



West Belconnen Development

Employment and Economic Resilience
Green Star Report

11 March 2014

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Executive Summary

This report constitutes the submission for the West Belconnen Development for Green Star Rating points under the category Employment and Economic Resilience. The report demonstrates the West Belconnen Development's eligibility for a total of 1.32 points out of the available 2 points.

The West Belconnen Development

The West Belconnen Development is a 1,623 ha in area straddling the ACT and New South Wales Border. The site is located on the north western edge of Canberra adjacent to the suburbs of Macgregor and Holt. In May 2013 the landowners and the ACT Government signed a heads of agreement which facilitates the development of the land, primarily for residential uses.

The Riverview Group, working with the ACT and NSW Governments, intends to develop the West Belconnen site to achieve a vision of inspiring sustainable living, development practice and awareness. Achieving a high quality of life for the people living at Belconnen is at the heart of the project planning and design.

The intent is to create a community that exemplifies World's Best Practice in its design, construction and long-term liveability. As a model of sustainable community living it will be a place and community that can be showcased throughout Australia and internationally. Ensuring that the West Belconnen development is economically sustainable – appropriately sized to meet the needs of the emerging population – is an important consideration.

Current Employment in the Local Area

The defined local area for the West Belconnen Development includes the Kippax Group Centre in Holt and the Charnwood Group Centre which are the current hub of employment in the local area.

An estimated 33,100 residents were living in the local area when the last Census of Population and Housing was last conducted by the Australian Bureau of Statistics in 2011 with some 18,200 persons in the labour force. Accounting for unemployment, some 17,600 or 53% of the total estimated resident population in the local area are currently employed.

In terms of those currently employed in the local area, some 3,800 workers are currently employed in the local area which translates to a low 22% gross job containment rate. Gross job containment is the ratio between the number of local jobs to the number of local residents employed in local jobs.

Green Star Points for Employment and Economic Resilience

This report demonstrates that the West Belconnen Development qualifies for **1.32 Green Star Points** under the category Employment and Economic Resilience.

Minimum requirement – net percentage increase of local jobs: We understand that to qualify for any points under the Green Star Category Employment and Economic Resilience a development must result in a positive net gain on existing employment opportunities within the local area.

Our analysis clearly demonstrates that the West Belconnen Development will result in a positive net gain on existing employment opportunities within the local area at capacity to comprise of:

- An additional 3,530 ongoing jobs that will be located within the West Belconnen Development
- Some 500 ongoing jobs external to the project but to be located within the local area.

Local area employment: Up to one point can be awarded to a project based on the proportion of the job demand from the project that is serviced locally at the time of the project's completion. We believe the West Belconnen Development is eligible to claim 0.32 points out under the Local Area Employment Criteria.

- On average, 53% of current residents in the local area are employed. Applying this rate to the planned 30,000 West Belconnen residents is projected to result in a total job demand for the project of some 16,000 jobs.
- The West Belconnen Development is to contribute a total of 4,030 jobs at capacity equating to a 25.3% gross job containment rate
- Taking the ratio between the gross local job containment rate for the project of 25.3% and the Green Star local job containment rate target of 80% results in 0.32 points

ANZSIC sector jobs: Our analysis demonstrates that the West Belconnen Development is eligible to claim one point under this criterion. According to the Green Star Guidelines one additional point is awarded where:

- At least 15% of jobs in the local area are from Type A industry sectors, and
- Jobs from a Type B industry do not constitute more than 50% of all jobs in the local area

At capacity, 35% of local jobs will be from Type A industry sectors. Also, no one Type B industry sector represents more than 50% of local area jobs, with the highest percentage of jobs being 18% in retail trade.

Introduction

PURPOSE OF REPORT

This report constitutes the submission for the West Belconnen Development for Green Star Rating points under the category Employment and Economic Resilience.

The report demonstrates the West Belconnen Development's eligibility for a total of 1.32 points out of the available 2 points under the following criteria:

- Minimum requirement – net percentage increase of local jobs
- Local area employment
- ANZIC Sector Jobs

EVIDENCE OF REPORT BEING PREPARED BY A SUITABLY QUALIFIED PROFESSIONAL

This report is prepared by two suitably qualified Urbis professionals, Princess Ventura and Ryan McKenzie. A summary of their qualifications is provided below and their CVs are annexed as **Appendix A**.

PRINCESS VENTURA – DIRECTOR, ECONOMICS AND MARKET RESEARCH

Princess is an experienced economist and project manager with 15 years of experience. She holds a Bachelor Degree in Economics from Eastern Connecticut State University from the United States and a Masters in Business Administration (MBA) from Monash Business School.

Princess focuses on applying international best practice, economics and quantitative skills in a variety of business and public policy areas. She has a deep understanding of the success drivers for a number of property sectors such as retail in CBD, office and waterfront locations.

Prior to Urbis, Princess has worked for a number of years for The World Bank in international development advising policy makers on the design and implementation of reforms in a variety of economic spheres, and conducting economic and policy analysis.

EXPERTISE

Princess has wide-ranging experience and skills including:

- Expert witness on the economic impact of proposed property developments
- Strategies and assessments of market trading potential for many of Australia's largest shopping centres, and centres in CBD locations and growth areas, including scheme options
- Assessment of demand for industrial, residential and student accommodation developments
- Strategic reviews of specific market sectors, e.g. port related employment land and industrial land in Melbourne, residential in Melbourne, retail in Melbourne and Perth, internet retailing in Australia
- Highest and best use analysis
- Employment forecasting
- Cost benefit analysis and public expenditure review
- Economic development strategy
- Public policy impact assessment

RYAN MCKENZIE – CONSULTANT, ECONOMICS AND MARKET RESEARCH

Ryan holds a Bachelor Degree in Economics from the University of Queensland and has 5 years of economics related work experience.

Prior to joining Urbis two years ago, Ryan was an Economics and Planning Analysis at MacroPlan Dimasi. Since joining Urbis, Ryan has primarily focused on workforce and employment analysis/forecasting, market assessments (industrial, residential and student accommodation) and demographic analysis.

EXPERTISE

Ryan has wide-ranging experience including:

- Regional employment lands policy assessments in both the Hunter Region and Western Sydney
- Investigation and assessment of large industrial and employment land holdings in the West of Sydney, providing both a supply and demand assessment
- Strategic and demographic assessment of large scale mixed use developments in the Sydney CBD
- Land use and redevelopment options for key recreational and open space land in Sydney
- High level demographic and economic strategic assessment for a large scale mixed use development in Sydney's CBD
- Business Park economic and feasibility assessment, justifying the economic rationale behind the development of a new business park in Sydney North-West
- Analysis of the residential market at a Sydney metropolitan level

REPORT STRUCTURE

The rest of the report is structured as follows:

- Section 1 describes the West Belconnen Development
- Section 2 provides the employment profile of the current population in the defined local area
- Section 3 presents the employment that will be generated by the West Belconnen Development
- Section 4 provides an overview of the location of new employment that will be generated by the West Belconnen Development
- Section 5 provides a summary on how the West Belconnen Development qualifies for Green Star points under the category Employment and Economic Resilience

1 West Belconnen Development

This section provides an overview of the West Belconnen Development.

1.1 SUBJECT SITE

The West Belconnen subject site is a 1,623 ha landholding straddling the ACT and New South Wales Border. In May 2013 the landowners and the ACT Government signed a heads of agreement which facilitates the development of the land, primarily for residential uses.

The western portion of the site forms an escarpment to the Murrumbidgee River and it is proposed that this land will be maintained as a river corridor with public access. The majority of the site is gently undulating and offers potential for residential subdivision. A central portion of the site is currently used for landfill and as a recycling centre.

Access to the site is currently provided via Parkwood Road (to the landfill and recycling centre) and via Stockdill Drive to the southern site boundary.

The site is located on the north western edge of Canberra adjacent to the suburbs of Macgregor and Holt.

The site is bounded:

- On the east by Stockdill Drive and the Belconnen Magpies Golf Course (a portion of which was recently rezoned for residential development), as well as by the Macgregor West residential area
- On the south and west by the Murrumbidgee River
- On the north by the Ginninderra Creek beyond the ACT/NSW boundary

The subject site is illustrated in the maps and photographs on the following pages.

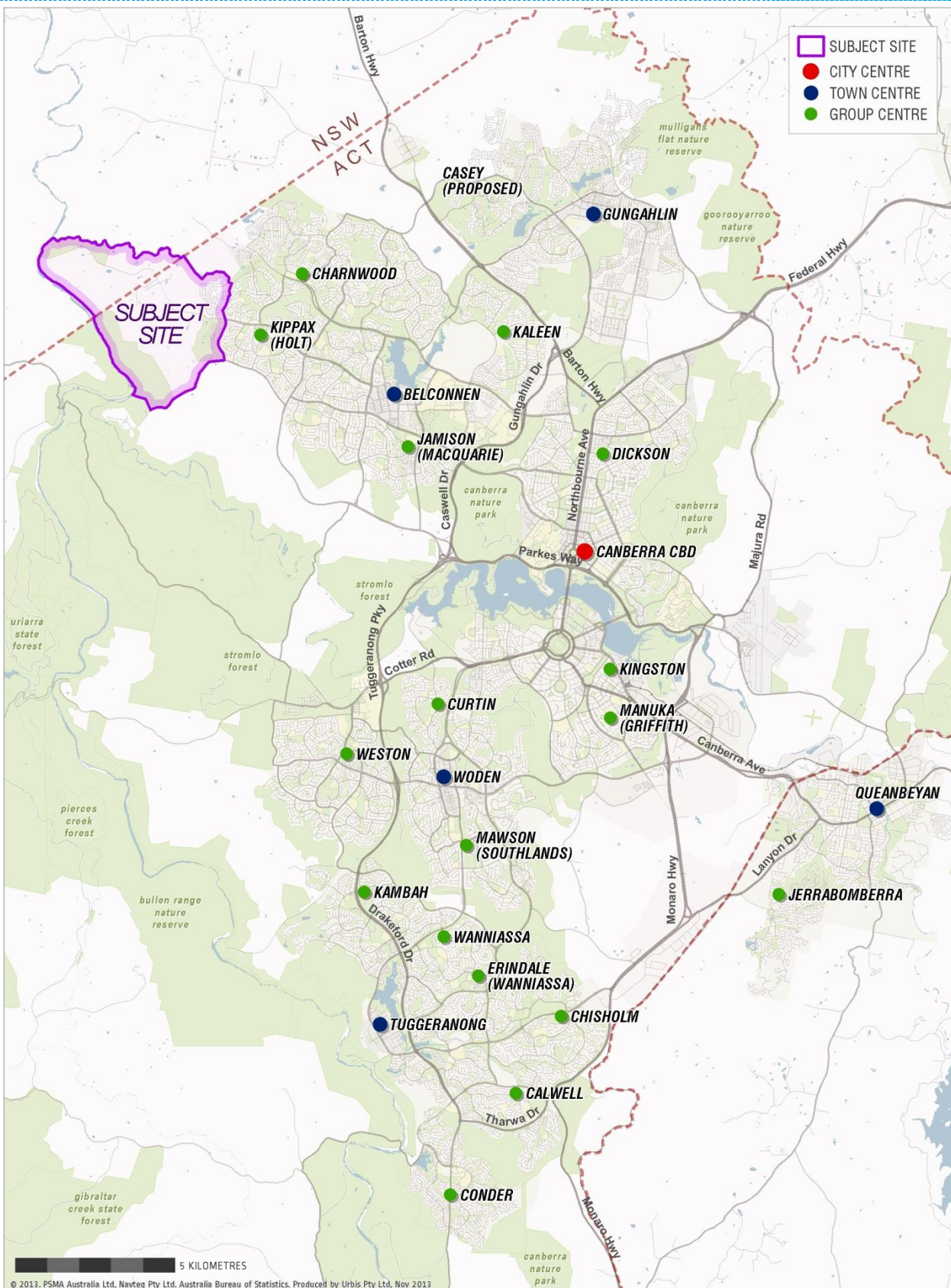
1.2 KEY DEVELOPMENT PRINCIPLES

The Riverview Group, working with the ACT and NSW Governments, intends to develop the West Belconnen site to achieve a vision of inspiring sustainable living, development practice and awareness. Achieving a high quality of life for the people living at Belconnen is at the heart of the project planning and design.

