

Campbelltown Employment Lands Review

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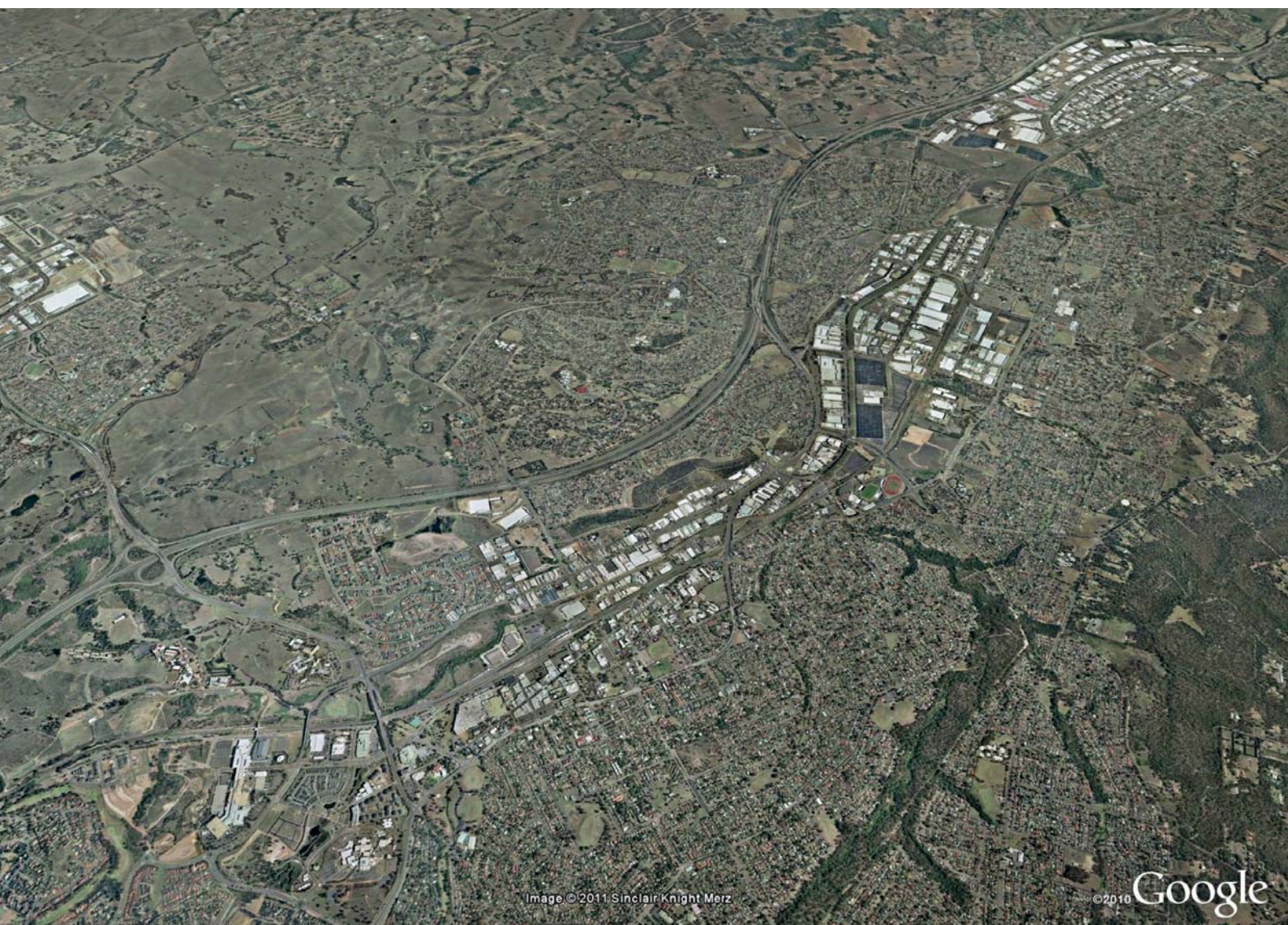


Table of Contents

1.0	INTRODUCTION
2.0	DEFINING EMPLOYMENT LANDS
3.0	PLANNING AND POLICY FRAMEWORK
4.0	SOUTH WEST SYDNEY REGIONAL CONTEXT
5.0	THE METROPOLITAN AND REGIONAL ECONOMIC CONTEXT
6.0	CAMPBELLTOWN ECONOMY
7.0	METROPOLITAN AND REGIONAL EMPLOYMENT LANDS TRENDS
8.0	CAMPBELLTOWN EMPLOYMENT LANDS
9.0	CENTRES
10.0	INFRASTRUCTURE
11.0	EMPLOYMENT PROJECTIONS
12.0	METROPOLITAN PLAN 2010
13.0	EMPLOYMENT LANDS PROJECTIONS
14.0	STRATEGIC OPPORTUNITIES

00 Executive Summary

Campbelltown City Council is concerned with ensuring that employment lands policy and planning contributes to desired local economic and employment goals. This includes a strong and diverse city economy, more jobs for local residents and supporting economic growth in the rapidly growing South West Sydney Subregion. The objectives of the Campbelltown Employment Lands Review are to:

- Evaluate the current demand for employment lands within the Campbelltown LGA;
- Determine the future demand for employment lands;
- Identify opportunities for meeting current and future employment lands needs ;
- Identify opportunities for job creation; and
- Inform the preparation of the new Local Environmental Plan.

The Sydney Metropolitan Plan 2010 defines employment lands as industrial areas and business and technology parks. Industrial areas include factories and warehouses with some associated offices, and accommodate a range of industrial activities such as manufacturing, distribution, concrete batching and panel beating. Business parks and technology parks, the latter usually linked to universities, tend to integrate high value added activities including research, advanced manufacturing, distribution and office based facilities including management and marketing in modern facilities.

The Campbelltown LGA and the South West Sydney Subregion suffer from a severe job deficit. Employment lands planning and policy, along with other strategic economic development, education and infrastructure initiatives, will play an important role in addressing this shortfall. Around 33% of the Campbelltown LGA's resident labour force is employed within the LGA, while two thirds of the resident labour force commutes to other areas.

Most importantly, the South West Sydney Subregion is projected to experience more population and labour force growth than any other metropolitan subregion by 2036. However, the NSW Government employment projections indicate there will be a massive widening of the job deficit i.e. local jobs minus the number of residents in the labour force for the South West Sydney Subregion, from 60,000 jobs in 2006 to almost 150,000 jobs by 2036. Economic development and employment planning for South West Sydney requires close coordination between local, State and National authorities in order to ensure that South West Sydney is shifted onto a higher economic and employment growth path.

The strategy to increase the supply and diversity of well-serviced local employment lands must form part of a comprehensive economic development strategy which also includes developing the Campbelltown-Macarthur Centre as one of the Sydney's most significant regional cities with an expanding commercial

office market, building opportunities around health and educational assets, and also establishing high value added labour intensive business park capacity in the Campbelltown LGA.

The Transport Data Centre estimates that employment in the Campbelltown LGA will increase by more than 29,000 jobs between 2006 and 2036, with most of these jobs concentrated in service-based industries in centres, in and around health and educational establishments, and increasingly in home based businesses. These estimates are too low and, will result in a decline in employment self-containment in the Campbelltown LGA and South West Sydney.

Campbelltown has 741 hectares of zoned employment lands located in the Ingleburn, Minto, Campbelltown and the smaller Leumeah industrial areas. The Campbelltown LGA, whilst containing around 4% of Sydney's population, provides around 5% of all of Sydney's employment lands. Notwithstanding the Campbelltown LGA's contribution to metropolitan lands supply, the South West Sydney Subregion has a shortage of employment lands. This will have significant impact on employment lands demand in the Campbelltown LGA.

Firstly, most employment lands in the Campbelltown LGA are occupied, with only about 30 hectares of vacant land, particularly in the Minto industrial area.

Secondly, high population growth in South West Sydney will significantly

increase demand for regional employment lands. Although the South West Sydney Growth Centre has allocated 1,364 hectares for employment lands, the timing of the development of most of this land and much of the pressure to meet demand will spillover around the major interstate rail and road corridors in the Campbelltown LGA.

Thirdly, most government attention on new greenfield releases is concentrated around the Western Sydney Employment Hub, based particularly in Blacktown and Penrith. Insufficient attention has been given to meeting demand in the South West Sydney Subregion.

The Campbelltown LGA is experiencing solid employment growth in industries associated with employment lands, specifically manufacturing and transport and storage. Between 1996 and 2006, for example, manufacturing and transport and storage industry employment grew by 2,752 jobs. This accounted for 39% of total job growth of 7,048 new jobs in the Campbelltown LGA over this period. This amounts to a take-up rate in the LGA of around 8 hectares per year.

Given the acceleration of the rate of growth of the South West Sydney Subregion and the attractiveness of transport corridor through Campbelltown, it is estimated that Campbelltown will require around 10 additional hectares per annum to 2036, or around 250 additional hectares of new greenfield sites for industrially zoned land with IN1 or

IN2 zonings. Hence, it is proposed that Campbelltown City Council plan for a total of around 1,000 hectares of zoned employment lands for non-business park activities.

The options for major new employment lands in the Campbelltown LGA are limited. Two major sites have been identified in previous reports – Glenlee Coal Plant and Glenfield Waste Disposal Site. To develop new greenfield sites – close cooperation will be required between land owners, Campbelltown City Council and the neighbouring councils, Camden Council in the case of Glenlee and Liverpool Council.

Given the regional significance of both sites, the State Government should be involved in the planning and development of both sites. Both have advantages but have infrastructure challenges. It is proposed that Campbelltown City Council commence negotiations with Liverpool City Council regarding the development of the Glenfield Waste Disposal Site for employment lands. Councils should aim to have the site rezoned and serviced by 2020. It is proposed that Campbelltown City Council approach Camden Council with a view to commence planning investigations of the Glenlee Coal Plant with a target operational date of 2026.

At this stage, there are few opportunities to encourage redevelopment or higher density development of existing sites. The competitive advantage of the Campbelltown LGA's large employment lands is their location on Sydney's major rail and road networks.

This attracts freight intensive industries and brings substantial benefits to the metropolitan economy. Over the past decade, there have been a number of proposals to expand intermodal facilities along the south west corridor. The most significant development is the proposal to locate a mega intermodal facility in Moorebank in close proximity to the Campbelltown LGA.

This review also examines Campbelltown's main centres. Although employment lands are distinguished from centres, such as Campbelltown-Macarthur and Ingleburn, there are important relationships between the two that impact employment lands planning. Firstly, the more successful centres are in attracting employment the less pressure it puts on employment lands to supply numbers of increased jobs.

The review shows that the Campbelltown-Macarthur Centre was Sydney's most successful centre (outside of the Global Centre) in generating new jobs between 2001 and 2006. Secondly, many jobs that were traditionally based in firms located in industrial areas, such as design, engineering, finance and marketing, are increasingly out-sourced and located in centre based firms. Thirdly, new investment in employment lands can stimulate centre activity such as retailing, hospitality and local business services.

The Campbelltown-Macarthur Centre has been very successful at generating new jobs in the early years of this millennium. Employment in the centre

increased from 10,300 in 2001 to 14,100 in 2006, or by 3,800 jobs. Most of the new jobs are in retail and health and community services. Given that the 2005 Metropolitan Strategy set a target of 15,000 jobs in total by 2031, this is an extraordinary achievement. Despite the fact that the Metropolitan Strategy designated Liverpool as a Regional City and Campbelltown as a lower status Major Centre, the evidence suggests that Campbelltown-Macarthur Centre will consolidate its role as the key Regional City for South West Sydney. An employment target of 35,000 for Campbelltown-Macarthur by 2036 would be more realistic.

One way to address the employment challenges in South West Sydney is to plan for and establish a business park in the area. Over the past 20 years, jobs in business parks in Sydney have been growing at three times the rate of jobs in major centres. In 2006, around 100,000 jobs, or 5% of Sydney's total jobs were located in business parks such as Macquarie Park and Norwest. By 2036, we estimate that around 250,000 jobs, or 10% of Sydney's total jobs, will be based in business parks. Successful business parks attract high value businesses and high skilled workers. They are well planned and serviced and have good amenities such as child care centres, convenience shopping for the workforce and entertainment.

The Metropolitan Strategy 2005 emphasises the importance of business parks and the need for future supply to be accommodated close to good public transport. A modern and well located business park, accommodating between 12-15,000 jobs by 2036, is needed in South West Sydney. The subregion is reaching critical mass in terms of population and the labour force is becoming highly skilled, with the proportion of residents with tertiary qualifications increasing significantly. High growth occupations within the Campbelltown labour force include business and information professionals, business and administrative associate professionals, science, building and engineering professionals.

The Campbelltown LGA, with its excellent transport linkages, university and proximity to major hospitals, is well positioned as a possible location for a new business park. This report identifies possible sites including residual UWS/TAFE land and the 50ha Bethlehem Monastery site, separated only by Narellan Road from the UWS/TAFE Campus. These two sites could be linked by a pedestrian bridge positioning the Monastery as an ideal business/ research park, particularly with the site's outstanding access to the motorway and Macarthur Railway Station.

Another site with potential as a business park is the Hurlstone Agricultural High School site and the adjacent DOP land, west of the Southern Railway and bisected by the South West Rail Link on its route from Glenfield to Leppington, which is now under construction. The site comprises 200 ha, divided approximately 170ha north and 30 ha south of the new rail line.

To the south of the site is the historic Macquarie Field House and the 'up-market' Macquarie Links Estate. The South West Growth Centre precincts of Leppington and Edmondson Park will have direct access to the site by road and rail.

RECOMMENDATIONS

1. Given the severe and growing job deficit in the South West Sydney Subregion, Campbelltown City Council should seek the support of other South West Sydney councils, the NSW and Federal Governments to make sustainable economic development and employment growth the highest priority for a comprehensive growth strategy for the South West. In the first instance, Council should investigate ways to strengthen its in-house local economic development and employment capabilities, including strengthening local business networks, attracting new investment, and ensuring that strategic infrastructure priorities are aligned with economic opportunities.
2. Campbelltown City Council should establish a target to increase employment in the LGA from 46,000 in 2006 to 106,000 in 2036, or by 60,000 jobs, more than double the 29,000 projection of the NSW Government's Transport Data Centre. A high proportion of metropolitan Sydney's population growth is expected to be accommodated in South West Sydney. Given the NSW Government's ambitious population and hence workforce growth projections for South West Sydney, it is imperative that economic development and employment growth are

aligned with workforce growth. Without a realistic job target, employment self-containment will decline resulting in an increase in commuting and unemployment. This is unacceptable from an economic, social and environmental perspective. Campbelltown, because of its infrastructure, dynamic centre and established and well located employment lands, is emerging as the major economic and employment centre for South West Sydney. Council should prepare a submission to the State and Federal Governments setting out why stronger economic and employment growth in South West Sydney, and Campbelltown in particular, is central to ensuring that metropolitan Sydney is transformed into a City of Cities. All tiers of governments need to support a more realistic employment target, develop and implement strategies to achieve this target and monitor progress to ensure that jobs and urban growth are closely aligned.

3. Campbelltown City Council, with its South West Sydney partners including MACROC, recognising the central importance of economic development, should take a pro-active leadership role in developing and implementing economic development strategies to accelerate job growth and the continuous transformation towards a high value added

economy. Campbelltown Council, recognising the increasing role of the city as an economic and employment centre, should prepare a Campbelltown Economic Development Strategy. The strategy should focus on practical initiatives that build on industry and community strengths and improvements in health, education and transport infrastructure to accelerate the transformation and growth of the local economy.

4. Campbelltown City Council should establish the following realistic and achievable spatial employment targets to guide economic development and land use planning.

Campbelltown-Macarthur Centre	35,000 (Metro Strategy target 25,000)
Campbelltown Business Park	10,000 (current target 0)
Campbelltown employment lands	30,000 (current projection around 20,000)
Other	31,000 (current 30,000)

The need to substantially increase economic and employment growth is a key theme of this report. The table is a guide to the spatial allocation of employment. The arguments supporting these targets are as follows: Firstly, the Campbelltown-Macarthur Centre, along with Wyong-Tuggerah, has been the best performing strategic

centre in the Greater Metropolitan Region (GMR) over this decade. For example, employment in the Centre grew by 3,800 jobs between 2001 and 2006, which is more than four times the growth in Liverpool centre (900 jobs), the designated Regional City for South West Sydney, over the same period. Hence, new targets need to be adopted to support the higher Campbelltown growth trajectory. Secondly, the fastest employment centres in the GMR are business parks, such as Macquarie Park and Norwest, which are growing at three times the rate of traditional centres. Campbelltown, because of its transport, education and health infrastructure advantages, urgently needs to identify and pursue new opportunities to establish a business park to support knowledge based economic and employment growth. Thirdly, employment lands supply needs to be expanded to accommodate projected growth in demand, particularly for manufacturing and logistics, in the LGA. Finally, to support the strategic objectives of Campbelltown 2025 – Looking Forward, Council needs to limit employment growth outside of centres and employment lands.

5. Campbelltown City Council should establish a target of 1,000 hectares of general industrial (IN1 or IN2) employment lands by 2036 (currently 741 hectares) i.e a

target to provide an additional 259 hectares of employment lands to accommodate growth in demand for local industry and freight oriented businesses.

6. Campbelltown City Council should recognise the metropolitan significance of existing employment lands along the major rail and road corridors, and should ensure that larger sites remain available to meet the long term demands of the logistics industry.
7. Campbelltown City Council should establish target dates for the operation of two proposed industrial areas – Glenfield Waste Disposal site by 2020 and Glenlee Coal Plant by 2026.
8. Campbelltown City Council should approach the NSW Government Employment Lands Development Program with a proposal to have a general industrial area operational within the Glenfield Waste Disposal Site by 2020.
9. Campbelltown City Council should approach the NSW Government Employment Lands Development Program and Camden Council with a proposal to work collaboratively to have a general industrial area operational at Glenlee by 2026
10. Given the strategic location of Campbelltown's existing employment lands on the M5 and Sydney-Melbourne Rail Line, Council should not seek, at least in the short-medium

term, to sub-divide larger parcels of employment lands. Some densification is likely to occur over time. One opportunity for greater densification is the area on the western side of Ingleburn railway station linked to the broader Ingleburn industrial area. Council should consider opportunities for general higher industrial density developments that will support the growth of Ingleburn Centre.

11. Campbelltown City Council should seek clarification of the timing and commitment to the proposed Moorebank Intermodal Facility before giving consideration to new Intermodal facilities in the Campbelltown LGA.
12. Campbelltown City Council should approach the South West Sydney Institute of TAFE with a proposal to develop the old Austool site at Ingleburn into a metropolitan leading centre, with strong participation from the building and construction industry, for sustainability and affordable residential construction.
13. Campbelltown City Council should give high priority to the establishment of one or two business parks in the Campbelltown LGA. Council should consider commissioning an investigation of options to expand its business park capacity, including possible sites, infrastructure requirements, economic and commercial

potential, and in the event of a positive evaluation, possible partners to move the project forward. Given the growing professionalisation and advanced technical skills of the labour force, health and education institutions and strategic location, the Campbelltown LGA is well placed to establish a business park with the potential to develop as a specialised centre. Given the target of 10,000 jobs, (with the potential of 15,000, when fully developed) it is possible that more than one site would be needed, although employment densities in business parks are increasing all the time. This report has identified two potential sites that warrant careful consideration:

- The DET Agricultural School Site at Glenfield (with a focus on agriculture and food) and adjoining DOP land; and
- Surplus TAFE/UWS land and the Bethlehem Monastery Site.

- 14.** Campbelltown City Council should make a business case to the NSW Government to designate Campbelltown-Macarthur Centre as a Regional City with an employment target of 35,000 jobs by 2036. The point needs to be emphasised that a 35,000 target for the centre is actually based on a continuation of the current trend which has seen the centre emerge as the natural regional centre for South West Sydney.

- 15.** Campbelltown City Council should continue to develop and implement strategies to build Campbelltown-Macarthur as the major knowledge based centre of South Western Sydney and take steps to strengthen the centre's commercial office market. The boundaries of the Centre need to incorporate the University of Western Sydney, the South Western Sydney Institute and Bethlehem Monastery. All land uses in this broader catchment should support the long term employment target of 35,000 jobs by 2036.

- 16.** Campbelltown City Council should request that the NSW State Government adopt and fund a priority infrastructure project to strengthen access to and from the city's employment lands. Key priorities include:
- Better east-west road access from the South West Growth Centre to the Campbelltown-Macarthur Centre through the extension of Badgally Road; and
 - Four way intersections with Raby Road and Brooks Road to give better access to the Minto and Ingleburn employment areas.





01

Introduction

01 Introduction

The Campbelltown Employment Lands Review will provide an input into the preparation of the comprehensive Local Environmental Plan for The Campbelltown LGA and inform Campbelltown City Council about how employment land policy could increase jobs in Campbelltown. The objectives of the project are:

- Evaluate the current demand for employment lands within the Campbelltown LGA;
 - Determine the future demand for employment lands;
 - Identify opportunities for meeting current and future employment land needs;
 - Identify opportunities for job creation; and
 - Inform the preparation of the new Local Environmental Plan
- Campbelltown City Council has adopted Campbelltown 2025 – Looking Forward. Campbelltown 2025 provides a planning framework of future directions for the Campbelltown LGA including employment lands. It puts forward six strategic directions:
- Protecting and enhancing the City's environmental assets;
 - Growing the Regional City;
 - Building a distinctive sense of place;
 - Getting around the City;
 - Building and maintaining quality public infrastructure, and
 - Retaining and creating jobs.

The Review has relevance to all of these strategic objectives:

Firstly, land uses associated with employment lands impact the natural environment. The vision for Campbelltown is one based on the growth of high value added and non-polluting industries located with good access to the transport network to ensure good accessibility.

Secondly, Campbelltown City Council aspires to develop the Campbelltown-Macarthur Centre. The Sydney Metropolitan Strategy designated Parramatta, Liverpool and Penrith as Regional Cities i.e higher order centres that provide the full range of business, government, retail, cultural, entertainment and recreational activities and a focal point for regional transport and jobs. Over this millennium Campbelltown has actually been out-performing the Regional Cities, particularly in terms of job growth. The case for designating Campbelltown as a Regional City is made below.

Thirdly, employment lands can enhance a sense of place in The Campbelltown LGA, particularly if new opportunities are created around knowledge hubs such as Campbelltown Hospital, and the University of Western Sydney.

Fourthly, the location of employment lands in relation to where workers live, and to suppliers and markets has an important bearing on traffic congestion and economic efficiency.

Fifthly, Campbelltown City Council has

responsibility for investment in key infrastructure supporting employment lands particularly local roads and drainage systems. Heavy use of local roads by large vehicles can have a significant impact on maintenance costs, and these factors need to be taken into account in planning for future employment land uses.

Finally, it is in relation to the Campbelltown 2025 strategic direction: retaining and creating jobs, that employment lands policy has a central role to play. In particular this review is concerned with industry structure and the dynamics of the local and South West Sydney economies, the specific employment lands requirements of business investors and competitive local businesses, and the quantity and employment lands zonings that underpin industry growth. One critical issue is the supply of employment lands. According to Campbelltown 2025:

"The critical shortage in supply of zoned employment lands (industrial and business park type development opportunities) within Macarthur and adjoining regions must be acknowledged". Further, Campbelltown 2025 aims to increase opportunities for new enterprises as well as retain existing businesses, with priority to industries that adopt sustainable and cleaner production techniques.

