Street

Sydney NSW 2000

(02) 9221 5211

GOLD COAST

Level 2

89 - 91 Surf Parade

Broadbeach QLD 4218

(07) 3221 8166

Prepared for: NSW Department of Planning, Industry, and Environment

Macroplan staff responsible for this report:

Gordon Yoon – Manager, NSW

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Executive Summary

Macroplan has been engaged to consider the likely land use change that may occur at the Frenchs Forest Planned Precinct (see map at **Appendix 1**) as a direct result of the new Northern Beaches Hospital (NBH), and to develop an employment strategy for the precinct to guide its future development.

Our engagement has involved an examination of the potential retail and related ancillary floorspace that could be accommodated within the Frenchs Forest Planned Precinct (FFPP) and a separate examination of the demand for health, education and other 'commercial' floorspace.

A key consideration has been the share of jobs that is likely to be attracted to the FFPP in light of the 'on-site' offerings of the NBH and the adjacent business park, i.e. whether the precinct is likely to compete with these adjoining offerings or benefit from them.

Our assessment of market demand for employment floorspace has been informed by:

- A detailed retail market assessment which distributes forecast expenditures across a 'trade area', having regard for market share and existing and planned competition;
- A consideration of other health precincts and a high-level demand assessment of health-related and other commercial land uses that could be attracted to Frenchs Forest; and
- The Destravis report of June 2018 which considers the aspirational requirements of some future potential tenancies at the FFPP (including student housing, hotel, tertiary education and retirement/aged care providers).

A statement of economic intent has been prepared to support the development of the FFPP as a health and education hub. Its employment potential will be achieved via:

- New jobs associated with the Northern Beaches Hospital
- Additional services that will be incorporated within the NBH complex
- New retail development in the Frenchs Forest Town Centre
- Other non-retail floorspace attracted to the FFPP that will complement and support the hospital operation.

A recommended employment strategy for FFPP informs the likely sequencing and delivery of recommended land use types, as incorporated in the following table.

Frenchs Forest Planned Precinct - indicative composition - non-retail & residential uses							
Category	Emp. Density (sq.m)	Short-medium		Medium 5-10 yrs		Long 10-25 yrs	
		FF PP GLA (sq.m)	Emp. Dividend (workers)	FF PP GLA (sq.m)	Emp. Dividend (workers)	FF TC GLA (sq.m)	Emp. Dividend (workers)
Northern Beaches Hospital	-	61,711	1,000	61,711	1,300	80,224	2,000*
Medical imaging & Nuclear Medicine	30	1,475	49	1,475	49	1,475	49
Pathology	35	382	11	382	11	382	11
Pharmacy	35	387	11	387	11	387	11
Medical Clinic	30	400	13	400	13	400	13
Specialist Suites	30	3,250	108	3,250	108	3,250	108
Education / training	35	870	25	870	25	870	25
Retail	35	1,525	44	1,525	44	1,525	44
Total NBH floorspace/emp. dividend		70,000	1,261	70,000	1,561	88,513	2,261
Other retail uses							
Supermarket (major)	30	2,000-5,300	67-177	2,000-5,300	67-177	2,000-5,300	67-177
Mini-majors	30	1,000-2,000	33-67	1,000-2,000	33-67	1,000-2,000	33-67
Specialities	35	2,650-5,250	76-150	2,650-5,250	76-150	2,650-5,250	76-150
Total Retail		5,650-12,550	176-393	5,650-12,550	176-393	5,650-12,550	176-393
Ancillary non-retail**	60	2,000-3,750	33-63	2,000-3,750	33-63	2,000-3,750	33-63
Other non-retail & non-residential uses							
Consulting suites / medical related	30	1,000	33	2,500	83	4,000	133
Medical centre / allied	25	1,000	40	1,500	60	3,000	120
Hotel (4-stars)***	-	0	0	15,000	214	15,000	214
Education / training / research	30	0	0	2,500	83	10,000	333
Child care	60	1,500	25	1,500	25	1,500	25
Nursing accommodation / facilities		0	0	12,500	0	12,500	0
Fitness / wellbeing	70	1,000	14	4,000	57	4,000	57
Retirement / aged care	150	10,000	67	10,000	67	20,000	133
General commercial / innovation / co-work	25	4,500	180	8,000	320	10,000	400
Total other non-residential floorspace	-	19,000	359	57,500	910	80,000	1,416
Total FFPP floorspace/ emp. Dividend		96,650-105,300	1,830-2,076	135,150-143,800	2,680-2,927	176,163-184,813	3,887-4,133
Notes:							
NBH - 70,000 sq.m (10 storeys). 488 beds, 14 theatres, six surgical suites							
* Assumes potential for growth in capacity to meet future demand at NBH (30-40%)							
** Banks, Services, Gym and Childcare etc.							
*** 1 employee per 2 hotel rooms							

Source: Macroplan

The new Northern Beaches Hospital itself will support a range of knowledge-intensive jobs, innovation and service delivery, commencing with 1,000 jobs and increasing to 2,000+ jobs in the longer term.

The broader Frenchs Forest district presently accommodates around 9,300 jobs. As a specialised health and education hub, it is earmarked to accommodate between 12,000 – 13,000 jobs. This report discusses how and in what form these additional jobs are to be accommodated within the FFPP.

Section 1: Introduction & Previous Findings

Macroplan has been engaged to advise the NSW Department of Planning, Industry, and Environment and the Northern Beaches Council of the likely land use change that may occur at the Frenchs Forest Planned Precinct (FFPP) as a direct result of the new Northern Beaches Hospital (NBH), and to develop an employment strategy for the precinct to guide its future development.

1.1 Frenchs Forest Planned Precinct

In June 2017, the Minister for Planning announced Frenchs Forest as a Priority Precinct.

Phase 1 of the Structure Plan approach for the area includes the delivery of the Town Centre. The town centre forms a major component of the Frenchs Forest Planned Precinct (FFPP). This precinct, along with other phases of the Structure Plan is illustrated at **Appendix 1**.

A key objective of this report is to develop an Employment Strategy for the FFPP that identifies:

- the role of the precinct in the North District of Sydney in the provision of health services given trends toward the location of diagnostic and related activities outside of hospitals
- the role of the precinct in achieving the vision for Frenchs Forest as a future “health and education precinct” and
- a preferred scale/mix of employment land uses based on a broader understanding of projected demand for retail, commercial, medical related and tertiary education floorspace on the Northern Beaches Hospital site and surrounding local area.

1.2 Research Scope

Our engagement has involved an examination of the potential retail and related ancillary floorspace that could be accommodated within the FFPP and a separate examination of the demand for health, education and other ‘commercial’ floorspace (including retirement and aged care, child care, short-term accommodation and general commercial uses, including innovative and co-work space).

This task has required:

- an examination of other successful health precincts, big and small;
- a consideration of the nature of health uses (both primary and secondary) that would normally be expected to be available in association with a Level 5 hospital;
- regard for the broader catchment’s population and employment growth characteristics; and
- an appreciation of the make-up and growth potential of the adjacent Frenchs Forest Business Park, other nearby commercial/retail land uses and potential new market entrants.

Our research provides a market-grounding of the potential land uses that could be expected to occur at the FFPP as a direct result of or in association with a new Level 5 hospital. It is supported by separate ‘commercial-in-confidence’ investigations undertaken by the Destravis Group¹ which provides a preliminary assessment of the level of interest in locating at FFPP by potential key sector players.

Our research findings are documented in separate reports for the FFPP, viz:

- **Part 1: Retail Potential;** and
- **Part 2: Non-Retail Land Use Potential**

This work, produced in May 2018, is revised by this report which takes into consideration the potential for an expansion in retail services from other centres close to the FFPP, actual floorspace allocations within NBH and Destravis’ separate findings from its ‘aspirational stakeholder engagement’.

¹ Destravis Group, Aspirational Stakeholder Engagement, Frenchs Forest Masterplanned Precinct, June 2018

1.3 Previous Findings

Retail potential

The supportable mix of retail and ancillary non-retail uses within the FFPP has been formulated with regard to the potential for expansion of retail services at other centres within the Frenchs Forest trade catchment.

The Forestway Shopping Centre (SC) is the dominant retail asset in the area, containing around 9,100 sq.m of gross lettable area (GLA), anchored by a Woolworths supermarket and a smaller Aldi store. For the purpose of this assessment it is considered that Forestway could provide around an additional 6,000 sq.m of expanded retail and related ancillary floorspace but is unlikely to increase the number of supermarkets it accommodates².

Notwithstanding any potential expansion of retail services at Forestway, there remains potential for a new Frenchs Forest Town Centre within the FFPP to provide additional retail floorspace to serve its primary trade area and to support the operation of a multi-use specialised precinct.

Our forecast of supportable retail and ancillary floorspace within the FFPP, presented in the table below, provides for a range of additional floorspace to meet demand, spread between the existing (and potentially expanded) Forestway SC and a new planned town centre offering adjacent to the Northern Beaches Hospital.

The ultimate potential at the new town centre will be influenced, but not dictated, by any potential expansion at Forestway.

The resulting provision of supporting specialty and mini-major retail at the FFPP is a function of the key anchor tenants under each scenario. Under Scenario 1 the town centre entails a larger, convenience-based neighbourhood centre development including a full-line Coles supermarket and Harris Farm; while Scenario 2a and 2b entail smaller provisions with the former including a smaller Coles supermarket and larger Harris Farm, and the latter including a large Harris Farm only.

It is further noted that NBH itself accommodates around 1,500 sq.m of retail floorspace (mainly relating to food and beverage and other convenience services) as well as a separate pharmacy of

² It is understood that the retail capacity of this shopping centre may be limited by traffic conditions. The assumed 6,000 sq.m. allocation is independent of any traffic assessment.

around 390 sq.m. These offerings trade directly to hospital users, are relatively minor in the context of catchment need and do not have a large bearing on the supportable retail recommendations for the town centre, as provided below.

Taking into consideration an assumed level of potential expansion at Forestway SC, the below table presents a range of possible scenarios for the provision of retail services at the FFPP.

Table 1.1 FFPP - indicative retail floorspace provisions

French's Forest Planned Precinct - indicative composition									
Category	Forestway SC			Scenario 1		Scenario 2a		Scenario 2b	
	Existing	Expansion	Total	FFTC	Total	FFTC	Total	FFTC	Total
	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)
Major tenants									
Supermarket									
• Woolworths	3,800	600	4,200		4,200		4,200		4,200
• Aldi	1,200	650	1,850		1,850		1,850		1,850
• Coles				3,800	3,800	2,250	2,250		0
• Harris Farm				1,500	1,500	1,750	1,750	2,000	2,000
Total majors	4,800	1,250	6,050	5,300	11,350	4,000	10,050	2,000	8,050
<u>Mini-majors</u>									
<i>Total mini-majors</i>	0	1,500	1,500	2,000	3,500	1,000	2,500	1,000	2,500
Retail specialties									
Food & liquor	650	250	900	750	1,650	500	1,400	400	1,300
Food catering	800	1,000	1,800	2,500	4,300	2,000	3,800	1,500	3,300
Non-food retail	1,000	1,250	2,250	2,000	4,250	1,000	3,250	750	3,000
Total retail spec.	2,450	2,500	4,950	5,250	10,200	3,500	8,450	2,650	7,600
Total centre - retail	7,250	5,250	12,500	12,550	25,050	8,500	21,000	5,650	18,150
<u>Ancillary non-retail</u>									
Banks, services, other	1,750	750	2,500	1,500	4,000	1,000	3,500	750	3,250
Gym	0	0	0	1,500	1,500	500	500	500	500
Childcare	0	0	0	750	750	750	750	750	750
Total non-retail	1,750	750	2,500	3,750	6,250	2,250	4,750	2,000	4,500
Total retail/ancillary	9,000	6,000	15,000	16,300	31,300	10,750	25,750	7,650	22,650

Source: Macroplan

Non-retail development potential

Our previous assessment of non-retail potential at FFPP considers other health precincts from around Australia and provides a high-level demand assessment of health-related and other commercial land uses that could be attracted to French's Forest.

The latter Destravis report of June 2018 (commercial-in-confidence) provides a preliminary overview of market interest from retirement and aged care providers, community housing providers, education and research institutions, universities and from hotel providers.

Destravis' work considers feedback from a range of stakeholders to assess the extent of their interest in locating at FFPP and their potential spatial requirements. Destravis reports that most stakeholders are interested in the precinct and have expressed a willingness to 'stay informed' of the precinct's progress.

Notably, the ongoing interest of universities at FFPP is likely to be dependent on which university is able to form an educational alliance or affiliation with NBH.

The University of Sydney, through its 'Northern Clinical School', has an existing teaching relationship with the Royal North Shore Hospital and the other hospitals (Manly, Mona Vale, Hornsby and Ryde Hospitals) within the Northern Sydney Local Health District (NSLHD). At present it has not been publicly stated whether this arrangement will extend to the new NBH or, if it does, whether it will be to the exclusion of other universities and/or training providers. Manly and Mona Vale hospitals, of course, will be superseded by the new NBH facility.

Notwithstanding, it is apparent that, courtesy of the Northern Clinical School network, there is already an extensive range of existing teaching facilities and research centres located across northern Sydney, including the Kolling Institute of Medical Research, the Institute of Bone and Joint Research and the Northern Clinical School's new state-of-the-art Clinical Skills and Simulation Centre, all located within the Kolling Building at the Royal North Shore campus.

The NBH facility at Frenchs Forest will incorporate around 870 sq.m of internal floorspace dedicated to teaching, training and research, although this space will be used jointly for the clinical training of medical professionals undertaking vocational training (medical and surgical sub-specialties), other clinical training (e.g. nursing and allied health) and for non-clinical training (e.g. hospital staff including ward clerks and those that operate machinery etc).

In all, unless a teaching affiliation is formed with a university other than the Sydney University, it is unlikely that additional health-related teaching space will be required immediately to service NBH. Such provision is not presently planned to occur or could, if required over time, be incorporated within an expanded NBH on its own site. Our understanding of other campuses (e.g. the Clinical Education

Centre at the SAN Hospital, Wahroonga and the manner of operation at Royal North Shore) suggests that an 'on-site' provision of medical training and teaching facilities is preferred.

This does not mean that other, non-health-related educational floorspace would not be attracted to the FFPP over time. Such assumptions are incorporated within our Part 2 report, which considers the suitability of Frenchs Forest as a location for a university learning centre or as a health-related research centre.

The Destravis findings canvass an interest that several universities could have in locating at FFPP, suggesting a longer-term potential of the precinct for educational and/or research purposes.

Since our initial assessment of non-retail floorspace potential for the town centre component of the FFPP, advice has been received that the NBH complex will also allocate 1,475 sq.m of floorspace to medical imaging and nuclear medicine; 382 sq.m to pathology; 400 sq.m to a GP/medical clinic; 3,250 sq.m to specialist consulting suites and 870 sq.m, as previously mentioned, for teaching, training and research needs.

This is a substantial provision of floorspace for medical-related and doctor uses.

Having regard for these allocations, the Destravis work and our own reconnaissance of market need for non-retail floorspace, the following short-term to long-term provision of supportable non-retail floorspace at FFPP is recommended.

Despite the lack of immediacy in market demand for commercial floorspace at Frenchs Forest, the precinct has a medium-longer term potential to attract such uses.