The intent is to create a community that exemplifies World's Best Practice in its design, construction and long-term liveability. As a model of sustainable community living it will be a place and community that can be showcased throughout Australia and internationally. The following guiding principles are amongst those shaping the master planning process for West Belconnen:

- Designing neighbourhoods that support and encourage community interactions through imaginative, functional and enjoyable public spaces
- Building on existing local infrastructure
- Ensuring long-term economic viability through design excellence and community building
- Integrating with the Belconnen commercial, retail and employment networks
- Growing a formal and informal green economy that fosters local jobs and builds regional learning around green innovation and technology

Ensuring that the West Belconnen development is economically sustainable – appropriately sized to meet the needs of the emerging population – is also an important consideration.



2 Current Employment Profile of the Local Area

This section provides an overview of the current employment profile for the defined local area for the West Belconnen development.

2.1 LOCAL AREA DEFINITION

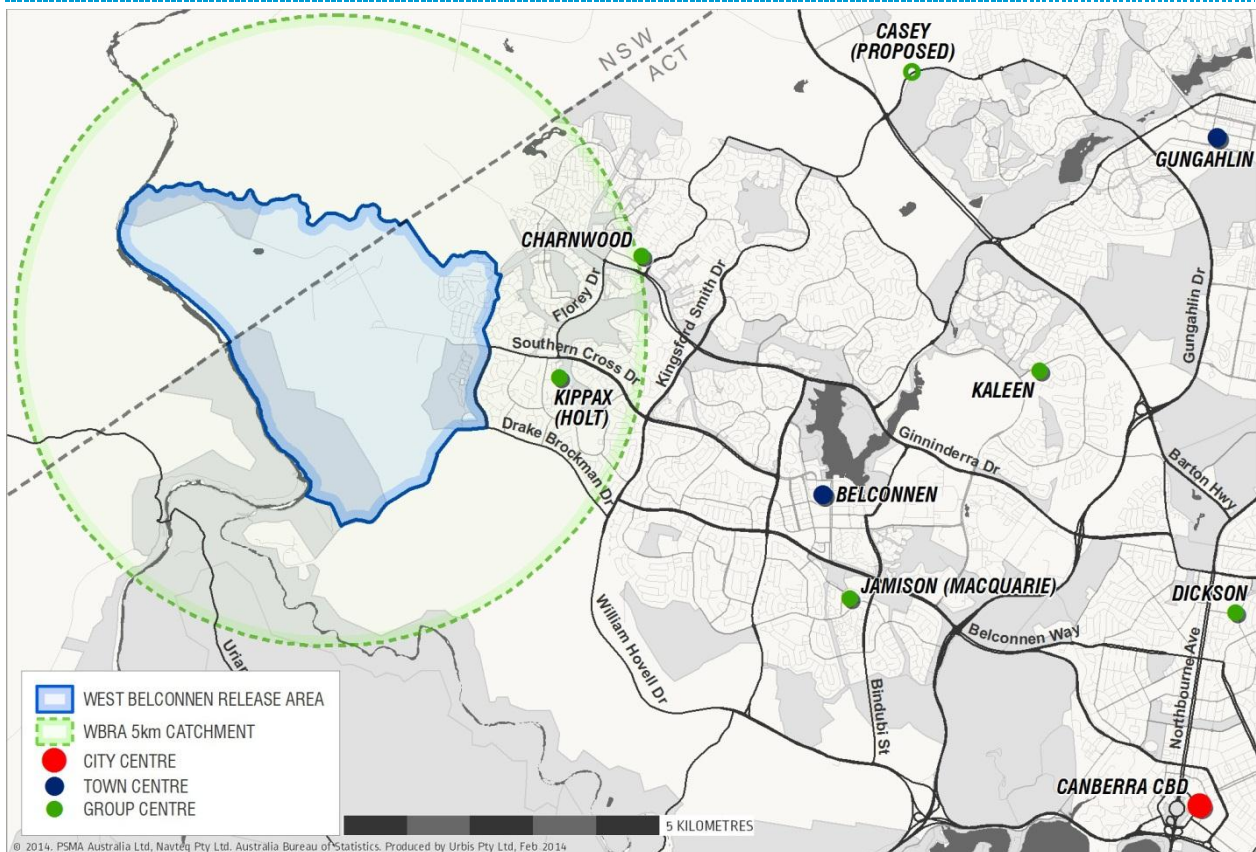
As stipulated in the Green Star Guidelines Map 2.1 below shows the 5km radius from the geographical centre of the West Belconnen development site which will be used for the purposes of the rest of the report as the definition of the 'local area.'

Map 2.2 shows the destination zones that are included in the local employment analysis. As defined in the Green Star Guidelines, destination zones (DZ) that fall within the 5 km radius area from the geographical centre of the development are included in the local area analysis even if part of the zone falls outside the radius.

The defined local area includes the Kippax Group Centre in Holt and the Charnwood Group Centre which are the current hub of employment in the local area.

WEST BELCONNEN LOCAL AREA DEFINITION

MAP 2.1



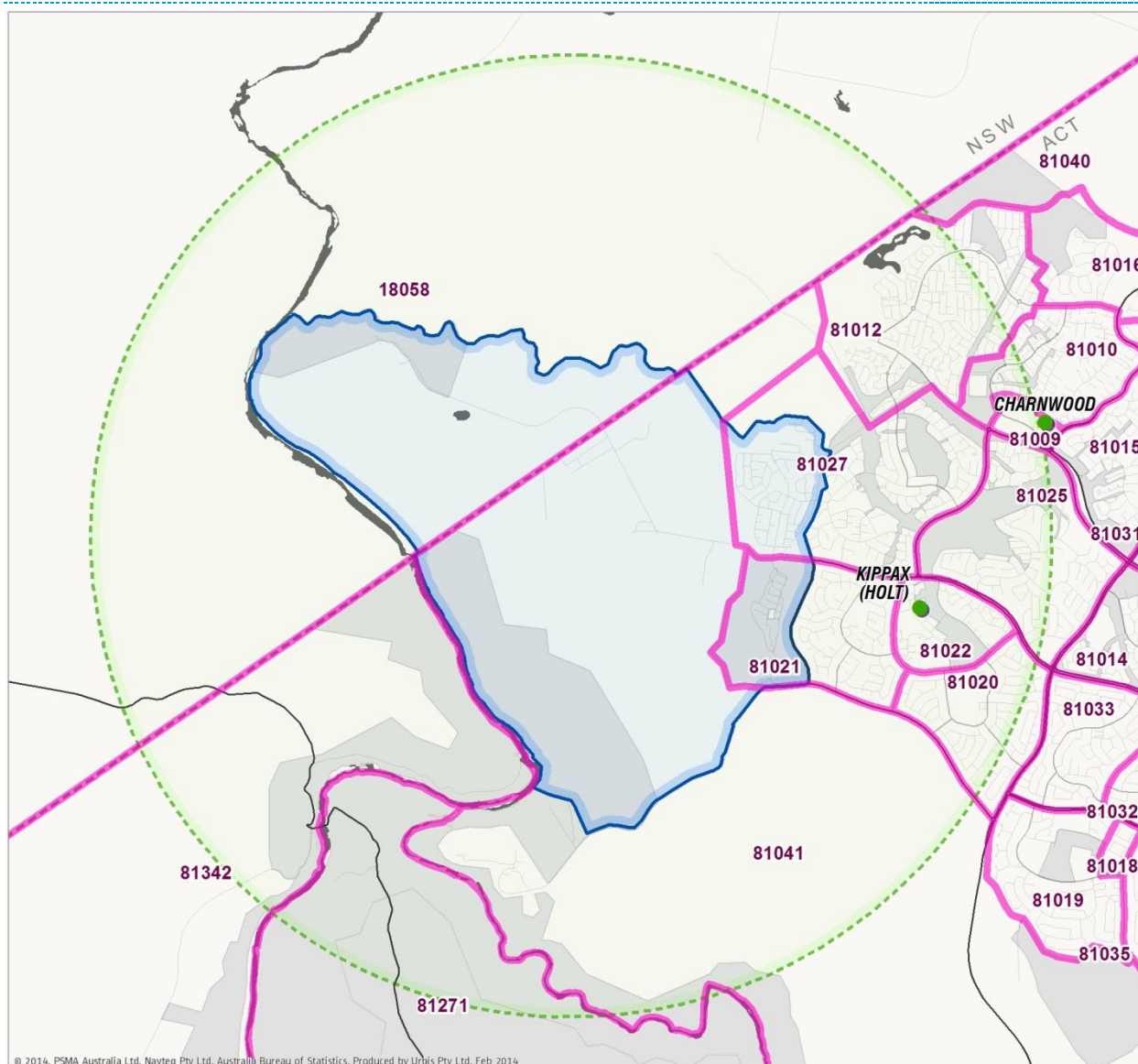


TABLE 1 – DESTINATION ZONES (DZ) INCLUDED IN THE LOCAL AREA

DESTINATION ZONES	
810041009	810191027
810061012	810271342
810141020	810271271
810151021	810281041
810151022	110048058
810171025	

2.2 OVERVIEW

Table 2.2 provides an overview of the defined local area.

An estimated 33,100 residents were living in the local area when the last Census of Population and Housing was last conducted by the Australian Bureau of Statistics in 2011 with some 18,200 persons in the labour force. Accounting for unemployment, some 17,600 or 53% of the total estimated resident population in the local area are currently employed.

Some 3,800 workers are currently employed in the local area which translates to a low 22% gross job containment rate. Gross job containment is the ratio between the number of local jobs to the number of local residents employed in local jobs.

Employment Overview

'LOCAL AREA', 2001 TO 2011

TABLE 2.2

	2001	2006	2011	Change (2001-11)
Resident Population	25,200	28,700	33,100	+ 7,900
Labour force	13,500	15,700	18,200	+ 4,700
Employed	12,700	15,200	17,600	+ 4,900
Employed (% resident population)	50.4%	53.0%	53.2%	+ 2.8%
Unemployment	800	500	600	-200
Unemployment (% of labour force)	5.9%	3.2%	3.3%	-2.6%
Local Jobs ¹	-	3,100	3,800	+ 700
Gross Job Containment %	-	20%	22%	+ 1%

¹ No concordance between Destination Zones and 2001 SLA, change in jobs is between 2006-2011

Source: ABS Census 2001, 2006 and 2011; Urbis

2.3 EMPLOYMENT PROFILE OF LOCAL WORKERS

Table 2.3 shows a profile of persons currently working within the local area by ANZSIC Industry Sector. Highlights include:

- Education and training is the largest employer where 13% of jobs are currently provided and it is also the industry sector that experienced the strongest growth over the last five years where an addition 200 jobs have been added between 2006 and 2011
- Retail trade and construction are significant employers providing 11% of jobs in the local area each
- Public administration and safety; healthcare and social assistance; accommodation and food services; and professional, scientific and technical services are also significant employers providing around 8% to 10% of local jobs each.