The Employment Lands Review is guided by desired economic and employment outcomes cited in Campbelltown 2025:

- A diversified economic base with all (urban) sectors represented;
- A high degree of employment self-containment (50% of working people living in Campbelltown are employed at a location within the City;
- A co-operative regional response to the diminishing supply of zoned employment lands within the City and the Macarthur region;
- Employment opportunities distributed across the City area, but concentrated in the Regional City centre precinct, nominated employment lands and in business centres;
- A sustainable supply of zoned employment lands in appropriate locations, where greater certainty of approval exists;
- Enterprise access to high quality urban infrastructure (including telecommunications, information technology, transport, roads and parking); and
- A high proportion of new enterprises that adopt cleaner production techniques.



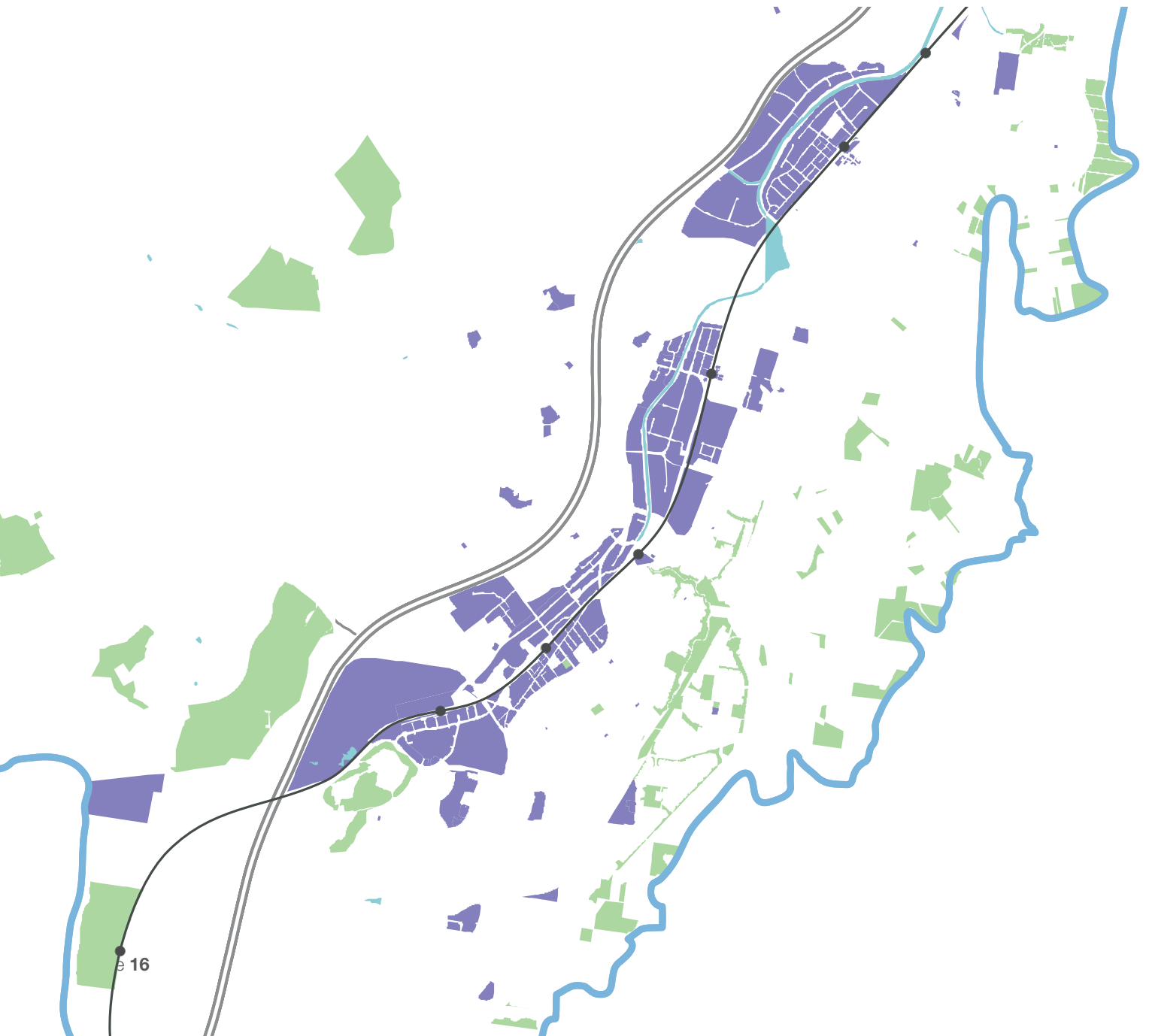


02

Defining employment lands

02 Defining employment lands

ACCORDING TO THE METROPOLITAN STRATEGY, EMPLOYMENT LANDS ARE DEFINED AS INDUSTRIAL AREAS AND BUSINESS AND TECHNOLOGY PARKS.



Industrial areas include factories and warehouses with some associated offices, which accommodate a range of industrial activities including manufacturing, distribution, concrete batching and panel beating. In some areas including the Campbelltown LGA, non-industrial activities, such as religious and recreational facilities, are locating in employment lands.

Business parks and technology parks the latter usually linked to universities tend to integrate high value activities in modern facilities including research, advanced manufacturing, distribution and office based facilities including management and marketing. These are high value forms of employment lands. Successful business parks attract complex and clean industries. They tend to be labour intensive with a high proportion of research, management and marketing jobs. More than 100,000 workers are employed in business and technology parks in Sydney (around 5% of total jobs) but the proportion is growing rapidly.

The Metropolitan Strategy defines employment lands as areas zoned to accommodate manufacturing, warehousing, urban services such as batching plants, waste management plants, construction and repairs, as well as business and technology parks for higher order jobs and areas containing a mix of activities associated with transforming, storing, maintenance and repairing materials and goods.

The scale of activity varies dramatically, ranging from small local firms providing local services such as panel beating through to large manufacturing facilities such as paper mills and steel plants. Sydney has around 15,000 hectares of employment lands. They employ one in four of Sydney's workforce and contain around 450,000 jobs.

Employment yields vary significantly for employment lands: A rule of thumb for employment densities includes:

EMPLOYMENT DENSITIES

HIGH TECHNOLOGY	50-200 jobs per hectare
MANUFACTURING	35-45 jobs per hectare
LOGISTICS	8-20 jobs per hectare
LIGHT INDUSTRY	40-55 jobs per hectare





03

Planning and policy framework

03 Planning and Policy Framework

THE CORE FRAMEWORK FOR PLANNING AND GROWTH OF SYDNEY AND ITS CENTRES AND EMPLOYMENT LANDS IS PROVIDED BY THE METROPOLITAN STRATEGY 2005.

The Strategy was recently updated with the release of the Sydney Metropolitan Plan 2010. The later Plan incorporates the same framework as the Metropolitan Strategy and provides employment forecasts to 2036, compared to the 2031 forecasts provided by the Metropolitan Strategy.

A key principle of these metropolitan plans is that Sydney will evolve around a network of strategic centres and strong subregions. The aim is to develop the metropolitan area in such a way where residents can access jobs, education, health, shopping, services and recreation without having to travel more than one hour per day.

The Metropolitan Plan reflects the State Plan – A New Direction for NSW, which provides the state government's framework for governing NSW and providing better services. The State Plan sets out five areas of activity that impact the residents of the state. The Department of Planning has responsibility for the NSW State Plan Priority E5 - Jobs closer to home, which is designed to achieve less travel, more productive businesses, less road congestion and less pollution, and more vibrant and attractive cities and centres.

A key objective of the State Plan is to increase the proportion of people living within 30 minutes of a

FIGURE 3 NSW METROPOLITAN PLAN 2010, DOP



Strategic Centre by public transport in Sydney. Although 75% of Sydney's population lives within 30 minutes by public transport to one of the designated Strategic Centres, this varies significantly within sub-regions. Whereas resident workers of the inner city sub-regions have relatively good access to the city's strategic centres, the rapidly growing areas of South West Sydney do not have this advantage.

Whilst increased levels of skill and education attainment are apparent

FIGURE 3.1 NSW STATE PLAN, 2007

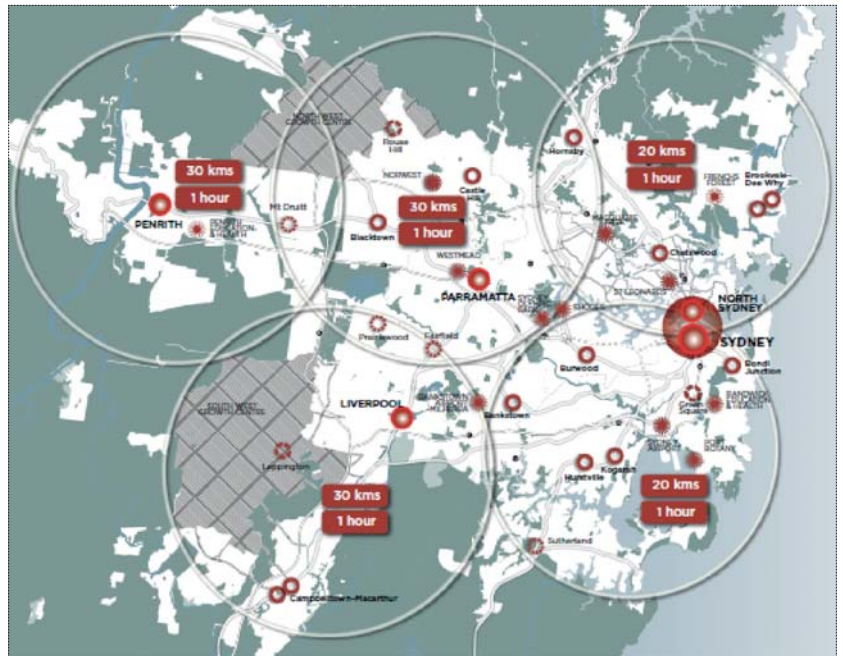


in all areas across the GMR, high skilled jobs - with the exception of education and health - tend to be more concentrated around the Global Economic Corridor and pockets in regional cities. Hence, in order to achieve Jobs Closer to home, policy needs integrate where people live with skilled jobs, particularly knowledge based jobs, in order to provide more opportunities for an increasingly qualified GMR workforce. The economy of Campbelltown LGA does have some important advantages, including, strong growth of the

Campbelltown-Macarthur Centre, established employment lands on major transport corridors accessible by public transport and a growing regional role in health and education.

Although achieving the one hour city for all workers and residents in a travel dependent city like Sydney will be difficult, as a guide it has major implications for the planning and development of the metropolitan area. For South West Sydney, it requires a commitment to support the growth of key strategic centres such as Campbelltown, Liverpool and Leppington, and strong private sector investment in business parks, employment lands and centres. This in turn requires a diverse range of employment lands options.

FIGURE 3.2 SYDNEY – A CITY OF CITIES



SOURCE DOP 2010

THE METROPOLITAN STRATEGY HAS A VISION FOR THE ECONOMY AND EMPLOYMENT IN SYDNEY WITH THREE ELEMENTS:

- Sydney will have a competitive, innovative and adaptable economy which underpins its success in the global economy;
- Economic spaces will strengthen globally competitive industry networks and clusters; and
- An advanced infrastructure network will support the flow of ideas, people and products.

Strengthening economic activity and employment growth in Western Sydney

is one of the greatest challenges identified by the Metropolitan Strategy. Of the three sub-regions of Western Sydney, the South West Sydney Subregion faces the greatest employment challenge. The North West Subregion is performing strongly and the West Central Subregion has a strong employment base and is experiencing relatively slower population growth. South Western Sydney, on the other hand, has a relatively smaller economy and lower employment self-containment. It is

also expected to accommodate the largest share of labour force growth of any sub-region.

The Metropolitan Strategy identifies a number of initiatives to facilitate job growth. Firstly, there is a focus on strengthening the competitiveness of centres, including regional cities (Parramatta, Liverpool and Penrith), specialised centres such as Sydney Olympic Park/Rhodes, Westmead and Bankstown Airport/Milperra, strategic centres such as Campbelltown and Blacktown, and planning for emerging centres such as Leppington. Actions include major public investment in transport and social infrastructure, office relocations (eg NSW Police, Sydney Water relocations to Parramatta), major infrastructure commitments (eg hospital expansions) and detailed centre plans designed to encourage investment and diversification of these centres.

Secondly, the Metropolitan Strategy found that Sydney has a shortage of employment lands. The Strategy identifies new areas for employment lands growth, including land identified in the North West and South West Growth Centres, and along major transport corridors. The Action Plan for Sydney's Employment Lands, a commitment of the Metropolitan Strategy, put forward five initiatives to advance the planning of employment lands:

1. Establish an Employment Lands Development Program to maintain a balance between the demand and supply of employment land.
2. Release more greenfield land to overcome a shortage of supply.
3. Develop new policy initiatives to encourage the regeneration of brownfield sites to support new investment and employment opportunities.
4. Employ more efficient processes for zoning and developing employment lands.
5. Improve coordination between State Departments and agencies, councils and industry to improve economic development opportunities associated with employment lands policy.

Thirdly, one of the innovations of the Metropolitan Strategy is to develop specialised centres, which concentrate economic activities that have metropolitan wide significance. Specialised Centres include major

airports, ports, health and education centres and business parks. These are high intensity activity centres that perform vital economic, social and employment roles. A number of specialised centres are business parks such as Macquarie Park, Norwest and Sydney Olympic Park/Rhodes. Jobs in business parks are growing at a much faster rate than in traditional centres.

The performance of these business parks has important implications for both the metropolitan and subregional economies. They are all experiencing high rates of investment in knowledge based industries and employment growth. They are also significant trip generators. Being designated as specialised centres provides a better planning focus, including public transport investment, and planning instruments to encourage higher employment densities, and a diverse range of economic activities. Planning for higher density employment outcomes in specialised centres facilitates greater participation by transport agencies.

The NSW Government is committed to planning and managing growth to support the economic role of Specialised Centres (Action B3.3.4). The Metropolitan Strategy states:

"The Government recognises the significance of a number of specialised centres that have metropolitan and economy wide impacts... Planning in and around these centres needs to support and encourage their specialised function". "This

The Government recognises the significance of a number of specialised centres that have metropolitan and economy wide impacts... Planning in and around these centres needs to support and encourage their specialised function

means ensuring that development controls (where appropriate), State Government business attraction and development initiatives, and the Government's own investment activities are directed to reinforcing the specialties in these centres. It also means that transport planning should focus on increasing connectivity to these centres, particularly rail transport".

The Metropolitan Strategy recognises the important role business parks play in the economic competitiveness of Sydney. Action A1.8.1 proposes that the NSW Department of Planning will develop guidelines for the location for future business parks. Key criteria in these guidelines include:

- Locating them on existing or proposed public transport networks;
- Accessing Sydney's Orbital Motorway Network and economic gateways;
- Complementing established centres;
- Attaining a minimum warehouse component;
- Demonstrating a contribution to subregional economic and job growth; and
- Providing for recreational, cultural and/or learning facilities.

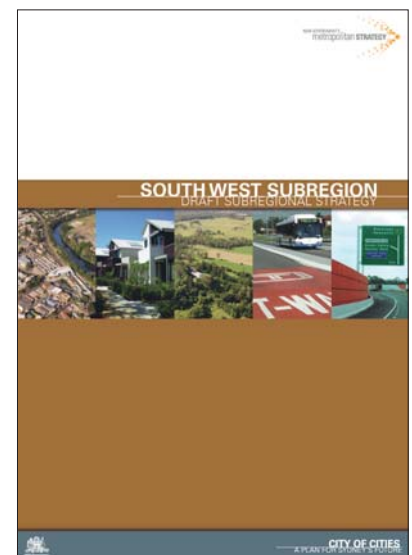
These guidelines are reinforced in the Sub-Regional strategies. These strategies seek to enhance the role of business parks that make use of public transport infrastructure. The challenge is to ensure that

public transport is coordinated with investment in business parks, rather than lagging behind job growth or leading investment in these spaces. The planning and establishment of a major business park in South West Sydney in an optimal location would be a catalyst for higher order job growth in the subregion.

Fourthly, the Metropolitan Strategy recognises that the attainment of the economic and employment vision for subregions such as South West Sydney depends to a large extent on the creation of attractive living environments, growing more opportunities for existing households and firms, and attracting new firms and households to locate in the region.

The draft South West Subregional Strategy established a target of 89,000 jobs in the South West Sydney (SWS) subregion between 2001 and 2031, of which 26,000 net new jobs were to be located in the Campbelltown LGA. Recent employment forecasts provided by the Transport Data Centre estimate that the number of jobs in the LGA will increase from 45,000 in 2006 to 75,000 in 2036. These projections are a substantial under-estimate of the number of net new jobs required to maintain even the current levels of employment self-containment in the subregion (which are too low). The actual labour force in the Subregion will increase by closer to 150,000 by 2031. The irony of these projections is that employment in Campbelltown LGA is actually growing at a rate well above the forecasts.

FIGURE 3.3 DRAFT SOUTH WEST SUBREGIONAL STRATEGY, DOP, 2007



The methodology used to prepare the forecasts gives strong weighting to population growth in the locality, and, given that Campbelltown's population growth has slowed, this is reflected in low local employment projections. But the evidence is suggesting that employment growth in Campbelltown LGA is increasingly driven by broader regional growth in South West Sydney and infrastructure investments in transport, health and education.





04

South West Sydney Regional Context

04 South West Sydney Regional Context

THE SOUTH WEST SUBREGION IS COMPRISED OF THE CAMDEN, CAMPBELLTOWN, LIVERPOOL AND WOLLONDILLY LOCAL GOVERNMENT AREAS.

Most of the population growth will be accommodated in new release areas in Camden and Liverpool (and small areas of Edmondson Park and Leppington East). Some additional population will be accommodated in existing urban areas, and in the rural areas of Wollondilly.

Housing in Campbelltown LGA is projected to grow from 49,000 dwellings in 2004 to 74,000 dwellings in 2031, excluding the South West Growth Centre. The additional 25,000 dwellings will be made up of 20,000 infill and 5,000 greenfield (South West Sub Region Strategy Tables). The Campbelltown LGA component of the growth centre is estimated to be 2,000 dwellings for Edmondson Park and 1,000 for Leppington East, a total for the LGA of 77,000 by 2031. This could be projected to say 80,000 by

2036, given that there were 50,000 dwellings in Campbelltown LGA in 2006 and if further infill is achieved during the next 25 years.

The Metropolitan Plan projects that the population of Sydney will grow from the current 4.5 million to 6 million in 2036. The South West Sydney Sub-region is expected to accommodate more population growth than any of the subregions in metropolitan Sydney. Based on current Department of Planning population projections, the Subregion's population is projected to increase from 410,500 in 2006 to 875,000 in 2036 i.e an additional 464,500 people or more than 30% of Sydney's total population growth. This is a massive challenge for new housing, infrastructure, services and the environment. Arguably the most significant challenge will be creating

jobs to ensure that residents in the labour force have an opportunity to work close to where they live. Currently, the area has an employment deficit and higher than average unemployment.

The Metropolitan Strategy 2005 estimated that the South West Sydney subregion would provide 155,000 new dwellings and 89,000 new jobs by 2031 and more recent projections used by the Sydney Metropolitan Plan indicate that employment will grow by 105,147 jobs between 2006 and 2036. One of the central aims of the two metropolitan plans is to grow jobs across Sydney, with a particular focus on Greater Western Sydney, which is projecting an additional 364,469 jobs (or 51% of the total new jobs in Sydney) to be accommodated in Greater Western Sydney by 2036. This is enormous challenge to shift the west onto a strong employment growth path.

South Western Sydney is the most rapidly growing region in the Greater Metropolitan Region and one of the most rapidly growing regions in Australia. The population of the South Western Sydney region grew by 131,000 residents, from 290,000 to around 410,500 between 1991 and 2006, an increase of more than 40%. The Department of Planning forecasts this to increase to 875,000 people by 2036, an increase of 464,500 people over a period of 30 years – an increase of 55% - one of the largest absolute increases in population in Australia.

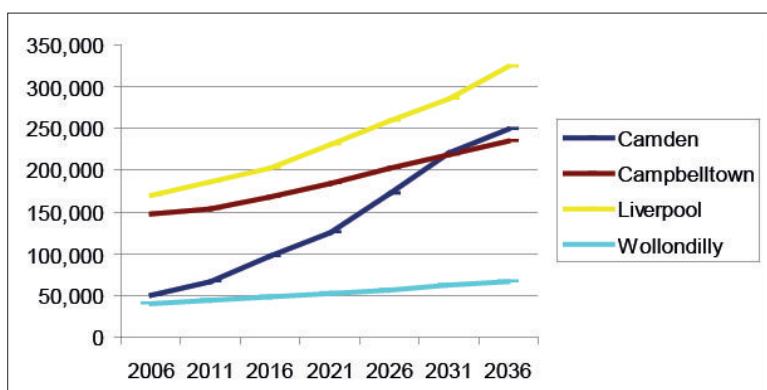


FIGURE 4.1 SOUTH WEST POPULATION PROJECTIONS 2006 - 2036
SOURCE DEPARTMENT OF PLANNING 2010

The draft South West Subregional Strategy established a Subregional dwelling target of 155,000 additional dwellings by 2031, increasing the total number of dwellings from 128,570 to 283,570. Of these additional dwellings 40,000 are proposed to be located in existing areas, 100,000 in the South West Growth Centre and 15,000 at other sites. This represented approximately 25 per cent of the total dwelling target for the Sydney metropolitan region, the largest increase of any subregion in the Sydney metropolitan area. The Strategy indicates that the South West's share of total dwelling stock in Sydney will increase from eight to thirteen per cent.

According to the Southwest Subregional Strategy, the dwelling target equates to approximately 5,740 new dwellings per annum, which will be a much higher rate of development than has been experienced over the last 10 years (2,900 new dwellings per annum). The major contributor to growth in dwelling numbers is the development of the South West Growth Centre.

One of the challenges for South West Sydney is to increase the supply of high quality housing if it is to sustain a higher employment growth path. This is because the proportion of managers and professionals in the labour force is increasing more rapidly than any other occupational grouping. If the demands of this group are not catered for, they will look for housing in other areas. Further, managers and professionals are at the core of the knowledge economy, where the generation, diffusion and application of knowledge are the key drivers for wealth, income and employment growth.

A strategic priority of the Metropolitan Strategy is to increase employment self-containment in rapidly growing

urban areas. This process is occurring. Employment in South Western Sydney more than doubled between 1981 and 2004, from 63,000 to 127,000 jobs.

The other focus is to expand a network of local employment lands to assist the South West in strengthening employment self-containment. Historical evidence suggests that there is always a significant lag between population growth and jobs growth in rapidly expanding urban areas.

There is a strong focus on Liverpool, Campbelltown and the identified strategic centre of Leppington to accommodate new employment opportunities. To attain its employment capacity target by 2031, the Subregion must succeed, not only in supporting population related job growth, but in creating new jobs in high growth knowledge based industries including advanced manufacturing, finance and business services, health and community, information and communications technologies, and environmental products and services.