Table 1.2 FFPP – non-retail floorspace provisions

Frenchs Forest Planned Precinct - indicative composition - non-retail uses						
Category	Short-medium		Medium 5-10 yrs		Long 10-25 yrs	
	FF TC	Total	FF TC	Total	FF TC	Total
	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)	GLA (sq.m)
<u>Preliminary/indicative</u>						
Consulting suites/medical related	1,000	1,000	2,500	2,500	4,000	4,000
Medical centre/allied	1,000	1,000	1,500	1,500	3,000	3,000
Hotel (4-stars)	0	0	15,000	15,000	15,000	15,000
Education / training / research	0	0	2,500	2,500	10,000	10,000
Child care	1,500	1,500	1,500	1,500	1,500	1,500
Nursing accommodation / facilities	0	0	12,500	12,500	12,500	12,500
Fitness / wellbeing	1,000	1,000	4,000	4,000	4,000	4,000
Retirement / Aged care	10,000	10,000	10,000	10,000	20,000	20,000
General commercial / innovation / co-work	<u>4,500</u>	<u>4,500</u>	<u>8,000</u>	<u>8,000</u>	<u>10,000</u>	<u>10,000</u>
Total FFPP floorspace	19,000	19,000	57,500	57,500	80,000	80,000

Source: Macroplan

Importantly, our Part 1 and Part 2 recommendations have considered the market appeal of the FFPP in the context of other provisions and opportunities in the broader catchment.

Notably, the employment potential of FFPP and its town centre is and will continue to be largely influenced by the adjacent 60ha Frenchs Forest Business Park.

Our research has identified that the Business Park performs an important local employment role, although it is currently under-utilised.

The employment potential of the Frenchs Forest Business Park is not necessarily harmful to the role that the FFPP will play in supporting a multi-functional specialised precinct. Indeed, the success of the FFPP including its retail, commercial and residential offerings and its transport initiatives will be underpinned by a strong and high-yielding adjacent business presence.

The business park's focus on local employment is very important. It has a 'double whammy' effect – it serves local need and eases regional traffic flows by providing local work opportunity for those that would otherwise leave the LGA on a daily basis.

Given the relative 'isolation' of the business park, however, it is not expected that it will 'out-run' its local employment significance, at least not in the foreseeable future, i.e. it is almost always likely to attract more local employees than those that need to travel far to reach it. It is possible, therefore, for the business park to transition to a higher order employment centre over time and to maintain a strong local employment flavour. This provides a framework for the consideration of additional land uses that might take up available or under-utilised space within the park.

1.4 Part 3 Research Scope & Objective

This current report forms **Part 3** of Macroplan's outputs for the FFPP.

It incorporates previous, updated findings to present a final **employment strategy** and **statement of economic intent** to guide the FFPP's planning controls and its commercial delivery.

Our work points to an increased density capacity, both in resident population and employment terms, enabling a vibrant, multi-purpose, 18-hour precinct (and a gradual shift in travel mode to support the broader region's transport initiatives). Our work also confirms the important employment role played by the adjacent Frenchs Forest Business Park, noting its current occupancy types and its local employment attributes.

The planning context of the FFPP is outlined in **Section 2** of this report, providing a context for the consideration of employment delivery across the precinct.

In **Section 3** of this report current employment trends are analysed.

Section 4 considers the implications of these trends and previous research on the broader locality.

Section 5 presents a final employment strategy and statement of employment intent for the FFPP. The strategy suggests a sequenced delivery of employing land uses that reflects market interest and the timing of demand, providing the foundations of a strong and vibrant mixed-use town centre.

Section 2: FFPP – Planning Context

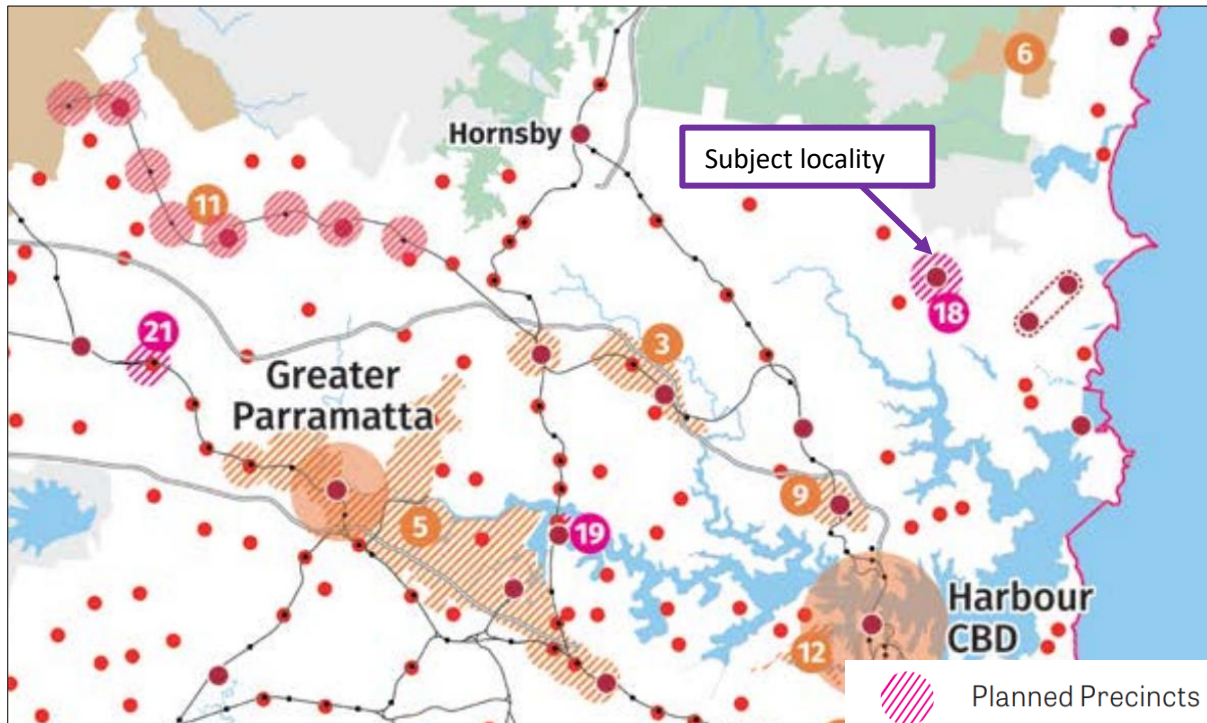
This chapter outlines the current planning context of Frenchs Forest and the Frenchs Forest Planned Precinct (FFPP) in particular, focusing on the framework created under the recent Greater Sydney Commission’s Sydney Region Plan and its North District Plan.

Appendix 2 to this report provides a commentary on historical planning documentation relating to the Northern Beaches LGA and to the Frenchs Forest locality. This historical account provides a relevant background to the FFPP and how it has evolved over the course of various planning strategies and approaches.

2.1 Greater Sydney Region Plan

The Greater Sydney Region Plan, 2017 designates Frenchs Forest as a ‘Planned Precinct’.

Figure 2.1 Greater Sydney Region Plan Extract



Source: Greater Sydney Region Plan, 2018

Planned Precincts seek to facilitate place-based outcomes for specific employment and mixed-use centres across Sydney.

Planned Precincts comprise targeted development focused on housing diversity around a centre and transit node/rail station.

These precincts are expected to deliver new homes and jobs located close to public transport, shops and services, while retaining and enhancing a community's character.

2.2 North District Plan

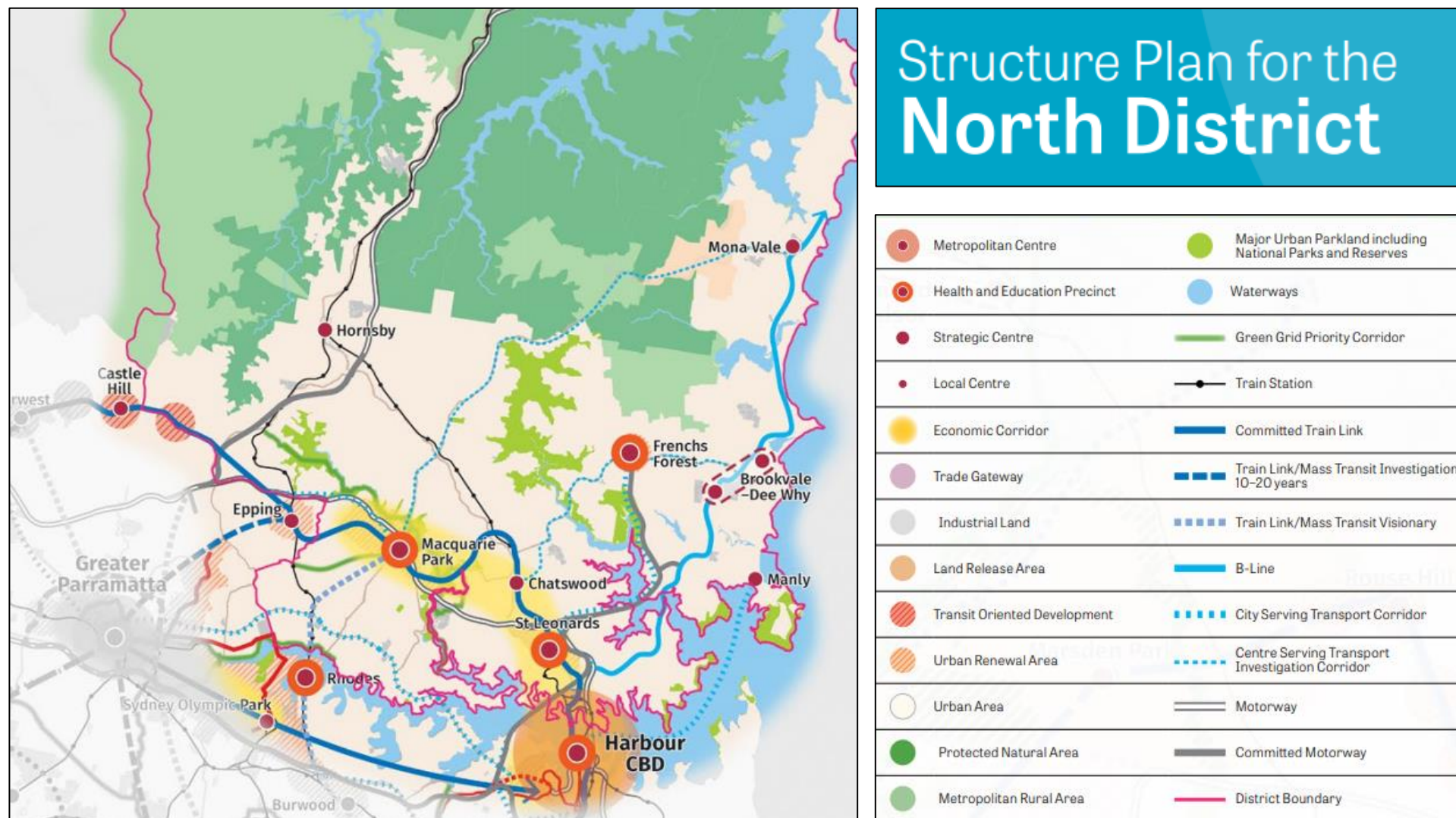
Frenchs Forest falls within the North District Plan, 2017 and is designated as a 'Health and Education Precinct' under this Plan.

The Northern Beaches Hospital project is expected to anchor the precinct providing knowledge-intensive jobs, innovation and service delivery.

The new hospital is planned to be supported by improved transport links to support a developing urban core and employment hub with a mix of surrounding commercial and residential uses, open space and community facilities. The revitalisation of Frenchs Forest is nominated as including a vibrant new town centre supporting the region's growing population.

The Plan estimates that the Frenchs Forest precinct will deliver between 12,000 to 13,000 jobs. Continued investigations into the provision of a high frequency public transport link to support a successful commercial environment are mooted.

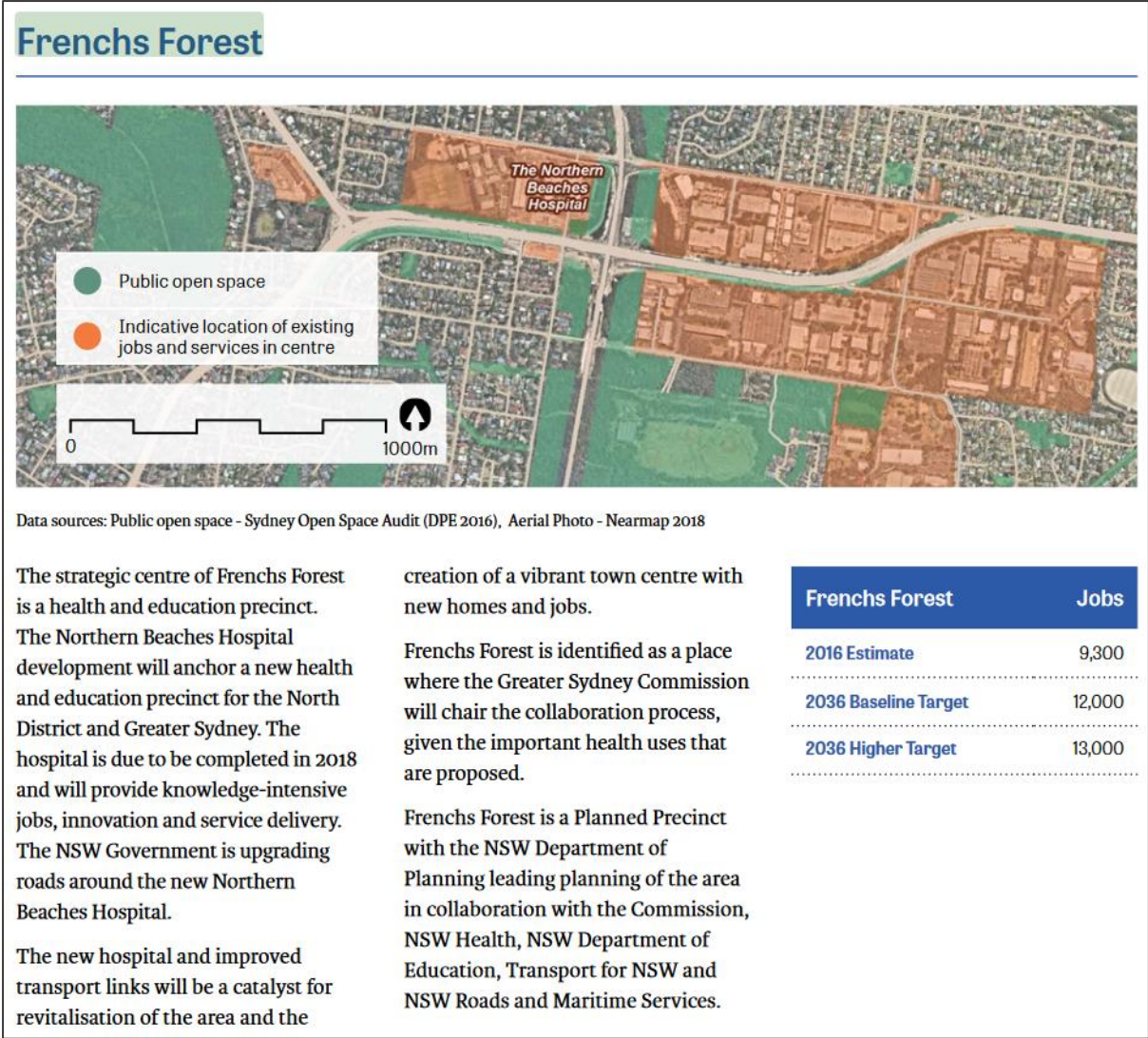
Figure 2.2 North District Plan (2018) Extract



An extract from the North District Plan follows. Notably, for the purpose of calculating the precinct’s employment potential, the District Plan incorporates the adjacent B7 Business Park and the Forestway Shopping Centre.