Industry Profile

'LOCAL AREA' WORKERS, 2006 AND 2011

TABLE 2.3

ANZSIC Industry Sector	2006		2011		
Type A Sectors	Number	%	Number	%	Change
Agriculture, Forestry and Fishing	303	9.9%	277	7.3%	-26
Electricity, Gas, Water and Waste Services	55	1.8%	122	3.2%	+67
Public Administration and Safety	253	8.3%	359	9.5%	+106
Education and Training	279	9.1%	485	12.8%	+206
Health Care and Social Assistance	180	5.9%	298	7.9%	+118
Total - Type A	1,070	35.0%	1,541	40.7%	+471
Type B Sectors	Number	%	Number	%	
Mining	7	0.2%	10	0.3%	+3
Manufacturing	138	4.5%	118	3.1%	-20
Construction	369	12.1%	404	10.7%	+35
Wholesale Trade	41	1.3%	42	1.1%	+1
Retail Trade	378	12.4%	430	11.4%	+52
Accommodation and Food Services	259	8.5%	316	8.3%	+57
Transport, Postal and Warehousing	71	2.3%	72	1.9%	+1
Information Media and Telecommunications	26	0.9%	35	0.9%	+9
Financial and Insurance Services	41	1.3%	31	0.8%	-10
Rental, Hiring and Real Estate Services	50	1.6%	39	1.0%	-11
Professional, Scientific and Technical Services	304	10.0%	301	7.9%	-3
Administrative and Support Services	91	3.0%	82	2.2%	-9
Arts and Recreation Services	53	1.7%	168	4.4%	+115
Other Services	109	3.6%	167	4.4%	+58
Inadequately Described / Not Stated	49	1.6%	31	0.8%	-18
Total - Type B	1,986	65.0%	2,246	59.3%	+260
Total - All	3,056		3,787		+731

Source : ABS Census 2006 and 2011; Urbis

2.4 EMPLOYMENT PROFILE OF LOCAL RESIDENTS

Table 2.4 provides a profile of the local area residents who are currently employed.

In contrast to the jobs available in the local area, the majority (28%) of the local resident workers are employed in public administration and safety. This outcome is consistent with the employment profile of the broader ACT labour force.

However, similar to the available jobs in the local area, a large proportion of local resident workers are employed in education and training; professional, scientific and technical services; healthcare and social services, construction; and retail trade which employ 8% to 10% of local resident workers each.

Industry Profile

'LOCAL AREA' RESIDENTS, 2006 AND 2011

TABLE 2.4

ANZSIC Industry Sector	2006		2011		
Type A Sectors	Number	%	Number	%	Change
Agriculture, Forestry and Fishing	15	2.1%	278	1.6%	+264
Electricity, Gas, Water and Waste Services	135	0.9%	177	1.0%	+42
Public Administration and Safety	3,980	24.5%	4,896	27.8%	+916
Education and Training	1,400	8.9%	1,681	9.5%	+281
Health Care and Social Assistance	1,474	9.2%	1,598	9.1%	+124
Total - Type A	7,003		8,630		+1,627
Type B Sectors	Number	%	Number	%	
Mining	7	0.0%	7	0.0%	+1
Manufacturing	409	3.0%	383	2.2%	-26
Construction	1,135	8.0%	1,582	9.0%	+446
Wholesale Trade	235	1.7%	208	1.2%	-27
Retail Trade	1,518	9.7%	1,354	7.7%	-164
Accommodation and Food Services	797	5.3%	954	5.4%	157
Transport, Postal and Warehousing	432	2.7%	505	2.9%	+73
Information Media and Telecommunications	360	2.2%	295	1.7%	-65
Financial and Insurance Services	299	2.4%	359	2.0%	+60
Rental, Hiring and Real Estate Services	223	1.5%	238	1.3%	+14
Professional, Scientific and Technical Services	1,369	8.9%	1,654	9.4%	+285
Administrative and Support Services	437	2.8%	429	2.4%	-8
Arts and Recreation Services	334	2.2%	388	2.2%	+55
Other Services	662	4.0%	637	3.6%	-25
Total - Type B	8,217		8,992		+775
Total - All	15,220		17,622		+2,402

Source : ABS Census 2006 and 2011; Urbis

2.5 WHERE DO LOCAL RESIDENTS CURRENTLY WORK?

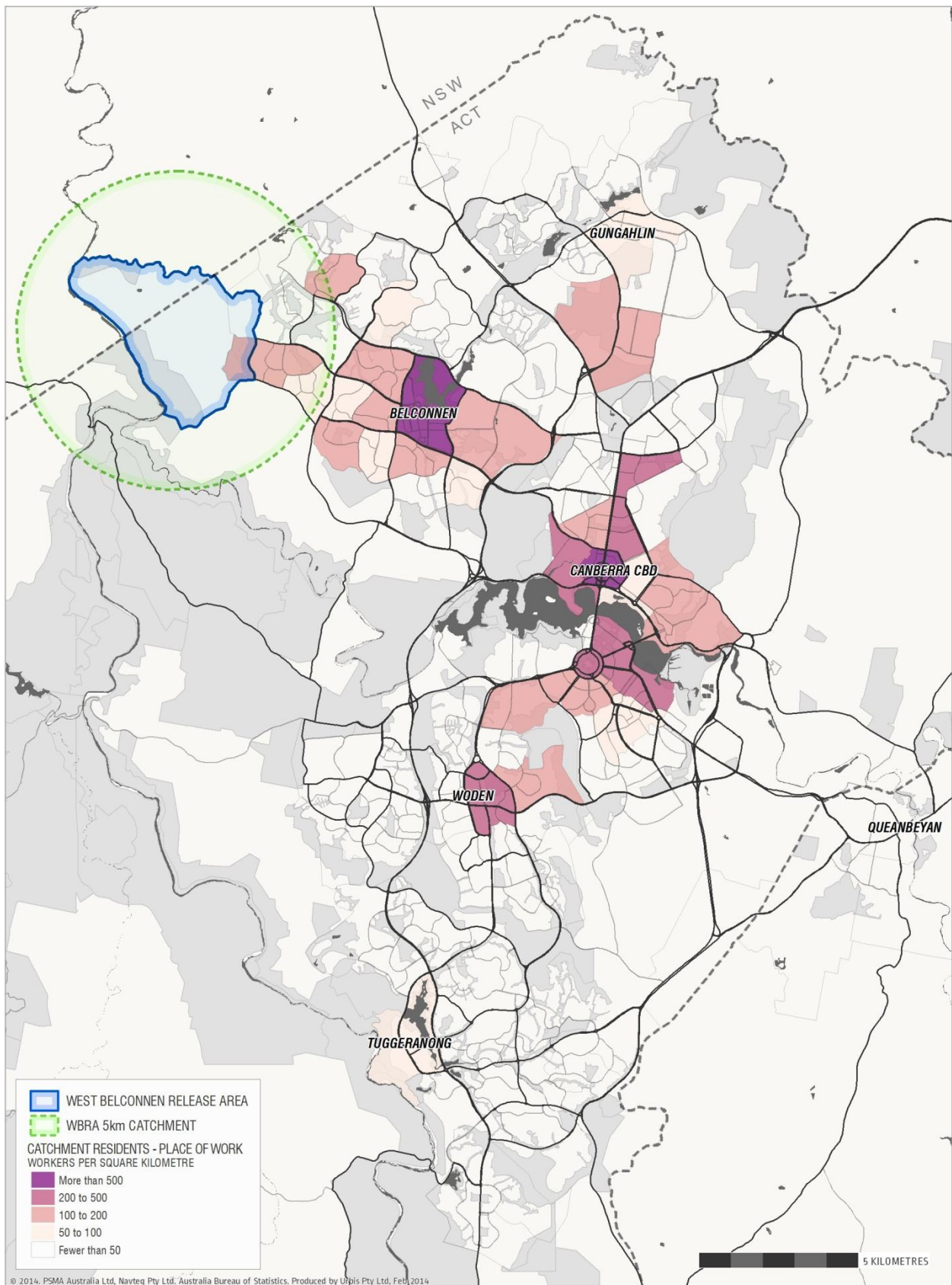
Map 2.3 shows where local residents currently work based on the ABS Census 2011. This map shows that there is a high concentration of local resident workers who are employed in Belconnen, in and around the Canberra CBD and Woden.

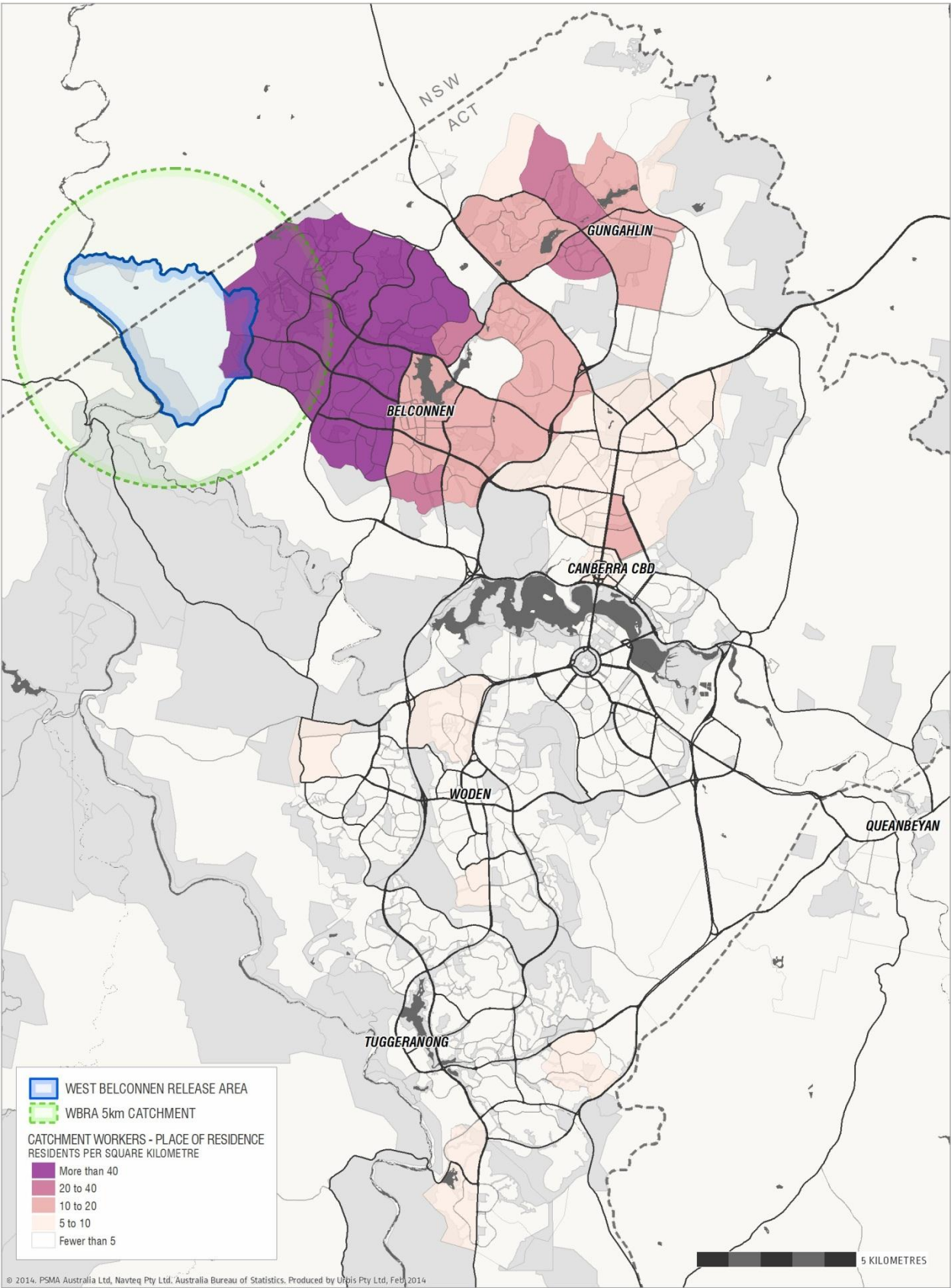
This *Journey to Work* pattern for local residents is consistent with the industries where local resident workers are skilled in and the distribution of facilities in these industries throughout the ACT.