Population growth in the region is a catalyst for new economic activity. Much of the employment growth in South West Sydney in the past decade has occurred in retailing, construction and community services including health and education. The largest employment increases in the South West in the medium term are forecast to be specialist managers, business and information professionals, educational professionals, other associate professionals, construction tradespersons, intermediate service workers, road and rail transport drivers and elementary sales workers. Job losses are expected for mechanical and fabrication engineering tradespersons, automotive tradespersons, other tradespersons, secretaries and personal assistants, intermediate machine operators and factory labourers¹.

Pockets of high income suburbs have been growing across the Subregion. In the more established local government areas of Liverpool and Campbelltown, a number of suburbs have evolved with gross median household incomes in excess of \$2,500 per week including Denham Court, Macquarie Links and Glen Alpine. In the more peripheral areas of Wollondilly and Camden, more high income housing is emerging in places such as Stonequarry, Harrington Park and Mount Annan.

There are also areas of social disadvantage. South Western Sydney has a high proportion of its population receiving Centrelink income support (29%). These groups are concentrated in public housing estates and in other low income suburbs of Campbelltown and Liverpool, including Macquarie Fields, Busby, Minto, Raby, Claymore, Miller and Warwick Farm.

South Western Sydney is a large, complex and diverse subregion, with strong links to global Sydney and other major regions through transport infrastructure links including the M5 and M7, and the main Sydney-Melbourne rail line and the East Hills rail line.

Significant social and economic differences exist between the local government areas of South West Sydney and indeed within the four LGAs of Liverpool, Campbelltown, Camden and Wollondilly.

1 Strategic Economics, Internal databases and forecasts, for the South West Sydney Institute of TAFE





05

The Metropolitan and Regional Economic Context

05 The Metropolitan and Regional Economic Context

TO FOCUS ON EMPLOYMENT LANDS PLANNING AND POLICY IN CAMPBELLTOWN, IT IS IMPORTANT TO CONSIDER ECONOMIC CONTEXT IN METROPOLITAN AND REGIONAL DIMENSIONS.

5.1 METROPOLITAN

Sydney's Gross Regional Product in 2008-09 is estimated at \$257.9 billion, representing around 25% of the Australian economy. The Gross Regional Product of South West Sydney is around \$15.5 billion, or 6% of the metropolitan economy². The metropolitan economy is large and diverse and increasingly driven by service based and knowledge based activities, but it retains an important manufacturing base, and a small agricultural base, particularly in outlying areas. Up until the Global Financial Crisis in 2008, the economy was characterised by macroeconomic stability, increasing specialisation and technological innovation. This resulted in high demand but increasing competition for supply inputs. The metropolitan economy experienced a long economic boom from the mid 1980s to 2006; punctuated by recession in the early 1990s. Since the early 1990s prosperity was broadly shared by other advanced western economies and emerging economies such as India and China. Across the Greater Metropolitan Region, substantial improvements in per capita incomes and productivity created opportunities for education, health and expenditure on housing and consumption goods.

A number of studies designate Sydney as Australia's global city, although all Australian metropolitan cities are increasing their global orientation³. Sydney's global status is based on the premise that the city's links with the global economy are the main driver for wealth creation and employment growth. These links include capital flows, airline services, international tourist flows, business interactions and global flows of knowledge and information. Over half of all international visitors come to Sydney⁴. Sydney is a popular location for the regional offices of Australian-based foreign companies⁵. The relationship between Sydney and the global economy, particularly the growth nodes of East and South Asia, provide the city with unique locational advantages. As the urban economy evolves it has become more characterised around a grouping of industry clusters such as finance and business services, and

tourism and recreation.

Since the early 1980s Sydney's global links, characterised by significant increases in global investment, trade, communications and movement of people, became the dominant driver for growth. Sydney's status as a global city puts pressure on its infrastructure network. Over half of Australia's international flights arrive at Sydney Airport. The Sydney Airport Master Plan forecasts that passenger numbers (international and domestic) will increase by around 4.2% each year, from 35 million in 2009 to 78.9 million passengers in 2029⁶.

Sydney emerged as a dominant national financial and business centre. The economy became increasingly trade dependent, with a dramatic increase in movement and storage of goods and rationalisation of less competitive industries particularly in manufacturing. More recently relative

² AEC Group (2010), **Sydney Metropolitan Region Economic Baseline Assessment**, for Regional Development Australia Sydney.

³ Searle, G. (1996) **Sydney as a Global City**, Department of State and Regional Development and Department of Urban Affairs and Planning; National Economics (2001) *State of the Regions 2001*. Sydney: National Economics and Australian Local Government Association.

⁴ Tourism Australia (2008), **International Visitors in Australia - Quarterly results of the International Visitor Survey**, Belconnen: ACT, p46.

⁵ New South Wales Government (2005) **City of Cities: A Plan for Sydney's Future**. Sydney: NSW Government, pp 43-44.

⁶ Sydney Airport Corporation Ltd. (2009), **Sydney Airport Master Plan**

economic growth has slowed due to high property prices, strong growth in other capital cities (particularly in resource based states), and the impacts of the global financial crisis.

The structure of Sydney's economy is changing rapidly and this impacts the spatial allocation of economic activities and their links to households. Over the past 30 years, the urban economy has undergone enormous sectoral and spatial change. Major drivers for change include globalisation and the growing complexity of supply chains, growth and consolidation of finance and business services in central locations, de-industrialisation and restructuring of manufacturing, growth and decentralisation of retail and community services, massive growth in information and communications technologies and associated e-business. Population growth has shifted increasingly westward, including to the planned areas around Macarthur. Population growth facilitates growth in local service activities including retail, community health, education and the like. Residential growth drives demand for construction and household goods, which in turn increases demand for employment lands; for bulky goods, building materials, concrete batching plants and other similar land uses.

Globalisation has also driven a dramatic increase in sea freight. Sydney's container throughput grew from about 175,000 TEUs⁷ in 1970 to 1.62 million TEUs in 2007 with growth particularly strong over the last five years. A third terminal is being constructed at Port Botany to accommodate forecast demand of over 3 million TEUs by around 2020⁸. In addition, major increases in interstate and intra-metropolitan freight movements are occurring. The increase in freight-intensity of

the economy is resulting in significant increases in demand for warehousing and storage space for employment lands in strategic transport corridors.

These forces, underpinned by policies such as trade liberalisation, resulted in major structural industry change. Table 5.1 provides a snapshot of sectoral employment change over the decade 1996 to 2006, with total metropolitan employment increasing from 1.48 million to 1.65 million, a net increase of 170,000 jobs over this period. The Australian Bureau of

TABLE 5.1 SYDNEY'S EMPLOYMENT CHANGE BY INDUSTRY 1996-2006

INDUSTRY	1996	2006	Change 96-06
PRIMARY INDUSTRIES	12,068	10,154	-1,914
MANUFACTURING	199,156	182,174	-16,982
ELECTRICITY, GAS, WATER SUPPLY	9,752	10,662	910
CONSTRUCTION	76,642	86,115	9,473
WHOLESALE TRADE	110,831	103,467	-7,364
RETAIL TRADE	191,518	219,525	28,007
ACCOMMODATION, CAFES & RESTAURANTS	67,413	76,179	8,766
TRANSPORT & STORAGE	75,491	87,473	11,982
COMMUNICATION SERVICES	36,110	32,367	-3,743
FINANCE & INSURANCE	96,917	117,018	20,101
PROPERTY AND BUSINESS SERVICES	195,022	235,851	40,829
GOVERNMENT ADMINISTRATION	60,139	73,777	13,638
EDUCATION	99,475	121,355	21,880
HEALTH AND COMMUNITY SERVICES	138,584	169,565	30,981
CULTURAL AND RECREATION SERVICES	40,342	44,037	3,695
PERSONAL SERVICES	53,662	60,077	6,415
OTHER	17,708	20,987	3,279
TOTAL	1,480,830	1,650,783	169,953

SOURCE: AUSTRALIAN BUREAU OF STATISTICS, 2010

7 TEU's are twenty-foot equivalent units – the standard measure used in container shipping.

8 Sydney Ports (2009), Port Botany Container Terminal Expansion Overview, October

Statistics data in the table is derived from the 2006 Census of Population and Housing. It provides the most accurate and consistent estimates of industry trends. But the Census is based on the number of residents who fill out the Census and hence is an under-estimate of the actual number of jobs. The Transport Data Centre (TDC) makes corrections to make employment estimates consistent with total population, and hence employment estimates from TDC are much higher.

Strong growth occurred in property and business services, associated with strong employment growth in real estate agents, IT and management consultants, legal services, accounting, and cleaning. Property and business services provided a high proportion of knowledge intensive services. Employment growth in these industries concentrated around the Sydney CBD, but more of these jobs are decentralising to suburban locations to support growing local demand. Finance and insurance also experienced solid growth. Some jobs have been rationalised, particularly in banking, but new specialised financial services grew rapidly, at least up until the onset of the Global Financial Crisis (GFC). Higher order financial services cluster around the global centre, but out-sourcing of back and middle office activities to low cost global centres (e.g. Bangalore) and competitive rental centres (e.g. Homebush Bay in Western Sydney) is accelerating dispersal from the Sydney CBD.

The issue for outlying centres of the metropolitan area is whether they can capture a higher share of the high growth finance and business services market. The key to success is some critical mass in quality commercial office space (such as premium and A-grade properties) and a growing population and skilled residential catchment area.

Health and community services contain high growth industries with employment spread right across the metropolitan area. Employment growth is dominated by employment concentrations in hospitals, as well as large numbers of people employed in nursing homes, GP medical services, child care and non-residential care. Health and community services have overtaken or are matching retail as the largest sector in most regions, particularly where there are large public hospitals. Education is also showing solid growth, driven by increasing population, demand for learning and increasingly, education exports.

Manufacturing continues to restructure, driven by global competition and technological innovation. Despite net employment losses, manufacturing remains the third largest sector in the metropolitan area in terms of employment and has strong links to other sectors such as transport and storage and business services. Retail is Sydney's largest sector and continues to grow, with employment continually dispersing to high growth areas of the city. In

other sectors, transport and storage industries are showing strong growth, driven by a more open economy and more complex supply chains.

Transport and logistics, involving movement of people and goods, are major activities in Sydney, employing around 84,500 workers in 2001. Employment in transport and logistics is increasing rapidly in Western Sydney. Key industries include road, bus and rail transport, taxis and parking. Growth is driven by growing trade dependence, improvements in transport infrastructure and land around the Sydney Orbital, competitively priced land and growing economies of scale in the storage and movement of goods. Around 40% of the metropolitan total in transport and logistics are located in Western Sydney.

Some important observations can be made from an analysis of subregional and regional employment trends across Sydney and the Greater Metropolitan Region (GMR) more broadly. Most significantly, the trends confirm that the City of Cities is becoming a reality. More jobs are growing around strategic centres and employment lands in Western Sydney, and in most areas, employment self-containment is strengthening. Higher job growth is providing more support for population growth, but in areas such as South Western Sydney the gap between labour force growth and the growth of local jobs remains substantial. Major changes are occurring that potentially increase job

opportunities in outlying areas. This includes:

- Strong population driven employment growth;
- An increase in the proportion of the labour force with professional qualifications;
- Rapid growth of knowledge based firms;
- Closer integration of outlying areas into the metropolitan economy; and

- Growth of new economic spaces including Norwest, Macquarie Park and Westmead.

Employment in the GMR grew from 2.117 million in 2001 to 2.216 million in 2006, an increase of close to 100,000 jobs, or around 1% per annum. Table 5.2 shows employment growth by subregion 2001-06¹⁰. The table indicates that more jobs are shifting to the rapidly growing subregions. High job growth is

occurring in faster growing outlying areas with the highest growth rates in the Lower Hunter, North West, Central Coast, South West and Wollongong, with the 5-year growth rate above the GMR average. The Lower Hunter appears as an economic success story, with broad based growth in resources, manufacturing and service sectors. The region experienced the strongest employment growth in both absolute terms as well as the highest growth rate in the GMR. Despite problems with long commuting

TABLE 5.2

EMPLOYMENT CHANGE IN THE GREATER METROPOLITAN REGION 2001-2006

SUB-REGION	EMPLOYMENT 2001	EMPLOYMENT 2006	EMPLOYMENT CHANGE 2001-06	EMPLOYMENT CHANGE 2001-06 %	SHARE OF GMR GROWTH 2001-06
SYDNEY CITY	378,291	396,180	17,889	4.70	18.00
EAST	122,962	121,943	-1,020	-1.00	-1.00
INNER NORTH	216,682	216,869	188	0.01	0.10
INNER WEST	91,591	90,903	-688	-1.00	-1.00
SOUTH	174,583	178,480	3,897	2.20	4.00
NORTH	74,534	76,247	1,713	2.30	2.00
NORTH EAST	77,726	80,659	2,933	3.80	3.00
WEST CENTRAL	289,834	294,990	5,156	1.80	5.00
NORTH WEST	223,153	243,386	20,233	9.10	20.00
SOUTH WEST	112,092	122,142	10,050	9.00	10.00
CENTRAL COAST	85,328	95,337	10,009	11.70	10.00
NEWCASTLE	179,900	201,960	22,060	12.30	22.00
WOLLONGONG	90,221	97,111	6,890	7.60	7.00
TOTAL	2,116,898	2,216,208	99,310	4.7	

SOURCE: ABS CENSUS OF POPULATION AND HOUSING, 2010

¹⁰ These figures have not been adjusted to take account of under-reporting in the Census and they exclude non-classifiable economic units and not stated. Hence the table under-estimate actual employment but they do pick up clear trends over the period 1996-2006.

distances, the Central Coast shows signs of shifting more towards a self-reinforcing employment growth trajectory, with stronger local jobs growth attracting more investment in the region. Employment growth in Wollongong was also well above the GMR average, reflecting revitalisation, diversification and macro-economic recovery. The North West is showing strong employment growth and, although not growing as fast the South West also experienced solid employment growth, although major economic challenges remain.

A strategic priority of the Metropolitan Strategy is to increase employment self-containment in rapidly growing urban areas. The evidence suggests this is now happening. Inter-censal estimates of employment change in South Western Sydney, for example, suggest employment doubled between 1981 and 2006, from 63,000 to 127,000 jobs. The 2005

Metropolitan Strategy established an employment capacity target of 207,000 jobs in 2007, an increase of 63%, the biggest percentage increase of jobs in metropolitan Sydney. There is a strong focus on Liverpool, Campbelltown and the identified strategic centre of Leppington.

Table 5.3 summarises subregional employment self-containment trends. Employment self-containment is defined as the ratio of local jobs to the resident labour force. A low employment self-containment ratio suggests that a high proportion of the labour force will have to commute to other employment centres. The table indicates the important role of the City of Sydney as an employment destination. It also highlights the challenge for outlying areas in particular where a high proportion of resident workers commute to other regions for work. It also shows that employment self-containment is strengthening in some

areas. North West Sydney and the Central Coast both show a significant improvement in employment self-containment over a ten year period. In the North West, employment self-containment increased from 54 local jobs per 100 local resident workers in 1996 to 60 local jobs per 100 local resident workers in 2006. Similarly, employment self-containment on the Central Coast increased from 62 local jobs per 100 local resident workers to 67 local jobs per 100 local resident workers over the same period.

The improvement in the South West subregion, from an employment/labour force ratio of 58 to 59 over this period, although small, is at least a move in the right direction.

TABLE 5.3 SUBREGIONAL EMPLOYMENT SELF-CONTAINMENT TRENDS

METROPOLITAN SUBREGION	JOB/ LABOUR FORCE RATIO 1996	JOB/ LABOUR FORCE RATIO 2006
Sydney City	5.08	4.11
Inner North	1.24	1.27
South	0.52	0.52
East	0.75	0.81
Inner West	0.83	0.72
North East	0.58	0.62
North	0.54	0.55
West central	0.97	0.95
North west	0.54	0.60
South west	0.58	0.59
Central Coast	0.62	0.67

SOURCE: AUSTRALIAN BUREAU OF STATISTICS, 2010

The challenge is to create a stronger commercial office market, with finance and business services supporting a rapidly growing region.

5.2 SOUTH WEST SYDNEY REGIONAL ECONOMIC CONTEXT

In the Metropolitan Strategy, South West Sydney includes Liverpool, Campbelltown, Camden and Wollondilly LGAs. This is projected to be the most rapidly growing Subregion in the Greater Metropolitan Region and one of the most rapidly growing regions in Australia.

The South West Sydney economy evolved initially around agriculture and key service towns such as Liverpool, Campbelltown and Camden. The Campbelltown LGA has an important role in the South West Sydney economy. As Sydney grew and infrastructure links improved, the region became more integrated into the metropolitan area. The Three Cities Structure Plan and the establishment of the Macarthur Development Board created the framework for the growth of South West Sydney. New employment lands were developed in the Campbelltown LGA with the objective of attracting large manufacturers to the area to provide opportunities for the growing local workforce. Improvements in infrastructure links and competitively priced employment lands attracted firms to relocate from inner city areas to the south west. Comprehensive planning resulted in opportunities to locate the University of Western Sydney, a major campus of NSW TAFE and a major public hospital in the area.

Population growth created significant opportunities for the expansion of retail and community services. The South Western Subregion has a relatively low share of jobs in finance and insurance and business services. New opportunities include growth in demand for business and household financial advisers, human resources and management firms, back offices for medical and health insurance, and information and communications specialists, and advertising firms. There is a growing relationship between firms located in employment lands and strong centres, driven by increasing out-sourcing of business service functions from industrial firms such as finance, human resources and marketing. Campbelltown-Macarthur is not generally considered as a commercial office centre, but local business service activity is increasing.

The challenge is to create a stronger commercial office market, with finance and business services supporting a rapidly growing region.

The region continues to attract firms from inner and southern Sydney looking for affordable land, more space and large population catchment areas. The improvements in transport infrastructure with the M5 extension and the completion of the Sydney Orbital have driven investors and users to look at the South West Sydney market.

Many industrial firms also look to locating close to customers and a skilled workforce. The doubling of the population in South West Sydney is attractive to firms involved in local services. This includes demand for light industrial activities, storage and distribution, factory units, bulky goods, hardware facilities, nurseries, gardening and building suppliers.

Population growth in the region is a catalyst for new economic activity. Most employment growth in South West Sydney in the past decade has occurred in retailing, construction and community services including health and education. The largest employment increases in the South West in the medium term are forecast to be in specialist managers, business and information professionals, educational professionals, other associate professionals, construction tradespersons, intermediate service workers, road and rail transport drivers and elementary sales workers. Job losses are expected for mechanical and fabrication engineering tradespersons, automotive tradespersons, other tradespersons, secretaries and personal assistants, intermediate machine operators and factory labourers¹¹.

11 Strategic Economics, Internal databases and forecasts

The challenge is to create a stronger commercial office market, with finance and business services supporting a rapidly growing region.

Population growth and the emerging infrastructure network are driving opportunities for employment lands in South West Sydney. The region contains around 2,177 hectares of employment lands, with around 400

hectares or 18% of this land vacant. The region is absorbing around 50 hectares per year. The Economic Development Plan for MACROC estimates that this is increasing to 80 hectares per annum.

TABLE 5.4 SOUTH WEST SYDNEY EMPLOYMENT BY INDUSTRY 2010

Industry	Camden	Campbelltown	Liverpool	Wollondilly	SWS total	SWS share of metro jobs (%)
Primary	344	73	565	496	1,478	30.6
Mining	32	169	25	1,207	1,433	66.6
Manufacturing	1,325	6,766	8,012	1,204	17,307	16.8
Utilities	165	129	580	179	1,053	16.9
Construction	1,251	1,904	3,062	835	7,052	18.1
Wholesale trade	594	1,799	2,576	268	5,237	12.0
Retail trade	2,466	5,715	5,781	861	14,823	19.5
Accommodation/food	1,052	2,528	1,967	448	5,995	18.0
Transport, postal and warehousing	923	2,040	3,138	437	6,538	18.1
Information media & telecommunications	73	333	564	44	1,014	12.4
Financial and insurance services	285	645	838	105	1,873	9.8
Rental, hiring and real estate services	315	710	805	113	1,943	19.0
Professional, scientific and technical services	644	1,187	1,747	417	3,995	14.8
Admin. & support	293	921	1,658	143	3,015	19.7
Public administration & safety	496	2,169	3,775	407	6,847	17.5
Education and training	1,493	4,580	4,180	766	11,019	21.9
Health care/ social assistance	1,453	4,161	6,803	502	12,919	19.8
Arts and recreation	209	325	438	106	1,078	16.4
Other services	724	1,541	1,866	333	4,464	17.8
Other	152	371	528	87	1,138	15.7
Total	14,289	38,066	48,908	8,958	110,221	17.8

SOURCE: AUSTRALIAN BUREAU OF STATISTICS, 2010





06

The Campbelltown Economy

06 The Campbelltown Economy

THE 1968 SYDNEY REGION OUTLINE PLAN (SROP) CONFRONTED THE CHALLENGE OF GUIDING SYDNEY'S POPULATION GROWTH FROM 2.6 MILLION TO OVER 5 MILLION AND TO PROVIDE FOR THE ASSOCIATED EMPLOYMENT LAND NEEDS.

As the established inner and middle suburbs were not expected to add significant net population growth, the majority of growth was to be in the outer areas. These growth areas were in the form of corridors (sectors) focused on established and proposed rail lines. The flagship of the Plan was the South West Sector. This comprised all of Campbelltown and key parts of Camden, Wollondilly and at a later date, Liverpool.

The SROP recognised the pivotal role of the South West Sector by designating Campbelltown, and Parramatta, as the two subregional centres second only to the regional centre, the Sydney CBD. The Federal Government designated the South West Sector as a growth centre, subsequently termed the Macarthur Growth Centre and managed by the Macarthur Development Board. The Board comprised representatives of the Commonwealth, the State and Councils. Macarthur, with a target of 500,000 people became one of the largest new towns in the world, matched only by the Paris new towns and Irvine, the private new town in Southern California.

The key planning principle for Macarthur was employment self-containment, requiring local job provision to match population growth.

To that end, the Macarthur Development Board purchased, developed and promoted over 800 hectares of land at Minto, Ingleburn and Campbelltown for industrial development and land for the location of the subregional centre at Campbelltown. The industrial areas were serviced and developed around the Main Southern Railway Line, with access to the M5 Expressway. The Subregional centre was targeted to reach an employment level of 40,000 by 2000 whilst Macarthur's industrial areas including Smeaton Grange at Camden and Blaxland Road were targeted to provide 90,000 jobs by 2000. The 1970s and 1980s showed great promise with several international firms establishing in Minto such as Comalco, ACl-Pilkington, Unilever, Pirelli, and Amco Jeans as well as a number of smaller, labour intensive companies.