The North District Plan establishes an employment target of between 12,000 – 13,000 jobs by 2036 for Frenchs Forest.

Figure 2.3 North District Plan – Frenchs Forest Employment Projection



Source: North District Plan, 2018

Section 3: Trends & Forecasts

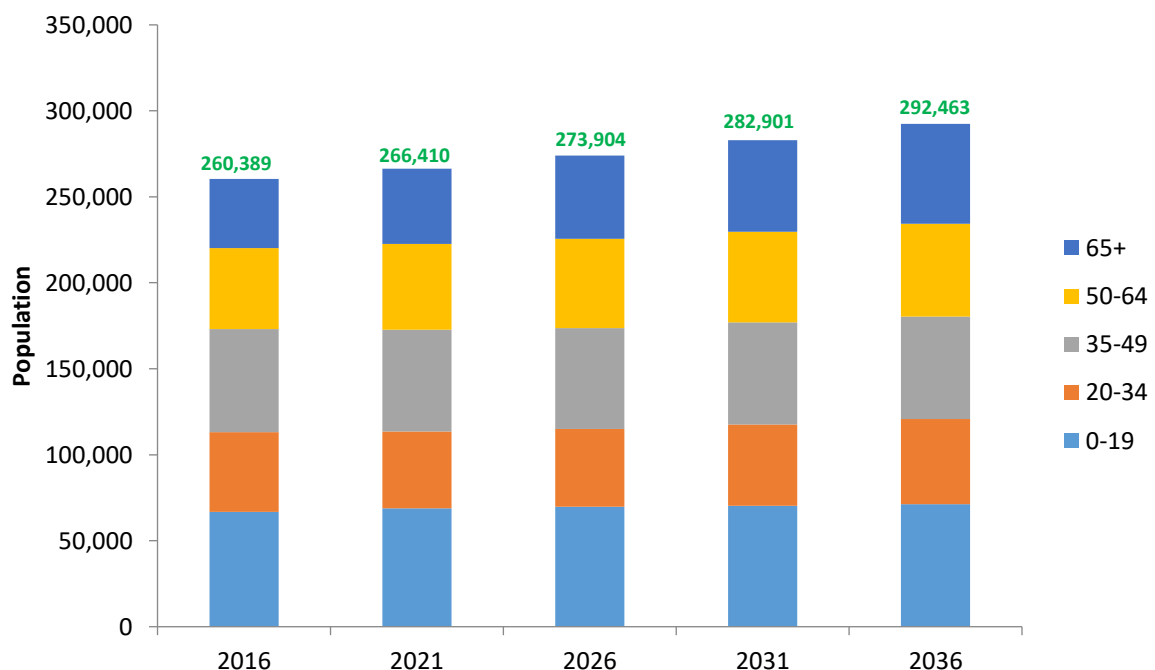
This section outlines the key characteristics and trends that are likely to impact upon employment formation at Frenchs Forest, and which therefore will influence the take-up of employment opportunity at the Frenchs Forest Planned Precinct.

3.1 Population Characteristics and Forecasts

Forecasts for future population growth have been prepared and published by the NSW Transport Performance and Analytics (TPA) and the NSW Department of Planning, Industry, and Environment (DPIE).

The Northern Beaches LGA has a population of 260,389 people (TPA, 2016) and is projected to grow to 292,463 people by 2036. This equates to an increase of 32,074 people (i.e. 12.3%) over a 20-year period, or approximately 1,600 new residents per annum. The changing quantum and make-up of the Northern Beaches population over the forecast period is depicted below.

Figure 3.1 Northern Beaches Population Forecast 2016 to 2036



Source: NSW TPA, Macropian

Northern Beaches currently has a relatively older population in comparison to Greater Sydney, with a higher proportion of people aged 50 years and older; and a significantly lower proportion of people aged between 20-34. Moreover, Northern Beaches' future population will age rapidly, with growth in the 65+ age cohort tipped to outstrip all other age segments to 2036.

This shift in age profile will impact on future employment capacity and needs, e.g. a higher demand for health and medical services associated with both a young and ageing population is expected. Notably, according to the TPA's projections, there will be little to no growth in 'working age' residents, particularly the 35-49 years cohort.

Table 3.1 Northern Beaches, Age Profile Change 2016-2036

2016-36 Change	0 to 19 years	20 to 34 years	35 to 49 years	50 to 64 years	65+ years	Total
Numerical Change	4,641	2,906	-333	6,966	17,894	32,075
% Change	7.0%	6.3%	-0.6%	14.8%	44.5%	12.3%

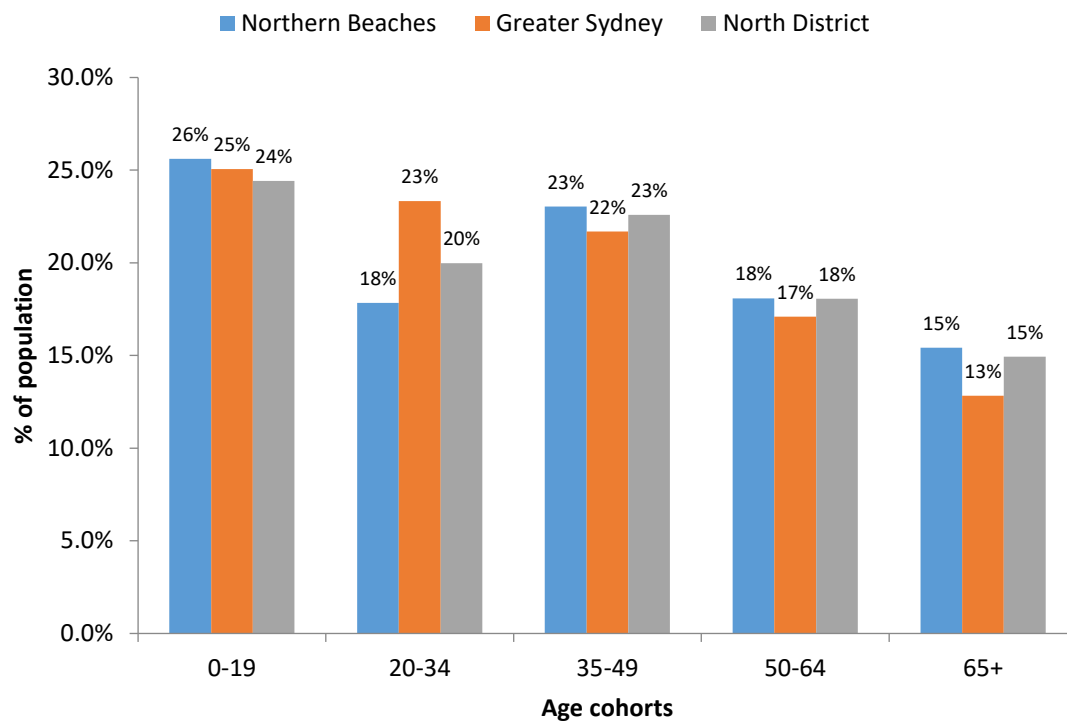
Source: NSW TPA, Macropian

The following graphs illustrate the changing profile of Northern Beaches population compared to metropolitan Sydney and the North District (as defined by the Greater Sydney Commission).

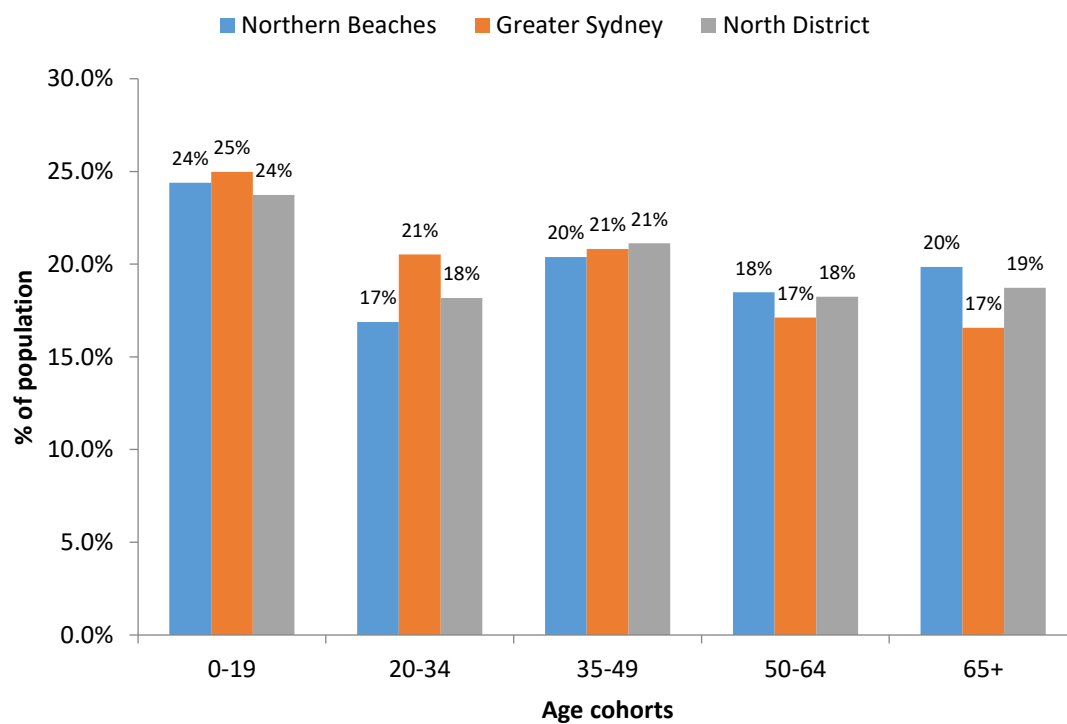
Some key findings from the data include:

- Whilst Sydney in general will experience an ageing of its population, this **trend will be greater in Northern Beaches**.
- The **Northern Beaches has a rising age dependence ratio³**, meaning that there are less working age persons to support its ageing demographic and perhaps suggesting that **strategies to attract young workers who can contribute services and income to the local economy ought to be pursued**.
- The projected growth in working age adults is unlikely to be sufficient to support the expanding demand for services from retiree households.

³ The ratio of people aged 65 years and older to the working age population

Figure 3.2 Northern Beaches Population by Age - 2016

Source: NSW TPA, Macroplan

Figure 3.3 Northern Beaches Population by Age - 2036

Source: NSW TPA, Macroplan

3.2 Northern Beaches employment profile

As at Census 2016, the Northern Beaches LGA had a labour force of just over 134,000 persons, with 4,645 persons or 3.5% identified as unemployed.

Table 3.2 Northern Beaches Labour Force Status, 2016

	15-19 years	20-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65-74 years	75-84 years	85 years and over	Total
Employed, worked:										
Full-time(a)	947	4,899	17,889	21,811	21,540	11,777	2,205	194	22	81,284
Part-time	4,751	4,474	5,347	8,530	8,517	6,910	3,532	547	54	42,662
Employed, away from work(b)	227	251	1,033	925	572	543	239	31	4	3,825
Hours worked not stated	<u>125</u>	<u>194</u>	<u>391</u>	<u>421</u>	<u>391</u>	<u>250</u>	<u>93</u>	<u>27</u>	<u>19</u>	<u>1,911</u>
Total employed	6,050	9,818	24,660	31,687	31,020	19,480	6,069	799	99	129,682
Unemployed, looking for:										
Full-time work	104	237	406	458	585	356	44	7	0	2,204
Part-time work	<u>750</u>	<u>316</u>	<u>264</u>	<u>363</u>	<u>333</u>	<u>284</u>	<u>112</u>	<u>11</u>	<u>3</u>	<u>2,441</u>
Total unemployed	854	553	670	821	918	640	156	18	3	4,645
Total labour force	6,904	10,371	25,330	32,508	31,938	20,120	6,225	817	102	134,327

Source: ABS, Macroplan

The following table provides a breakdown of local jobs and the resident locations of the workers who occupy them.

More than three-quarters of the 88,232 local jobs that exist in the Northern Beaches LGA are filled by worker residents of the LGA.

Table 3.3 **Jobs in Northern Beaches – Place of Worker Residence (Employment Sufficiency), 2016**

	No. of Jobs	% Northern Beaches Employees
Northern Beaches (A)	67,575	76.6%
Ku-ring-gai (A)	2,478	2.8%
Hornsby (A)	1,853	2.1%
North Sydney (A)	1,358	1.5%
Central Coast (C) (NSW)	1,272	1.4%
Willoughby (C)	1,234	1.4%
Sydney (C)	1,058	1.2%
Ryde (C)	1,057	1.2%
Parramatta (C)	960	1.1%
Inner West (A)	815	0.9%
Blacktown (C)	780	0.9%
Mosman (A)	702	0.8%
Canterbury-Bankstown (A)	691	0.8%
Cumberland (A)	588	0.7%
The Hills Shire (A)	538	0.6%
Lane Cove (A)	495	0.6%
Randwick (C)	419	0.5%
Other	4,359	4.9%
Total	88,232	100.0%

Source: ABS

The LGA's employment sufficiency rate (i.e. the percentage of local jobs that are filled by local workers) is quite high, at over 76%.

The LGA's employment self-containment rate (i.e. the percentage of local employees that work within the Northern Beaches LGA) is moderately high, at 52%.

Notably, a substantial proportion of employment for the Northern Beaches' working population is located in the Sydney LGA (18.6%) and within the adjacent/neighbouring northern LGAs of North Sydney, Willoughby, Ryde, Ku-ring-gai, Mosman, Lane Cove and Hornsby (approximately 17%)

Table 3.4 Northern Beaches Workforce – Place of Employment (Employment Containment), 2016

	People	People (%)
Northern Beaches (A)	67,575	52.1%
Sydney (C)	24,153	18.6%
North Sydney (A)	6,681	5.2%
Willoughby (C)	5,905	4.6%
No Fixed Address (NSW)	5,763	4.4%
Ryde (C)	3,658	2.8%
Ku-ring-gai (A)	2,126	1.6%
Mosman (A)	1,733	1.3%
Parramatta (C)	1,568	1.2%
Botany Bay (C)	1,095	0.8%
Lane Cove (A)	1,038	0.8%
Hornsby (A)	926	0.7%
Inner West (A)	925	0.7%
The Hills Shire (A)	614	0.5%
Randwick (C)	564	0.4%
Blacktown (C)	511	0.4%
Other	4,847	3.7%
Total	129,682	100.0%

Source: ABS, Macropian

The following table provides a comparison of employment by industry sectors. It lists the sectors that local workers are employed in and the number of local jobs that are available in those sectors.

The most prominent employing industries across the Northern Beaches LGA were:

- 'Professional, Scientific and Technical Services' (13.2%)
- 'Health Care and Social Assistance' (10.7%)
- 'Retail Trade' (9.1%)
- 'Construction' (8.9%)
- 'Education & Training' (8.5%)
- 'Finance and Insurance Services' (6.7%).

Amongst these major sectors, 'finance and insurance services' stands out, in that over 78% of local resident workers employed in this field find work outside of the LGA. Other notable exporters of skilled workers include the 'mining', 'information, media and telecommunications', 'transport and warehousing', 'administrative services' and 'public administration' sectors.