- The majority of public sector jobs are concentrated in and around the CBD
- The CBD, Belconnen and Woden have a high concentration of retail offer all of which include a large regional shopping centre
- The location of Canberra University in Belconnen and the Australian National University in the CBD and high proportion of local resident workers employed in education account for the high concentration of resident workers in Belconnen and the CBD

2.6 WHERE DO LOCAL WORKERS LIVE?

Map 2.4 provides a map of where local workers live. The map shows that the majority of local workers are from the local area and immediate vicinity of Belconnen.





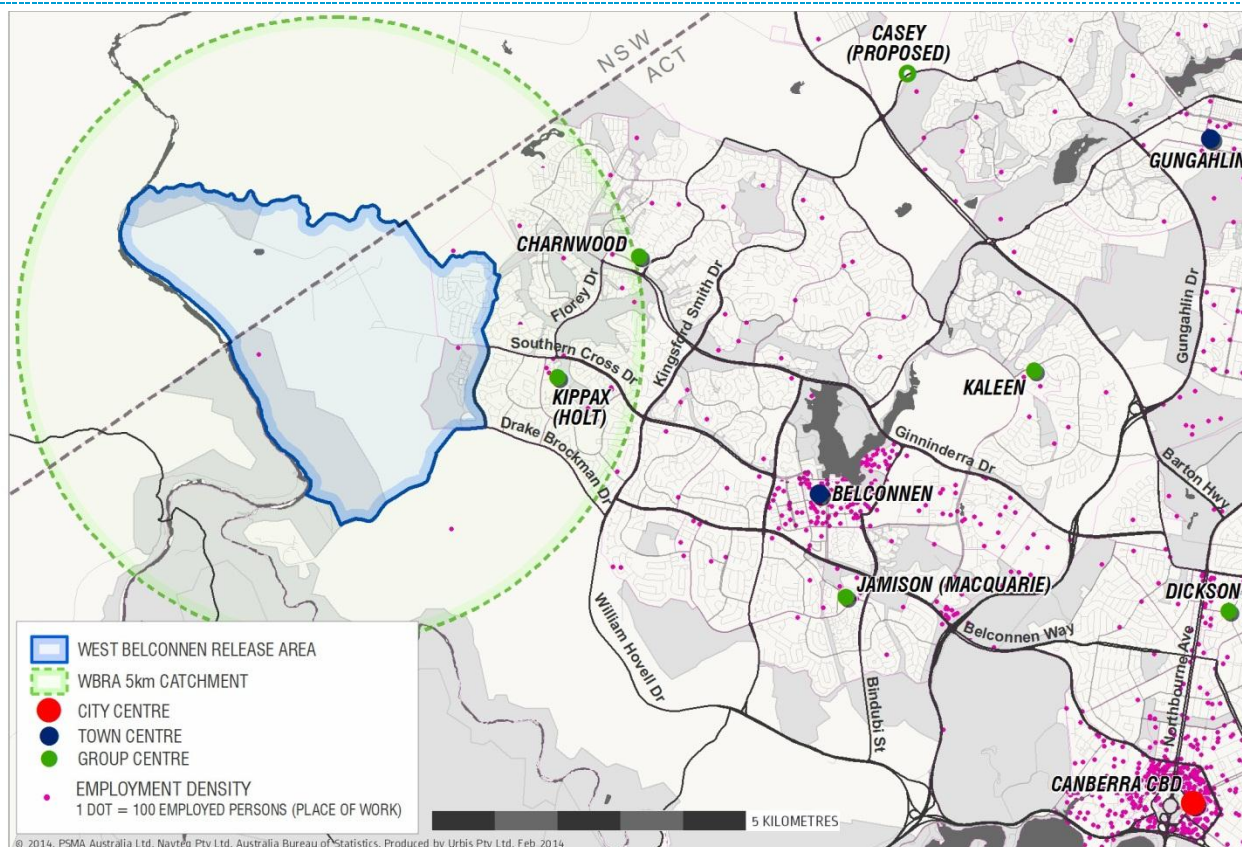
2.7 EXISTING EMPLOYMENT LOCATIONS

Map 2.5 shows the concentration of employment in and around the defined local area. This map shows that the current employment density in the local area is quite low which is consistent with the largely rural character of the area.

Most of the current jobs in the local area are concentrated in and around the Kippax and Charnwood Group Centres. However, the current employment provision in the local area is a very small fraction of the jobs available in and around the Belconnen Town Centre and the Canberra CBD.

EMPLOYMENT DENSITY IN AND AROUND THE LOCAL AREA 2011

MAP 2.5



3 West Belconnen and Employment Creation

This section presents projects on local job creation that is to be generated by the West Belconnen Development. These local employment estimates include jobs that are to be located within the West Belconnen Development and those that are to be located elsewhere but still within the confines of the local area.

3.1 EMPLOYMENT WITHIN WEST BELCONNEN

The employment that will be located within the West Belconnen Development fall under two broad headings, namely:

- Land uses that are to be supported by demand from the West Belconnen and surrounding local population
- Broader regional uses that will appeal to populations within and outside the local area

LOCAL POPULATION DEMAND DRIVEN EMPLOYMENT USES

Table 3.1 below outlines the population thresholds required to support different facilities and used to estimate the employment uses that can be supported by the West Belconnen residents. Most of these uses will be located within the planned West Belconnen Group Centre.

Local Population Driven Employment Uses

WEST BELCONNEN DEVELOPMENT

TABLE 3.1

LAND USE	POPULATION THRESHOLD (RESIDENTS)
Retail	
Supermarket	330 – 350 sq.m per 1,000 people
DDS	32,000
Specialty	Determined by size and performance of anchor tenants
Commercial Office	300 sq.m per 1,000 people
Education	
Childcare Centre	4,300
Government Primary School (P-6)	10,000
Private Primary School (P-6)	15,000
Government High School (P-10)	30,000
Government Secondary College (Years 11-12)	30,000
Health	
Community Health Centre	30,000
Medical Practice/Centre	6,000
Community Care Hub	30,000
Gym	Varies in size
Primary Services Hospital	30,000
Community Services	
District Community Centre	30,000
Local Community Centre	30,000
Library	30,000

Source: Elton Consulting; Urbis

Table 3.2 shows the land uses that can be supported by residents of the new West Belconnen Development along with the projected employment yields associated with each land use at capacity. These land uses have been divided into two categories:

- Land uses that will be supported by demand from the West Belconnen and immediate surrounding population are projected to provide a substantial 2,780 jobs annually at capacity
- In addition, land uses that will attract demand from the broader ACT market are projected to provide some 750 jobs annually at capacity

The analysis on the supportability of the regional demand driven land uses are annexed as Appendix B to E and the timing of supportable floorspace and associated employment yields by five year intervals throughout the development of the project are shown in Tables 3.3 and 3.4.

REGIONAL EMPLOYMENT USES

Eco-Tourism/Biosphere

In addition to standard employment uses, an “out of the box” land use has been considered that is not capital intensive but would be effective in placing West Belconnen firmly on the map in a positive light; and generate visitation, spending and employment.

The out of the box land use suggested is a sustainable social enterprise only found in south-east England at present, The Eden Project which has been outlined in more detail in Appendix D.

The project is unique for two reasons: first, it is located in a non-metropolitan area. The site is a former clay mine about 10km north east of the village of St Austell, which has a population of about 25,000 people, not dissimilar to the scale of population forecast for West Belconnen. The project has transformed many people’s perception of Cornwall, from a former mining community to one that embraces regenerative economic, environmental and social projects.

The second reason for its uniqueness is the architecture. The main attraction of the Eden Project is its two greenhouses, which comprise eight inter-linked domes covering 23,000 sq.m. They are at the forefront of sustainable design; the Eden Project is the only World Heritage Site created by a living architect. According to the UK’s Living Places, in 2007/8, the total income for the project was £22.3 million, of which 75% came from tourism, 17% from fundraising and 8% from other activities such as concerts, functions, and consultancies.

Eden operates as a charity and a social enterprise that employs nearly 500 staff. Economic impact studies have shown that the project has contributed approximately £1 billion to the local economy. This amount excludes visitor spending at Eden itself, but includes off-site tourism related business in Cornwall and the rest of the region. The project transformed the region of Cornwall and provides an example of how cutting-edge design can revitalise an area.

Analysis by tourism consultants Geoff Broom and Associates found that during the first six months of the 2002/3 financial year, the Eden Project contributed massively to the South West regional economy.

- It stimulated over 2.5 million visitor days in the region
- Increased employment by nearly 5,500 jobs
- Boosted business turnover by £177 million
- Generated an additional £81 million of income for local residents
- These benefits were felt by Eden’s 2,500 local suppliers and a range of other businesses such as hotels, restaurants, bed and breakfasts, pubs and taxis.

A West Belconnen Biosphere of potentially half of the Eden’s size would require approximately 1 hectare of land, provide 250 direct jobs and substantial indirect employment and patronage for other local business particularly in food and beverage.

Business Park

To provide an indication of the business park jobs that could be supportable within the West Belconnen release area, Urbis have derived the benchmark of industrial jobs in Gungahlin excluding those in the Mitchell SA2 area. This provides an indication of the jobs supportable within a mainly residential release area, which does not have the same road infrastructure accessibility as other established industrial precincts such as Mitchell.

FACTOR	NUMBER
Population Growth, West Belconnen (2016 to 2054)	30,000
Resident Population per Industrial Job	200
Industrial Jobs	150
Floorspace per job (Sq.m)	150
Business Park Land	2 to 3 ha

Source: ABS Census 2011; Urbis

The 150 industrial jobs across 15,000 sq.m of floorspace can be generated from a 'Business Park' type format that includes a mix of office, warehousing and light industrial uses. This park could be combined with some of the commercial office space. This could comfortably be accommodated on 2 to 3 hectares of business park land, either as a part of a redeveloped land-fill site or in close proximity to the group centre.

Sustainable Food and Beverage

There is scope to move away from a conventional pub/club to deliver a high quality indoor/outdoor licenced premises which can link into the environmental sustainability aspect of the development and provided locally sourced products in West Belconnen.

A venue such as the Grounds of Alexandria in Sydney performs this role very well by combining a high quality indoor and outdoor area, growing products on site, and incorporating bespoke coffee roasting and microbrewery facilities. It is located on a site of around 1,600 sq.m of which around 40% is indoor space and 60% is landscaped outdoors providing a mix of seating, food growing areas and market stall space.

The success of The Grounds is reflected in its large customer base and the waiting time to be seated in an otherwise unremarkable industrial estate in Alexandria.

This type of use, integrated within a centre, could create a real community destination for West Belconnen and could also assist in drawing weekend custom from beyond the trade area. It could provide a counterpoint, albeit on smaller scale to the role of the Old Bus Depot Markets at Kingston Foreshore.

A more detailed description is annexed as **Appendix E**.