The Campbelltown-Macarthur Centre has met many of its ambitious targets. This includes a regional shopping centre, a university, a regional TAFE College, a public and private hospital,

a new railway station and a number of higher density housing estates. The merging of the Macarthur Centre with the established centre of Campbelltown, and with Council's Civic and Administrative Centre is evolving as was proposed in the 1970s Centre Plan. Unfortunately, as the Campbelltown LGA's industrial estates were attracting international companies, tariffs were drastically reduced resulting in restructuring of Australia's industrial production and as a consequence the Campbelltown LGA's take up of industrial land declined significantly. Instead of the 45,000 jobs target established for Campbelltown (State Planning Authority 1973) in the LGAs major employment lands, by 2006 employment reached only 17,000, despite the two estates now being almost fully developed. A number of low density employment uses have infiltrated the employment lands such as bulky goods retailing, brothels and recreation facilities such as dance studios.

The subregional centre has been successfully developed, particularly with retailing, tertiary education and health, including a medical school. What has been disappointing is the lack of offices, both government and private such as finance and business

The key planning principle for Macarthur was employment self-containment, requiring local job provision to match population growth.

services, in the centre. There have been a number of reasons for that – first the downturns in 1980s, 1990 and the recent GFC when established offices in the Sydney CBD became vacant and little was developed in suburban centres. One of the key employment challenges for Campbelltown is to establish a dynamic commercial office market in the centre. The lack of State Government offices is possibly due to the perceived distance of Campbelltown from the Sydney CBD. Those making the decisions for relocating government head offices are often reluctant to shift out of the CBD and only under pressure will they move to Chatswood or Parramatta.

A major issue has been the dramatic decline in employment density in the industrial zoned lands. The policy of self containment, particularly achieving a balance between jobs and the workforce had been a fundamental principle which determined the amount of employment land allocated in Campbelltown. Large sites were set aside close to the rail corridor for major manufacturing firms. When these opportunities didn't eventuate, the sites were taken up by large logistics firms with low employment densities.

Major external developments will impact employment in Campbelltown. The development of the South West Growth Centre with 100,000 dwellings (250,000 people) will increase demand for employment lands in the Campbelltown LGA. Notwithstanding the increase in supply of new employment lands

within the South West Growth Centre itself, this is likely to be insufficient and not completely aligned with the skills of the growing workforce. Many will be looking for service based jobs in major centres. There is also the long term need to develop Macarthur South, possibly 80,000 dwellings (200,000 people). These two emerging urban areas, along with growth of The Campbelltown LGA, will lead to a population catchment of 700,000 for the Campbelltown-Macarthur Regional Centre and the industrial estates of Minto, Ingleburn and Campbelltown. In a high growth scenario, two large strategic centres, Campbelltown - Macarthur and Liverpool, together with a new future centre at Leppington would serve the projected 900,000 people.

The South Western Subregion is becoming more prosperous, diverse and service based. On average, real incomes and education attainment outcomes are improving. It remains an important region in Sydney for manufacturing. Table 6.1 shows employment change in Campbelltown between 1996 and 2006. Key features of the table include:

- Retail is the largest sector, and, although it grew solidly over the decade, the rate of growth is declining as retail capacity expands throughout the South West region and competition intensifies;
- Manufacturing is very important to the Campbelltown LGA economy,

and experienced the most significant employment growth of any sector between 1996 and 2006. Many manufacturing firms are consolidating their metropolitan and national operations and the Campbelltown LGA, with relatively larger sites close to transport, is well positioned. Key growth areas in manufacturing include processed foods, paper products and pharmaceuticals. Intensified global competition, associated with tariff liberalisation and the relocation of manufacturing to lower cost countries particularly China, resulted in a long term restructuring of manufacturing. Trade dependent industries have experienced employment declines, but manufacturing remains strong in The Campbelltown LGA due to well located industrial sites providing good access to local markets and a skilled workforce. The Campbelltown LGA has strengths in a number of manufacturing industries such as building materials and products and in some metals and engineering industries. The Campbelltown LGA has a small but important group of high value added manufacturers in industries such as machine tools, metals, aerospace and advanced materials.

- Transport and storage is a major growth area, with employment more than doubling over the decade. Significant employment

growth is occurring in road transport and rail transport, driven by opportunities created by the M5 east extension, more recently the completion of the M7 and increased rail freight flows and intermodal opportunities; and

- Health and community services is growing strongly due to new investment in hospital infrastructure and growing demand for community services.

6.1 CAMPBELLTOWN BUSINESSES

Like most outlying areas, the Campbelltown economy is dominated by a large number of small businesses. There are around 8,500 registered businesses in The Campbelltown LGA. The majority, with large concentrations in construction and property and business services, don't employ workers. Table 6.2 shows that the area has an important group of small businesses, with less than 1,000

businesses employing between 5 and 19 workers. There are also 267 medium sized firms employing between 20 and 100 workers. The Campbelltown LGA does have a group of larger firms, mainly in manufacturing, and these companies play a significant role in supporting local employment.

From the perspective of employment lands planning, it is important to analyse the growth potential of existing firms and whether planning instruments are flexible enough to encourage growth in existing locations.

TABLE 6.1 CAMPBELLTOWN EMPLOYMENT CHANGE 1996-2006

INDUSTRY	1996	2006	CHANGE
AGRICULTURE FORESTRY FISHING	176	98	-78
MINING	56	167	111
MANUFACTURING	5,290	6,968	1,678
ELECTRICITY GAS WATER	145	47	-98
CONSTRUCTION	1,860	1,901	41
WHOLESALE	1,182	1,934	752
RETAIL	6,501	7,352	851
ACCOMMODATION, CAFES, RESTAURANTS	1,141	1,471	330
TRANSPORT AND STORAGE	852	1,926	1,074
COMMUNICATIONS	465	269	-196
FINANCE AND INSURANCE	591	641	50
PROPERTY AND BUSINESS SERVICES	2,120	2,622	502
GOVERNMENT AND DEFENCE	1,113	1,514	401
EDUCATION	4,164	4,520	356
HEALTH AND COMMUNITY	3,374	4,334	960
CULTURAL RECREATIONAL SERVICES	438	536	98
PERSONAL AND OTHER SERVICES	1,255	1,405	150
NON-CLASSIFIABLE ECONOMIC UNITS	281	341	60
NOT STATED	23	29	6
TOTAL	31,027	38,075	7,048

SOURCE: AUSTRALIAN BUREAU OF STATISTICS, 2010

Employment lands policy is not just concerned with ensuring sufficient space for future employment growth. In the case of the Campbelltown LGA, it is also concerned with “catching – up” and reducing the out-commuting from the area. The Campbelltown LGA still has a long way to align local jobs with where people live. Table 6.3 summarises where Campbelltown residents worked at the 2006 Census. The table shows that one in three resident workers work locally while 14.6% (more than

9,000 workers) worked elsewhere in the south west. The important employment destinations outside Campbelltown include West Central, particularly Fairfield, Bankstown and Parramatta; and the City of Sydney, the employment destination for more than 6,500 worker residents.

6.2 OCCUPATIONAL AND LABOUR DYNAMICS

Employment lands planning involves ensuring there is sufficient land to accommodate economic and employment growth over a long period of time. *It is also about aligning the employment lands zonings with the occupations and skills of the local and regional labour force.* Account needs to be taken of local and regional occupational structure and dynamics. It is not optimal to have strong local

TABLE 6.2 CAMPBELLTOWN BUSINESS COUNTS 2007

INDUSTRY	NON EMPLOYING	1 TO 4	5-19	20-49	50-99	100-199	200+	TOTAL
Agriculture forestry and fishing	90	9	3	0	0	0	0	102
Manufacturing	252	165	159	45	6	15	9	651
Electricity gas and water supply	12	0	0	0	0	0	0	12
Construction	1110	642	129	27	3	0	3	1914
Wholesale trade	183	165	66	18	6	0	3	441
Retail trade	477	360	180	42	6	3	3	1071
Accommodation cafes and restaurants	33	57	42	15	3	0	3	153
Transport and storage	666	225	39	6	6	0	0	942
Communication services	162	45	6	0	0	0	0	213
Finance and insurance	219	93	15	0	0	0	0	327
Property and business services	1173	486	132	36	18	0	0	1845
Education	36	30	15	3	0	0	0	84
Health and community services	150	147	72	12	0	0	0	381
Cultural and recreational services	93	30	9	6	0	0	0	138
Personal and other services	180	114	30	6	3	3	0	336
Total	4,836	2,568	897	216	51	21	21	8,508

SOURCE: AUSTRALIAN BUREAU STATISTICS, 2010

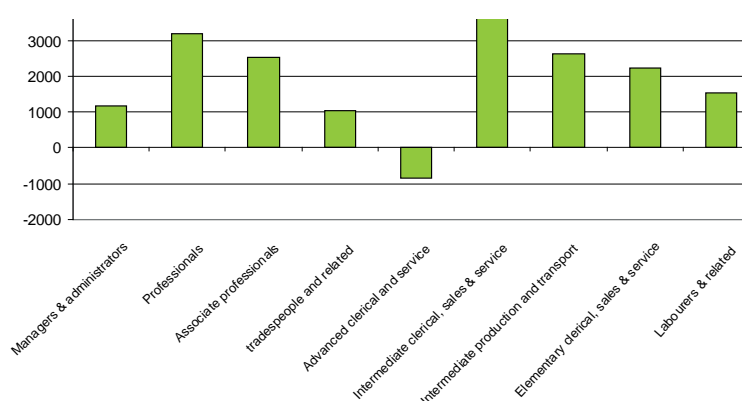
TABLE 6.3 EMPLOYMENT DESTINATIONS FOR CAMPBELLTOWN RESIDENTS 2006

Destination	Number	%
Campbelltown	21,097	33.5
Other South West	9,182	14.6
West Central	9,700	15.4
City of Sydney	6,522	10.4
North West	1,811	2.9
Inner West	1,289	2.0
East	1,461	2.3
Northern metro	1,646	2.6
South	2,549	4.1
Elsewhere in GMR	433	0.5
Other/not defined	7,246	11.5

SOURCE: AUSTRALIAN BUREAU STATISTICS, 2010

job growth but the jobs are not aligned with local skills. It is not sufficient, for example, to increase the amount of land for production and distribution related jobs if local residents are shifting into more service based occupations.

The Employment Lands Review is concerned with planning for employment growth and change over the next 25 years. Table 6.4 and Figure 6.1 shows what happened in the Macarthur sub-region over the period 1996-2006, i.e Campbelltown, Camden and Wollondilly LGAs, which is the primary catchment for jobs in Campbelltown.

FIGURE 6.1 MACARTHUR EMPLOYMENT CHANGE BY OCCUPATION 1996 - 2006

SOURCE: AUSTRALIAN BUREAU STATISTICS, 2010

Highlights of the data include:

- High employment growth occurred at both high skilled levels and lower skilled levels;
- The number of Managers, Professionals and Associate Professionals residing in the Macarthur area is increasing above the average for the Sydney Statistical Division in many occupations, including general managers, health and education professionals, and associate business professionals;
- Strong numerical growth is occurring in high skilled occupations with around 3,000 additional professionals and 2,500 additional associated professionals. Industry trends

suggest that there are increasing opportunities for high skilled professionals to work in the health and community, and education sectors, but there are fewer local opportunities in finance and business services, hence a higher proportion of these workers will commute;

- A significant increase in employment opportunities has occurred for residents employed in intermediate clerical and sales, and in transport occupations;
- The number of residents employed in construction is increasing at twice the rate of that in metropolitan Sydney;
- Strong growth is occurring for elementary sales i.e. lower skills

sales staff and service workers;

- Around 17,500 net new jobs were taken up by Macarthur residents between 1996 and 2006. Around 40% of net new jobs for residents have been in high skilled management, professional and associate professional occupations i.e predominantly centre and special activity centre based; and
- Around 15% of all net new jobs were in production and transport related occupations i.e predominantly located in traditional employment lands.

TABLE 6.4
MACARTHUR OCCUPATIONAL CHANGE FOR RESIDENT WORKFORCE 1996 – 2006

OCCUPATION	1996	2006	CHANGE 96–06	COMPOUND GROWTH RATE 96–06	METRO COMPOUND GROWTH RATE 96–06
Generalist Managers	1,453	1,844	390	2.4	2.3
Specialist Managers	3,763	4,706	943	2.3	2.4
Farmers And Farm Managers	911	752	-159	-1.9	-3.1
Science, Building & Engineering Prof.	1,041	1,169	128	1.2	1.9
Business And Information Professionals	3,287	4,093	806	2.2	3.6
Health Professionals	2,250	2,826	575	2.3	1.6
Education Professionals	3,771	4,651	880	2.1	1.6
Social, Arts & Miscellaneous Prof.	1,421	2,228	807	4.6	3.0
Science, Engineering & Related Assoc.	1,574	1,448	-125	-0.8	-2.0
Business And Admin. Associate Prof.	2,682	4,116	1,434	4.4	3.5
Managing Supervisors (Sales & Service)	3,265	3,977	712	2.0	1.1
Health And Welfare Assoc. Professionals	560	755	194	3.0	3.0
Other Associate Professionals	1,099	1,396	297	2.4	1.9
Mechanical & Fabrication Engineering Tradespersons	3,091	2,935	-156	-0.5	-2.4
Automotive Tradespersons	1,858	1,902	43	0.2	-1.4
Electrical And Electronics Tradespersons	2,265	2,671	406	1.7	0.6
Construction Tradespersons	3,116	3,777	660	1.9	0.9
Food Tradespersons	796	929	134	1.6	0.3
Skilled Agricultural And Horticultural	650	713	62	0.9	0.8
Other Tradespersons & Related Workers	2,489	2,385	-104	-0.4	-1.1
Secretaries And Personal Assistants	3,005	2,120	-885	-3.4	-4.3
Other Advanced Clerical And Service	1,668	1,709	41	0.2	0.2
Intermediate Clerical Workers	10,823	12,504	1,681	1.5	0.9
Intermediate Sales And Related Workers	2,093	2,514	421	1.9	0.7
Intermediate Service Workers	4,351	6,301	1,949	3.8	2.8
Intermediate Plant Operators	1,646	2,537	891	4.4	2.0
Intermediate Machine Operators	1,859	1,470	-389	-2.3	-4.8
Road And Rail Transport Drivers	3,896	4,944	1,048	2.4	1.0
Other Intermediate Prod. & Transport	3,111	4,191	1,080	3.0	1.5
Elementary Clerks	1,025	951	-74	-0.7	-2.0
Elementary Sales Workers	6,220	8,046	1,826	2.6	1.8
Elementary Service Workers	1,194	1,656	462	3.3	2.5
Cleaners	1,945	1,916	-29	-0.1	-1.4
Factory Labourers	2,288	2,947	660	2.6	0.3
Other Labourers And Related Workers	3,452	4,346	894	2.3	1.3
TOTAL	89,918	107,421	17,503	1.6	1.2

SOURCE: AUSTRALIAN BUREAU STATISTICS, 2010





07

Metropolitan
and South West
Sydney
Employment
Lands Markets

07 Metropolitan and South West Sydney Employment Lands Markets

EMPLOYMENT LANDS ACCOMMODATE INDUSTRIAL ACTIVITIES SUCH AS LIGHT INDUSTRIAL, MANUFACTURING, WHOLESALE, TRANSPORT AND STORAGE, WAREHOUSES, DISTRIBUTION CENTRES, BULKY GOODS, AS WELL AS TECHNOLOGY AND BUSINESS PARKS.

Some non-industrial activities requiring large floor plates, such as fitness centres, recreation and religious uses are locating in some employment lands, taking up land that could be used for employment creation.

7.1 SYDNEY'S EMPLOYMENT LANDS

The Sydney Metropolitan Strategy 2005 identified a shortage of employment lands as a challenge, leading to increased land prices and possibly lost investment opportunities for Sydney. The Sydney Metropolitan Plan 2010 estimates that Sydney will require up to 8,000 hectares of additional employment land by 2036, on the strength of successful regeneration of older employment lands in established areas.

The number of jobs in employment lands is forecast to increase from 450,000 in 2004 to 650,000 in 2036, whilst the share of total jobs in employment lands is forecast to remain stable at around 23%.

Decreasing job densities in many industrial activities such as warehouses are offset by increasing number of high density jobs in business parks. In larger areas with well located

employment lands, it is preferable to seek a mix of employment lands to accommodate low employment densities and high employment densities such as business parks. Sydney's leading business parks, Macquarie Park and Norwest, have been designated strategic centres and have become the focal points for major infrastructure investment.

Demand for employment lands is driven by a number of macro factors including Gross Domestic Product growth, international and interstate competition, interest rates and exchange rates. Local factors include:

- Increasing prosperity and changes in workplace design have resulted in the growth of distribution centres, warehouses and bulky goods facilities;
- Population growth drives demand for local services including auto repairs, building supplies, hardware, plant nurseries and the like;
- Globalisation (associated with global integration of global financial and trading systems), and technological innovations in transport, information and communications, is driving new opportunities for extended supply chains with emphasis

on transportation, storage and distribution;

- Increasing energy prices (including factoring in a price on carbon), economies of scale and increasing urban congestion, backed up by policy commitments to increase the share of freight transported by rail, are all improving the economics of rail movements and demand for employment lands with good rail access;
- Economic restructuring resulting in the relative decline in manufacturing and growth of business parks integrating production, research, administration, distribution and sales; and
- The growth of super funds and property trusts has created new markets with investors looking for long term returns, leading to land banking of employment lands. This can result in slower development of employment lands, particularly where major players wait until prices reach a certain level before developing their land.

The number of jobs in employment lands is forecast to increase from 450,000 in 2004 to 650,000 in 2036, whilst the share of total jobs in employment lands is forecast to remain stable at around 23%.

7.2 EMPLOYMENT LAND SUPPLY

Over the last 15 years most new employment lands in Sydney have been developed in the greenfield sites of Western Sydney. The most significant commitment has been the establishment of the Western Sydney Employment Hub, located in the vicinity of the intersection of the M7 and M4 motorways. South West Sydney has received less attention, with most interest in creating new employment lands in the South West Growth Centre, and some interest in establishing new intermodal facilities along the South West Corridor. Transport access has been the overriding location factor in provision and uptake of employment lands. Increased land prices in inner city areas and urban consolidation (and opportunities to convert employment lands to residential development) encouraged industrial activities to relocate to competitively priced greenfield sites.

New infrastructure such as the M7 motorway and the proposed Southern Sydney Freight Line are fuelling continued demand for employment lands in Greenfield areas in the region.

Around 70% of Sydney's employment lands (including Central Coast) are located in Western Sydney, with the largest and most rapidly growing share in the North West (Figure 7.1). Most new employment lands will occur in the Western Sydney Employment Hub and in the Western Sydney

TABLE 7.1 EMPLOYMENT LANDS DISTRIBUTION IN SYDNEY 2006

SUB-REGION	AREA ZONED	SHARE OF METROPOLITAN SYDNEY (%)
North West	4,173.4	28.22%
South West	2,062.9	13.95%
West Central	4,031.0	27.26%
Inner West	361.3	2.44%
South	758.6	5.13%
Sydney City	236.3	1.60%
East	659.9	4.46%
Inner North	193.8	1.31%
North East	301.4	2.04%
North	167.8	1.13%
Central Coast	1,840.4	12.45%
Sydney Total	14,786.8	100.00%

SOURCE: NSW DEPARTMENT OF PLANNING

Employment Lands Investigation Area.

Given its labour growth, new employment lands are also urgently required for the South West sub-region.

A BIS Shrapnel study¹² for the NSW Department of Planning on drivers of conversion of industrial land concluded that, based on assumptions on the nature and rate of uptake of employment lands (primarily for warehousing), employment land supply pressures are, and will continue to be, greatest in the outer ring. The study projected a worst case scenario of only four to 11 years for zoned, serviced – ready to use – land.

Within Australia, Sydney has the highest industrial rents, expensive

employment lands and most significant supply constraints. The high cost of employment lands and accommodation places Sydney at a competitive cost disadvantage compared with Melbourne and Brisbane, particularly when it comes to land-intensive low-tech manufacturing. More significant than interstate competition, however, is intensified global competition driven by wage differentials that drives industrial investment offshore.

Most interest in South Western Sydney is concentrated in distribution and warehouses. Most activity is

¹² BIS Shrapnel, **Drivers for conversion of industrial land**, for Department of Planning, 2006.

Given its labour growth, new employment lands are also urgently required for the South West sub-region.

concentrated around the M4, M5 and M7. Employment lands prices experienced substantial increases up until the Global Financial Crisis (GFC), and areas such as South West Sydney were hit hard by the GFC. However real price increases over the decade occurred, driven by an upsurge of industrial production, and super funds investment in new Greenfield sites. Employment lands prices are high in Sydney due to a number of factors:

Competition from other land-uses particularly residential demand.

Supply shortages of suitably zoned and serviced employment lands and low reserves of land on the market.

Land banking and control of the market in strategic locations by a small group of owners.

Globalisation and structural change in metropolitan Sydney pushing up overall land prices levels, due to geographical constraints and the increasingly higher-value and intensive nature of industry.

TABLE 7.2 EMPLOYMENT LANDS IN SOUTH WESTERN SYDNEY

Employment lands area	Zoned employment lands (hectares)	Vacant employment lands
Chipping Norton	97.3	3.62
Crossroads	46.1	23.68
Moorebank	27.0	12.00
Orange Grove	40.5	5.62
Prestons	224.0	64.35
Sappho Road/Warwick Farm	40.3	
Camden	2.8	0.13
Narellan	40.9	9.56
Smeaton Grange	230.2	84.11
Central Hills Business Park	40.0	40.0
Campbelltown	160.4	29.86
Ingleburn	335.8	45.60
Minto	318.8	36.75
Appin	11.0	3.10
Bargo	2.0	0.075
Maldon	104.0	55.40
Picton	32.0	4.52
South West Growth Centre	1, 634.0	1, 634.0
Warragamba/Silverdale	64.0	18.70
Total	3,451.1	2,071.10

SOURCE: MACROC (UPDATED BY STRATEGIC ECONOMICS/ COX)

Table 7.2 shows employment lands supply in South Western Sydney

7.3 DEMAND-DRIVERS

Growth in South Western Sydney employment lands will be driven by a number of factors:

- Global and macro economic growth rates, Australia's industries competitiveness and Sydney's capacity to attract and retain skilled workers;
- Improved access to local and global suppliers and customers as a result of investment in the M5 East Extension, M7 Westlink Motorway and improved links across metropolitan Sydney and the proposed Southern Sydney Freight Line;
- Competitively priced, availability and abundant employment lands including large sites well located for metropolitan and national distribution and its major infrastructure networks;
- Rapid population and industry growth in surrounding sub-regions; and
- Strong growth in skills base of the rapidly growing regional labour force.

Analysis of specific industrial activities likely to be accommodated in South Western Sydney employment lands (excluding higher order business park activities) include:

- Manufacturing;
- Transport and logistics;
- Construction and urban services; and
- Bulky goods retail.

7.4 MANUFACTURING

The share of manufacturing employment has declined over a 30 year period but in South Western Sydney it remains strong. It is particularly strong in Western Sydney and growing in some localities including Campbelltown. More than half Sydney's manufacturing jobs are located in the subregions of Western Sydney. Manufacturing industries were vulnerable to tariff reductions in areas such as textile, clothing and footwear, as well as metals and engineering. This resulted in substantial job losses in industrial localities including Fairfield, Bankstown, Blacktown, Campbelltown and Liverpool. A number of global and national corporations rationalised higher cost Australian based operations and now out-source from low cost countries. Innovation and automation has reduced labour inputs per unit of output. However, many companies are consolidating their activities on larger sites (greater than 5 hectares), and these trends benefits areas such

as Campbelltown. Although there is a trend towards smaller industrial lots, there will always be some demand for larger sites. Councils can protect these sites by not sub-dividing a selective group of sites.