Table 3.5 Employment by Industry – Local Employment and Local Jobs, 2016

	Local Employees (Employed people that live in Northern Beaches)		Local Jobs (Jobs located within Northern Beaches)		Net Employment Importation +/- Exportation -	
	No.	%	No.	%	No.	%
Agriculture, Forestry and Fishing	430	0.33%	388	0.40%	-42	-9.77%
Mining	234	0.18%	81	0.10%	-153	-65.38%
Manufacturing	5,693	4.39%	5,205	5.90%	-488	-8.57%
Electricity, Gas, Water and Waste Services	755	0.58%	468	0.50%	-287	-38.01%
Construction	11,586	8.93%	7,684	8.70%	-3,902	-33.68%
Wholesale Trade	5,277	4.07%	4,489	5.10%	-788	-14.93%
Retail Trade	11,820	9.11%	11,140	12.60%	-680	-5.75%
Accommodation and Food Services	7,763	5.99%	7,517	8.50%	-246	-3.17%
Transport, Postal and Warehousing	3,610	2.78%	1,949	2.20%	-1,661	-46.01%
Information Media and Telecommunications	4,657	3.59%	1,654	1.90%	-3,003	-64.48%
Financial and Insurance Services	8,739	6.74%	1,868	2.10%	-6,871	-78.62%
Rental, Hiring and Real Estate Services	3,116	2.40%	1,899	2.20%	-1,217	-39.06%
Professional, Scientific and Technical Services	17,114	13.20%	8,466	9.60%	-8,648	-50.53%
Administrative and Support Services	4,903	3.78%	2,753	3.10%	-2,150	-43.85%
Public Administration and Safety	5,410	4.17%	2,768	3.10%	-2,642	-48.84%
Education and Training	11,040	8.51%	7,943	9.00%	-3,097	-28.05%
Health Care and Social Assistance	13,922	10.74%	11,458	13.00%	-2,464	-17.70%
Arts and Recreation Services	2,589	2.00%	1,695	1.90%	-894	-34.53%
Other Services	4,811	3.71%	3,979	4.50%	-832	-17.29%
Inadequately described	4,918	3.79%	3,875	4.40%	-1,043	-21.21%
Not stated	1,295	1.00%	955	1.10%	-340	-26.25%
Total	129,682	100.0%	88,232	100.00%	-41,450	-31.96%

Source: ABS, Macroplan

The following tables consider employment characteristics and forecasts that are specific to the Frenchs Forest locality.

There were almost 17,000 employed persons that reside in Frenchs Forest as at 2016. This number is expected to increase to over 25,000 persons by 2056.

Table 3.6 **Persons Employed, 'Frenchs Forest – Belrose' SA2 (2016-56)**

	2016	2021	2026	2031	2036	2041	2046	2051	2056
Agriculture, Forestry and Fishing	8	8	8	8	8	8	8	8	8
Mining	5	5	5	5	5	5	5	5	5
Manufacturing	1,340	1,132	999	917	879	873	886	916	962
Electricity, Gas, Water and Waste Services	186	201	219	239	252	264	274	283	291
Construction	1,016	1,062	1,109	1,171	1,250	1,353	1,444	1,521	1,594
Wholesale Trade	2,826	2,879	2,787	2,701	2,667	2,577	2,489	2,384	2,377
Retail Trade	2,169	2,287	2,351	2,437	2,518	2,637	2,741	2,816	2,892
Accommodation and Food Services	803	851	891	933	974	1,035	1,088	1,135	1,180
Transport, Postal and Warehousing	439	429	404	342	348	343	338	328	330
Information Media and Telecommunications	663	680	682	689	685	685	685	686	692
Financial and Insurance Services	328	363	387	408	433	459	482	502	522
Rental, Hiring and Real Estate Services	147	158	168	177	187	201	213	224	237
Professional, Scientific and Technical Services	2,199	2,492	2,691	2,930	3,198	3,486	3,775	4,040	4,319
Administrative and Support Services	475	496	506	519	537	557	578	595	615
Public Administration and Safety	172	189	204	218	233	248	261	271	282
Education and Training	1,394	1,552	1,715	1,881	2,044	2,224	2,393	2,551	2,693
Health Care and Social Assistance	1,640	2,472	2,783	3,037	3,311	3,633	3,957	4,287	4,650
Arts and Recreation Services	325	354	382	411	441	475	507	535	563
Other Services	782	825	852	886	925	969	1,006	1,037	1,066
Total	16,915	18,436	19,144	19,910	20,897	22,031	23,131	24,126	25,278

Source: TPA (2018)

The following table provides an account of jobs by sector at Frenchs Forest in 2011 and 2016, and a forecast of jobs growth across each sector up to 2056, based on NSW TPA projections.

Table 3.7 Frenchs Forest – Current & Forecast Jobs by Industry, 2016-2056

	2011	2016	2021	2026	2031	2036	2041	2046	2051	2056
Agriculture, Forestry and Fishing	0	0	0	0	0	0	0	0	0	0
Mining	4	5	5	5	5	5	5	5	5	5
Manufacturing	778	716	602	531	485	464	459	465	479	502
Electricity, Gas, Water and Waste Services	40	48	53	57	62	66	69	72	74	76
Construction	177	192	201	210	222	237	256	273	288	302
Wholesale Trade	2,126	2,203	2,245	2,173	2,106	2,079	2,009	1,941	1,859	1,853
Retail Trade	1,026	1,106	1,167	1,199	1,243	1,285	1,345	1,398	1,437	1,475
Accommodation and Food Services	526	568	602	630	660	689	732	770	803	834
Transport, Postal and Warehousing	352	348	341	321	271	276	272	268	261	262
Information Media and Telecommunications	389	409	420	421	426	423	423	423	423	427
Financial and Insurance Services	177	201	222	237	250	265	281	295	307	319
Rental, Hiring and Real Estate Services	60	70	76	80	85	89	96	101	107	113
Professional, Scientific and Technical Services	818	931	1,056	1,140	1,241	1,355	1,477	1,599	1,711	1,829
Administrative and Support Services	234	235	246	251	257	266	276	286	295	305
Public Administration and Safety	83	98	108	116	124	133	141	148	154	161
Education and Training	335	388	432	477	524	569	619	666	710	750
Health Care and Social Assistance	1,108	1,287	2,130	2,412	2,632	2,870	3,149	3,429	3,716	4,030
Arts and Recreation Services	176	200	218	235	253	272	293	313	330	347
Other Services	304	338	357	369	383	400	419	435	449	461
Total	8,710	9,346	10,478	10,864	11,228	11,742	12,321	12,889	13,407	14,052

Source: TPA, Macropian

Frenchs Forest already accommodates over 9,300 jobs and is earmarked to achieve its District Plan target (of between 12,000 to 13,000 jobs) by the late 2030's. Most of the expected jobs growth will occur in 'health care and social assistance', courtesy of the NBH project⁴, and in the 'professional, scientific and technical services' sector.

Notably, fewer people are expected to be employed at Frenchs Forest in the 'manufacturing', 'wholesaling' and 'transport, postal and warehousing' sectors by 2056, suggesting a re-shaping of the locality's principle employment centre, the Frenchs Forest Business Park.

Interestingly, in 2016, of the 9,346 jobs located at Frenchs Forest, 8,135 of these were filled by local residents of the Northern Beaches LGA, representing a sufficiency rate (i.e. the percentage of local jobs filled by local workers) of 87%, being considerably above the overall sufficiency rate for the LGA (76%).

Table 3.8 **Persons Employed in Frenchs Forest-Belrose SA2 that live in Northern Beaches (2016)**

Frenchs Forest – Belrose SA2	
Northern Beaches (A)	8,135

Source: ABS, Macropian

Some key take-outs from this overview of employment characteristics across the LGA and at Frenchs Forest include that:

- A high share of workers within the LGA are engaged in services industries (61%).
- Northern Beaches has **129,682 employed residents** (2016). It provides **88,232 local jobs, 67,575 of which are held by local residents**, representing a 76.5% employment self-sufficiency rating.
- **Approximately 48% of the Northern Beaches employed residents work outside the LGA**, representing a job containment measure of 52%. Sydney CBD (18%) and neighbouring northern LGAs (17%) are major employing locations for Northern Beaches' residents.
- The export of services sector jobs far exceeds that for jobs in the non-service sectors. Over 36,000 of the 41,450 residents (86%) that work outside the LGA work in service-related fields.

⁴ NBH will support around 1,000 operational jobs once fully functional. A further 300 mental health staff presently located at Mona Vale will transfer across to NBH. An operational level of employment at NBH in the order of 1,300 – 2,000 FTE is expected over time. This is reflected in the TPA forecasts.

- An **export of labour resources is partly a natural consequence of scale economies**. As local employment hubs grow, more businesses will migrate to the area to service both the local working and resident population. The extent of this growth, however, at the Northern Beaches will be influenced by the efficiency of its transport services in moving labour into and out of the region.
- At **Frenchs Forest** a high percentage of **existing jobs in the locality (87%) are occupied by LGA residents**.
- The nature of **employment** at Frenchs Forest is projected to change, **becoming more service-oriented**.

3.3 Major projects and investment trends

This section provides a high-level overview of recent investment and construction trends across Sydney and the Northern Beaches.

Commercial development of the type expected to occur at the FFPP tends to be attracted to specific centres that are close to a large labour force and well connected to either public transport or easily accessible by private transport and which provide both business-to-business capacity and access to clients (persons as opposed to businesses).

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

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

Notably, business parks have tended to accommodate a high proportion of smaller businesses seeking affordable strata office property with higher car park to floorspace ratios.

At Norwest in the Hills Shire, for instance, almost half of the available office space is strata office space.

Likewise, the Frenchs Forest Business Park functions as an important business incubator for small-medium (SME) sized businesses⁵.

The table below shows commercial / service sector development in the Northern Beaches that has occurred since 2013 or is 'in the pipeline' to occur, including commercial projects over \$8million in value and medical and education developments over \$5million.

Those projects relevant to Frenchs Forest are highlighted.

Table 3.9 Major Projects - 'Commenced/To Commence' Northern Beaches (2013 onwards)

Project	Address	Suburb
Commercial Projects		
DEE WHY TOWN CENTRE - SITE B - LIGHTHOUSE AT DEE WHY	884-896 Pittwater Rd	DEE WHY
MANLY LEAGUES CLUB SITE	563 Pittwater Rd	BROOKVALE
SKYLINE PLACE MIXED USE DEVELOPMENT	5 Skyline Pl	FRENCHS FOREST
THE CARLYLE	697-701 Pittwater Rd	DEE WHY
OSPREY APARTMENTS	5 Mooramba Rd	DEE WHY
DELMAR PARADE MIXED DEVELOPMENT	2 Delmar Pde	DEE WHY
BROOKVALE HOTEL - BROOKVALE APARTMENTS	511-513 Pittwater Rd	BROOKVALE
CONDAMINE STREET MIXED USE DEVELOPMENT	259 Condamine St	MANLY VALE
PITTWATER RD & OAKS AV MIXED DEVELOPMENT	876-878 Pittwater Rd	DEE WHY
PENINSULA BUSINESS CENTRE	2 Daydream St	WARRIEWOOD
NARABANG WAY - AUSTLINK BUSINESS PARK	12 Narabang Way	BELROSE
RICKARD ROAD SHOP TOP HOUSING	2-8 Rickard Rd	NORTH NARRABEEN
Education Projects		
HARBORD DIGGERS MEMORIAL CLUB	80 Evans St & 4A Lumsdaine Dr	HARBORD
DEE WHY TOWN CENTRE - SITE B - LIGHTHOUSE	884-896 Pittwater Rd	DEE WHY
CURL CURL NORTH PUBLIC SCHOOL	Playfair Rd	NORTH CURL CURL
MANLY VALE PUBLIC SCHOOL	Lot 1768 Sunshine St	MANLY VALE
NB CHRISTIAN SCHOOL - PROJECT BARCELONA	1 Yanderra Rd	DUFFYS FOREST
HARBORD PUBLIC SCHOOL	Cnr Oliver St & Wyandra Av	FRESHWATER
ST AUGUSTINES COLLEGE	Federal Pde	BROOKVALE
OLD PITTWATER RD MIXED USE DEVELOPMENT	97 Old Pittwater Rd	BROOKVALE

⁵ As at 2014, 74% of estate's tenancies occupied space of less than 2,000m². Generally, these SME's have a local employee base and service a local market. As these small businesses grow, they tend to move to more centrally located employment areas, e.g. Chatswood, Gordon, St Leonards, Macquarie Park and Norwest.

KILLARNEY HEIGHTS PUBLIC SCHOOL	10 Tralee Ave	KILLARNEY HEIGHTS
OXFORD FALLS GRAMMAR SCHOOL - BLOCK K	1078 Oxford Falls Rd	OXFORD FALLS
KIDS CLUB NORTH MANLY CHILD CARE	368-376 Pittwater Rd	NORTH MANLY