Land Use	Number of Facilities	Total Floorspace (Sq.m)	Jobs per 1,000 sq.m	Jobs Potential
LOCAL POPULATION DRIVEN JOBS				
Retail				
Supermarket(s)	2	5,000	40.8	200
Mini-Majors	1	650	23.5	20
Specialty Shops	-	2,700	60.7	160
Non-Retail/External	-	2,100	42.7	90
Plant Nursery (Retail/Wholesale) ²	1	80,000	0.34	27
Total - Retail Centres		90,450		500
Commercial Office	-	9,000	51	460
Education				
Long Day Care	7	2,100	14	30
Govt. Primary School (P-6)	3	16,500	12	200
Private Primary School (P-6)	2	11,000	18	200
Government Highschool (P-10)	1	17,500	18	320
Government Secondary College (Yr 11-12)	1	4,900	12	60
Total - Education		52,000		810
Health				
Gym	1	900	27	20
Community Health Centre	1	800	13	10
Medical Practice/Centre	5	1,500	11	20
Community Care Hub	1	1,000	15	20
Primary Services Hospital	1	6,000	13	80
Total - Health		10,200		150
Community Services				
Community Centre (District)	1	1,600	14	20
Community Centre (Local)	1	800	14	10
Library	1	1,200	12	10
Total - Community Services		3,600		40
Home Based Businesses¹	-	-	-	820
Total - Local Population Driven Jobs		165,250		2,780
REGIONAL DRIVEN JOBS				
Existing Employment				
Recycling Management Centre	1	-	-	30
Rural agricultural / services	-	-	-	50
Total - Existing Employment				80
Potential Regional Employment				
Eco Tourism / Bio-Sphere	1	10,000	25	250
Business Park	1	15,000	10	150
Recycling Facility ²	1	127,000	1.75	220
Premium F&B	1	1,500	35	50
Total - Regional Driven Jobs		153,500		750
Total - West Belconnen Jobs		318,750		3,530

¹ Assumed 5% of labour force

² Floorspace refers to site area

Source: Urbis

Floorspace by Land Use

WEST BELCONNEN, 2016 TO 2054

TABLE 3.3

	2016	2020	2025	2030	2035	2040	2045	2050	2054
West Belconnen	0	3,900	7,800	11,700	15,600	19,500	23,400	27,300	30,000
Retail									
Supermarket(s)	0	0	3,500	3,500	5,000	5,000	5,000	5,000	5,000
Mini-Majors	0	0	400	400	650	650	650	650	650
Specialties	0	0	1,400	1,400	2,700	2,700	2,700	2,700	2,700
Non Retail Speciatly	0	0	1,300	1,300	2,100	2,100	2,100	2,100	2,100
Retail/Wholesale Plant Nursery	0	0	80,000	80,000	80,000	80,000	80,000	80,000	80,000
Total - Retail¹	0	0	86,600	86,600	90,450	90,450	90,450	90,450	90,450
Total - Commercial Office	0	1,170	2,340	3,510	4,680	5,850	7,020	8,190	9,000
Education									
Long Day Care	0	300	600	900	1,200	1,500	2,100	2,100	2,100
Govt. Primary School (P-6)	0	0	5,500	5,500	11,000	11,000	16,500	16,500	16,500
Private Primary School (P-6)	0	0	5,500	5,500	5,500	5,500	11,000	11,000	11,000
Government Highschool (P-10)	0	0	0	0	17,500	17,500	17,500	17,500	17,500
Government Secondary College (Yr 11-12)	0	0	0	0	4,900	4,900	4,900	4,900	4,900
Total - Education	0	300	11,600	11,900	40,100	40,400	52,000	52,000	52,000
Health									
Gym	0	0	900	900	900	900	900	900	900
Community Health Centre	0	0	0	0	800	800	800	800	800
Medical Practice/Centre	0	300	300	600	900	900	1,200	1,500	1,500
Community Care Hub	0	0	0	0	1,000	1,000	1,000	1,000	1,000
Primary Services Hospital	0	0	0	0	6,000	6,000	6,000	6,000	6,000
Total - Health	0	300	1,200	1,500	9,600	9,600	9,900	10,200	10,200
Community Services									
Community Centre (District)	0	0	0	0	1,600	1,600	1,600	1,600	1,600
Community Centre (Local)	0	0	0	0	800	800	800	800	800
Library	0	0	0	0	1,200	1,200	1,200	1,200	1,200
Total - Community Services	0	0	0	0	3,600	3,600	3,600	3,600	3,600
Regional Employment									
Eco Tourism / Bio-Sphere	0	0	10,000	10,000	10,000	10,000	10,000	10,000	10,000
Business Park	0	0	15,000	15,000	15,000	15,000	15,000	15,000	15,000
Recycling Facility2	0	0	127,000	127,000	127,000	127,000	127,000	127,000	127,000
Premium F&B	0	0	0	1,500	1,500	1,500	1,500	1,500	1,500
Total - Regional Employment	0	0	152,000	153,500	153,500	153,500	153,500	153,500	153,500
Grand Total	0	1,770	253,740	257,010	301,930	303,400	316,470	317,940	318,750

Source: Urbis

¹ Includes non-retail specialty jobs located in centre

Employment by Land Use

WEST BELCONNEN, 2016 TO 2054

TABLE 3.4

	2016	2020	2025	2030	2035	2040	2045	2050	2054
West Belconnen	0	3,900	7,800	11,700	15,600	19,500	23,400	27,300	30,000
Retail									
Supermarket(s)	0	0	140	140	200	200	200	200	200
Mini-Majors	0	0	10	10	20	20	20	20	20
Specialties	0	0	80	80	160	160	160	160	160
Non Retail Specialty	0	0	60	90	90	90	90	90	90
Plant Nursery (Retail/Wholesale) ²	0	0	30	30	30	30	30	30	30
Total - Retail¹	0	0	320	350	500	500	500	500	500
Total - Commercial Office	0	60	120	180	240	300	360	420	460
Education									
Long Day Care	0	0	10	10	20	20	20	30	30
Govt. Primary School (P-6)	0	30	60	90	110	140	200	200	200
Private Primary School (P-6)	0	30	50	80	100	130	150	180	200
Government Highschool (P-10)	0	40	80	120	160	200	250	290	320
Government Secondary College (Yr 11-12)	0	10	20	20	30	40	50	50	60
Total - Education	0	110	220	320	420	530	670	750	810
Health									
Gym	0	0	20	20	20	20	20	20	20
Community Health Centre	0	0	0	0	0	0	0	0	10
Medical Practice/Centre	0	0	3	3	7	10	20	20	20
Community Care Hub	0	0	0	0	0	0	0	0	20
Primary Services Hospital	0	0	0	0	0	0	0	0	80
Total - Health	0	0	23	23	27	30	40	40	150
Community Services									
Community Centre (District)	0	0	0	0	0	0	0	0	20
Community Centre (Local)	0	0	0	0	0	0	0	0	10
Library	0	0	0	0	0	0	0	0	10
Total - Community Services	0	0	0	0	0	0	0	0	40
Home Based Businesses	0	110	210	320	430	540	640	750	820
Existing Employment									
Recycling Management Centre	30	30	30	30	30	30	30	30	30
Rural agricultural / services	50	50	50	50	50	50	50	50	50
Total - Existing	80	80	80	80	80	80	80	80	80
Potential Regional Employment									
Eco Tourism / Bio-Sphere	0	0	250	250	250	250	250	250	250
Business Park	0	0	150	150	150	150	150	150	150
Recycling Facility ²	0	0	220	220	220	220	220	220	220
Premium F&B	0	0	0	50	50	50	50	50	50
Total - Regional Employment	0	0	620	670	670	670	670	670	670
Grand Total	80	360	1,593	1,943	2,367	2,650	2,960	3,210	3,530

Source: Urbis

¹ Includes non-retail specialty jobs located in centre

3.2 EMPLOYMENT ELSEWHERE WITHIN THE LOCAL AREA

It is expected that other jobs will be generated by demand from West Belconnen residents within the local area, but outside the project area. Demand for goods and services from West Belconnen residents are forecast to generate an additional 500 ongoing retail jobs elsewhere in the local area.

The additional retail jobs are likely to be located in the Kippax Group Centre, with the full-analysis included in Section 3.3 below.

3.3 RETAIL EMPLOYMENT ANALYSIS

Residential growth at West Belconnen has the potential to generate significant additional local employment within the retail sector:

- Within new retail facilities provided within the West Belconnen development itself, and
- As a catalyst for further retail expansion at Kippax Group centre

RETAILING AT WEST BELCONNEN

A population of 30,000 people at West Belconnen upon completion has the potential to support up to two supermarkets and associated specialty retailing.

Table 3.5 presents an indicative composition and staging for the development of the retail components at West Belconnen.

Indicative Composition and Staging of Retail Development

WEST BELCONNEN GROUP CENTRE

TABLE 3.5

	Stage 1 2025	Stage 2 2035	Total at Capacity
Supermarket 1	3,500		3,500
Supermarket 2		1,500	1,500
Mini Majors	400	250	650
Specialties ¹	1,400	1,300	2,700
Total retail floorspace	5,300	3,050	8,350
Non retail specialties ²	1,300	800	2,100
Total centre	6,600	3,850	10,450
<i>Plus destinational food & beverage</i>	<i>1,500</i>		<i>1,500</i>

Total¹

1. Includes food, non food and retail services and tenants on pad sites

2. Includes banks, insurance, post office, TAB, bar, office suites etc

Source : Urbis Retail Averages 2013

Based on the dwelling take up rates assumed in our assessment our analysis indicates that Stage 1 of the retail development could occur by **2025**, with stage 2 occurring around **2035**.

The initial stage of development around 2025 is heavily dependent on good population growth within the trade area. Given the forecast growth, the initial stage would be the development of a 3,500 sq.m supermarket. At this time, the performance of the supermarket could also support a mini-major tenant of around 400 sq.m such as a pharmacy, along with around 1,400 sq.m of retail specialty shop floorspace.

Given the annual rate of population growth the performance of the supermarket is expected to improve greatly within a couple of years of opening, this level of specialty shop floorspace should certainly be sustainable and provide residents in the local catchment area with a convenient retail offer, with a focus on fresh food and groceries and other everyday shopping needs. A further 1,300 sq.m of non-retail shops (e.g. banks, post office, bar/hotel) could take the total centre to around **6,600 sq.m**.

In order to account for a destinational food and beverage use with the development (like the Grounds of Alexandria example in Sydney) we have also provision for the inclusion of a premium food and beverage outlet of 1,500 sq.m to be incorporated within the development mix, which would take the size of the centre to around **8,000 sq.m**.

A **Stage 2** expansion, supported by a second smaller supermarket of around 1,500 sq.m could occur around 2035. Beyond 2035, the introduction of a second supermarket, taking total supermarket provision to 5,000 sq.m, would also support additional mini-major, specialty and non-retail floorspace. We estimate that an additional 250 sq.m mini major floorspace, 1,300 sq.m specialty floorspace space and 800 sq.m non retail floorspace could be added. This would take the total size of a Group Centre at West Belconnen to around **10,450 sq.m** by 2035, or up to around **12,000 sq.m** including a premium food and beverage outlet.

This scale of retail development would be around 70% of the size of an average Australian double supermarket-based shopping centre and is consistent with the scale of retailing provided at the Kippax and Jamison group centres.

In the event that future supermarkets are able to achieve a higher market share they would achieve stronger sales which in turn could support additional floorspace.

The retail uses will provide opportunities for on-going employment on the site. Expected employment densities for each component (employment per hectare) are derived from a range of sources, including:

- The Australian Bureau of Statistics, 1998-99 Retail Industry publication (8622.0)

- NSW Department of Planning, Employment Monitoring of Commercial and Industrial Areas
- Other publicly available sources and information held by Urbis.