Local manufacturers compete well in the following areas:

- where transport costs are relatively high (e.g. high volume to value ratios);
- local supply chains are important (e.g. maintenance, processed foods); and
- high value-added niches such as pharmaceuticals, tool making and advanced metals.

Campbelltown LGA has a good concentration of these industries. Many activities previously undertaken in-house are now being outsourced such as design, finance, human relations, administration and cleaning. Campbelltown LGA and South Western Sydney have a number of competitive advantages including diverse lot sizes, good infrastructure, and a skilled labour pool. Emerging opportunities include:

- Continuing relocation of manufacturers from inner Sydney due to high land prices and poor distribution networks close to the centre;
- Relocation of manufacturers from Melbourne to Sydney due to the latter's superior logistics advantages to service East Coast markets; and

- New niche opportunities in a range of small unit runs in manufacturing including sporting goods, scientific and medical equipment, plastics, publishing, specialty foods, auto and aerospace parts and components.

Some areas of manufacturing are experiencing employment growth including some food and beverages, chemicals, publishing and other periodicals and electronics. Manufacturing is expanding in growing sub-regions particularly in building and construction materials. Emerging opportunities associated with the transition to a sustainable economy and emerging technologies such as nanotechnology and photonics will drive new opportunities for manufacturing. These high technology activities are suitable for business parks.

Job rationalisations in older industries located in traditional employment lands are expected to continue, particularly in metals and engineering. On the other hand, job increases are occurring in new greenfield areas located close to growing residential areas, such as in Camden. This is due to growing local markets in outlying areas providing opportunities for light industries. In addition, more advanced manufacturing firms are shifting to greenfield sites where they can assemble large floor

plates to accommodate automated production and distribution activities, as well as co-locating with white collar knowledge based jobs.

Key criteria for locating manufacturing activities in employment lands include:

- Direct access to motorways, main arterials, and intermodal terminals for supplies and to export to customers;
- Location on public transport networks – such as strategic bus routes;
- Within a large labour pool catchment area, particularly for skilled managers, tradespeople and process workers;
- Accessible to and from airport or major freight transport facilities.
- Buffer zones from residential areas;
- Competitively priced land and local charges; and
- Space to grow and accommodate large vehicles.

7.5 TRANSPORT AND LOGISTICS

Transport and logistics, involving movement of people and goods, are growing industries in South West Sydney, employing around 6,500 workers in 2006. Key industries include road, bus and rail transport. Globalisation, increasing trade dependence and the proximity to Australia's main economic gateways of Sydney Airport and Port Botany are driving demand for transport and logistics activities.

Many firms are engaged in global trade, and as they become more specialised, they outsource activities that were traditionally undertaken in-house. The concept of efficient supply chains, where goods and materials flow rapidly between suppliers, producers and customers increases demand for transport and logistics. The growth of E-Commerce and reduction in inventories also drives demand for transport and logistics.

Globalisation, technological innovation and industrial restructuring are driving significant increases in freight transported in containers across the metropolitan area and the national economy. This is creating demand across the South West, because of the subregion's superior rail and road corridors, particularly in the Campbelltown and Liverpool LGAs. The establishment of a major Intermodal Facility at Moorebank will further stimulate demand throughout the region. Imports are increasing

“Imports account for twice as many full containers passing through Port Botany as exports. Well over 90% of imported containers are unloaded in Metro Sydney, and the great majority of their contents is destined for consumption by Sydney’s residents. Port Botany’s import traffic is for local supply – it is not a major transshipment port or a hub that handles cargo on the way to somewhere else”.

dramatically, exports are increasing at a slower rate, and supply chains are becoming more fragmented - resulting in a surge in freight. Container trade through Sydney has been increasing at around 7.5% per year over the past 20 years and is forecast to increase by 5-7% per year over the next 20 years. The Port Botany Expansion Project, by adding a new container terminal, will increase capacity of the Port from 1.375 million TEU in 2005 to 3.2 million TEU in 2025. Sydney Ports estimate that 85% of containers passing through Port Botany originate or are destined for a location within a 40 kilometre radius of Port Botany. According to the Infrastructure Implementation Group¹³,

“Imports account for twice as many full containers passing through Port Botany as exports. Well over 90% of imported containers are unloaded in Metro Sydney, and the great majority of their contents is destined for consumption by Sydney’s residents. Port Botany’s import traffic is for local supply – it is not a major transshipment port or a hub that handles cargo on the way to somewhere else”.

Interstate freight movements are also increasing exponentially. Melbourne-Sydney rail and road freight, for example, is projected to increase significantly in the next twenty five years. One report has estimated that total freight movements between Melbourne and Sydney will increase from around 10 million tonnes to 25 million tonnes per year between 2004 and 2029¹⁴.

A westward shift in freight transport and storage is occurring with growth in jobs in transport, postal and warehousing exceeding the rate of growth of the Sydney average. The opportunities are driven by new road infrastructure, new greenfield sites and investment in new distribution and storage facilities. The increased freight traffic includes export and import of containers, interstate movements of freight along the east coast of Australia and the distribution of freight within metropolitan Sydney itself. In recent years major corporations such as ING, Mirvac and Australand are investing in warehousing and distribution centres.

7.6 BULKY GOODS RETAIL AND URBAN SERVICES

Retailing, which involves businesses selling goods and services to consumers for their personal, family, or household use, is the largest industry employer in New South Wales. Key drivers for retail employment include economic growth rates, disposable incomes, technology, workplace conditions, consumer preferences and the availability of credit. NSW planning policies encourage the location of retail activities in centres to encourage higher employment densities and the use of public transport. Hence major retail within employment lands is discouraged. The Department of Planning distinguishes between “bulky goods” and outlets with a particular physical need for customer car access and parking, and other retail forms,

which should not be in employment lands but located in centres¹⁵. Bulky goods outlets are outlets for the sale of large goods, such as furniture, do-it-yourself home improvement materials that:

- generate low return per unit of floor area, and
- are of such a size and shape as to require a large area for handling, storage or display and easy and direct vehicular access to enable the goods to be collected by customers after sale.

Rapidly growing areas also use employment lands for local services such as auto-electricians, panel beaters and auto repairs, and sometimes for specialised recreational facilities.

Bulky goods are a growing sector of the retail economy and are differentiated from general retailing by the need to display large goods which require large floor plates, and can be transported by customers after purchase, in their own vehicles, therefore requiring adequate car parking.

13 Infrastructure Implementation Group. **Review of the Freight Industry Advisory Board Report**. May 2007.

14 Ernst and Young. ACIL Tasman, Hyder Consulting. **North-South Rail Corridor Study**, for Auslink, 2007.

15 SGS and Parsons Brinckerhoff, **Integrating land-use and transport for emerging retail formats**, for the Department of Planning, 2003.

It is suggested that bulky goods outlets be clustered adjacent to major shopping centres so as to share access to roads and parking. The 2010 Metropolitan Plan suggests the B5 Business Development Zone is generally an appropriate zone in which to cluster this kind of development. The objectives of the zone are to: enable a mix of business and warehouse uses, and specialised retail uses that require a large floor area, in locations that are close to, and that support the viability of centres. Ideally, a site adjacent to the Campbelltown-Macarthur Centre would be suitable for bulky goods retailing.

Bulky goods should not replace valuable employment land. However there may be industrial land adjacent to a retail centre, which does not suit major employment. A benchmark for the location of bulky goods is the service trade centres adjacent to Canberra's Town Centres, such as those at Woden and Belconnen.

7.7 BUSINESS PARKS

Business parks are Sydney's employment "hot spots" - with jobs growing at over 6% per year - compared to 2% for other strategic centres. With Norwest nearing capacity, an opportunity exists to develop new business park(s) in outer Sydney, with the potential to generate around 20,000 jobs per major business park by 2036. This scale is required to give the business park the status of a specialised centre, with a focus for infrastructure planning and delivery. Key industry growth prospects that could be accommodated in any proposed business park include:

- Advanced building design and materials;
- Sustainable technologies and environmental equipment;
- Corporate distribution and logistics headquarters and facilities;
- Advanced manufacturing and services - including scientific and medical equipment, nano-technology;
- Information technologies
- Advanced metals, including tooling and machining;
- Building product design and distribution;
- Telecommunications products and services;
- Environmental Management Products and Services;
- Aerospace, aviation and transport design and components; and
- Active health products and services.

A number of factors drive demand for business parks. They include:

- A sizeable catchment containing a large proportion of residents with knowledge based skills and competencies including scientific, technology, venture capital and management;
- Proximity to research, innovative firms and higher education facilities;
- Outstanding amenities including childcare facilities, entertainment, recreational and cultural facilities; and
- Outstanding transport and communications infrastructure and good access for suppliers and customers.

Historically, the planning system was uncomfortable with business parks. They were defined as "out-of-centre" economic areas. They tend to be car dependent and compete with existing centres on public transport networks. The Metropolitan Strategy takes a much more positive view particularly with the extraordinary employment growth experienced by business parks. Macquarie Park and Norwest are designated specialised centres, with a focus on improving public transport access to them. More business parks are required in the Sydney Basin.





08

Campbelltown Employment Lands

08 Campbelltown Employment Lands

THE CAMPBELLTOWN LGA CURRENTLY HAS 741 HECTARES OF ZONED EMPLOYMENT LANDS, WHICH IS AROUND 5% OF SYDNEY'S TOTAL EMPLOYMENT LANDS (COMPARED WITH 4% OF TOTAL POPULATION)

There are around 17,000 jobs located in the major employment areas: Ingleburn, Minto, Campbelltown, and the smaller Leumeah industrial area. The declining employment/hectare ratio is an indication of major structural change in the economy, with the demise of labour intensive manufacturing industries and the growth of logistics and distribution facilities, which have low employment/hectare ratios.

The release of these employment lands, however, coincided with structural changes in the economy. The rate of growth of manufacturing employment had peaked, and hence the take-up of land was much slower than expected and employment densities were relatively low. Nevertheless Campbelltown's employment lands offered many advantages such as access to the M5 and M7 and the rest of the Sydney Orbital Network. The revitalisation of rail for interstate freight movements has provided new opportunities for intermodal terminals and warehouse and distribution facilities.

8.1 CAMPBELLTOWN EMPLOYMENT LANDS

8.1.1 Context

Campbelltown was nominated as one of the satellite towns beyond the Greenbelt in Sydney's first strategic plan, the 1948 County of Cumberland Planning Scheme and was targeted to house a population of 30,000 people. Under the 1968 Sydney Region Outline Plan (SROP), the South West Sector, made up of Campbelltown, Camden and parts of Wollondilly, was nominated to accommodate 500,000 people by the year 2000. The South West was unique amongst the SROP sectors being singled out by the State Government for special attention and subsequently joining Bathurst-Orange and Albury-Wodonga in becoming one of the Australian Government's nominated growth centres under the Growth Centres Act 1975.

A development organisation, the Macarthur Development Board (MDB) was established to coordinate the planning and development of the area and to prepare a comprehensive structure plan. The plan was publicly exhibited in 1973.

A population target of 500,000 by the year 2000 was a highly ambitious task particularly as the population of

the area was only just over 34,000 in 1966. In fact there were no new towns or cities in the world which had such a proposed high growth rate and population target. Only Irvine, the privately funded new town in Southern California and Canberra were planned to house 500,000 people. The largest new town in Great Britain, Milton Keynes, was being planned for 200,000 whilst the Paris new towns such as Évry, which probably come closest in concept to Macarthur, were targeted at about 400,000 people.

The development process for Macarthur was different to the British new towns and Canberra in that the Macarthur Development Board acted more as a coordinator of development with major works being carried out by the private sector, the Housing Commission and the Land Commission.

FIGURE 8.1 SOUTH WEST SECTOR. SROP. 1968

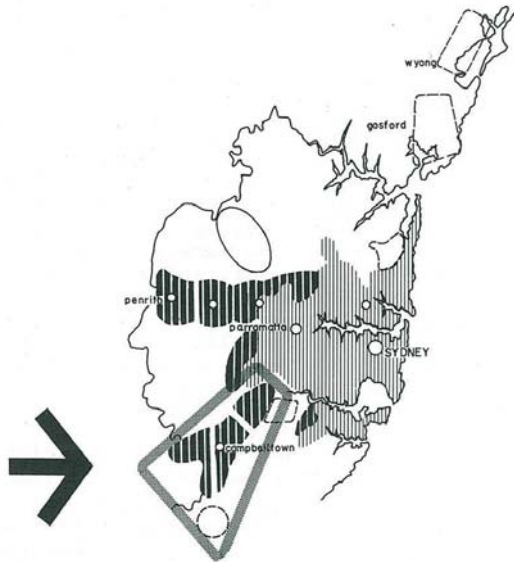
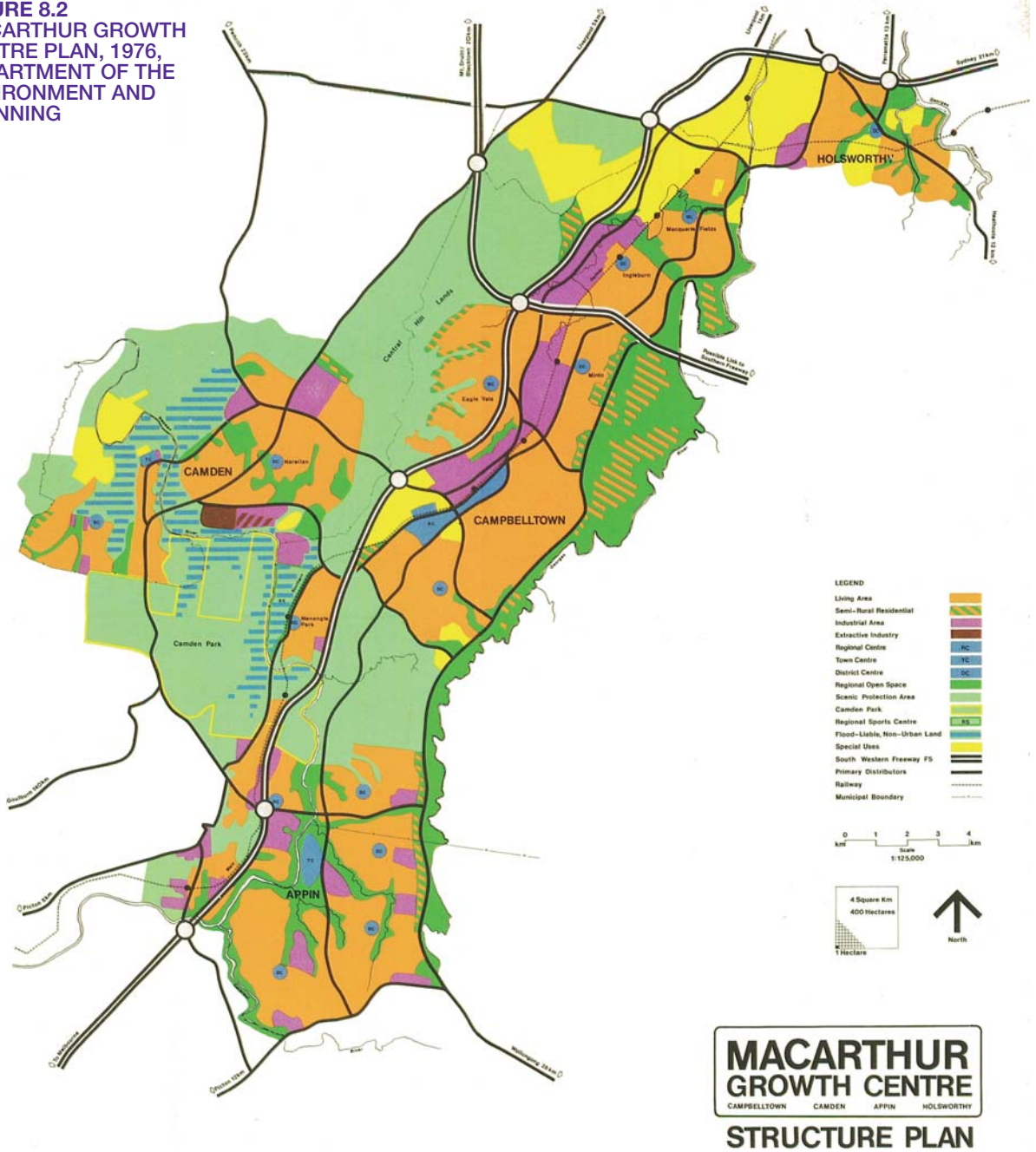


FIGURE 8.2
MACARTHUR GROWTH
CENTRE PLAN, 1976,
DEPARTMENT OF THE
ENVIRONMENT AND
PLANNING



8.2 POPULATION GROWTH

In 1966 the Campbelltown and Camden LGAs contained 34,386 people. In 1986 the Campbelltown and Camden LGAs had a population of 140,167, with a compound growth rate of 7.28% per annum. This growth needs to be compared with the Sydney Region which grew at an average of 1.3% per annum between 1966-86.

In The Campbelltown LGA the State Planning Authority and later the Macarthur Development Board (MDB) undertook and completed major drainage works which not only allowed the development of the Growth Centre's major industrial estates at Minto and Ingleburn but formed the major drainage system for much of the residential land.

FIGURE 8.3: IRVINE NEW TOWN, US

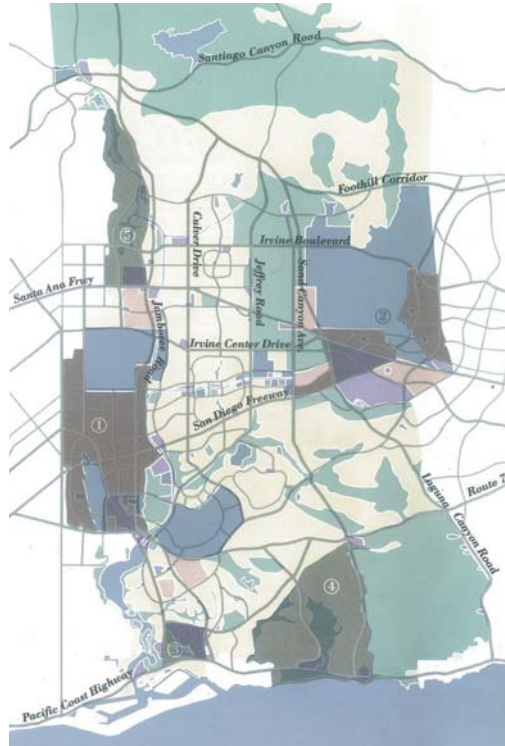


FIGURE 8.4: MILTON KEYNES NEW TOWN, UK

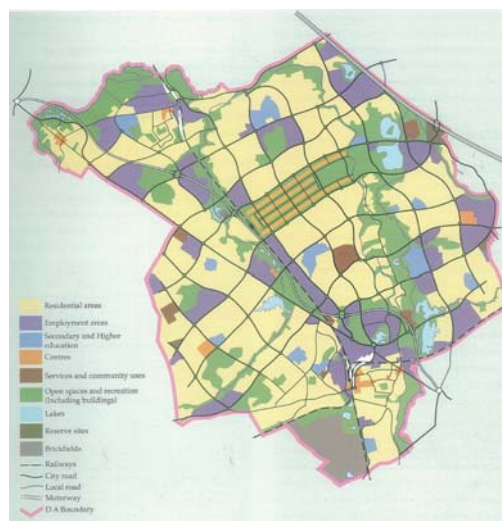


FIGURE 8.5: ÈVRY NEW TOWN, FRANCE



8.3 ECONOMIC DEVELOPMENT

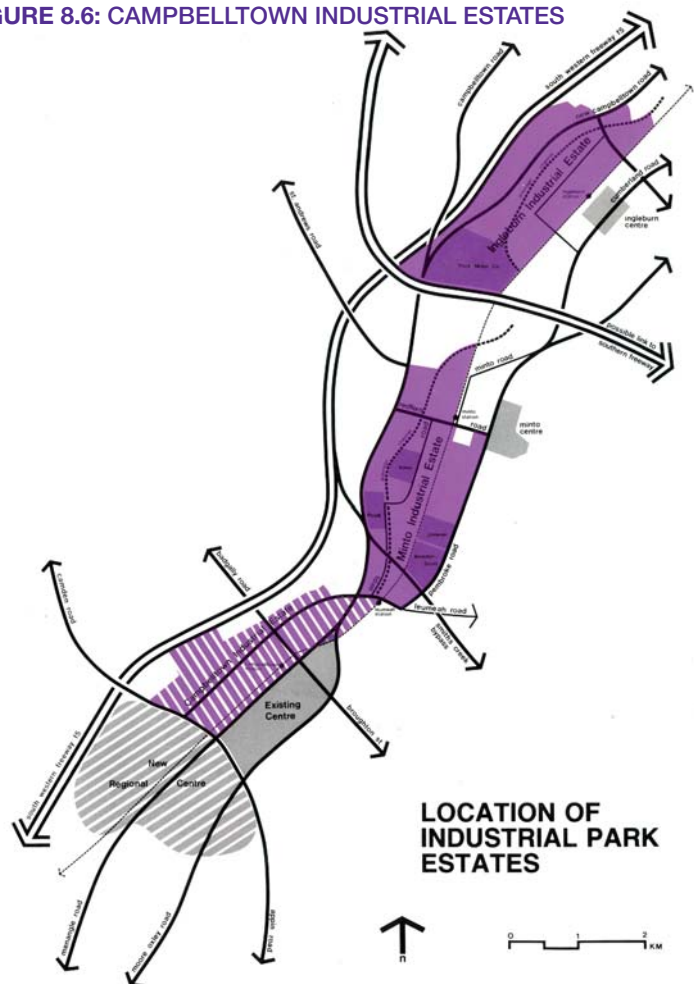
A major objective of the SROP was to foster Sydney's economic growth particularly through the continued availability of industrial land, and more specifically to allow the growth sectors to become as self sufficient in employment as possible.

Another major objective was to match population growth with the provision of commercial and community facilities, particularly shopping, education, health and recreation.

The most important task of the Macarthur Development Board was to promote employment. A considerable proportion of funds available to the Board were utilised to create the two industrial estates at Minto and Ingleburn. The SROP proposed manufacturing as the key sector for employment in the outer areas and it was with this conviction that a considerable proportion of Macarthur's funds were spent on the purchase and development of industrial land.

The 1970s showed great promise with some major international firms establishing in Minto such as Comalco, Unilever, Pirelli and Amco as well as a host of smaller yet labour intensive companies. In the early eighties there was a slow down reflecting a national trend, however, this picked up again with the establishment of the ACI-Pilkington production plant.

FIGURE 8.6: CAMPBELLTOWN INDUSTRIAL ESTATES



8.4 CAMPBELLTOWN IN THE SYDNEY REGION CONTEXT

The Metropolitan Plan projects a population of 6 million for the Sydney Region by 2036. This represents a growth of 1.15% from a 2011 population of 4.5 million, the average population growth rate since 1966.