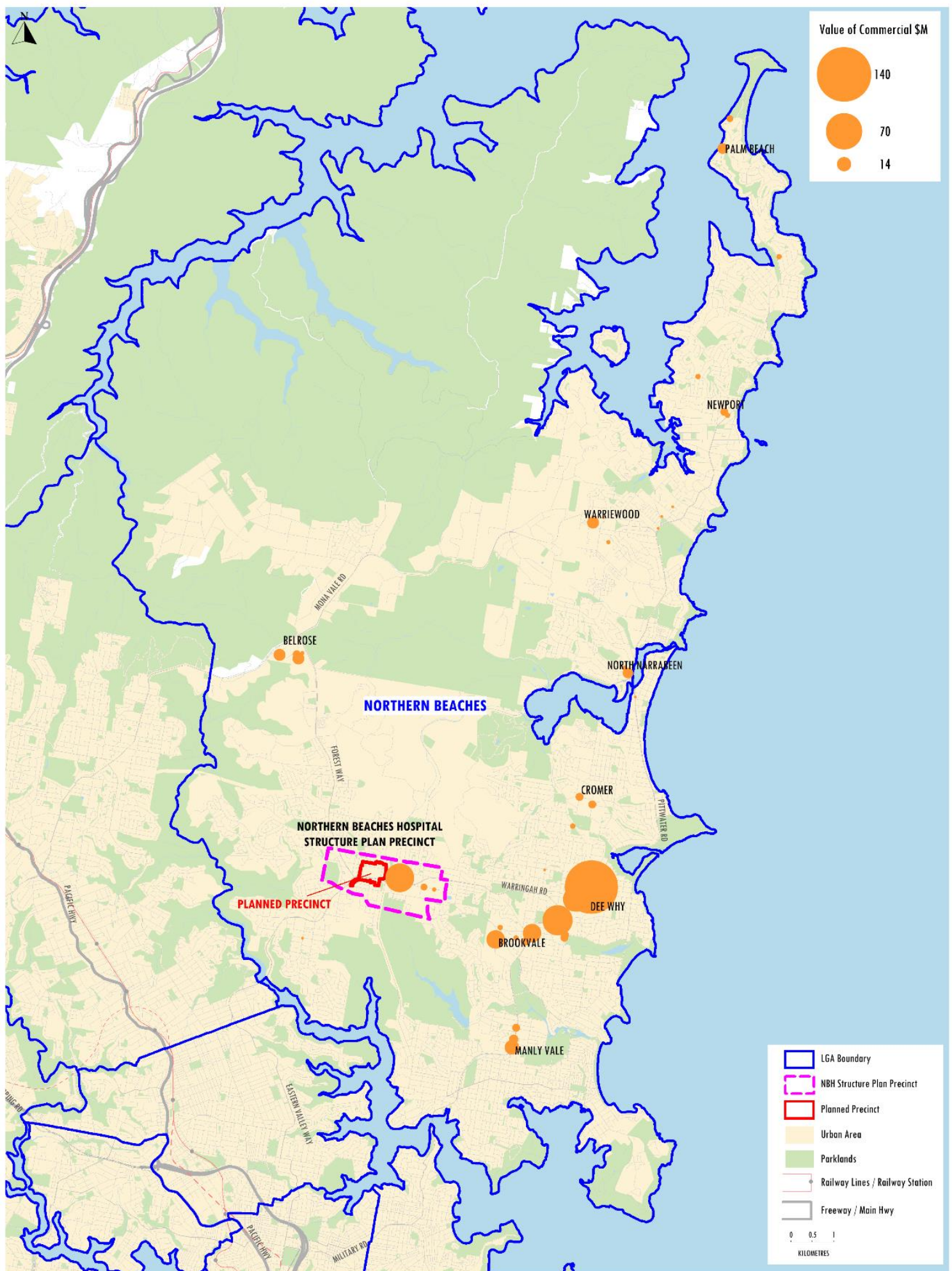
Medical/Health Projects

NORTHERN BEACHES HOSPITAL	Frenchs Forest Rd West	FRENCHS FOREST
TERREY HILLS PRIVATE HOSPITAL	Lot 2 Myoora Rd	TERREY HILLS
BROOKVALE COMMUNITY HEALTH CENTRE	612-624 Pittwater Rd	BROOKVALE
MONA VALE NORTHERN COMMUNITY HEALTH CENTRE	Coronation St	MONA VALE
ARCADIA PRIVATE HOSPITAL PITTWATER	4 Daydream St	WARRIEWOOD
ROYAL FAR WEST CHILD HEALTH & LEARNING CENTRE	14-18 Wentworth St	MANLY
FRENCHS FOREST PRIVATE HOSPITAL	11 Tilley Ln	FRENCHS FOREST
DELMAR PRIVATE HOSPITAL	9-14 Patey St	DEE WHY
BUPA SEAFORTH	550 Sydney Rd	SEAFORTH
SARGOOD CENTRE	1 Brissenden Ave	COLLARROY
BROOKVALE MEDICAL CENTRE	10-12 Dale St	BROOKVALE
MONA VALE HOSPITAL	Coronation St	MONA VALE
DALWOOD FAMILY HEALTH SERVICES BUILDING	21 Dalwood Av	SEAFORTH
SOUTH PACIFIC PRIVATE HOSPITAL	24-28 Beach St	CURL CURL
PITTWATER DAY SURGERY	20 Bungan St	MONA VALE

Source: Cordell Connect, Macroplan

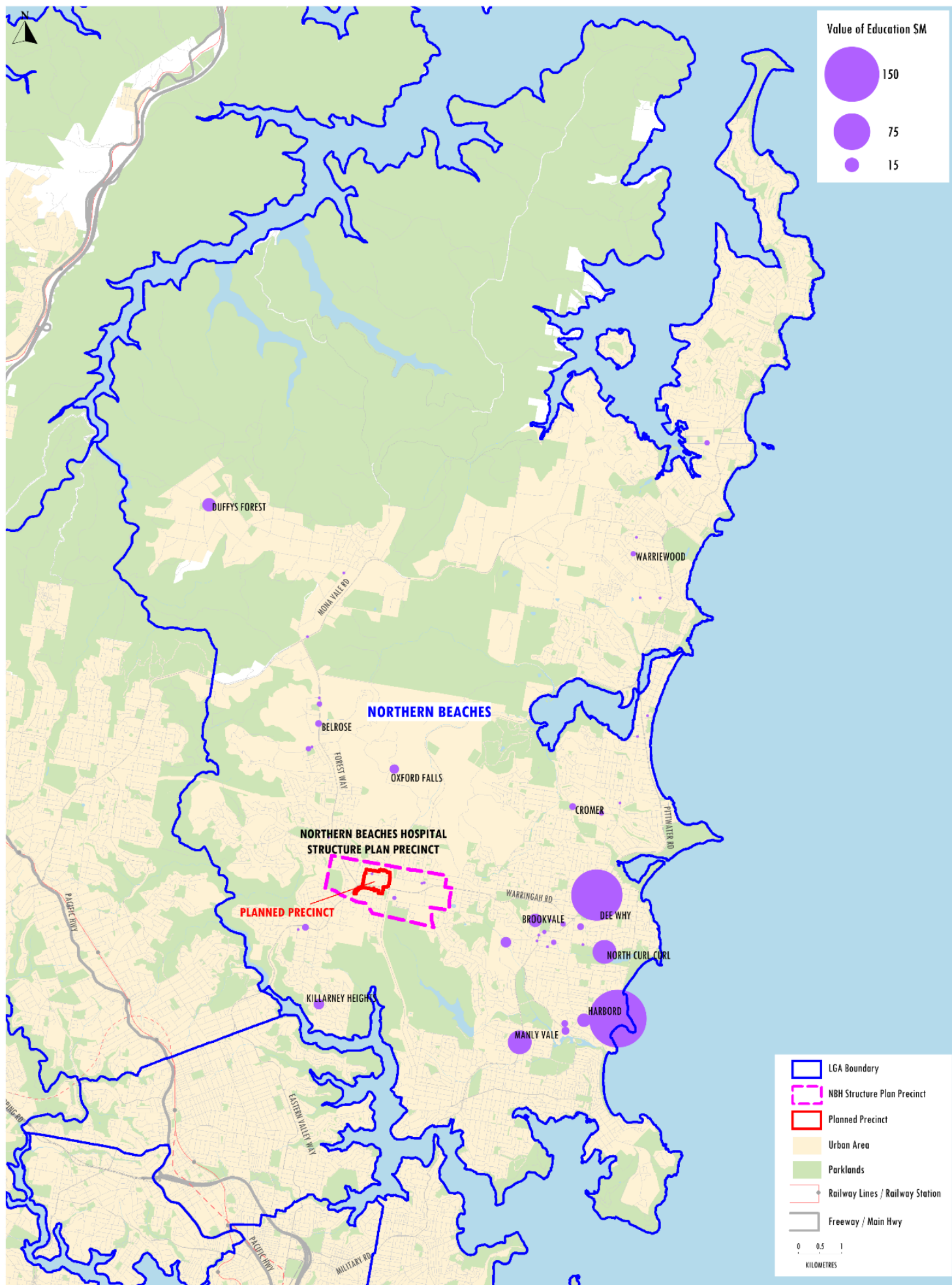
Notably, for ‘office’ development, most investment has occurred in ‘mixed-use’ projects with limited dedicated commercial floorspace.

The location and extent of recent commercial, educational and medical investment across the Northern Beaches LGA is shown graphically in the following maps.



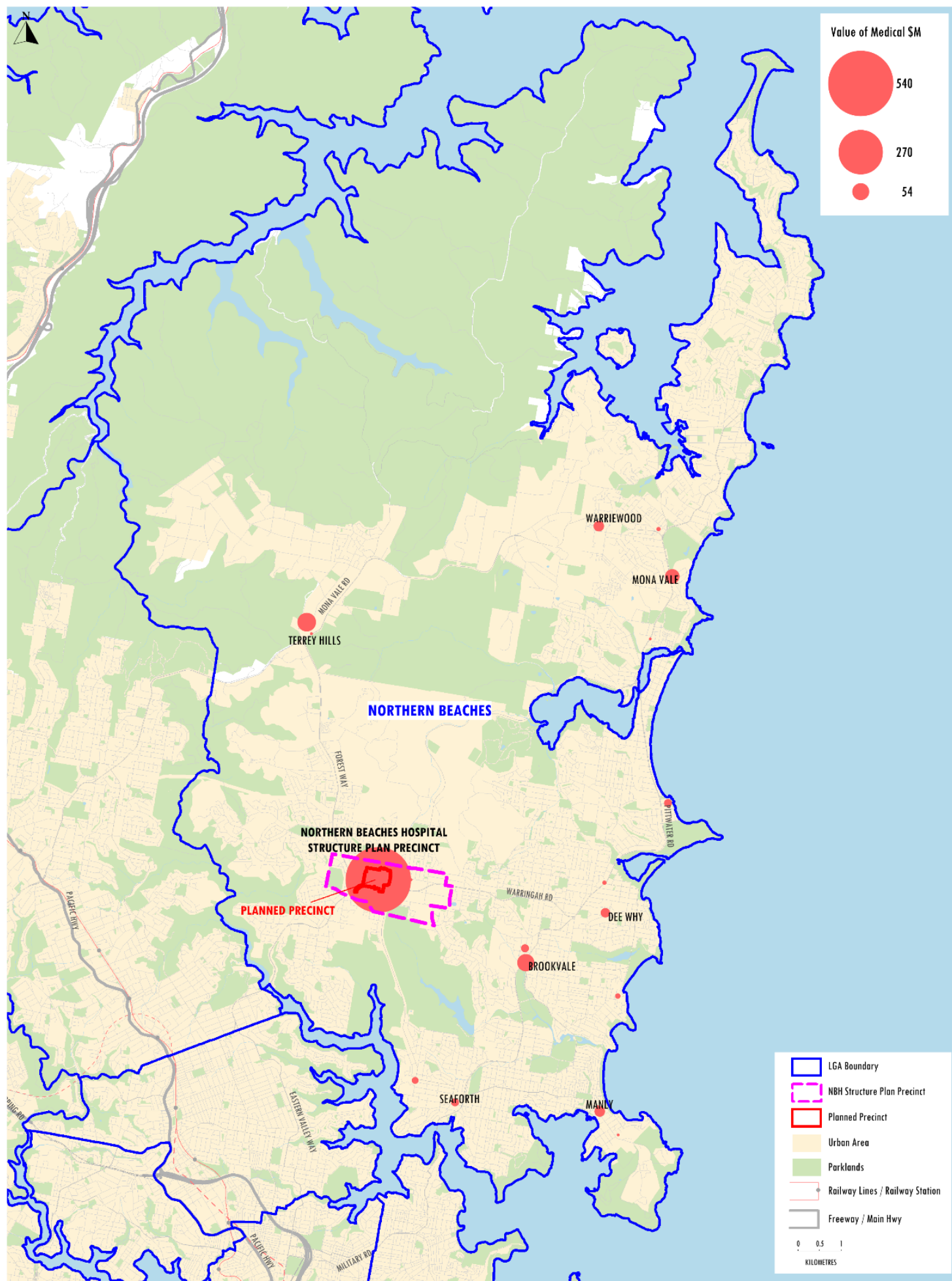
**Map 3.1: Major Commercial Projects
Northern Beaches LGA (2013 onwards)**

Source: Cordell Connect, ABS Custom Data, Macroplan



**Map 3.2: Major Education Projects
Northern Beaches LGA (2013 onwards)**

Source: Cordell Connect, ABS Custom Data, Macroplan



**Map 3.3: Major Medical/Health Projects
Northern Beaches LGA (2013 onwards)**

Source: Cordell Connect, ABS Custom Data, Macroplan

The following table lists **major industrial projects** (over \$30m in value) that have commenced across Sydney since 2016 as well as those in the pipeline to 2019, providing a gauge as to relative attractiveness and competitiveness of the Northern Beaches as a location for such investment. Whilst industrial development is not expected at the FPP, the list provides insight into the scale of new investment and the small share that is attracted to Sydney's northern suburbs.

Table 3.10 Major Industrial Projects, 'Commenced/To Commence' Greater Sydney (2016-2019)

Project Title	Project Address	Project City	Estimated Value
WESTMEAD HOSPITAL	Hawkesbury Rd	Westmead	\$900,000,000
SIMTA MOOREBANK INTERMODAL TERMINAL	Lot 1 Moorebank Av	Moorebank	\$490,000,000
UNIVERSITY OF NSW SCIENCE AND ENGINEERING	Anzac Pde	Kensington	\$176,000,000
WARWICK FARM SELLING CENTRE	Governor Macquarie Dr	Warwick Farm	\$114,884,000
AUSGRID GORE HILL	1 Broadcast Way	Artarmon	\$107,089,000
QUARRYWEST PROJECT DEXUS ESTATE	Lot 18 Reconciliation Rd	Greystanes	\$103,000,000
AUSTRALIAN TECHNOLOGY PARK	2 Locomotive St	Eveleigh	\$100,000,000
EQUINIX SY5 DATA CENTRE	506-518 Gardeners Rd	Alexandria	\$91,489,000
PRESTONS INDUSTRIAL ESTATE	Lot 34 Yarrunga St	Prestons	\$91,145,000
UNSW ELECTRICAL ENGINEERING BUILDING	UNSW	Randwick	\$90,000,000
UNSW BIOMEDICAL PRECINCT	Botany Rd	Randwick	\$88,400,000
ALTIS WAREHOUSE & LOGISTICS HUB	585-649 Mamre Rd	Orchard Hills	\$76,830,000
BMW AND MINI SYDNEY SHOWROOM	65 Craigend St	Darlinghurst	\$66,382,000
FORENSIC PATHOLOGY AND CORONERS COURT	Main Av & Joseph St	Lidcombe	\$65,000,000
MINCHINBURY EMPLOYMENT PARK	60 Wallgrove Rd	Minchinbury	\$60,000,000
MERCEDES BENZ CROYDON	178-204 Parramatta Rd	Croydon	\$50,605,000
WARWICK FARM LOGISTICS & BUSINESS PARK	Governor Macquarie Dr	Warwick Farm	\$50,000,000
HUNTINGWOOD DRIVE DATA CENTRE	35 Huntingwood Dr	Huntingwood	\$47,530,000
OAKDALE CENTRAL	Oakdale Central	Horsley Park	\$40,000,000
TARGET DISTRIBUTION CENTRE	400 Moorebank Rd	Moorebank	\$40,000,000
SIGMA DISTRIBUTION FACILITY	Lot 3A	Horsley Park	\$40,000,000
ST CATHERINES SCHOOL	26 Albion St	Waverley	\$38,683,000
BUNNINGS CARINGBAH	31-35 Willarong Rd	Caringbah	\$37,704,000
GOVERNOR MACQUARIE DR WAREHOUSES	200 Governor Macquarie Dr	Warwick Farm	\$30,802,000