Employment densities vary significantly by different building uses and other factors, such as age of building and quality of a building's design. Drawing on industry benchmarks as reported in the sources identified above, Table 3.6 outlines the estimated on-going employment that would be generated within the proposed retail, commercial and leisure uses at new retailing within West Belconnen.

Indicative Employment Capacity

WEST BELCONNEN GROUP CENTRE

TABLE 3.6

Type of Use	Employment Per '000 Sq.m Industry Average	Centre Expansion Additional ¹	
		GLA (Sq.m)	Employment (Persons)
Supermarket(s)	40.8	5,000	204
Mini-Majors	23.5	650	15
Specialty Shops	60.7	2,700	164
Non retail/External	42.7	2,100	90
Destinational Food & Beverage	35.0	1,500	53
Total Property		11,950	525

Source : Urbis

In total, the proposed retail supporting uses have the potential to provide employment for approximately **523** full-time, part-time and casual workers per year.

In addition to operational jobs the proposed development will also result in a range of direct and indirect employment during construction and multiplier jobs in the wider economy.

SUPPORTABILITY OF ADDITIONAL RETAIL JOBS AT KIPPAX GROUP CENTRE

Urbis' retail analysis has forecast that the existing Kippax trade area population is expected to stay fairly constant at around **38,200** people in 2016 and 2021. In the absence of any major shift in planning controls and market demand for infill development we expect the trade area population to remain consistent beyond 2021.

An increased resident population at West Belconnen and growth in per capita expenditure from Kippax trade area residents over the long term create an opportunity for Kippax retailers to enhance their productivity and market scope to support additional floorspace.

In the first years of residential development at West Belconnen, until such time as new retail facilities are operational, the Kippax Group Centre is also likely to benefit from food and grocery spending by new residents at West Belconnen.

In the longer term Kippax is likely to benefit from additional passing trade generated by West Belconnen residents, as well as attract some spend from Macgregor West and golf course residents.

The addition of the West Belconnen residents will allow the supportability of a discount department store (DDS) and additional retail floorspace at Kippax Group Centre. Kippax does not currently contain a DDS. Kippax Fair contains a full line supermarket and there is also an ALDI supermarket located adjacent to it.

The West Belconnen development can therefore be a catalyst for additional retail development at Kippax Group Centre as well as within the West Belconnen development itself.

Kippax Fair Shopping Centre currently provides around **7,800 sq.m of** retail floorspace and a total of 8,300 sq.m floorspace.

The additional 30,000 West Belconnen residents will contribute to the expansion potential of Kippax Fair to comprise of:

- An additional supermarket
- Discount department store (DDS)
- Specialty retail floorspace

Around **13,300 sq.m** of additional floorspace could be added to bring Kippax Fair in line with the average size of a single DDS based shopping centre

Adding this quantum of floorspace has the potential to provide around **400** additional full-time, part-time and casual workers per year within the local area.

Kippax Fair Indicative Expansion Potential

EMPLOYMENT GROWTH POTENTIAL

TABLE 3.7

	Gross Leasable Area ²					Employment	
	Current - Kippax Group Centre		Single DDS Sub Regional Average		Variation	Additional Jobs - Kippax Group Centre	
	sq.m	%	sq.m	%	Variation	Jobs per additional sq.m	Additional Jobs
Majors & Mini Majors:							
Discount Department Stores	0	0%	6,841	38%	-6,841	43	159
Supermarkets	3,888	50%	4,925	27%	-1,037	25	41
Other Majors	0	0%	183	1%	-183	43	4
Mini-Majors	0	0%	1,561	9%	-1,561	43	36
Total Majors & Mini-Majors	3,888	50%	13,510	74%	-9,622		
Total Retail Specialties	3,896	50%	4,664	26%	-768	16	48
Shopping Centre - Retail	7,784	94%	18,174	84%	-10,390		
Other / non reporting specialties	0	0%	1,372	6%	-1,372	23	60
Non Retail / Non Reporting	497	6%	1,627	8%	-1,130	23	49
Vacant	0	0%	434	2%	-434		
Total	8,281	100%	21,607	100%	-13,326		398

1. Benchmarks are for the year to June 2013 from Urbis Retail Averages 2012/13

Source: Urbis Retail Average (2013); Urbis

The table above assumes an additional 1,037 sq.m supermarket floorspace. It should be noted that the addition of a second full line supermarket (notionally of 3,500 sq.m) could support 140 supermarket jobs rather than the 41 identified above which would take the additional employment total to around **500**.

3.4 CONCLUSION

Table 3.8 shows a consolidated list of additional local employment that will be supported by the demand for goods and services by new West Belconnen residents in the local area by ANZIC Industry Sector at capacity and Table 3.9 shows the local employment projections by five year intervals throughout the project development timeframe.

Total Local Employment

BY ANZSIC INDUSTRY SECTOR, AT CAPACITY 2054

TABLE 3.8

West Belconnen Generated Local Area Employment (2054)

Type A - Industry Sectors	Number	%
Agriculture, forestry & fishing	214	5%
Electricity, as, water & waste services	30	1%
Public Administration & safety	0	0%
Education & training	810	20%
Health care & social assistance	130	3%
Type A - Total	1,180	29%
Type B - Industry Sectors		
Mining	0	0%
Manufacturing	243	6%
Construction	23	1%
Wholesale trade	15	0.4%
Retail trade	1,000	25%
Accommodation & food services	50	1%
Transport, postal & warehousing	23	1%
Information media & telecommunications	92	2%
Financial & insurance services	279	7%
Rental, hiring & real estate services	138	3%
Professional, scientific & technical services	302	7%
Administrative & support services	302	7%
Arts & recreation services	300	7%
Other services	82	2%
Type B - Total	2,850	71%
Total Jobs	4,030	100%

Source: ABS Census 2011; Urbis

Total Employment Growth

INDUSTRY SECTOR, LOCAL AREA, 2016 TO 2054

TABLE 3.9

	2016	2020	2025	2030	2035	2040	2045	2050	2054
Type A - Industry Sectors									
Agriculture, forestry & fishing	50	72	92	114	136	158	178	200	214
Electricity, as, water & waste services	30	30	30	30	30	30	30	30	30
Public Administration & safety	0	0	0	0	0	0	0	0	0
Education & training	0	110	220	320	420	530	670	750	810
Health care & social assistance	0	0	3	3	7	10	20	20	130
Type A - Total	80	212	345	467	593	728	898	1,000	1,184
Type B - Industry Sectors									
Mining	0	0	0	0	0	0	0	0	0
Manufacturing	0	0	243	243	243	243	243	243	243
Construction	0	0	23	23	23	23	23	23	23
Wholesale trade	0	0	15	15	15	15	15	15	15
Retail trade	0	0	570	600	1,000	1,000	1,000	1,000	1,000
Accommodation & food services	0	0	50	50	50	50	50	50	50
Transport, postal & warehousing	0	0	23	23	23	23	23	23	23
Information media & telecommunications	0	11	21	32	43	54	64	75	92
Financial & insurance services	0	37	72	109	146	183	218	255	279
Rental, hiring & real estate services	0	15	53	68	83	98	113	128	138
Professional, scientific & technical services	0	37	95	132	169	206	241	278	302
Administrative & support services	0	37	95	132	169	206	241	278	302
Arts & recreation services	0	0	270	270	270	270	270	270	300
Other services	0	11	21	32	43	54	64	75	82
Type B - Total	0	150	1,550	1,730	2,270	2,420	2,560	2,710	2,846
Total Jobs	80	360	1,900	2,200	2,860	3,150	3,460	3,710	4,030

Source: Urbis

4 Location of West Belconnen Related Employment

This section provides an indication of the likely location of employment that will be generated by the West Belconnen residents within the local catchment.

Map 4.1 shows the Draft West Belconnen Masterplan which shows the planned location of employment within the estate.

4.1 WITHIN WEST BELCONNEN

Group Centre

A retail centre is to be located within the planned West Belconnen Group Centre. A number of uses have been identified that have the potential to be located adjacent to the main retail facilities, and therefore within the land to be allocated to a future Group Centre. These uses include:

- Gym - the West Belconnen population will generate demand for a commercial gym which could be provided in the vicinity of the proposed centre
- Child care centre – the growing population will generate demand for several child care facilities. At least one could be provided in the vicinity of the proposed centre
- Community health and medical centre – a mix of community health facilities and private medical suites could be provided as part of the overall planning of centre for West Belconnen
- Community / civic centre - the West Belconnen population will generate demand for a range of community / civic facilities. Provision could be made for a community hub within the vicinity of the proposed centre.

Throughout the Residential Estate

- As shown in Map 4.2, similar to the current location of employment in health and education, schools, day-care centres, medical services and other community facilities are likely to be dispersed throughout the West Belconnen residential development
- The Biosphere, while a destination for tourists does not require a central location, and can be located away from the centre. It does however require a large site, with signage directing visitors. This could be accommodated within the existing land fill site or in the buffer zones.
- Sustainable Food and Beverage with a similar offer to the Grounds of Alexandria in Sydney to be co-located with the West Belconnen Biosphere or within the Group Centre.

Landfill

The Landfill is to include the following employment generators:

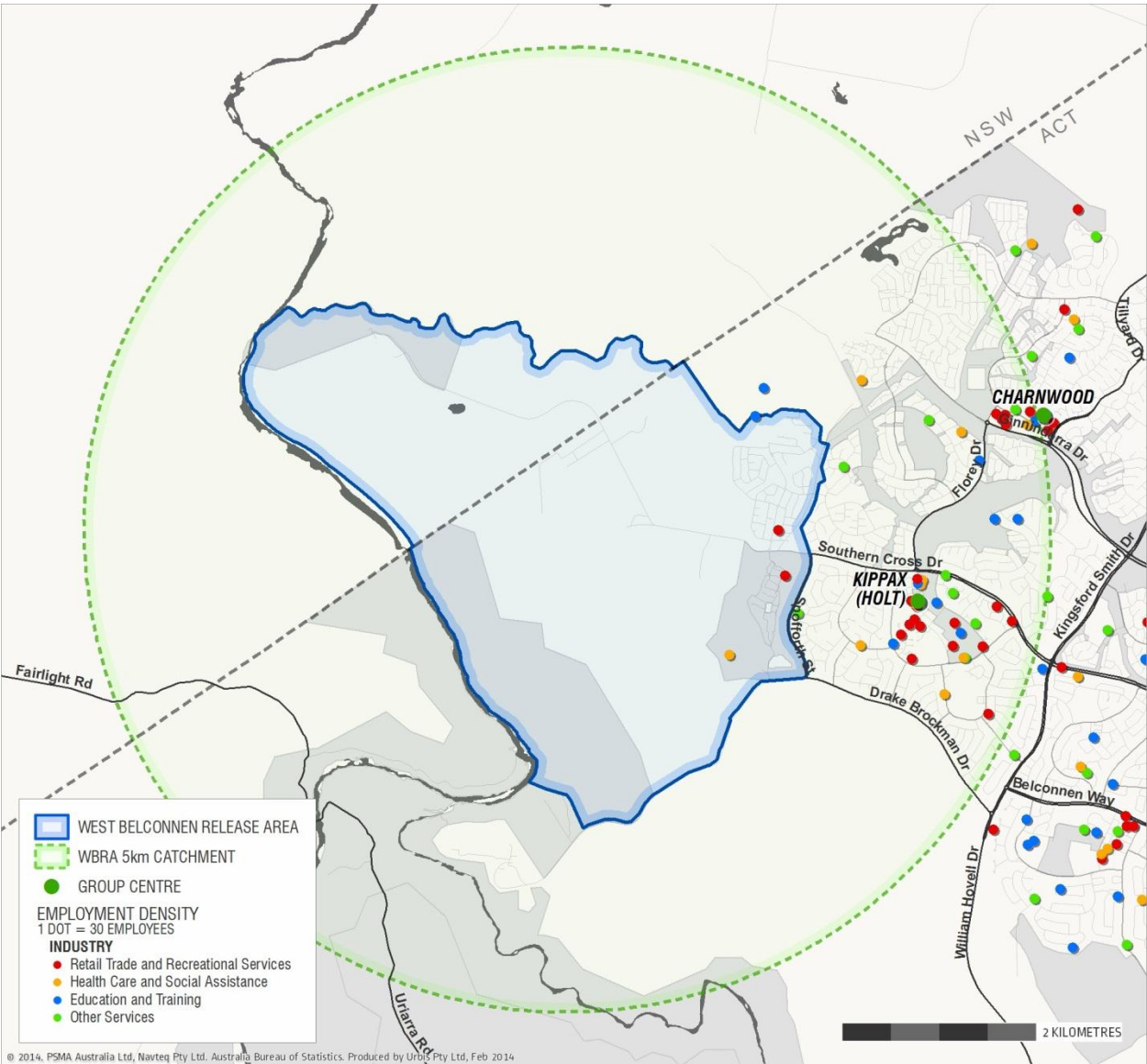
- Recycling facility, with the capacity to process / recycle materials onsite including green waste, solid waste transfer station, a supply chain and logistics facility and a retail and wholesale plant nursery
- The Business Park can be located within the existing landfill area, and separated from residential areas or on Parkwood Road