However, Greater Western Sydney (GWS) is growing at an average rate of 1.88% compared with 0.42% for the established eastern half of Sydney. The population of GWS is expected to reach 3 million when Sydney's population reaches 6 million by 2036.

This places a strain on GWS especially as there is already a deficit of jobs in the western LGAs.

FIGURE 8.7: POPULATION CHANGE 1996-2051, COX 2010

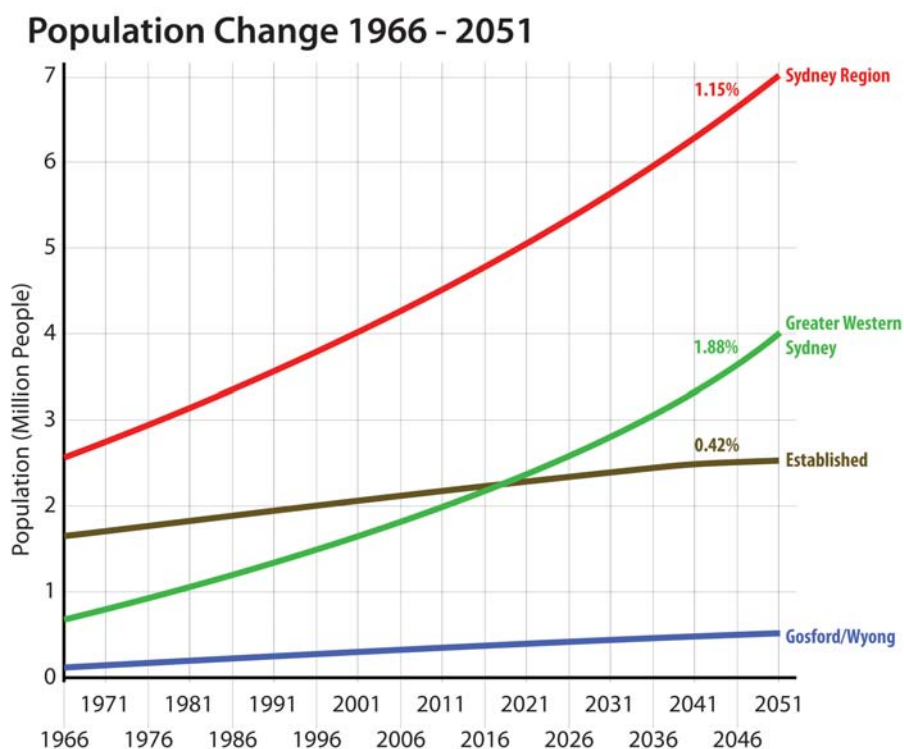
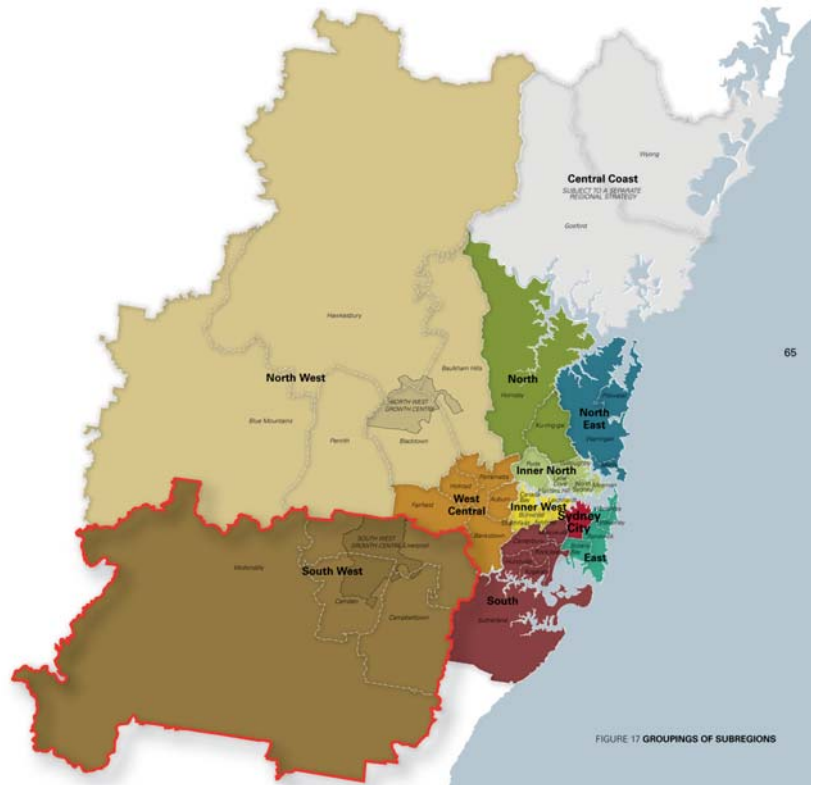


FIGURE 8.8: SOUTH WEST SUBREGION



8.5 THE SOUTH WEST SYDNEY SUBREGION

Campbelltown is one of four LGAs which make up the South Western Subregion (SWSR). Together with Camden, Liverpool and Wollondilly the population of 410,500 in 2006, is expected to reach 874,800 by 2036, a massive 113.1% growth. (Metropolitan Strategy Review, 2010)

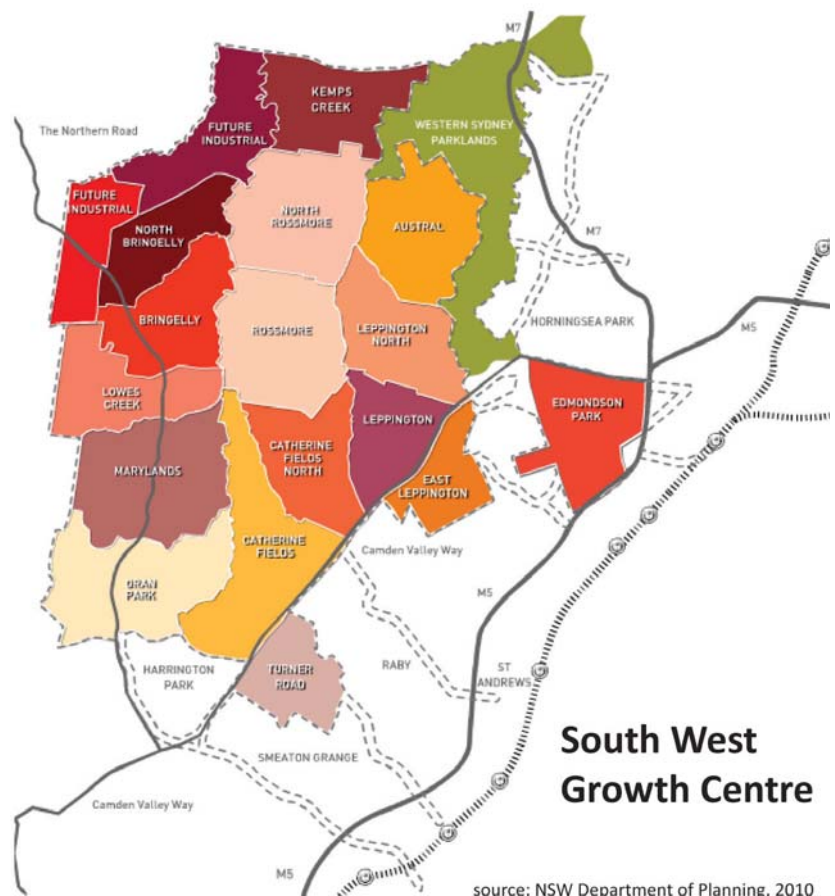
8.6 SOUTH WEST GROWTH CENTRE

The largest growth is expected within the South West Growth Centre, planned for 100,000 dwellings which could yield 250,000 people. Most of the Growth Centre's urban areas are in Camden and Liverpool with parts of Edmondson Park and Leppington East in Campbelltown.

The resulting workforce could number 120,000, many of whom could be expected to seek jobs in Campbelltown, Minto and Ingleburn employment areas, as well as in the Campbelltown Macarthur Centre.

The South West Growth Centre structure plan has identified 1,364 ha as industrial employment lands.

FIGURE 8.9: SOUTH WEST GROWTH CENTRE, DOP, 2010



8.7 THE CAMPBELLTOWN LGA

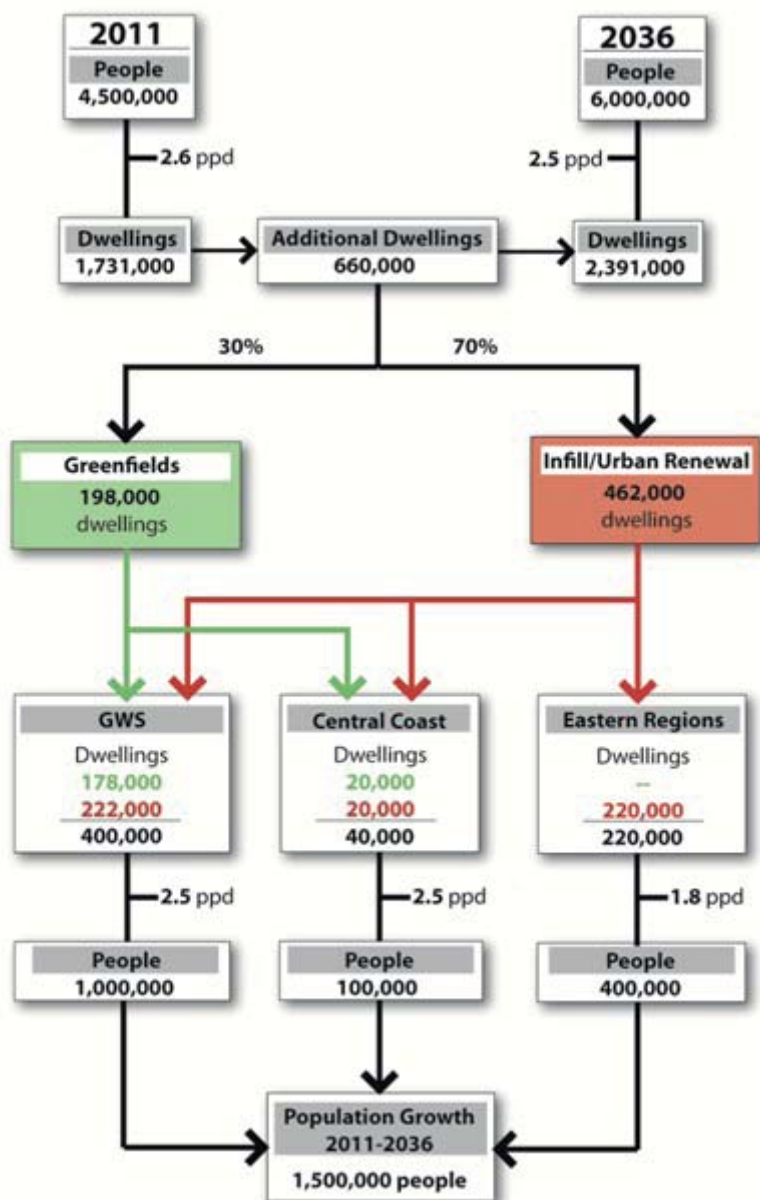
Campbelltown's population reached 143,077 in 2006, as projected by the Bureau of Transport Statistics, and could reach 234,000 by 2036 taking into account new urban development and its share of the 70% of urban renewal/ infill proposed by the 2010 Metropolitan Plan. The chart on the right shows that 222,000 dwellings will need to be provided in the established areas of Greater Western Sydney.

8.8 AVAILABLE EMPLOYMENT LAND

Campbelltown has 741 ha of zoned employment lands which currently accommodates approximately 17,000 jobs.

There is a need to identify more employment land if the long held policy of self containment is to be achieved, let alone to meet the demand from the South West Growth Centre, which will increased spillover demand to the better located Campbelltown LGA employment lands.

FIGURE 8.10: NSW METROPOLITAN STRATEGY, POPULATION CHART, COX 2010



8.9 POTENTIAL EMPLOYMENT LAND

There are few greenfield employment/industrial sites remaining in the Campbelltown LGA. The amount of industrial land provided in Campbelltown by the Macarthur Development Board in the 1970s was to cater for the expected number in the local workforce, when the population capacity was reached. The change in industries which remained in Australia in the 1980s, required more space per worker. As a consequence a greater amount of employment land is required to achieve the long held principle of balancing the number of jobs in Campbelltown with the number in the local workforce.

It is also important to ensure that non industrial uses are discouraged from locating in industrial areas.

New greenfield sites will be needed. This will require land currently used for other purposes to be identified and considered for rezoning for employment.

There is a need for more intensive employment as distinct from low density uses such as warehousing and logistics which are being catered for in parts of the Minto industrial areas and elsewhere in Greater Western Sydney (GWS), particularly on sites accessed from the M7.

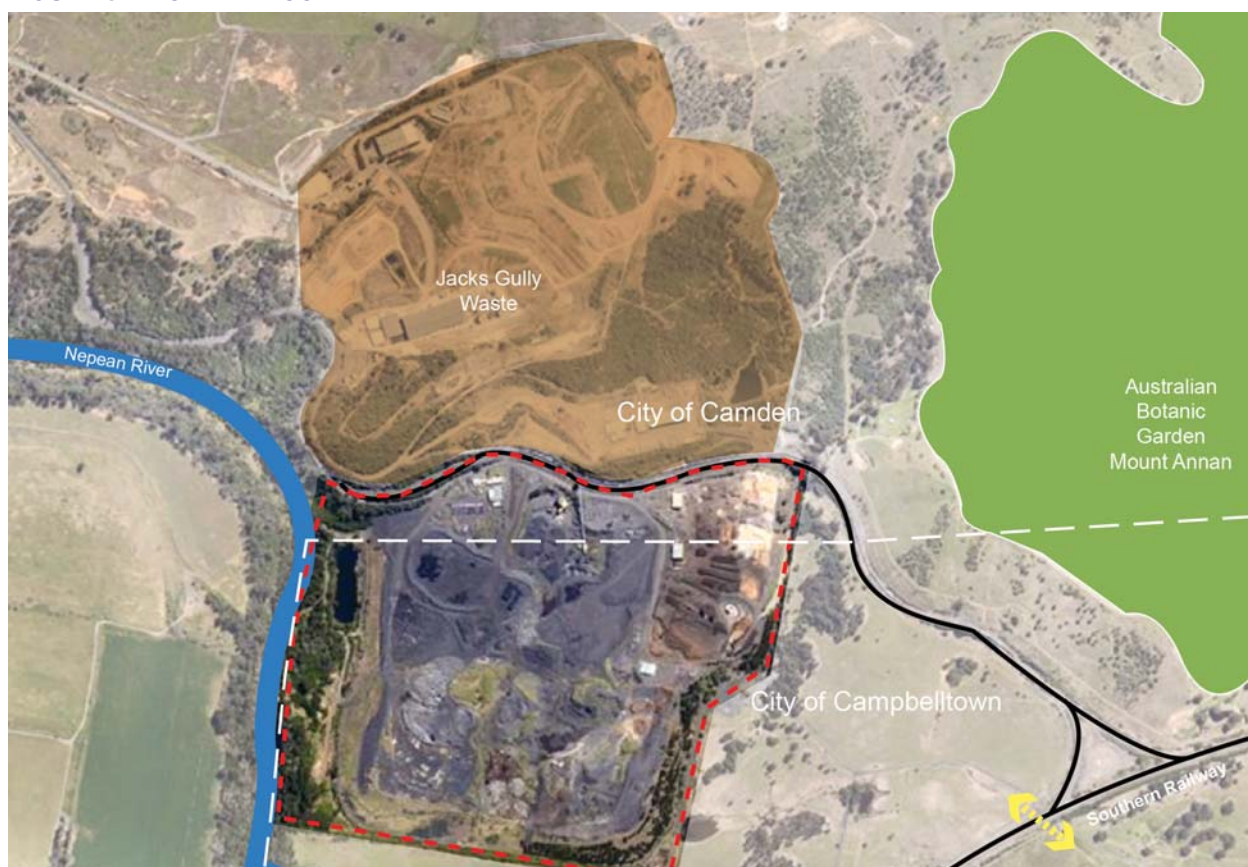
It is difficult to predict what the future demand will be regarding the type of industries and whether there are opportunities for redeveloping the

sites for more intensive employment or whether the densities will fall due to the demand for more warehousing and logistics. There is an opportunity however, for higher density employment in the employment lands immediately west of Ingleburn railway station and within a 500 metre radius of the station. This area could be zoned to allow a mix of general employment activities.

Better road access by providing full, four-way ramps off the Hume Highway at Brooks Road and Raby Road may help stimulate redevelopment.

Other potential employment areas that should be investigated include:

FIGURE 8.11: GLENLEE COAL PLANT



Glenlee Coal Plant

The 108 ha Glenlee site sprawls across the Campbelltown-Camden LGA boundary, with approximately 72ha being in Campbelltown and 36ha in Camden.

The site has the rare advantage of being served by the railway with the north route being part of the electrified metropolitan rail network.

Direct access to the Hume Highway, there are long term plans to link the suburbs of Elderslie-Spring Farm to the motorway and or Menangle Road

which could serve the Glenlee site.

With the potential of Springs Road and Glenlee Road being extended eastwards to intersect with the Hume Highway (Southwest Freeway) and Menangle Road. Glenlee, already served by the Metropolitan electric rail system, could become one of the most accessible employment nodes in the south west.

The site is bound by the Australian Botanic Garden, Mount Annan to the east, the Nepean River to the west, Spring Farm to the north and the

National Equestrian Sports Centre to the south.

The site is undulating but could be modified by cut and fill. The site is in one ownership which helps to facilitate development.

Glenlee best fits into the employment lands category of light industry. At a density of 40-45 persons/ha the site could employ between 4,000 and 6,000 persons.

FIGURE 8.12: GLENFIELD WASTE DISPOSAL



Glenfield Waste Disposal Site

The site is located east of the southern railway line, west of the Georges River, about 4 kilometres south of the M5 Moorebank interchange with the Orbital motorway and directly north of Cambridge Avenue.

The site is divided into two large land parcels bisected by the Liverpool/Campbelltown LGA boundary. Just south of the northern boundary of Campbelltown portion of the site, is the East Hills Railway Line. The Southern parcel in Campbelltown LGA measures around 60 hectares.

The portion of the site in Liverpool LGA is zoned RE1 Public Recreation under Liverpool Council's latest LEP (2008) which compiles with the standard LEP and is unlikely to be revised. Council intends to add the land to the Leacock Regional park which is west, across of the area across the Southern rail Line. The area suitable for employment is therefore confined to the portion within Campbelltown LGA.

Access is available from Cambridge Road which in turn intersects with Moorebank Road to the east. Moorebank Road is a direct link to

the M5 motorway, a link of the Sydney Orbital. The suggested zoning is light industry, at a density of 40-45 persons per hectare, which would enable the site to employ between 2400 and 2700 persons.

8.10 BUSINESS PARKS

Business parks, which comprise integration of high value added and predominantly advanced production, distribution and research and office based jobs are growing strongly. Tenants are attracted to spacious and attractive work environments and multi-purpose facilities. More controversially from a planning perspective, they are often characterised by a high degree of car dependence, although public transport improvements to major business parks are seeking to address this problem. The metropolitan plans are seeking to encourage an expansion of business park capacity in the Sydney Basin, but emphasise the importance of the need for better public transport outcomes.

It is essential that suitable sites are identified in Campbelltown for development to accommodate business parks and or research/technology parks. There are distinctions between business parks and technology/science parks. The former are attractive to corporates requiring large floor plates and good amenities, while the latter are more likely to have explicit links with research institutions and universities, and seek to spin-off new businesses from research.

As the fastest growing employment sector, a serious attempt needs to be made to identify the best site or sites which could fulfil the requirements of a business park. The two success stories in Sydney are Macquarie Park

and Norwest, each with particular characteristics which may or may not be replicated in the Campbelltown LGA.

These are:

- Good motorway access; Macquarie Park and Norwest are both served by the M2;
- Both have good access to higher Socio Economic residential areas;
- Macquarie Park is adjacent to a university and a regional shopping centre;
- Norwest is under the control of one owner which ensures a high quality of building and public domain;
- Macquarie Park now has heavy rail access, however the business park was well established prior to being served by three new stations in 2009;
- Both Macquarie Park and Norwest have good exposure to arterial roads, i.e. Epping/ Ryde Road and Windsor Road respectively; and
- Neither site had any intrinsic site characteristics – Macquarie Park was previously market gardens and Norwest a brickyard.

The Campbelltown LGA has a few sites which have the potential to become successful business parks:

The Tertiary Education Precinct:

This site contains UWS and the TAFE institute, which measures 136 ha and has approximately 6.6 ha not yet committed for other uses. The similarities with Macquarie Park are obvious, a university, a regional shopping centre, good access to the Hume Highway and Narellan Road and served by a railway station. A connection should be made between the Campbelltown-Macarthur Centre, the University of Western Sydney (UWS) Campbelltown campus and a possible Campbelltown-Macarthur Centre technology-based business park.

FIGURE 8.14: UWS CAMPBELLTOWN CAMPUS

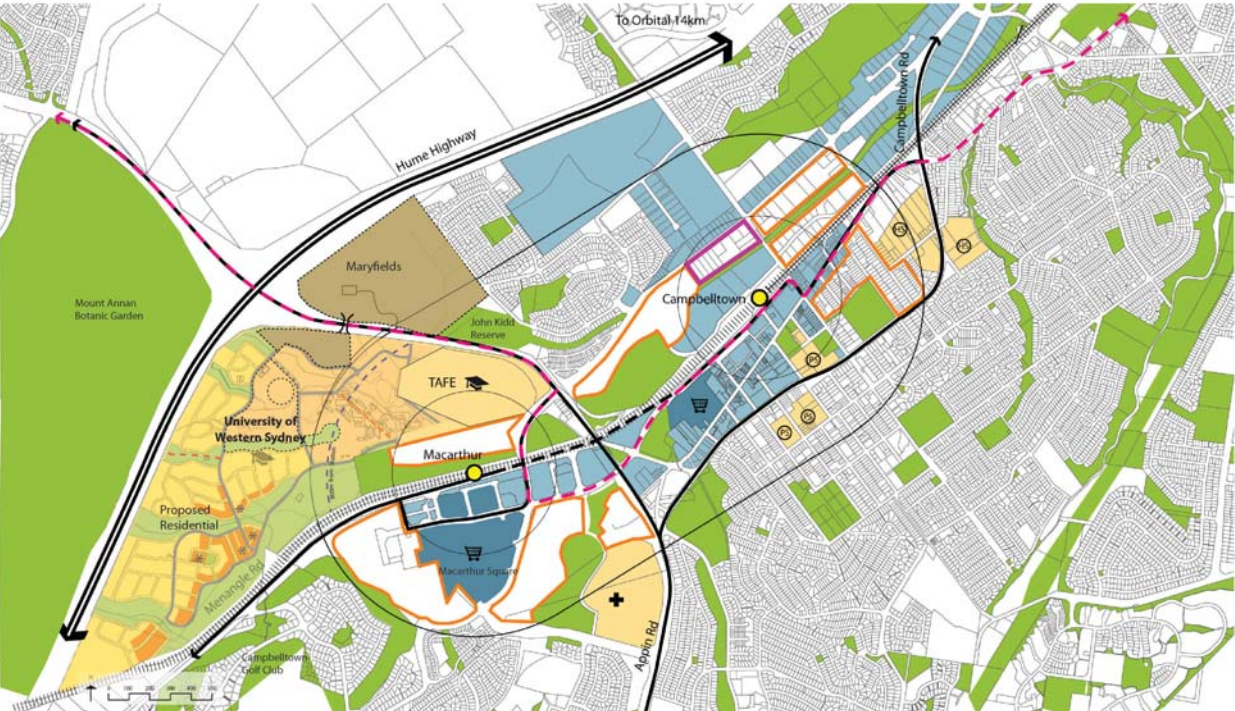


FIGURE 8.13: THE TERTIARY EDUCATION PRECINCT



FIGURE 8.14: BETHLEHEM MONASTERY



The Bethlehem Monastery:

This 50ha site is on Narellan Road and can be considered as part of the Campbelltown-Macarthur Centre, particularly the UWS/ TAFE Campus to which it could be linked by a pedestrian bridge spanning Narellan Road. The site has good access to the intersection of the Hume Highway and Narellan Road which in turn links it to the Orbital Motorway. It is a greenfield site in a fine setting and in

one ownership, making it attractive to businesses wishing to have a central site adjacent to a university and with easy access to Macarthur Station. At a density of around 150 persons per ha, the site could employ 7,500 persons.