Source: Cordell Connect, Macropian

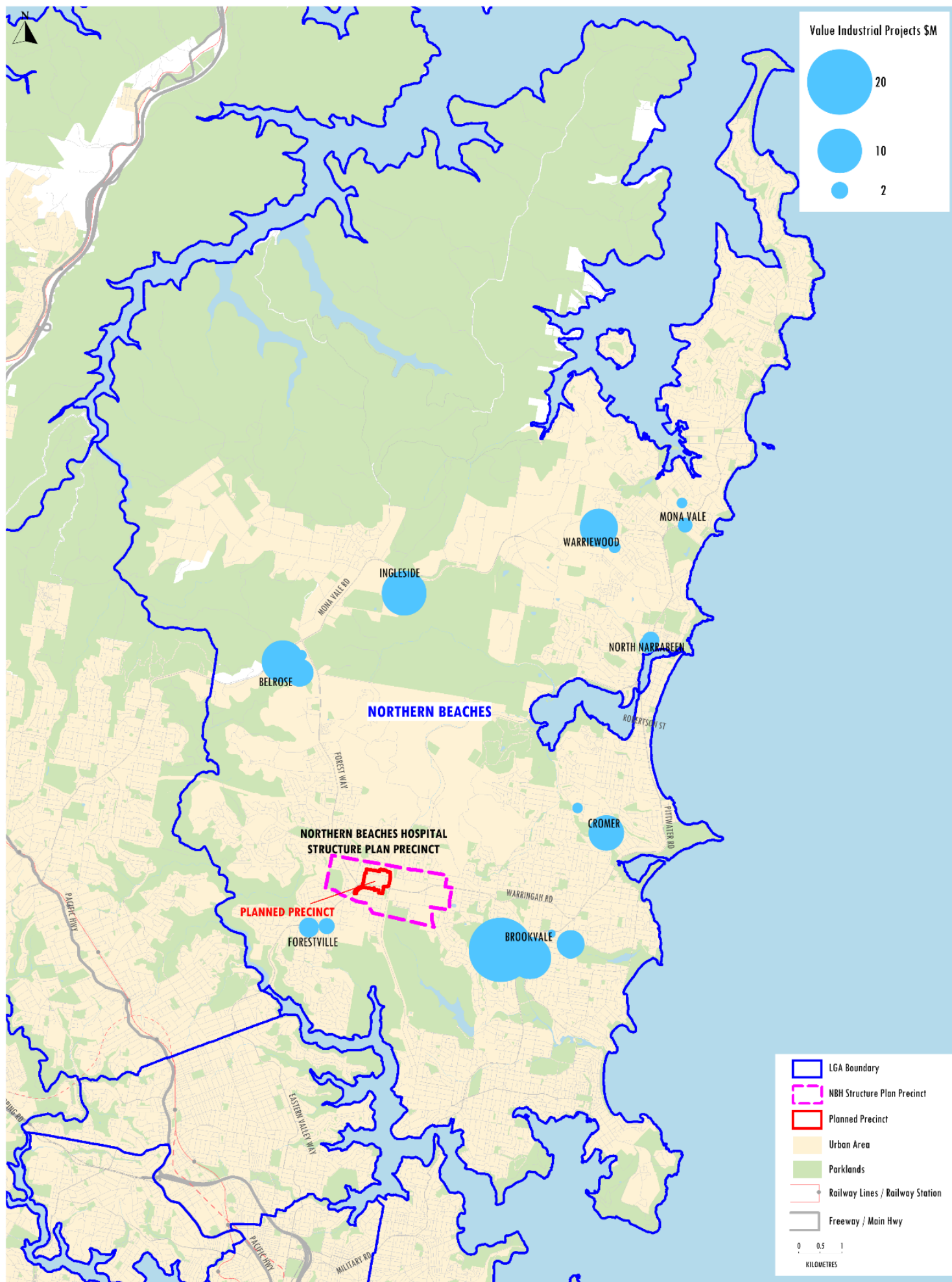
For the Northern Beaches, the following table lists major industrial projects that have occurred or are planned to occur by 2019. The list includes projects valued up to \$30 million.

Table 3.11 Major Industrial Projects, 'Commenced/To Commence' Northern Beaches (2016-2019)

Project Title	Project Address	Project City	Estimated Value
OLD PITTWATER ROAD INDUSTRIAL COMPLEX	138-140 Old Pittwater Rd	Brookvale	\$19,500,000
KIMBRIKI RESOURCE RECOVERY CENTRE	Kimbriki Rd	Ingleside	\$10,000,000
NARABANG WAY WAREHOUSE & INDUSTRIAL UNITS	8 Narabang Wy	Belrose	\$9,168,000
STORAGE KING BROOKVALE	628 Pittwater Rd	Brookvale	\$8,908,000
PENINSULA BUSINESS CENTRE STAGE 3	2 Daydream St	Warriewood	\$7,485,000
NATIONAL STORAGE CROMER	75 South Creek Rd	Cromer	\$6,600,000
NARABANG WAY INDUSTRIAL UNITS	19 Narabang Way	Belrose	\$4,531,000
BILL BUCKLE BROOKVALE SERVICE	196 Harbord Rd	Brookvale	\$4,475,000
BP SERVICE STATION FORESTVILLE	632-634 Warringah Rd	Forestville	\$2,375,000
PITTWATER RD BULKY GOODS WAREHOUSE	1416 Pittwater Rd	North Narrabeen	\$1,972,000
PITTWATER ROAD BULKY GOODS RETAIL PREMISES	1402-1406 Pittwater Rd	North Narrabeen	\$1,960,000
SHELL SERVICE STATION BROOKVALE	198 Harbord Rd	Brookvale	\$1,778,000
VIVA FORESTVILLE SERVICE STATION	665-671 Warringah Rd	Forestville	\$1,690,000
WARRINGAH AUTO BODY REPAIRS	13 Green St	Brookvale	\$1,520,000
7 ELEVEN MONA VALE	24 Barrenjoey Rd	Mona Vale	\$1,425,000
MAGNUM WAREHOUSE	6 Prosperity Pde	Warriewood	\$1,019,000
PONDEROSA PARADE WAREHOUSES	14A Ponderosa Pde	Warriewood	\$933,000
SOUTH CREEK ROAD CONCRETE BATCHING PLANT	160 South Creek Rd	Cromer	\$877,000
PETBARN BELROSE	2 Niangala Cl	Belrose	\$853,000
JOHNSON BROS MITRE 10	73-75 Bassett St	Mona Vale	\$846,000
SHORT ST WAREHOUSE	10 Short St	Brookvale	\$551,000
KINGSTONE INDUSTRIAL BUILDING	3 Mitchell Rd	Brookvale	\$496,000

Source: Cordell Connect, Macroplan

The location and scale of new industrial development across the Northern Beaches is denoted in the following map. In value terms, approximately 82% of all industrial approvals are accounted for.



Map 3.4: Industrial Commencements by Value (\$)
Northern Beaches 2016-2019

Source: Cordell Connect, ABS Custom Data, Macroplan

Some key take-outs from this brief overview of new commercial and industrial investment and its relevance to the Northern Beaches include:

- Most **new ‘office’ development has occurred or is occurring in a ‘mixed-use’ format**, and predominantly in the established centres of Dee Why and Brookvale.
- **Health/medical investment** is significant and **spread across the whole of the LGA**.
- **New private hospitals** are planned at Frenchs Forest Business Park and at Terrey Hills, Warriewood, Curl Curl, Mona Vale and Dee Why, emphasising the **‘local’ nature** of these types of projects.
- There is limited new investment proposed in tertiary education facilities across the LGA.
- **Most new industrial investment of scale (greater than \$30m in value) occurs in locations other than the Northern Beaches or, for that matter, northern Sydney.**
- Local investment in **industrial activity**, however, **is well spread across the LGA**, reinforcing the strong local employment flavour identified at the Frenchs Forest Business Park and expected of other industrial precincts within the LGA.

Together with the previously identified key demographic and employment trends, i.e. an ageing population and an increasingly service-based workforce and jobs outlook, the above-listed development trends suggest that the formation of new local centres, where mixed-use development is encouraged and provides a template for commercial and medical/health services, is critical to the Northern Beaches’ capacity to grow its employment base and to support its ageing population.

Through critical mass these centres are also expected to attract tertiary educational services, although this is more likely to occur over time as new centres develop and mature.

This outlook augers well for the Frenchs Forest Planned Precinct where mixed-use formats with a high degree of public amenity will attract new retail and commercial activity. The employment trajectory of the Planned Precinct will, however, be influenced by the adjacent Frenchs Forest Business Park which has already shown a capacity to attract and absorb office-related and health-related investment. This influence is further investigated in the following chapter.

Section 4: Broader Locality Considerations

As noted previously, the broader locality of Frenchs Forest already accommodates over 9,300 jobs and is earmarked to achieve its District Plan target (of between 12,000 to 13,000 jobs) by the late 2030's. Current major employment sources include the Frenchs Forest Business Park, existing local schools and the Forestway shopping centre.

The development of the FFPP is expected to further drive the locality's employment potential, although it will, to a degree, 'compete' with the adjacent business park (e.g. for commercial development and health-related projects) and will also be influenced, over time, by the efficiency of district transport services in moving labour into and out of the precinct.

The capacity of the adjacent Frenchs Forest Business Park to perform a higher order employment function (as would typically be expected of a fully functioning business park such as Norwest or Macquarie Park) is constrained by its distance from labour markets, Sydney airport and its lack of a 'centralised' public transport network.

The business park, however, performs an important local employment and business incubator function. Notably, also, the business park is currently under-utilised. Future planning for the business park should seek to protect and augment the business park's strong local employment identity, but, at the same time, will also need to consider how it may transition to a more efficient and higher-order employment centre, yielding potentially a greater number of jobs for local residents.

As noted, an increased employment potential of the Frenchs Forest Business Park is not necessarily harmful to the role that the FFPP will play in supporting a multi-functional specialised precinct. Indeed, the success of the broader Frenchs Forest area, including its retail, commercial and residential offerings and its transport initiatives will be underpinned by a strong and high-yielding business presence.

Indeed, the potential for the Frenchs Forest Business Park to perform at a higher land-use efficiency and at a higher job-yielding level ought to be factored into future employment planning for the FFPP.

In this light, it is suggested that the business park's employment potential be further investigated.

We note that the Business Park currently suffers from a high vacancy rate and that redevelopment of existing stock is unlikely across the whole of its 60ha given market depth and achievable rents.

These further investigations could include and consider the benefit of:

- A **more flexible zoning** – that might encourage a broader range of appropriate uses (interim and longer term) that reflect its locational advantages and, in turn, assist the estate to achieve a greater employment dividend.
- An **incentives clause**, similar to that incorporated in the standard instrument to encourage heritage conservation, which could be utilised to allow for identified additional uses, e.g. those which complement the Northern Beaches Hospital and other non-residential development formats expected within the FFPP.

Section 5: FFPP Employment Strategy

A **Precinct Employment Strategy** for the FFPP is outlined in this chapter. The strategy informs the likely sequencing and delivery of recommended land use types.

This section also presents a **‘Statement of Economic and Employment Intent’** for the FFPP, building on the trend analysis of previous chapters and the recommended levels of market-supported floorspace for retail and non-retail land uses that were recommended in the previous Part 1 and Part 2 reports.

The statement seeks to articulate the precinct’s employment expectations and how these can be encouraged through planning principles and practice.

5.1 Precinct Employment Strategy - Integrating Health, Education and Other Uses

A key element of the employment quantification for the FFPP has been to ensure that recommended retail and non-retail allocations are market-grounded and realistically reflect market need.

Our assessment of market demand for employment floorspace has been informed by:

- A detailed retail market assessment which distributes forecast expenditures across a catchment-based ‘trade area’, having regard for market share and existing and planned competition;
- A consideration of other health precincts and a high-level demand assessment of health-related and other commercial land uses that could be attracted to Frenchs Forest; and
- The Destraavis report of June 2018 which considers the aspirational requirements of future potential tenancies at the FFPP including a range of student housing, hotel, tertiary education and retirement/aged care providers.

One of the key considerations in the quantification of employment floorspace at the FFPP has been the share of jobs that is likely to be attracted to the precinct in light of the ‘on-site’ offerings of the NBH and the adjacent business park, i.e. whether the precinct is likely to compete with these adjoining offerings or benefit from them.

In particular, the recommended deliverable floorspace at FFPP has considered the capacity of NBH to provide its own on-site allied health and specialist doctor consultancy rooms and the likelihood of the hospital to provide a specific health-related teaching space.

Ultimately, it is considered that the NBH will not, at least as part of its stage 1 development, incorporate a dedicated teaching space, apart from a relatively minor allocation of 870 sq.m for 'teaching, training, education and research' uses. Given its allocation of 3,250 sq.m for 'specialist consulting suites', and having regard for other health precincts and current offerings in the adjacent business park, it is considered that around 7,000 sq. m of medical-related floorspace can be supported at the FFPP.

This is not to say that, overtime, the FFPP will not develop as an integrated health and education hub. In the mid-to-long-term, new development that complements the NBH is expected to occur – a hotel, aged care/retirement facilities, a tertiary education 'learning centre', plus additional health-related space (e.g. medical clinics or research facilities). Importantly, a component of the FFPP, situated along its Warringah Road frontage, is set aside to accommodate these additional uses.

Notably, the success of the whole precinct, including its retail, commercial and residential offerings and its transport initiatives, is reinforced by a strong and high-yielding adjacent business park.

5.2 Development Sequencing and Delivery

Having 'sized' the provision of retail, health/medical and other commercial floorspace to reflect market demand, it is also necessary to consider the sequence of its delivery over the short-medium-long term.

In this regard, we consider the likelihood for specific employment space to be provided during specific phases of the FFPP project – its establishment phase (a short-term period of 0-5 years); its growth phase (being 5-10 years) and at capacity (being over the 10-25-year timeframe).

Initially, in the short-term, the precinct's development will be anchored by its retail and residential uses, occupying a central 'B4 mixed-use' core of the site. Mixed-use formats with a high degree of public amenity and transport services provide a strong attraction for new residential, retail and associated development.

In the medium-term, precinct activation is expected to be driven by the advent of short-stay accommodation, new medical suites, key-worker and continued aged care/retirement provisions and co-work commercial floorspace.

Over the longer term educational/training/research facilities are expected to develop, in addition to a strengthening of hotel, key-worker housing and other commercial uses.

The recommended target employment floorspace levels for each employment category (retail, health/medical, commercial etc) and the likely sequencing of its delivery is outlined in the following table.

Table 5.1 FFPP - employment uses & jobs dividend over time

Frenchs Forest Planned Precinct - indicative composition - non-retail & residential uses							
Category	Emp. Density (sq.m)	Short-medium		Medium 5-10 yrs		Long 10-25 yrs	
		FF PP GLA (sq.m)	Emp. Dividend (workers)	FF PP GLA (sq.m)	Emp. Dividend (workers)	FF TC GLA (sq.m)	Emp. Dividend (workers)
Northern Beaches Hospital	-	61,711	1,000	61,711	1,300	80,224	2,000*
Medical imaging & Nuclear Medicine	30	1,475	49	1,475	49	1,475	49
Pathology	35	382	11	382	11	382	11
Pharmacy	35	387	11	387	11	387	11
Medical Clinic	30	400	13	400	13	400	13
Specialist Suites	30	3,250	108	3,250	108	3,250	108
Education / training	35	870	25	870	25	870	25
Retail	<u>35</u>	<u>1,525</u>	<u>44</u>	<u>1,525</u>	<u>44</u>	<u>1,525</u>	<u>44</u>
Total NBH floorspace/emp. dividend		70,000	1,261	70,000	1,561	88,513	2,261
Other retail uses							
Supermarket (major)	30	2,000-5,300	67-177	2,000-5,300	67-177	2,000-5,300	67-177
Mini-majors	30	1,000-2,000	33-67	1,000-2,000	33-67	1,000-2,000	33-67
Specialities	<u>35</u>	<u>2,650-5,250</u>	<u>76-150</u>	<u>2,650-5,250</u>	<u>76-150</u>	<u>2,650-5,250</u>	<u>76-150</u>
Total Retail		5,650-12,550	176-393	5,650-12,550	176-393	5,650-12,550	176-393
Ancillary non-retail**	60	2,000-3,750	33-63	2,000-3,750	33-63	2,000-3,750	33-63
Other non-retail & non-residential uses							
Consulting suites / medical related	30	1,000	33	2,500	83	4,000	133
Medical centre / allied	25	1,000	40	1,500	60	3,000	120
Hotel (4-stars)***	-	0	0	15,000	214	15,000	214
Education / training / research	30	0	0	2,500	83	10,000	333
Child care	60	1,500	25	1,500	25	1,500	25
Nursing accommodation / facilities		0	0	12,500	0	12,500	0
Fitness / wellbeing	70	1,000	14	4,000	57	4,000	57
Retirement / aged care	150	10,000	67	10,000	67	20,000	133
General commercial / innovation / co-work	<u>25</u>	<u>4,500</u>	<u>180</u>	<u>8,000</u>	<u>320</u>	<u>10,000</u>	<u>400</u>
Total other non-residential floorspace	-	19,000	359	57,500	910	80,000	1,416
Total FFPP floorspace/ emp. Dividend		96,650-105,300	1,830-2,076	135,150-143,800	2,680-2,927	176,163-184,813	3,887-4,133
Notes:							
NBH - 70,000 sq.m (10 storeys). 488 beds, 14 theatres, six surgical suites							
* Assumes potential for growth in capacity to meet future demand at NBH (30-40%)							
** Banks, Services, Gym and Childcare etc.							
*** 1 employee per 2 hotel rooms							

5.3 Statement of Economic and Employment Intent

Frenchs Forest presently accommodates around 9,300 jobs. As a specialised health and education hub, it is earmarked to accommodate between 12,000 – 13,000 jobs.