4.2 ELSEWHERE IN THE LOCAL AREA

Demand for retail goods and services from West Belconnen residents that will not be fulfilled within the project will be divided between:

- Other centres to be located in the local area such as Kippax and Charnwood Group Centres
- Belconnen Town Centre including Westfield Belconnen
- Other parts of the ACT and the Canberra CBD in particular



5 West Belconnen Against Green Star Criteria for Employment and Economic Resilience

This section provides a summary of our assessment of how the West Belconnen Development qualifies for **1.32 Green Star Points** under the category Employment and Economic Resilience.

5.1 MINIMUM REQUIREMENT – NET PERCENTAGE INCREASE OF LOCAL JOBS

We understand that to qualify for any points under Employment and Economic Resilience a development must result in a positive net gain on existing employment opportunities within the local area.

Our analysis in Section 3 clearly demonstrates that the West Belconnen Development will result in a positive net gain on existing employment opportunities within the local area at capacity to comprise of:

- An additional 3,530 ongoing jobs that will be located within the West Belconnen Development
- Some 500 ongoing jobs external to the project but to be located within the local area

West Belconnen Development Local Employment Creation

AT CAPACITY (2054)

TABLE 5.1

	ADDITIONAL EMPLOYMENT
West Belconnen residents driven employment	2,780
West Belconnen regional employment uses	750
West Belconnen Development located employment	<u>3,530</u>
Local employment to be located elsewhere	<u>500</u>
Total additional local employment	+4,030

5.2 LOCAL AREA EMPLOYMENT

Under this Green Star criteria, up to one point can be awarded based on the proportion of the job demand from the project that is serviced locally at the time of the project's completion.

We understand that Green Star points are to be calculated based on the proportion of local jobs that meet the criteria of 80% of local job demand from the project being met locally.

Based on this guideline, we believe the West Belconnen Development is eligible to claim 0.32 points under the Local Area Employment Criteria.

Table 5.2 provides an overview of our calculations. Their key steps are as follows:

- The West Belconnen Development will add an additional 30,000 residents in the local area
- On average, 53% of current local residents are employed (from Table 5.3)
- The West Belconnen Development is forecast to generate a total job demand of some 15,960 (from Table 5.3)
- The West Belconnen Development is to contribute a total of 4,030 jobs at capacity equating to a 25.3% job containment rate
- Taking the ratio between the gross local job containment rate for the project of 25.3% (F) and the Green Star local job containment rate target of 80% results in 0.32 points

Net % Increase in Local Jobs

LOCAL AREA, AT CAPACITY (2054)

TABLE 5.2

STEP	INDICATOR	AT CAPACITY (2054)
A	Additional West Belconnen residents	30,000
B	Employment rate (% of resident population)	53.2%
C=AxB	West Belconnen total job demand	15,960
D=80%C	Green Star 80% of additional job demand target for West Belconnen	12,768
E (from Table 7.10)	Additional local area employment from the West Belconnen Development	4,030
F=E/C	Gross job containment from the West Belconnen Development (Project related additional local employment as a % of total job demand from the project)	25.3%
G	Green Star local job containment target	80%
H=F/G	Local Area employment points	0.32

Source: Urbis

Tables 5.3 and 5.4 show the total job demand at capacity and at five year intervals that is forecast to be generated by the West Belconnen Development and the equivalent Green Star 80% Job Containment Target.

West Belconnen Development Job Demand Target

LOCAL AREA, 2011 AND 2054

TABLE 5.3

	Local Area (2011)	West Belconnen at Capacity (2054)
Resident Population	33,094	30,000
Employment Rate %	53.2%	53.2%
Job Demand	17,600	16,000
Greenstar Job Containment Target %	80%	80%
Greenstar Job Containment Target	14,100	12,800

Source: ABS Census 2011; Riverview Group; Urbis

Job Demand and Containment Target

WEST BELCONNEN, 5 YEAR INTERVALS, 2016 TO 2054

TABLE 5.4

	2016	2020	2025	2030	2035	2040	2045	2046	2054
Total Local Area Population	33,100	37,000	40,900	44,800	48,700	52,600	56,500	60,400	63,100
West Belconnen: Population	0	3,900	7,800	11,700	15,600	19,500	23,400	27,300	30,000
Employment Demand	0	2,100	4,100	6,200	8,300	10,400	12,400	14,500	16,000
Green Star Job Containment Target (80% of employment demand)	0	1,700	3,300	5,000	6,600	8,300	9,900	11,600	12,800

Source: Australian Bureau of Statistics, Cat No 3218.0, July 2012 (ASGS 2011); ACT PLA 2012, Riverview Group, Urbis

5.3 ANZIC SECTOR JOBS

According to the Green Star Guidelines one additional point is awarded where:

- At least 15% of jobs in the local area are from Type A industry sectors, and
- Jobs from a Type B industry do not constitute more than 50% of all jobs in the local area

Table 5.5 shows the employment breakdown by ANZSIC Industry for the local area, existing and proposed related to the West Belconnen Development. The table clearly shows that the project is eligible for the one point available under this Green Star criteria:

- 35% of local jobs are from Type A industry sectors
- No one Type B industry sector represents more than 50% of local area jobs, with the highest percentage of jobs being 18% in retail trade

Total Jobs

LOCAL AREA 2011 AND AT CAPACITY (2054)

TABLE 5.5

	Local Area (2011)		West Belconnen Generated Local Area Employment (2054)		Total Jobs (2054)	
Type A - Industry Sectors	Number	%	Number	%	Number	%
Agriculture, forestry & fishing	277	7%	214	5%	491	6%
Electricity, as, water & waste services	122	3%	30	1%	152	2%
Public Administration & safety	359	10%	0	0%	359	5%
Education & training	485	13%	810	20%	1,295	17%
Health care & social assistance	298	8%	130	3%	428	5%
Type A - Total	1,540	41%	1,180	29%	2,730	35%
Type B - Industry Sectors						
Mining	10	0.3%	0	0%	10	0.1%
Manufacturing	118	3%	243	6%	361	5%
Construction	404	11%	23	1%	427	5%
Wholesale trade	42	1%	15	0.4%	57	1%
Retail trade	430	11%	1,000	25%	1,430	18%
Accommodation & food services	316	8%	50	1%	366	5%
Transport, postal & warehousing	72	2%	23	1%	95	1%
Information media & telecommunications	35	1%	92	2%	127	2%
Financial & insurance services	31	1%	279	7%	310	4%
Rental, hiring & real estate services	39	1%	138	3%	177	2%
Professional, scientific & technical services	301	8%	302	7%	603	8%
Administrative & support services	82	2%	302	7%	384	5%
Arts & recreation services	168	4%	300	7%	468	6%
Other services	167	4%	82	2%	249	3%
Type B - Total	2,220	59%	2,850	71%	5,060	65%
Total Jobs	3,760	100%	4,030	100%	7,790	100%

Source: ABS Census 2011; Urbis

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This report is dated January 2014 and incorporates information and events up to that date only and excludes any information arising, or event occurring, after that date which may affect the validity of Urbis Pty Ltd's (**Urbis**) opinion in this report. Urbis prepared this report on the instructions, and for the benefit only, of Riverview Group (**Instructing Party**) for the purpose of Riverview Group's submission to apply for Green Star Points relating to "Employment and Economic Resilience" (**Purpose**) and not for any other purpose or use. Urbis expressly disclaims any liability to the Instructing Party who relies or purports to rely on this report for any purpose other than the Purpose and to any party other than the Instructing Party who relies or purports to rely on this report for any purpose whatsoever (including the Purpose).

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This report has been prepared with due care and diligence by Urbis and the statements and opinions given by Urbis in this report are given in good faith and in the reasonable belief that they are correct and not misleading, subject to the limitations above.

Appendix A

CVs

Appendix B

Business Park

Business Park precincts typically contain a mix of manufacturing, warehouse and distribution and logistics and office jobs that typically relates to the supply and demand for building construction - residential, commercial and industrial, distribution and logistics - as well as manufacturing.

Within Canberra, there are a number of precincts that have this industry profile, discussed below and illustrated overleaf in Map B.1:

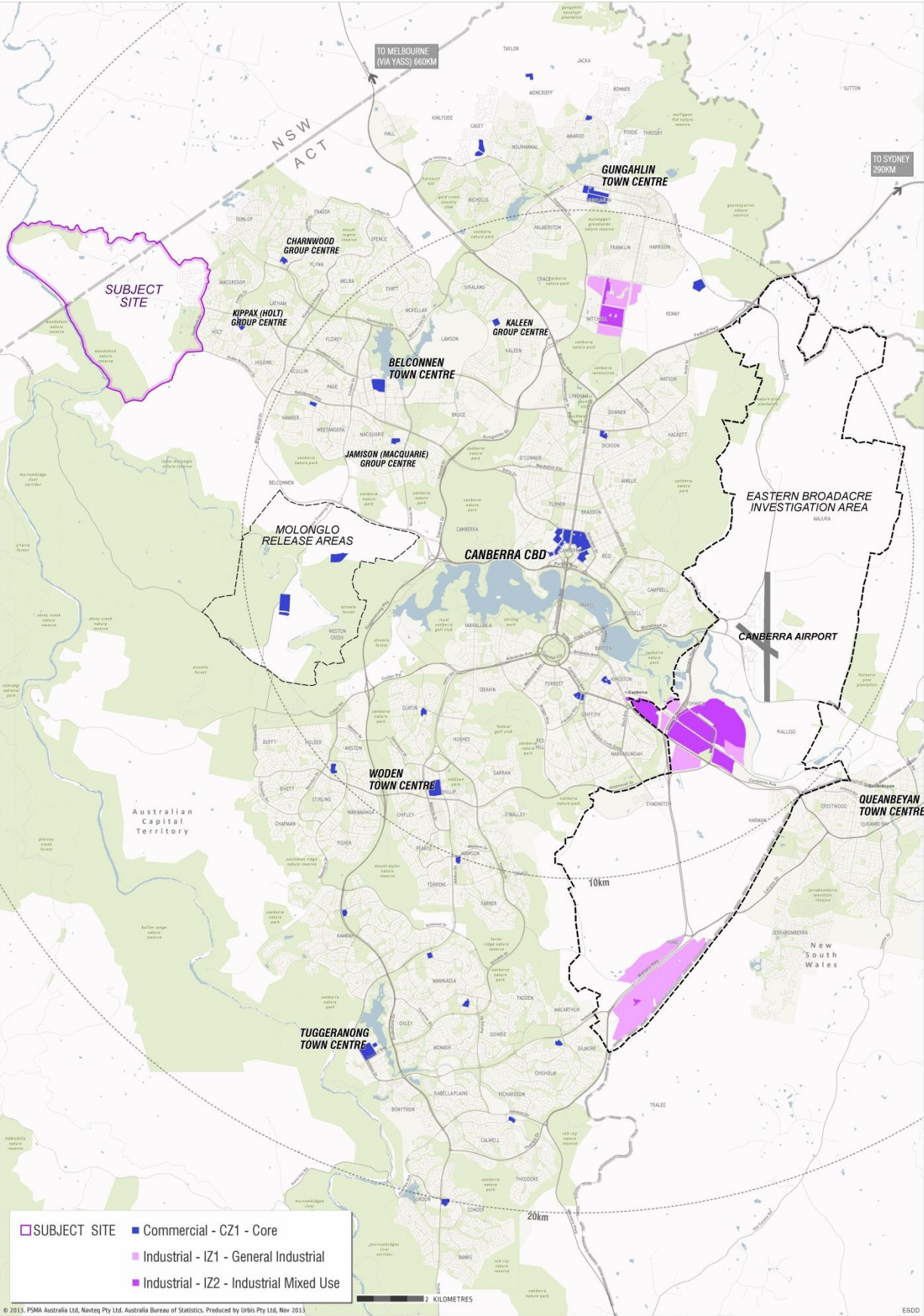
- The industrial precincts in Canberra are centred in three main areas – Mitchell, Fyshwick and Hume. The Mitchell, Fyshwick and Hume are 160, 470 and 350 hectares in size, respectively.
- These industrial precincts are situated in buffer zones which are located away from residential areas.
- The Mitchell industrial precinct is linked to Flemington Road, which is a short drive from the Gungahlin Town Centre. The precinct has convenient access to two highways Barton Highway, which links to Melbourne, and to the Federal Highway, which links to Sydney.
- Mitchell is located closest to the city centre with a distance of 8km, followed by Fyshwick at 9km and Hume the furthest away from the city at 15km.
- The Fyshwick and Hume industrial precinct is within close access to Canberra Ave, which links to Queanbeyan, as well as Monaro Highway, which links to the Hume industrial precinct and Majura Road. This provides close access to the Canberra Airport as well as the road link to Sydney.
- Majura Road is expected to be upgraded in June 2016 and will allow for increased connectivity of the north and south regions, as well as connecting the Federal and Monaro Highway. The easier and faster access will increase efficiency for freight and logistics.

To provide an indication of the business park jobs that could be supportable within the West Belconnen release area, Urbis have derived the benchmark of industrial jobs in Gungahlin excluding those in the Mitchell SA2 area. This provides an indication of the jobs supportable within a mainly residential release area, which does not have the same road infrastructure accessibility as other established industrial precincts such as Mitchell.

FACTOR	NUMBER
Population Growth, West Belconnen (2013 to 2046)	30,000
Resident Population per Industrial Job	200
Industrial Jobs	150
Floorspace per job (Sq.m)	150
Business Park Land	2 to 3 ha

Source: ABS Census 2011; Urbis

The 150 industrial jobs across 15,000 sq.m of floorspace can be generated from a 'Business Park' type format that includes a mix of office, warehousing and light industrial uses. This park could be combined with some of the commercial office space. This could comfortably be accommodated on 2 to 3 hectares of business park land, either as a part of a redeveloped land-fill site or in close proximity to the group centre.



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Appendix C

Landfill Site

The Belconnen land fill site is a 107 ha site with great potential to provide a range of facilities and services to the future population. Existing facilities on the site already provide a number of employment opportunities. These will be retained although they will be reconfigured and upgraded to ensure compatibility with the proposed development. Proposed activities include a substantial facility consisting of a waste recycling centre which will be operational through the 40 year construction period and beyond. It will comprise of:

- Green waste recycling
- Solid waste transfer station
- A supply chain and logistics facility
- Retail and wholesale plant nursery

The employment density for a facility that actively processes recycled material onsite is higher than as a landfill or depot facility, with an average of 17 employees per hectare (based on an established Sydney site).

The same rate has been applied to the other facilities and a total area equal to the existing recycling estate (12.7 ha) has been assumed. The size of the plant nursery has been assumed to be the same as the existing Yarralumla nursery (8.0 ha).

Appendix D

Eco Tourism / West Belconnen Biosphere

This section considers a unique “out of the box” land use that is not capital intensive but would be effective in placing West Belconnen firmly on the map in a positive light; and generate visitation, spending and employment.

The out of the box land use suggested is a sustainable social enterprise only found in south-east England at present, The Eden Project.

THE EDEN PROJECT

The Eden Project is part of a World Heritage site in the county of Cornwall, south-east England. It is a botanical garden, employment hub, community space, education centre, entertainment venue and tourist destination all rolled into one.

In 2008, 1.06 million people visited Eden Park, and in less than the ten years since its opening, more than 10 million people have visited. It has since become one of the United Kingdom’s most visited tourist attractions and the second most visited destination outside London.

The project is unique for two reasons: first, it is located in a non-metropolitan area. The site is a former clay mine about 10km north east of the village of St Austell, which has a population of about 25,000 people. The project has transformed many people’s perception of Cornwall, from a former mining community to one that embraces regenerative economic, environmental and social projects.

The second reason for its uniqueness is the architecture. The main attraction of the Eden Project is its two greenhouses, which comprise eight inter-linked domes covering 23,000 sq.m. They are at the forefront of sustainable design; the Eden Project is the only World Heritage Site created by a living architect.

THE EDEN PARK PROJECT

EXHIBIT D.1



Source: Wikipedia

One greenhouse contains tropical plants and allows visitors to walk through a rainforest. The Tropical Biome covers about 1.5 hectares and is 55 metres high, 100 metres wide and 200 metres long. It houses tropical plants, such as banana trees, coffee, rubber and giant bamboo, and mimics a tropical environment.

The second greenhouse, the Mediterranean Biome, contains temperate and arid environment plants. It covers about 0.6 hectares and is 35 metres high, 65 metres wide and 135 metres long. It houses temperate and arid plants such as olives and grape vines.

There are plans for a desert biome, but this is awaiting funding.

The greenhouse structure is supremely efficient. Each dome is made from a polymer that is assembled in triple layer pillows that are then ‘inflated’ for structural rigidity. These pillows can be made much larger than glass and are 1% of the weight, which substantially reduces the amount of steel required and allows more sunlight into the greenhouse.

The structure is so light that it weighs less than the air contained within the greenhouse and is mostly self-heated using passive solar heating, and the architect believes improvements to the design process can make them lighter still.

THE EDEN PARK PROJECT

EXHIBIT D.2



image courtesy Grimshaw

EDEN PROJECT DETAILS

Site:	110,000 sq.m
Owner:	Eden Project Limited
Architects:	Grimshaw Architects
Environmental Engineers:	ARUP
Landscape Consultants	Land Use Consultants
Structural Engineers:	Sinclair Knight Merz (SKM)

The £86 million development cost for the Eden Project was recovered within two years.

According to the UK's Living Places, in 2007/8, the total income for the project was £22.3 million, of which 75% came from tourism, 17% from fundraising and 8% from other activities such as concerts, functions, and consultancies.

Eden operates as a charity and a social enterprise that employs nearly 500 staff. Economic impact studies have shown that the project has contributed approximately £1 billion to the local economy. This amount excludes visitor spending at Eden itself, but includes off-site tourism related business in Cornwall and the rest of the region.

ECONOMIC BENEFITS FROM THE EDEN PROJECT

The project transformed the region of Cornwall and provides an example of how cutting-edge design can revitalise an area.

Analysis by tourism consultants Geoff Broom and Associates found that during the first six months of the 2002/3 financial year, the Eden Project contributed massively to the South West regional economy.

- It stimulated over 2.5 million visitor days in the region
- Increased employment by nearly 5,500 jobs
- Boosted business turnover by £177 million
- Generated an additional £81 million of income for local residents
- These benefits were felt by Eden's 2,500 local suppliers and a range of other businesses such as hotels, restaurants, bed and breakfasts, pubs and taxis

THE LESSONS FOR WEST BELCONNEN

The key lessons and implication for West Belconnen are as follows:

- Taking inspiration from Eden Park and creating a '**West Belconnen Biosphere**,' albeit at a smaller scale, would result in a multi-purpose site that draws tourists, creates jobs for local people and generates value for the community through food production and education.
- Build something with cutting edge design. The project does not have to be big and expensive, but it must be innovative and unique.
- Any tourist site must be connected to the local community. The Eden Project recognises that it could not sustain the massive amount of visitors it hosts each year without the support of the local community.
- Tim Smit, the founder of the Eden Project, says "we don't want replicas of Eden springing up around the world, like a kind of Disneyland. If we do go down this route, an overseas Eden should harness what's special about its environment."

Appendix E

Sustainable Food and Beverage

There is scope to move away from a conventional pub/club to deliver a high quality indoor/outdoor licenced premises which can link into the environmental sustainability aspect of the West Belconnen Development and provided locally sourced products.

A venue such as the Grounds of Alexandria in Sydney performs this role very well by combining a high quality indoor and outdoor area, growing products on site, and incorporating bespoke coffee roasting and microbrewery facilities. It is located on a site of around 1,600 sq.m of which around 40% is indoor space and 60% is landscaped outdoors providing a mix of seating, food growing areas and market stall space.

Located in an old pie factory from the early 1900's, The Grounds of Alexandria is the flagship venue for its specialty coffee. The site hosts a coffee research and testing facility alongside a café, opening onto a luscious garden of heirloom vegetables and fragrant herbs.

The integrity of the former warehouse has been retained by embracing its rustic and industrial aesthetic. Black and steel frames, bespoke wooden cabinetry and polished white and green subway tiles are contrasted against vintage wooden tables and refitted shipping containers.

With a holistic approach to food and design; The Grounds offers a wholesome and rustic menu. The kitchen uses sustainable practices including; picking fresh herbs every morning and working with full time horticulturalist to grow seasonal produce for the menu.

The Grounds markets are held on the first weekend of each month in the sprawling café garden. They allow visitors able to enjoy The Grounds brunch and own-roasted coffee whilst exploring of fresh produce and wholesome goods sold direct from the source. The markets also include live music performances, arts and craft activities and a petting zoo

The success of The Grounds is reflected in its large customer base and the waiting time to be seated in an otherwise unremarkable industrial estate in Alexandria.

This type of use, integrated within a centre, could create a real community destination for West Belconnen and could also assist in drawing weekend custom from beyond the trade area. It could provide a counterpoint, albeit on smaller scale to the role of the Old Bus Depot Markets at Kingston Foreshore.









THE LESSONS FOR WEST BELCONNEN

The key lessons and implication for West Belconnen are as follows:

- An operation of this nature would tie neatly into the agricultural heritage of the West Belconnen site.
- It would be consistent with the project objectives, particularly:
 - encourage community interactions through imaginative, functional and enjoyable public spaces
 - Ensuring long-term economic viability through design excellence
 - Growing a formal and informal green economy that fosters local jobs and builds regional learning around green innovation and technology
- It could be a highly destinational use that would retain local food and beverage spend, particularly at weekends, and could attract spending from beyond West Belconnen
- Good management is the key to successful food and beverage premises

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