Investigations of available land on the tertiary education precinct and the Bethlehem Monastery are not alternatives. Both may be needed to grow research based opportunities

linked to UWS, particularly associated with bio-medical and E-health research and applications.

FURTHER INVESTIGATIONS

All of the investigated sites can be easily accessed from other parts of the Sydney Region, and from the Southern Highlands, by road and rail. The purpose of this study was to determine whether or not they are appropriate sites for business parks (at least as a preliminary assessment). Each of these sites should be further investigated as to their suitability for business parks and rezoned B7 Business Parks under the standard LEP (if deemed suitable).

Alternative sites for current activities on these potential sites would need to be found or ways of co-locating current uses with employment would need to be investigated.

All the above sites are of a substantial size and are well located to serve as employment areas and possibly business parks if, after comprehensive and detailed investigation these sites are suitable and available for development for knowledge based employment.

FIGURE 8.15: GLENFIELD AGRICULTURAL SCHOOL SITE



Glenfield Agricultural High School Site:

This site measures 210 ha and is currently occupied by Hurlstone Agricultural High School, several special schools and the Department of Planning. The site can be accessed from the Hume Highway and the M5 and is close to the Crossroads. It is served by Glenfield Railway Station and with the South West Line now under construction, will have good

access to the SW Growth Centre via Leppington and Edmondson Park stations. It is adjacent to the suburbs of Macquarie Links and Denham Court which could provide executive housing opportunities.

One of the key objectives of further investigation of this site would be to identify research, educational and business opportunities that would complement the educational role of the High School. This may include

co-location of research and tertiary educational facilities in urban and sustainable agriculture, food and management of climate change food chains. Assuming that the area available for a business park measures approximately 140 ha, then at a density of 150 persons per ha, the site could employ 20,000 people.





09 Centres

09 Centres



FIGURE 9.1: CAMPBELLTOWN/ MACARTHUR CENTRE STRUCTURE PLAN 1976

9.1 CAMPBELLTOWN MACARTHUR CENTRE

Background

Campbelltown was founded by Governor Macquarie in 1820. Over the past one hundred years Campbelltown evolved to become a well-established centre with a railway station, a courthouse, police station, local government administrative centre and a traditional main street.

The centre did not have the capacity to become a regional centre, which was to contain a university, a TAFE college, a hospital, recreational and cultural facilities, a regional shopping

centre and major office employment. So as to ensure an eventual merging of the established and the new parts of a centre, land adjacent to the traditional centre was acquired by the State and a major centre was planned to serve a large population catchment.

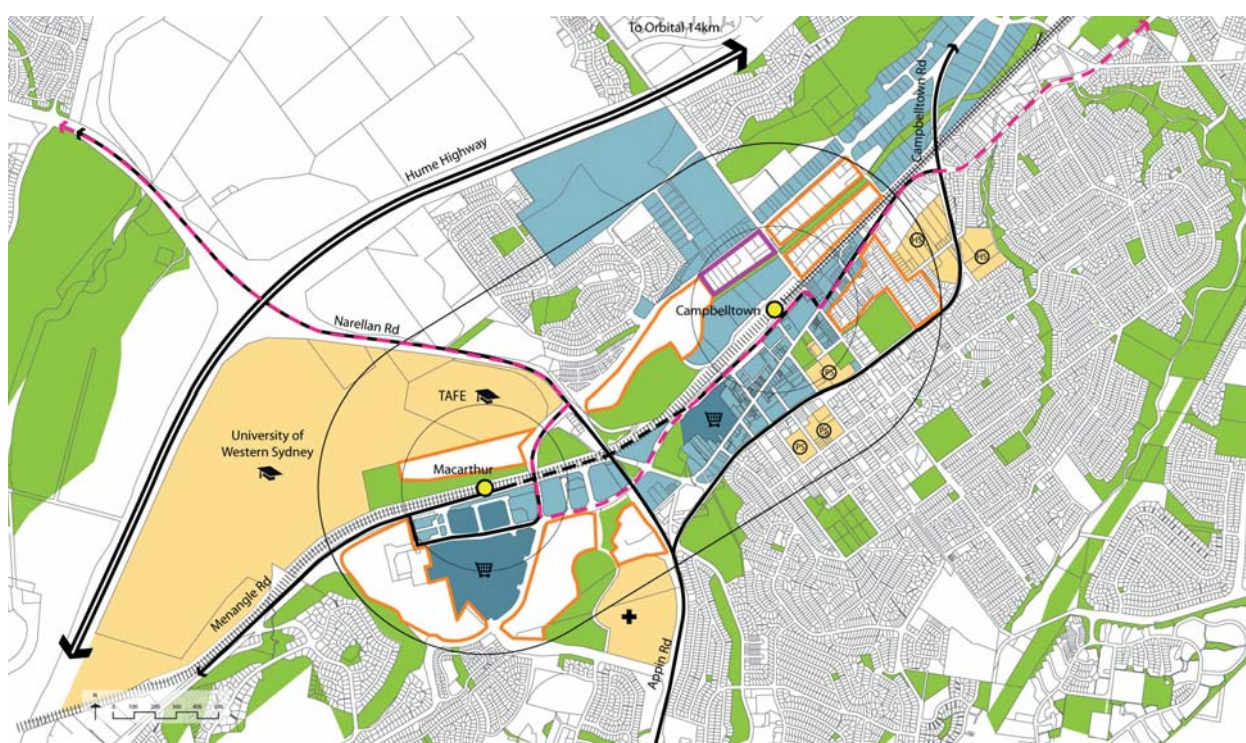
From the mid 1970s to the mid 1980s, this greenfield site was serviced and substantially developed with roads, bridges, an additional railway station/ bus interchange, hospital, university, TAFE College, regional shopping centre and office buildings. Since that time most of these institutions and associated infrastructure have been expanded. The gap between

the traditional and new centre has now been filled with commercial, recreation, cultural and residential development around a city park. Most of the planned residential suburbs surrounding the centre have been completed whilst the Camden part of Macarthur has been developing rapidly over the past twenty years.

Vision

The 2010 Metropolitan Plan projects the Campbelltown-MacArthur Centre to increase its employment by 50% to 25,000 jobs by 2036, with an emphasis on high value-added jobs, services and retail activities, and to offer more city lifestyle opportunities

FIGURE 9.2: CAMPBELLTOWN/ MACARTHUR TOWN CENTRE 2006



for a growing centre and sub-regional population. In 2006, employment in the centre had already reached 14,000, this under-estimates employment growth potential in the centre.

Metropolitan Context

In 2006, the Campbelltown-Macarthur Centre served a population of 192,600. This comprises around 143,000 residents in Campbelltown and 49,600 residents in Camden. The area is one of the most rapidly growing in Australia, with the population quadrupling over 30 years, from 49,000 in 1971. Additional development under the Metropolitan Development Program is taking place in Camden, as well as the South West Growth Centre. In the longer term, Macarthur South may be developed, which would complete the Campbelltown-Macarthur Centre's original population catchment.

The centre's two railway stations, Macarthur and Campbelltown,

are located on the main Sydney-Melbourne rail line. They are major origin stations for rail commuters from the Campbelltown and Camden local government areas, as well as from Wollondilly LGA and the Southern Highlands.

Current situation

The Centre has a number of key attributes including:

- Major medical and educational facilities, including Campbelltown Hospital, a Western Sydney Medical School at the UWS Macarthur Campus and the South West Sydney Institute of TAFE;
- Important local environmental and heritage assets including proximity the Australian Botanic Garden, Mount Annan and heritage buildings along Queen Street;
- Housing choices for a diverse community including high-income

residential estates such as Glen Alpine and public social housing and, increasingly, medium density development within the centre;

- A focal point for sub-regional public transport for bus services and two railway stations, with opportunities for densification of employment and residential development around public transport nodes;
- A well-planned centre with additional capacity to expand in strategic locations, including a light industrial area west of the rail line and land around UWS;
- Well positioned to serve the Sydney-Canberra corridor and has direct access to the Sydney/Melbourne Freeway; and
- A growing role servicing businesses in regional employment lands including Ingleburn, Minto, Campbelltown and Smeaton

**“There is potential for Campbelltown/Macarthur Centre to become a Regional City, providing a full range of business, government, retail, cultural, entertainment and recreational activities to Campbelltown, Camden, Wollondilly, and Wingecarribee residents.”
(South West Subregional Strategy, p59)**

Grange.

9.2 CAMPBELLTOWN- MACARTHUR AS A REGIONAL CITY

The Metropolitan Strategy Review (2010) shows that the Campbelltown-Macarthur Centre grew by 37% between 2001 and 2006, from 10,300 to 14,000, a faster growth rate than any nominated Regional City, suggesting the need for a review of the Centre's status.

There are three Regional City centres nominated to serve the 2 million people of Greater Western Sydney (GWS); Liverpool, Parramatta and Penrith. This represents one Regional City for nearly 700,000 people in 2011 and 1,000,000 people, assuming a population of 3 million people in 2036.

This compares with 320,000 people for Gosford serving the Central Coast; 550,000 people for Newcastle serving the Lower Hunter and 300,000 people for Wollongong serving the Illawarra. These are 2011 estimates and are acceptable due to their comparative isolation from the Sydney metropolitan area. Each of these regions could reach between 500,000 and 700,000 people by 2036 and beyond. By 2036, Greater Western Sydney's population is projected to reach 3 million people, half of Sydney's 6 million total. This is an increase of 1 million people from the 2011 population of 2 million. This growth is shown graphically in Figure 9.3.

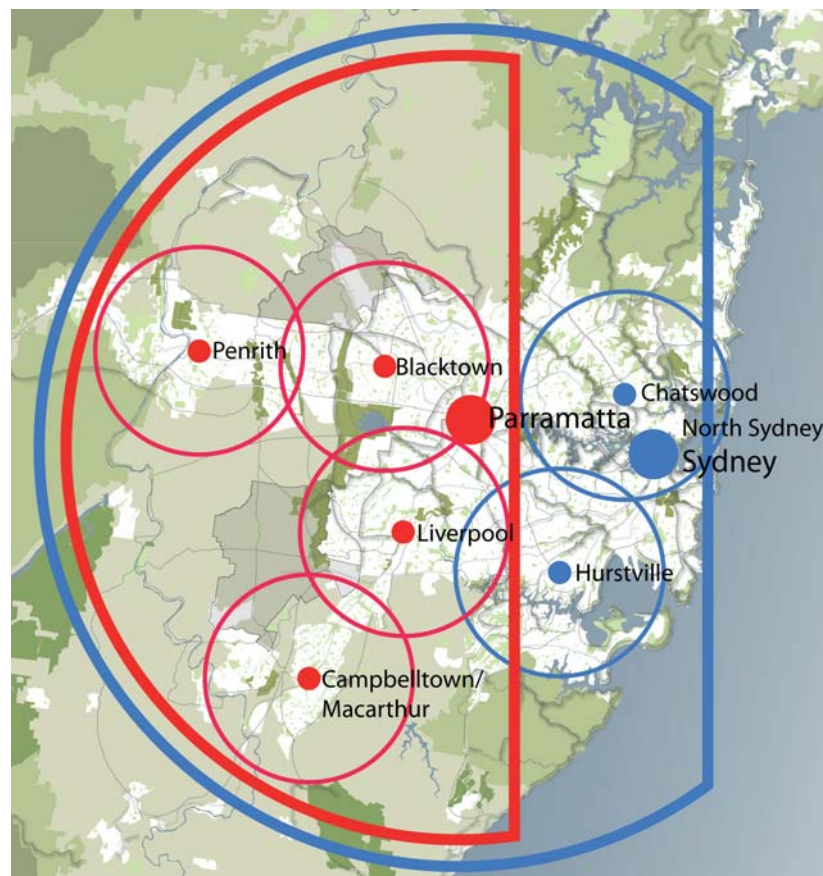
Parramatta, long termed Sydney's

second CBD, and now the premier regional city in the 2010 Metropolitan Plan, needs to have its status lifted, to the equivalent of a state capital, given that the centre serves an urban region larger than that of Brisbane or Perth and needs to be compared with their capitals in terms of jobs, cultural, recreational, entertainment, tertiary education and medical facilities.

If Parramatta fulfils a different role to a Regional City then two Regional Cities

serving 1 million people each in 2011 or 1.5 million people each in 2036 is untenable. Two more regional cities to serve GWS are needed to serve an average of 500,000 people each in 2011 and an average of 750,000 each

FIGURE 9.3: SYDNEY REGIONAL CENTRES, COX 2010



“There is potential for
Campbelltown/ Macarthur Centre
to become a Regional City, providing
a full range of business, government,
retail, cultural, entertainment and recreational
activities to Campbelltown, Camden, Wollondilly, and
Wingecarribee residents.”
(South West Subregional Strategy, p59)

FIGURE 9.4: WESTERN SYDNEY GROWTH, COX 2010

in 2036.

There are two obvious centres which can fulfil these roles in GWS, Blacktown and Campbelltown-Macarthur, both with considerable facilities built up over the past three to four decades which would satisfy the stated requirements of a Regional City.

Similarly, taking the Sydney-North Sydney global city out of the Regional City equation, the established eastern half of the metropolitan area could be served by Hurstville (south) and Chatswood (north) as Regional Cities.

Without a reasonable geographic spread of Regional City centres, each serving a maximum catchment of around 1 million people in 2011 to 1.5 million people in 2036, there is a danger that those GWS councils which may feel little affinity with Liverpool and Penrith centres, could locate major facilities in a number of dispersed local centres, which are within their LGAs.

This would obviate the principle behind the Regional City, that of achieving a critical mass of higher order activities in a limited number of centres, in order to support good access from each respective subregional catchment, particularly by public transport.

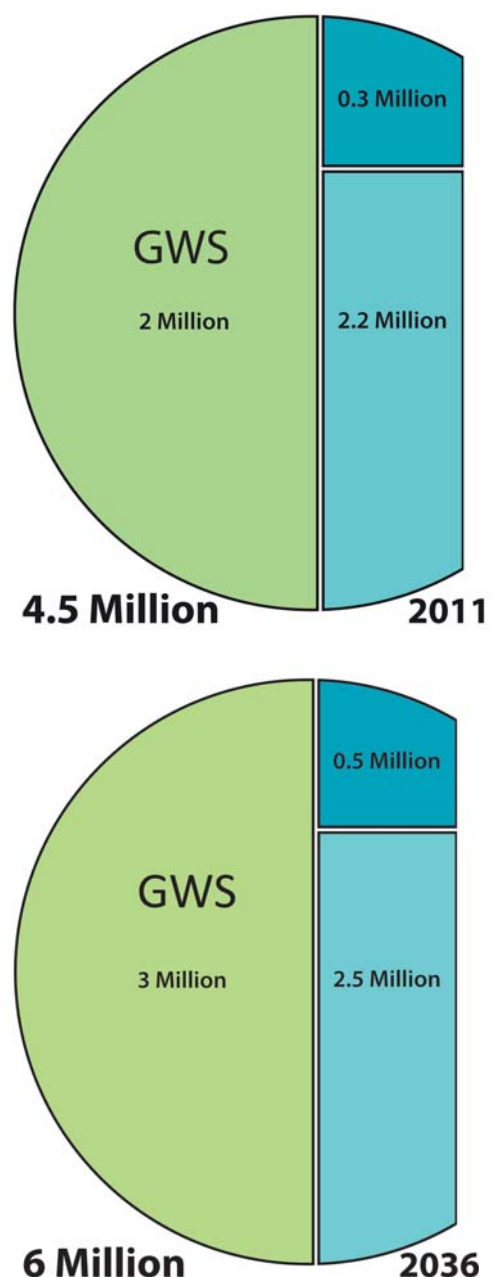
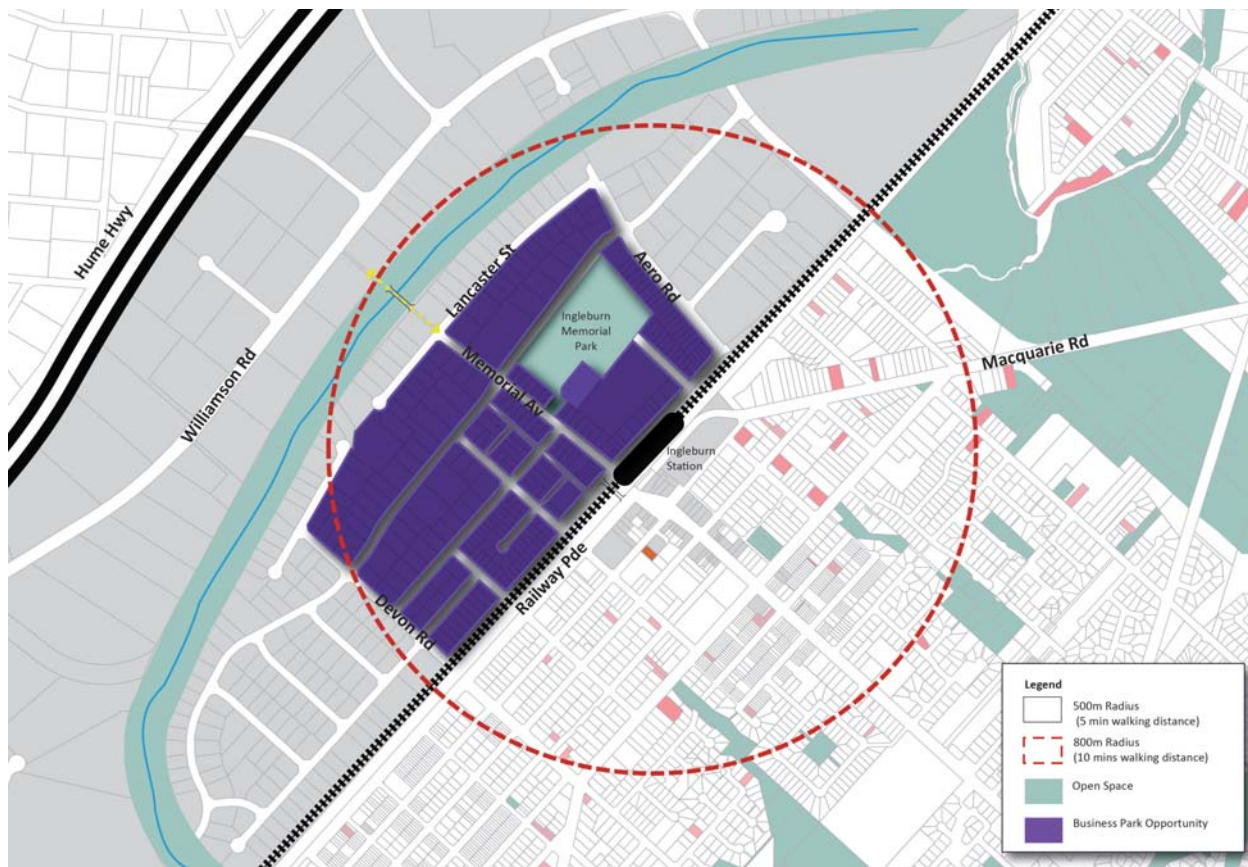


FIGURE 9.5: INGLEBURN TOWN CENTRE, COX 2010

9.3 INGLEBURN TOWN CENTRE

Ingleburn is nominated as a Town Centre in the draft South West Subregional Strategy reflecting its role as the principal centre for northern Campbelltown LGA. The Centre not only serves the residential areas to the east but the Ingleburn Employment Area.

An area measuring 40 ha, lends itself to becoming an intensive employment node and possibly a business park, west of the railway, with a B7 zoning. At a density of 100 persons per ha, the site could employ 4,000 people. The site is bounded by Stanley Road, Aero Road, Lancaster Street and Devon Road and is mostly within 5

minutes walking distance and about 10 ha within 8 minutes of Ingleburn Railway Station.

This is an opportunity to reinforce Ingleburn Centre, which in turn would be an asset to a business park. The 40 ha area bounded by Aero Road to the east, Devon Road to the west, Lancaster Street to the north, and Stanley Street to the south. The area is currently zoned as Industrial, and is adjacent to Ingleburn Railway Station. Business Parks need a catalyst as has been demonstrated at Macquarie Park and Norwest.

Being midway between Campbelltown-Macarthur and Liverpool Stations, Ingleburn is arguably the most important stop for express trains to Parramatta and the

Sydney CBD. With the addition of a major adjacent centre, the Ingleburn site, west of the railway station, offers an outstanding opportunity to be considered as a business park, acting as a transition between the Ingleburn Major Centre and its industrial area.

The challenge is to link land on both sides of the rail way line via the station, to form an important employment and service node to serve a considerably sized catchment of established and proposed residential areas.

Existing rail services connect Ingleburn with Sydney and Parramatta. These services are programmed to be upgraded over the next 10 years. There is also demand for additional commuter parking around the stations.

9.4 ECONOMIC DEVELOPMENT IN CAMPBELLTOWN- MACARTHUR

Campbelltown-Macarthur has not yet established a strong tertiary employment sector. Great hopes were held in the 1970s for new white collar jobs to establish in the nominated regional centres. The centre of Campbelltown was expanded to provide for new retailing, offices and other centre uses. A new railway station and bus terminal were built at Macarthur and sites were made available for office development. Attempts at attracting white collar employment to Campbelltown have been disappointing.

There were three reasons for this, firstly the glut of office space in the CBD/ North Sydney in the 1970s which was only taken up in the early 1980s, secondly the focus up to now for State and Commonwealth Government Office relocation being in Parramatta and Chatswood and thirdly the distance from the Sydney CBD to the sub regional centres such as Campbelltown, Penrith, Hornsby and Gosford. It has proven to be particularly difficult to persuade employers to move from the Sydney CBD to suburban centres and consequently centres like Campbelltown and Penrith may have to wait longer than was anticipated twenty years ago to become significant white collar employment nodes.