The new Northern Beaches Hospital will open in late 2018 and will support knowledge-intensive jobs, innovation and service delivery.

Our analysis of relevant key demographic, employment and construction trends suggests that the formation of new local centres within the Northern Beaches LGA, where mixed-use development is encouraged, and which provide a template for commercial and medical/health services, is critical to the LGA's capacity to grow its employment base and to support its ageing population.

For the FFPP, our work points to an increased density capacity, both in resident population and employment terms, enabling a vibrant, multi-purpose, 18-hour precinct, supporting a shift in travel mode choice that will further enhance the precinct's employment efficiency.

New mixed-use development at FFPP, complemented by a high-quality public domain, including open space provisions, will attract retail and commercial activity, providing a unique live-work precinct that aligns with the resident population's skill sets and employment needs. Further, our analysis of supportable retail and non-retail floorspace within the precinct provides a market-based blueprint for a range of employment uses to be delivered over the life of the project.

The Frenchs Forest Planned Precinct is a planned health and education hub -

- ***The new hospital and improved transport links will be a catalyst for revitalisation of the area, supporting a vibrant town centre, new homes and jobs, both health and education-related and across a range of other sectors, attracted to the site by its central location and the opportunity to co-locate with the NBH.***
- ***The precinct, based around its new town centre adjacent to the hospital, can support an additional 4,000 jobs.***
- ***Jobs growth can be further amplified through integration with the adjacent business park, which is expected to mature as a higher-order employment precinct.***

New employment at the FFPP will be achieved by:

- **New jobs associated with the Northern Beaches Hospital** – the hospital will commence operation with around 488 beds but has capacity to expand its capacity by 30% via building extensions on the current hospital site. Initially, NBH will support around 1,000 operational jobs. A further 300 mental health staff presently located at Mona Vale will transfer across to NBH. An operational level of employment at NBH in the order of 1,300 – 2,000 FTE is expected over time.
- **Additional services incorporated within the NBH complex** – new floorspace is allocated to private doctor suites, medical imaging, allied health, a pharmacy and a retail provision within the NBH building. This floorspace will be separately leased and operated and is anticipated to generate around 260 additional jobs upon the hospital's commissioning.
- **New retail development** in the Frenchs Forest Town Centre – between 7,000 – 16,000 sq.m of new retail and ancillary floorspace is anticipated at the new centre. Retail and associated development is expected to generate between 200 to 450 jobs.
- **Other non-retail floorspace** will be attracted to the FFPP and is expected to develop over the life of the project, some initially in association with the centre's retail offer and other facilities (e.g. short-stay accommodation, a tertiary educational campus) over time. Based on our projections of market need and likely supply, it is anticipated that a further 350 to 1,400 jobs will be generated from this additional floorspace.

In all, an additional 4,000 jobs are expected to be accommodated within the FFPP.

The employment capacity of the FFPP will be guided by the following principles and practices:

- The application of a **B4 mixed-use zoning** to the town centre component of the FFPP, allowing for ground/first floor retail and related commercial activation that is expected to flow out and into adjacent open space areas.
- The provision of a **high-quality public domain** at the ground level – the centre will need high quality public places and parks for workers and nearby residents. The allocation of suitable open space provisions ought to occur in the early planning of the precinct.
- The setting aside of a **commercial strip of land along the Warringah Road frontage** of the site to accommodate medium-long term non-retail land uses that will be attracted to the precinct over time. A commercial zoning is recommended for this strip of land, which will be almost a hectare in area, is expected to accommodate an educational campus, free-standing office floorspace (which

could incorporate co-work space for business start-ups), a hotel, an aged care and retirement offer and other uses.

Based on separate independent work, it is understood that that minimum affordable housing provisions will be integrated into the expected residential yields for the FFPP and adjacent lands..

This provision could either be achieved as a percentage component of each private housing development project, or potentially involve the identification and allocation of a specific site for, say, key worker housing.

An affordable housing outcome at FFPP could be attained through the project procurement process, either directly with community housing providers, the general industry or through education providers, noting that nursing accommodation at the site would be a desirable outcome⁶.

It is recommended that the provision of affordable / key worker housing form part of the contractual arrangements for the successful developer of the site.

Furthermore, it is recommended that the purpose and function of the adjacent Frenchs Forest Business Park be reviewed to account for the proximate location of the NBH, with a view to accommodating its transition to a more efficient business park and higher-order employment centre.

In conclusion, based upon the research and market investigations undertaken, the specific employment categories and their related job targets, over time, for the FFPP are presented in the table below.

⁶ Avondale College, for example, provides on-site nursing accommodation and training at the SAN hospital's Wahroonga campus.

Table 5.2 FFPP – anticipated employment delivery over time

Frenchs Forest Planned Precinct - employment dividend over time			
Category	Short-medium Emp. Dividend (workers)	Medium 5-10 yrs Emp. Dividend (workers)	Long 10-25 yrs Emp. Dividend (workers)
<u>Preliminary/indicative</u>			
<i>Northern Beaches Hospital</i>			
Northern Beaches Hospital	1,000	1,300	2,000*
Medical imaging & Nuclear Medicine	49	49	49
Pathology	11	11	11
Pharmacy	11	11	11
Medical Clinic	13	13	13
Specialist Suites	108	108	108
Education / training	25	25	25
Retail	<u>44</u>	<u>44</u>	<u>44</u>
Total NBH floorspace/emp. dividend	1,261	1,561	2,261
<i>Other retail uses</i>			
Supermarket (major)	67-177	67-177	67-177
Mini-majors	33-67	33-67	33-67
Specialities	<u>76-150</u>	<u>76-150</u>	<u>76-150</u>
Total Retail	176-393	176-393	176-393
<i>Ancillary non-retail**</i>	33-63	33-63	33-63
<i>Other non-retail & non-residential uses</i>			
Consulting suites / medical related	33	83	133
Medical centre / allied	40	60	120
Hotel (4-stars)***	0	214	214
Education / training / research	0	83	333
Child care	25	25	25
Nursing accommodation / facilities	0	0	0
Fitness / wellbeing	14	57	57
Retirement / aged care	67	67	133
General commercial / innovation / co-work	<u>180</u>	<u>320</u>	<u>400</u>
Total other non-residential floorspace	359	910	1,416
Total FFPP floorspace/ emp. Dividend	1,830-2,076	2,680-2,927	3,887-4,133
Notes:			
NBH - 70,000 sq.m (10 storeys). 488 beds, 14 theatres, six surgical suites			
* MacroPlan has noted that there is potential for growth in capacity to meet future demand at NBH (30-40%).			
** Banks, Services, Gym and Childcare etc.			
*** 1 employee per 2 hotel rooms			

Source: Macroplan

Appendix 1: Frenchs Forest Planned Precinct



Planned Precinct Area —

Appendix 2: Planning Literature Review

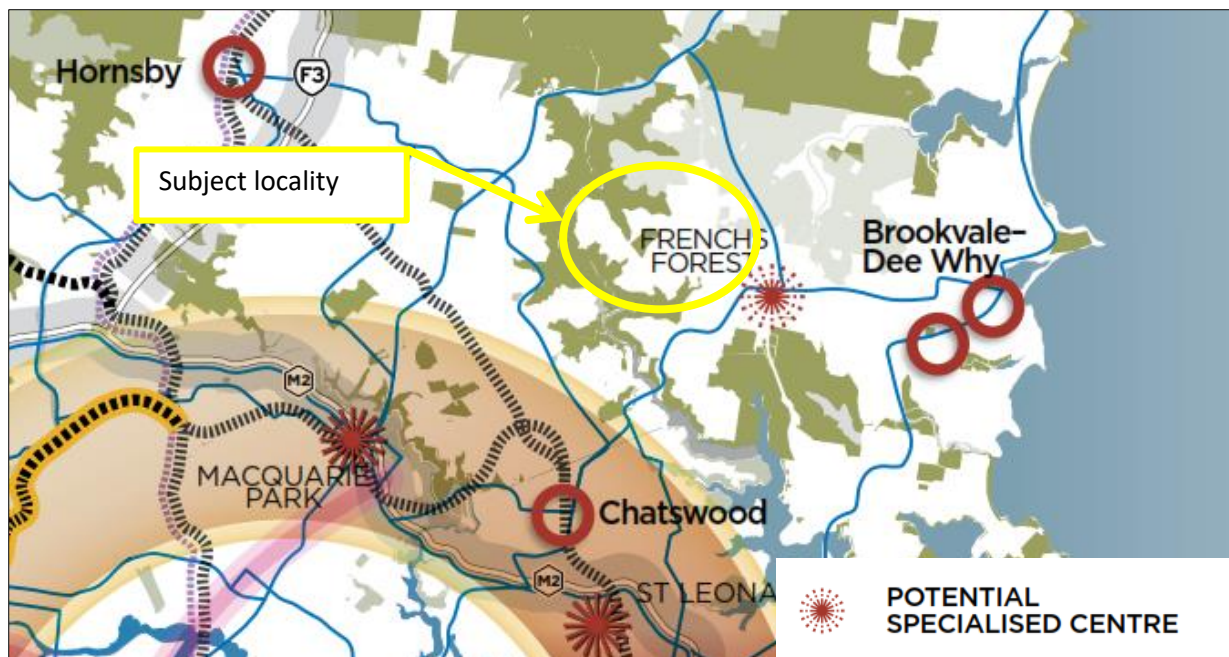
This appendix outlines the key findings from historical planning documentation relating to the Northern Beaches LGA and to the Frenchs Forest locality. This history provides a relevant background to the Frenchs Forest Planned Precinct (FFPP) and how it has evolved over the course of various planning strategies and approaches.

More recent planning strategies (i.e. the Greater Sydney Commission's *Sydney Region Plan* and its *North District Plan*) are discussed in Section 2 of this report.

1. Previous State & Regional Strategies and Policies

Sydney Metropolitan Plan 2036

The previous Metropolitan Plan 2036 designates the site of the Northern Beaches Hospital as a 'Potential Specialised Centre'.



Source: Sydney Metropolitan Plan 2036

Specialised Centres generally contain either airports, ports, hospitals, universities, or clusters of research and business activities. They are recognised for the agglomeration economies that they offer and have a primary significance as employment destinations.

As these centres are expected to perform a vital economic and employment role, the State Government has a strategic interest in their success.

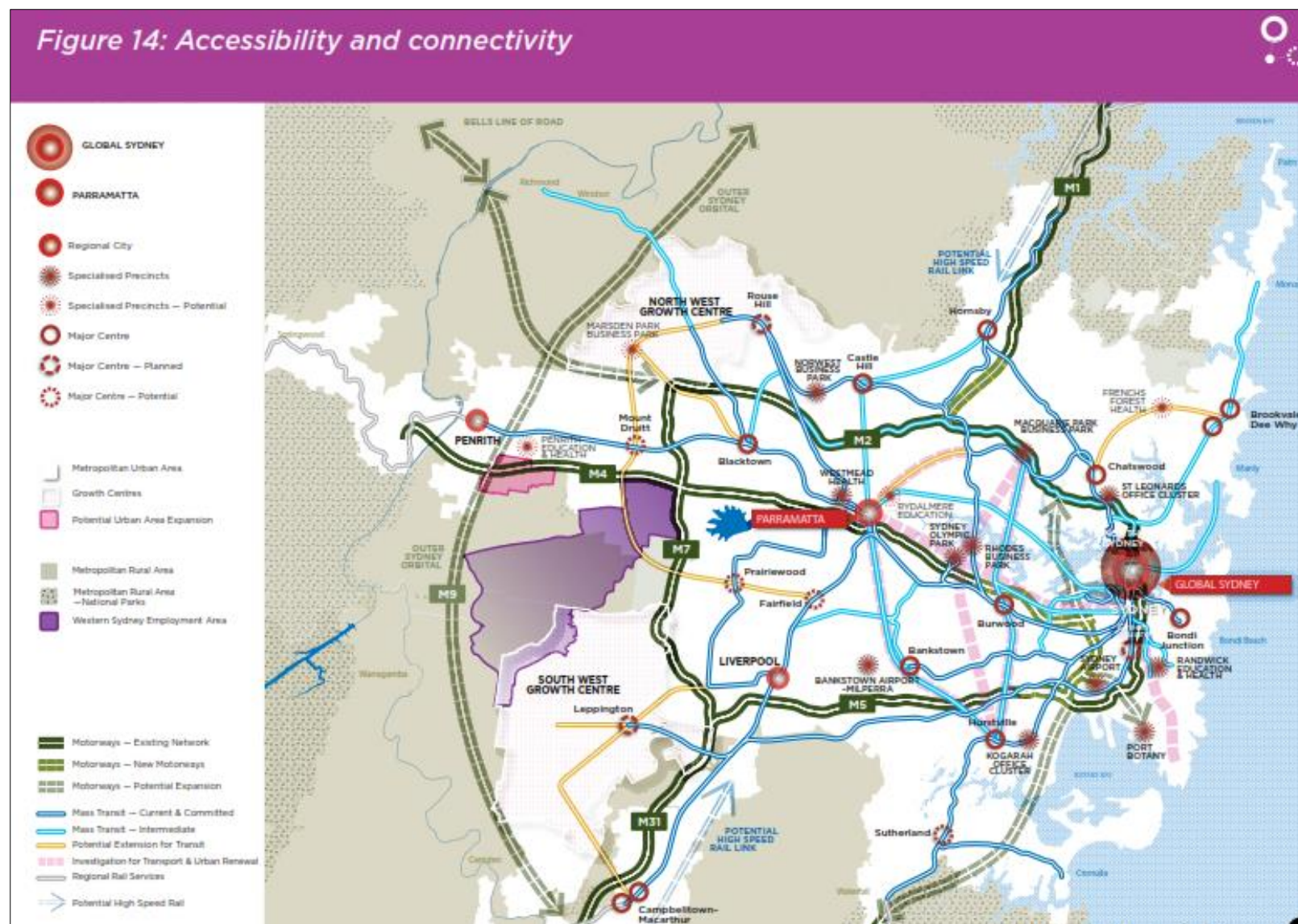
Draft Metropolitan Strategy for Sydney 2031

Under the previous *Draft Metropolitan Strategy for Sydney 2031* the site was designated as a 'Potential Specialised Precinct'.

Specialised Precincts are expected to accommodate a minimum of 8,000 jobs, with a potential for more than 12,000 jobs, although specific employment targets for each centre are not nominated.

The Strategy suggests that Potential Specialised Precincts “would need to be located near existing public transport and/or be supported by public transport improvements”.

The Strategy identifies a 'potential extension for transit' connecting Brookvale/Dee Why to Chatswood via Frenchs Forest. Whilst the Strategy suggests a program of corridors that will need to be investigated and protected for future transport investment, no specific mention is made of mechanisms to lock-in or protect the identified transit 'extension' that runs through the site.



Source: Draft Metropolitan Plan for Sydney 2031

Draft North Subregion Plan

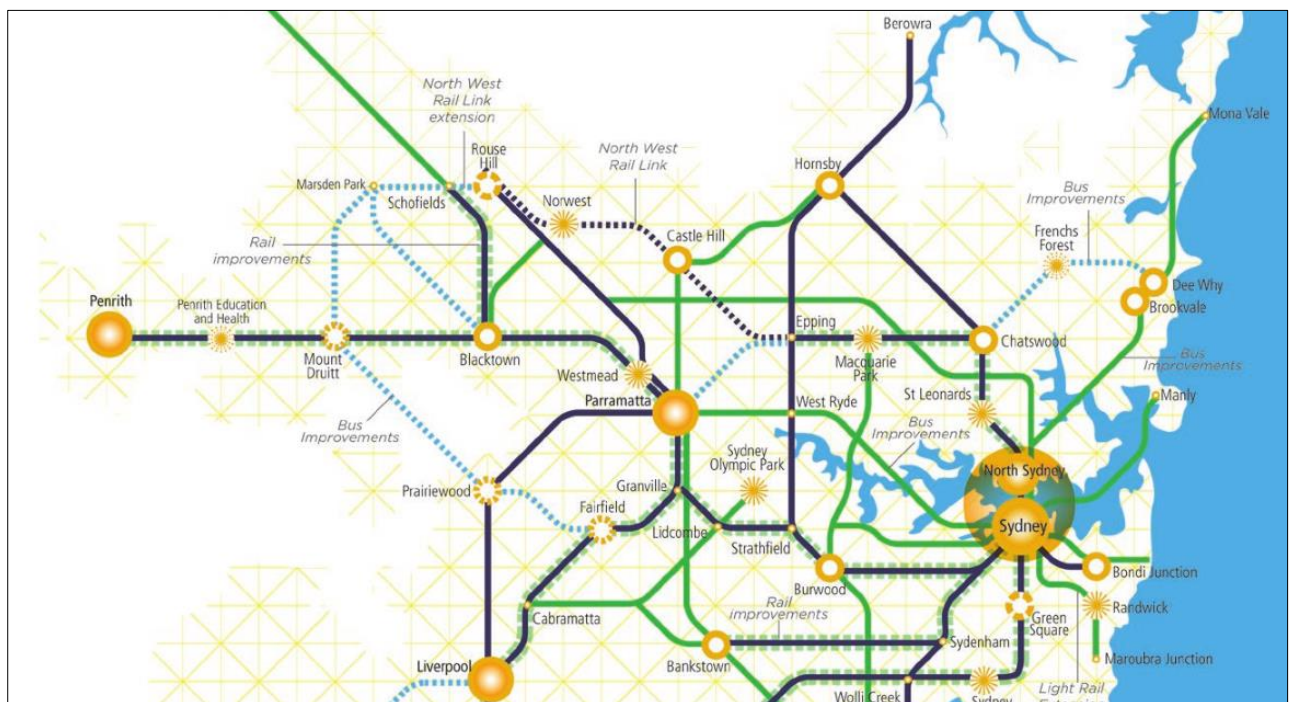
The previous Draft Metropolitan Strategy for Sydney 2031 incorporates a series of region-specific growth strategies. The draft Plan for the North Subregion applies to the LGAs of Hornsby, Ku-ring-gai, Manly, Pittwater and Warringah. Under this Plan the previous Draft North Subregion Plan, the Frenchs Forest Potential Specialised Centre is expected to “capitalise on the growing cluster of hospital and health-related uses with associated research/business park opportunities to stimulate local jobs”.

Little other specific detail of relevance to Frenchs Forest is provided, other than the identification of the need to “improve connections to the Global Economic Corridor via North Sydney and cross-regional links with Chatswood via Brookvale–Dee Why” as a metropolitan priority and the designation of regional housing and employment targets, being:

Housing:	+19,000 by 2021 +37,000 by 2031
Employment:	+22,000 by 2021 +39,000 by 2031

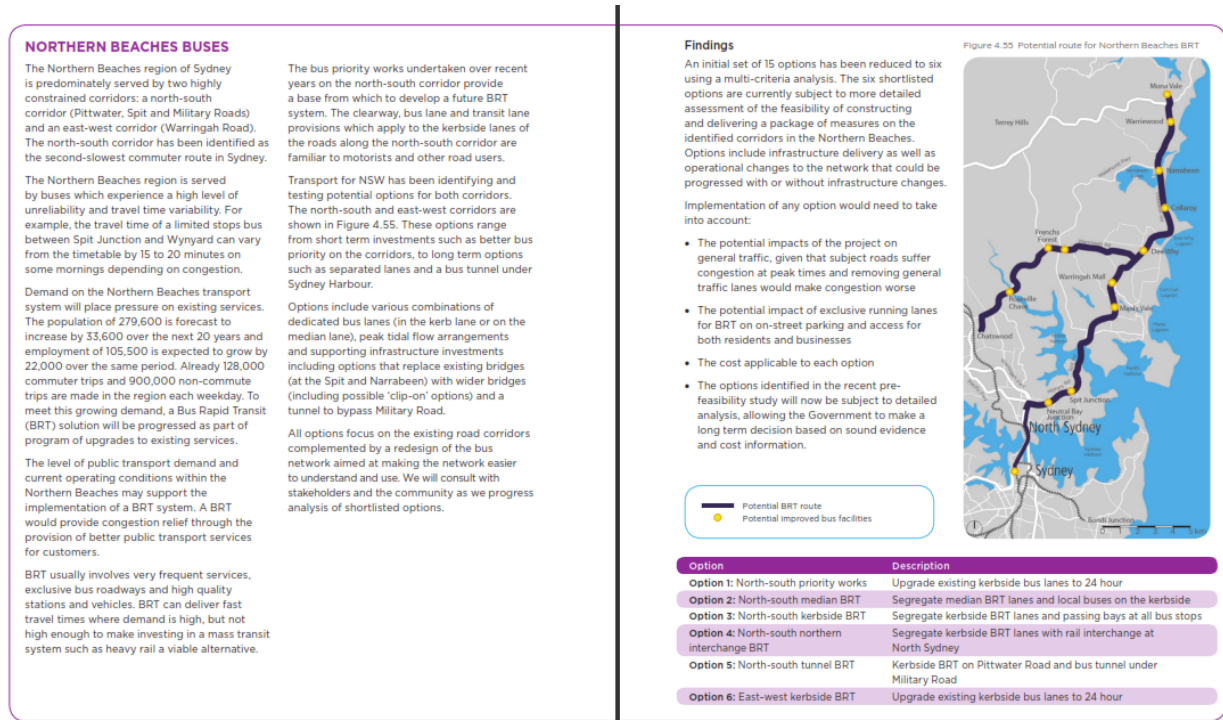
NSW Long Term Transport Master Plan

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



Source: NSW Long Term Transport Master Plan

The Mona Vale-CBD travel route is identified as one of the most constrained in Sydney. Consequently, the provision of a Northern Beaches Bus Rapid Transit (BRT) network extension is identified as a potential phase three strategic action (5-10+ years). This phase could see the construction of major new bus infrastructure, subject to further detailed assessment of route options and costs.



Source: NSW Long Term Transport Master Plan

Sydney's Bus Future 2013

The Sydney's Bus Future strategy was released by TfNSW in December 2013 as a long term plan to redesign the metropolitan bus network to meet customer needs now and into the future.

With the aim of delivering a 'simpler, faster, better' bus network, the strategy establishes a three-tiered operational network – rapid, suburban and local. The strategy identifies the Northern Beaches as a potential Bus Rapid Transit service and confirms Mona Vale-Sydney CBD as a priority rapid network, designating Pittwater Road as the main route.

Integrating Land Use and Transport -The Right Place for Business and Services

The assertion of this policy is that businesses and services which generate transport demand should be situated in locations (centres) that offer a choice of transport modes and encourage people to make fewer and shorter trips.

The purpose of the policy is to:

- Better integrate land use and transport planning and development
- Provide transport choice and manage travel demand
- Reduce growth in the number and length of private car journeys
- Make walking, cycling and public transport use more attractive.

NSW Draft Activities Centres Policy

In accordance with established planning practice, the Draft Activity Centres Policy establishes a preference to protect existing or new traditional urban centres.

However, the draft policy also recognises the need for flexibility in urban planning, as not all retail oriented land uses are suited to traditional centres. Further, the draft policy recognises the need to promote competition and consumer choice.

Employment Lands Development Program & Employment Lands Task Force

The Employment Lands Development Program ('ELDP') was developed as a means of monitoring the consumption of existing, and production of new employment lands in metropolitan Sydney. The ELDP categorises the Frenchs Forest Business Park as 'existing employment lands'.

'Employment lands' are defined as "concentrated areas of economic activity located out of urban centres that are zoned to meet diverse requirements including manufacturing; logistics, transforming and warehousing of goods; service and repair trades and industries; integrated enterprises with a mix of administration, production, warehousing, research and development; and urban services and utilities."

According to the Employment Lands Development Program, the Northern Beaches LGA has 196ha of zoned industrial land with less than 1ha identified as undeveloped.

The Frenchs Forest Business Park is identified as being all-but fully developed.

District	LGA	Business Park Precinct	Jan-15 (Ha)			Jan-16 (Ha)			Jan-17 (Ha)		
			Undeveloped	Developed	Total	Undeveloped	Developed	Total	Undeveloped	Developed	Total
Eastern City	Parramatta/Canada Bay	Sydney Olympic Park/Rhodes	1.5	77.3	78.8	1.5	77.3	78.8	1.5	50.0	51.5
North	Ryde	Macquarie Park	16.2	144.4	160.6	14.2	146.4	160.6	13.7	147.0	160.7
North	Northern Beaches	Frenchs Forest	1.4	55.1	56.5	1.3	55.2	56.5	1.3	55.2	56.5
Western City	Camden/Liverpool	Leppington North	92.3	-	92.3	92.3	-	92.3	92.3	-	92.3
Western City	Penrith	Sydney Science Park	-	-	-	-	-	-	150.6	-	150.6
Central City	Blacktown	Marsden Park	93.7	29.4	123.1	90.7	32.5	123.2	84.4	38.0	122.4
Central City	The Hills	Box Hill	67.3	2.1	69.4	66.5	2.9	69.4	76.6	2.9	79.5
Central City	The Hills	Norwest	36.1	120.6	156.7	31.7	125.0	156.7	27.4	129.4	156.8
Total			308.6	429.0	737.6	298.2	439.3	737.5	447.8	422.5	870.3

Source: Employment Lands Development Program (NSW DPIE)

2. Local Strategies and Policies

Warringah Employment Study [2013]

Prepared by SGS, this report considers the potential for the LGA to accommodate the additional employment capacity target of 12,500 jobs from 2001 to 2031 as set by the Draft North East Subregional Strategy (equivalent to an additional employment target of 7,500 jobs for the period from 2013 to 2031).

The study suggests that the Northern Beaches Hospital at Frenchs Forest will create significant opportunities for employment growth in health and wellbeing industries, noting that a small health related cluster of businesses and services related to the medical sector (pathology, x-ray, and physiotherapy) is growing in Frenchs Forest “with the knowledge and certainty that the new level 5 Frenchs Forest Hospital has been endorsed by the NSW State Government”.

The report further suggests that this clustering of health activities is likely to spur new interest in education, medical related research and pharmaceuticals industries, potentially creating significant economic and employment opportunities and strengthening both north-south and east-west transport corridors.

Further investment in transport infrastructure, however, is identified as necessary to accommodate this potential growth.

Warringah Council Economic Development Plan [2011]

Warringah Council’s Economic Development Plan acknowledges that Warringah has the largest economy of the SHORC Councils, with a stable, highly-skilled and educated workforce and increasingly diverse economic base.

The Plan seeks to confirm Council’s commitment to reducing obstacles and progressing actions that maximise opportunities for economic development.

The Plan’s expectations for Frenchs Forest are largely in line with other strategy documents in that *“...the area is envisaged ... as supporting the clustering of health, technology and medical device companies around a new hospital which is the catalyst for employment and business growth. Frenchs Forest will continue to support larger businesses and niche employment opportunities for a range of specialists ... who ... live and work locally.”*

Notably, the Plan suggests that the Frenchs Forest Specialised Centre is anticipated to accommodate up to 12,000-17,000 additional jobs (including 5,000 hospital jobs) out of the North-East subregion's overall target of 23,000 jobs by 2036, as nominated under the Metropolitan Plan for Sydney 2036.

The Frenchs Forest Specialised centre is identified by the Plan as a regional employment destination, and as a centre of sustainable development and architectural excellence.

Shaping Our Future [SHOROC, 2010]

The *Shaping Our Future* report was developed by the Shore Regional Organisation of Councils ('SHOROC'), comprising the LGAs of Mosman, Manly, Pittwater and Warringah Council's.

The strategy acknowledges the challenges of accommodating an additional 30,000 people over the next 20 years (an 11% increase) and the resultant dwelling and jobs targets that have been set for the region (+22,800 dwellings, including a potential 4,900 at Ingleside and 20,800 jobs).

The Strategy suggests that the housing and jobs targets can be sustainably met, with growth focussing on four key areas (Dee Why/Brookvale, Frenchs Forest, Terrey Hills and Warriewood/Ingleside). The Strategy confirms, however, that major infrastructure investment in transport and health are needed to enable this growth to occur.

The report suggests that Frenchs Forest is on a major transport route and is a logical choice for as a specialised centre, with housing and employment based around the new hospital. It calls for the grade separation of the Wakehurst Parkway/Warringah Road intersection to avoid gridlock and for upgrades to Wakehurst Parkway to provide flood-free access.

The report also identifies the need for the region's primary east/west transport route between Dee Why/Brookvale and Chatswood to be upgraded to relieve pressures on the north/south (Pittwater Road) corridor. It nominates the provision of a fast public transport link (a Bus Rapid Transit System) as a priority investment for the region.

SHOROC Employment Study [2008]

The 2008 Hill PDA study, completed on behalf of the Shore Regional Organisation of Councils (SHOROC), estimates that the Warringah LGA will experience substantial commercial growth:

“Warringah will experience a substantial increase in demand for commercial floorspace by 2031 (+108,000sqm) particularly relating to Property and Business Services (+91,000sqm or 57%). This could be accommodated ... in a range of locations including town centres ... and in Business Parks such as Frenchs Forest ... in conjunction with industrial uses.”

With respect to Frenchs Forest the study acknowledges its potential as a centre for medical-related and other land uses:

“Frenchs Forest: this area should be promoted as a Specialised Centre for Health and Technology. The Centre should be promoted as a premier location within the northern beaches for businesses with commercial office, light manufacturing and distribution needs (emphasis added). It is understood that the precinct has capacity for growth and therefore along with the proposed Northern Beaches Hospital, high technology uses relating to the health industry should be targeted”.