To continue to grow the centre, more emphasis needs to be given to getting

TABLE 9.1 EMPLOYMENT PROJECTIONS FOR SYDNEY'S MAJOR CENTRES 2006 - 2036

CENTRE	2006	2036	% GROWTH	GROWTH
North Sydney	43,727	46,864	7	3,137
St Leonards/ Crows Nest	41,904	53,317	27	11,414
Chatswood	21,643	25,037	16	3,395
Castle Hill	6,738	10,818	61	4,080
Hornsby	9,790	11,572	18	1,782
Burwood	9,173	12,125	32	2,952
Parramatta	40,931	51,984	27	11,053
Blacktown	11,356	16,844	48	5,488
Penrith	14,024	21,120	51	7,096
Liverpool	16,290	31,855	96	15,566
Campbelltown/ Macarthur	15,990	28,747	80	12,757
Bankstown	8,335	11,382	37	3,047
Hurstville	9,448	12,367	31	2,920
Kogarah	9,253	13,565	47	4,312
Bondi Junction	10,616	12,309	16	1,693

SOURCE: TRANSPORT DATA CENTRE

the infrastructure and services right, as well as more attention to expanding executive housing opportunities, which would be more likely to attract more white collar workers.





10

Infrastructure

10.1 RAIL NETWORK

Campbelltown is well served by the Main Southern Railway Line, with stops at Glenfield, Macquarie Fields, Ingleburn, Minto, Leumeah, Campbelltown, Macarthur and Menangle Park (although the latter link is not electrified).

Services on this line access stations to the Sydney CBD area via Granville or the East Hills line via Sydney Airport or Sydenham. The Cumberland Line gives direct access to Blacktown via Parramatta. This service is expected to be improved. See Figure 10.1

10.2 ROAD NETWORK

In terms of access, Campbelltown is served by the Hume Highway with direct access to the M7 Orbital Motorway. The Hume Highway gives direct access to the Southern Highlands, Canberra and Melbourne.

Arterial roads serving Campbelltown include Campbelltown Road and Narellan Road which is the main link between Camden Valley Way and Camden.

A long standing proposal by the RTA has been the circumferential roads made up of the Northern Road and the possible Werrington arterial, both linking the NW and SW Growth Centres between Campbelltown. Sections of this route have not been committed to.

An important issue is to provide for four way intersections at the Hume Highway with Raby Road, and Brooks Road to give better access to the Minto and Ingleburn employment areas.

10.3 PUBLIC TRANSPORT SPINE

Pembroke Road, Minto Road, Collins Road, Glenfield Road and Cambridge Road provide a network which forms a spine, designated by the Macarthur Development Board in the 1970s as a major public transport route linking the Campbelltown-Macarthur Centre and Moorebank, via Campbelltown's key residential areas. This remains a useful corridor which needs to be preserved.

FIGURE 10.1: KEY EXISTING AND PROPOSED CAMPBELLTOWN RAIL LINKS, COX, 2010

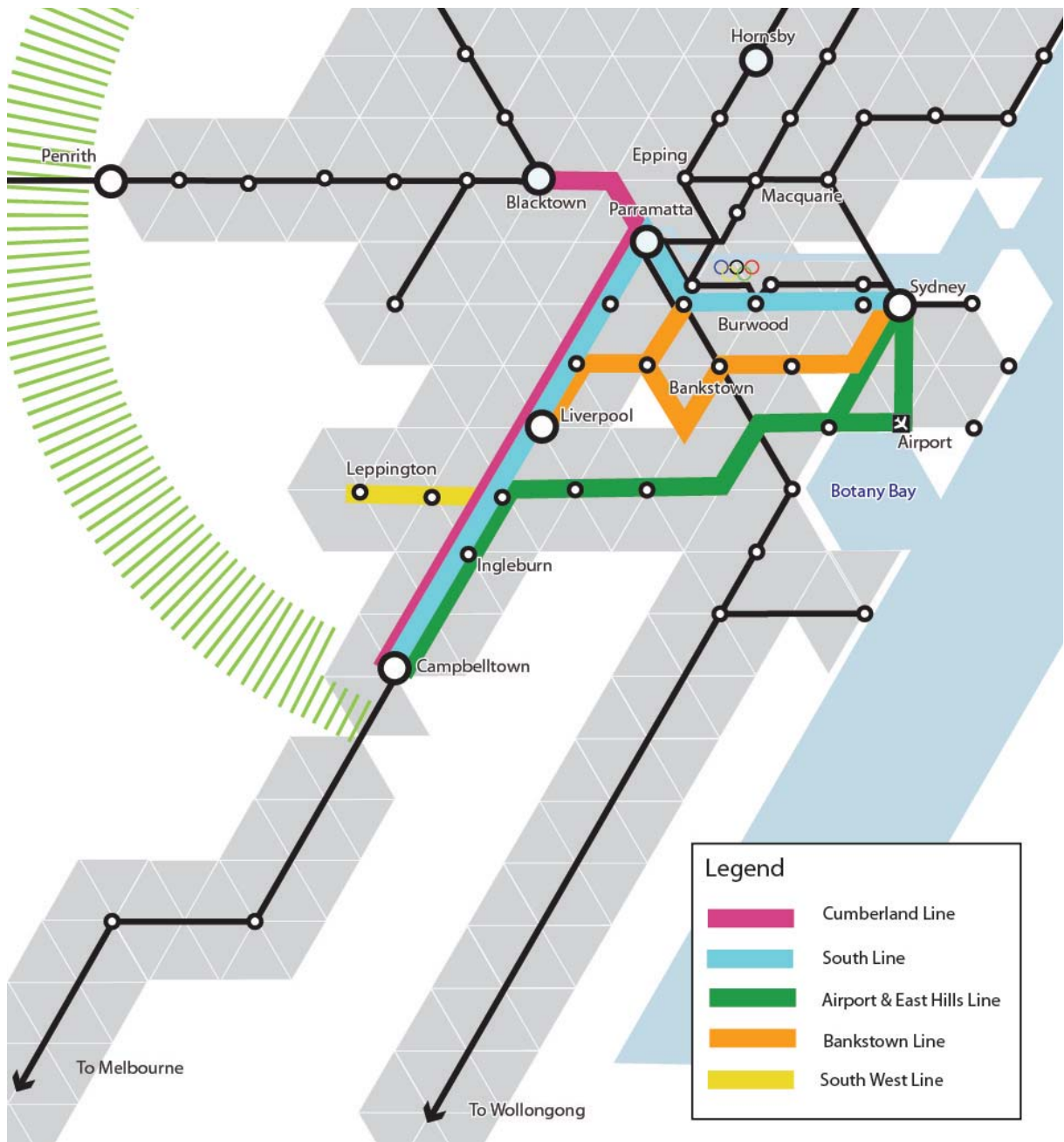
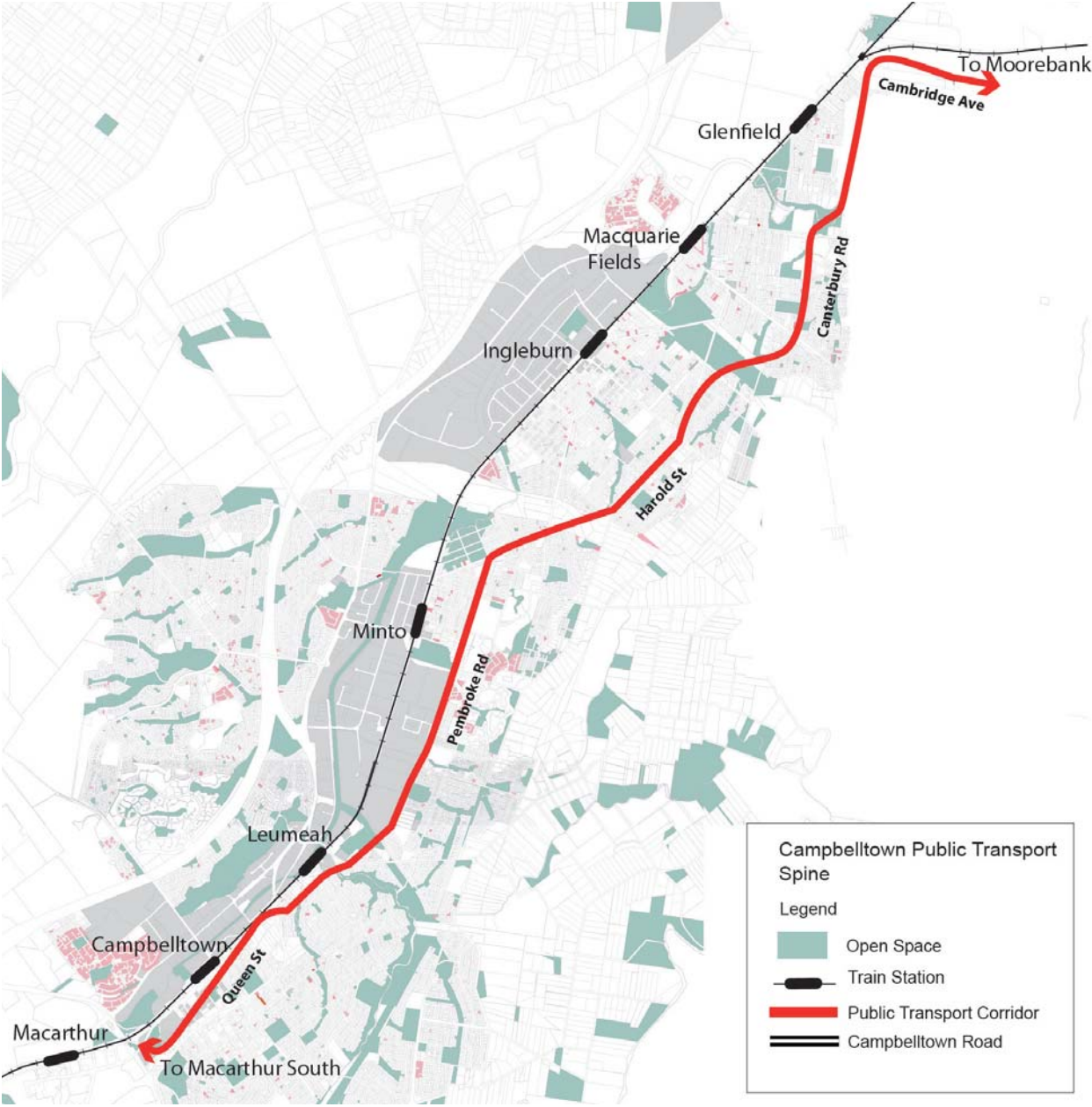


FIGURE 10.2: KEY CAMPBELLTOWN ROAD LINKS, COX, 2010



**FIGURE 10.3: PUBLIC TRANSPORT CONNECTOR
SPINE IN CAMPBELLTOWN**







11

Employment Projections

11.0 Employment Projections

IN 2006, THERE WERE 2.09 MILLION JOBS LOCATED IN METROPOLITAN SYDNEY. THE NSW GOVERNMENT'S TRANSPORT DATA CENTRE (TDC) FORECAST THAT THE NUMBER OF JOBS IN SYDNEY WILL GROW TO AROUND 2.85 MILLION, OR BY 760,000 BY 2036 TO SUPPORT AN ESTIMATED 6 MILLION POPULATION, AN INCREASE FROM THE CURRENT 4.5 MILLION.

The TDC forecasts that South West Sydney's share of jobs will increase from 6.4%, i.e. 133,321 in 2006 (or 6.4%) to 238,467 or to 8.4% by 2036.

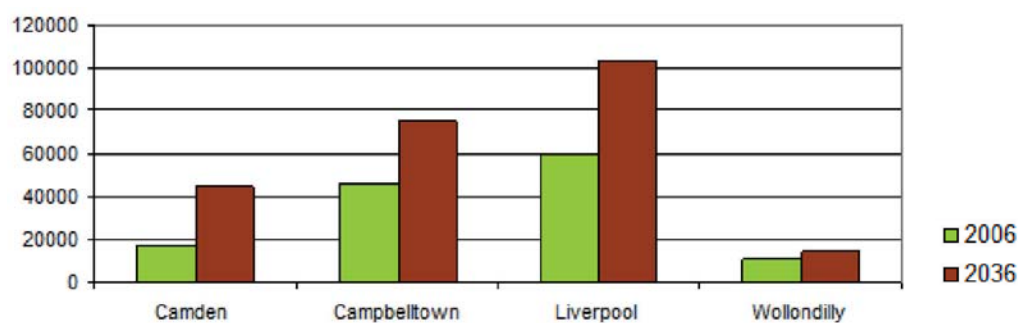
Table 10.1 and Figure 11.1 highlights a number of significant projections:

- Total employment in The Campbelltown LGA is projected to increase from 45,926 to 75,083, or by just over 29,000 jobs between 2006 and 2036;
- The Campbelltown LGAs share of total jobs in South West Sydney will decline over this period from 34.5% to 31.5%;
- Camden's share of subregional jobs is projected to increase significantly, from 13% of total SWS jobs in 2006 to 18.9% of total subregional jobs in 2006, with the increase in total employment, 27,663 jobs, almost as large as Campbelltown's share of growth; and
- Liverpool is projected to have the largest increase in employment, with jobs projected to increase from 59,156 in 2006 to 103,524 in 2036.

TABLE 11.1 EMPLOYMENT PROJECTIONS FOR SOUTH WESTERN SYDNEY

LGA	2006	2036	CHANGE 2006-36	LGA SHARE OF TOTAL SWS JOBS 2006 (%)	LGA SHARE OF TOTAL SWS JOBS 2036 (%)
CAMDEN	17,318	44,982	27,663	13.0%	18.9%
CAMPBELLTOWN	45,926	75,083	29,157	34.4%	31.5%
LIVERPOOL	59,156	103,524	44,368	44.4%	43.4%
WOLLONDILLY	10,920	14,879	3,958	8.2%	6.2%
TOTAL EMPLOYMENT	133,321	238,467	105,147	100.0%	100.0

SOURCE: TRANSPORT DATA CENTRE

FIGURE 11.1 SOUTH WEST SYDNEY EMPLOYMENT PROJECTIONS 2006 - 2036**TABLE 11.2 CAMPBELLTOWN EMPLOYMENT FORECASTS BY INDUSTRY 2006-2036**

Industry	2006	2036	Change 06-36
Agriculture, Forestry and Fishing	84	115	30
Mining	196	454	259
Food Product Manufacturing	910	1,540	630
Beverage and Tobacco Product Manufacturing	26	61	35
Textile, Leather, Clothing and Footwear Manufacturing	283	37	-246
Wood Product Manufacturing	285	227	-57
Pulp Paper and Converted Paper Product Manufacturing	572	312	-260
Printing, including the Reproduction of Recorded Media	215	203	-11
Petroleum and Coal Product Manufacturing	17	2	-15
Basic Chemical and Chemical Product Manufacturing	699	1,354	655
Polymer Product and Rubber Product Manufacturing	1,020	1,654	634
Non-Metallic Mineral Product Manufacturing	486	500	14
Primary Metal and Metal Product Manufacturing	402	528	126
Fabricated Metal Product Manufacturing	869	481	-388
Transport Equipment Manufacturing	286	373	87
Machinery and Equipment Manufacturing	717	606	-112
Furniture and Other Manufacturing	1,281	1,730	449
Electricity, Gas, Water and Waste Services	164	107	-57
Construction	2,470	3,401	932
Wholesale Trade	2,090	2,422	333
Retail Trade	6,829	13,860	7,031
Accommodation and Food Services	3,065	6,349	3,284
Transport, Postal and Warehousing	2,461	4,649	2,187
Information Media and Telecommunications	406	159	-247
Financial and Insurance Services	745	812	67
Rental, Hiring and Real Estate Services	827	2,133	1,306
Professional, Scientific and Technical Services	1,378	1,607	228
Administrative and Support Services	1,153	1,250	97
Public Administration and Safety	2,513	3,608	1,095
Education and Training	5,361	9,671	4,310
Health Care and Social Assistance	4,923	9,491	4,568
Arts and Recreation Services	395	500	105
Other Services	1,810	2,784	974
Unclassified	986	2,101	1,114
Total Employment	45,926	75,083	29,157

SOURCE: AUSTRALIAN BUREAU OF STATISTICS, 2010





12

Metropolitan Plan for Sydney 2036

12 Metropolitan Plan for Sydney 2036

THE METROPOLITAN PLAN RELEASED IN DECEMBER 2010 PROVIDES A NUMBER OF OBJECTIVES, TARGETS AND ACTIONS THAT RELATE TO SYDNEY'S AND THE STATE'S ECONOMY. MOST OF THE OBJECTIVES AND ACTIONS ARE REITERATIONS OF THE 2005 METROPOLITAN STRATEGY AND THE SUBREGIONAL STRATEGIES.

This section examines the relevance of the recently released 2010 Sydney Metropolitan Plan.

The Metropolitan Plan released in December 2010 provides a number of objectives, targets and actions as they related to Sydney's and the State's economy including Western Sydney (South West, North West and West Central Subregions), the South West Subregion and the Campbelltown LGA. Most of the objectives and actions are reiterations of the 2005 Metropolitan and the draft Subregional Strategies

Sydney will require 760,000 additional jobs to support an estimated population of 6 million people by 2036. The key principles for guiding Sydney's economic growth are reiterated, namely:

- Providing jobs closer to home; and
- Ensuring employment lands continue to meet Sydney's freight and industry needs.

To achieve greater employment self sufficiency, the job target for the South West Subregion is proposed to rise from 133,000 in 2006 to 274,000 in 2036 a massive 106% growth, three times the Metropolitan average of

36%. (Metropolitan Plan 2010 table E1 p133)

The target for additional South West Region represents 37% of Western Sydney's target of 384,000 jobs which represents just over 50% of Sydney's total job growth target for 2036, of 760,000 jobs.

An Employment Lands Taskforce has been established and the 2010 Employment Lands Development Program Overview Report has been released in early 2011.

12.1 JOBS IN STRATEGIC CENTRES

The second objective is "to focus Sydney's economic growth and renewal, employment and education in strategic centres, particularly those on the public transport network".

A total of 42% of all jobs by 2036 are targeted to be located in strategic centres, compared with the 2006 proportion of 39%.

The South West Subregion's centres, and their employment targets by 2036 consist of Campbelltown - Macarthur to grow from 14,000 jobs to 25,000, Liverpool from 16,000 to 31,000,

FIGURE 12.1: METROPOLITAN PLAN FOR SYDNEY 2036

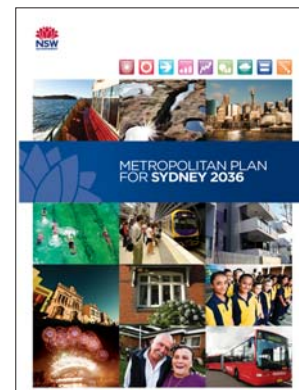
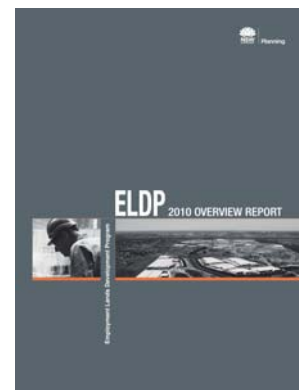


FIGURE 12.2: EMPLOYMENT LANDS DEVELOPMENT PROGRAM 2010



Leppington from zero to 13,000, a total of 69,000, representing 25% of South West Subregions 2036 employment target of 274,000. (Metropolitan Plan 2010 table E2 p135)

The Plan suggests the DoP will work with Councils to ensure that each LGA's Standard Instrument LEP contains appropriate provisions to meet:

- Retail capacity needs; and
- High grade office space.

12.2 BUSINESS PARKS

The Metropolitan Plan 2010 encourages the growth of Business Parks, particularly in Western Sydney, given their rate of employment growth between 2001 and 2006 was three times that of other strategic centres.

The suggested criteria for Business Park locations are:

- Access to public transport (preferred rail);
- Links to freight corridors;
- Land 50-180 ha;
- Proximity to workforce;
- (30 minute commute); and
- Relationship with hospitals, university educational facilities, research institutes or leaders in knowledge based activity. (Metropolitan Plan 2010 E24 p137)

12.3 STRENGTHEN CLUSTERS OF ACTIVITY

A key objective is to establish clusters of activity which would activate higher order jobs in Sydney. These clusters are suggested as:

- Finance and insurance services,
- Professional, scientific and technical services;
- Health care and social assistance,
- Manufacturing; and
- Education linked to health care and social assistance. (Metropolitan Plan 2010 E25 p138)

The most relevant site in Campbelltown to promote and facilitate an activity cluster is the Campbelltown-Macarthur Centre given the hospital, the University of Western Sydney and regional TAFE College.

The Centre is well served by rail and

FIGURE 12.3: EMPLOYMENT CAPACITY TARGETS BY SUBREGION DOP 2010

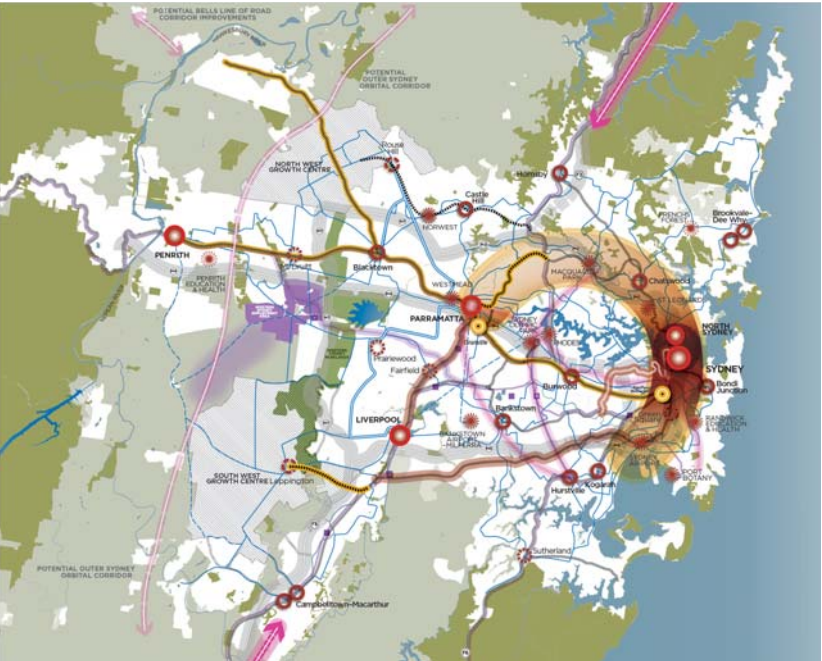
SUBREGION	BASE EMPLOYMENT 2006	LONG TERM EMPLOYMENT CAPACITY TARGET 2036	EMPLOYMENT GROWTH 2006-2036	EMPLOYMENT GROWTH 2006-2036
SYDNEY CITY	429,000	543,000	+114,000	27%
EAST	136,000	167,000	+31,000	23%
SOUTH	193,000	245,000	+52,000	27%
INNER WEST	99,000	124,000	+25,000	25%
INNER NORTH	238,000	300,000	+62,000	26%
NORTH	83,000	98,000	+15,000	18%
NORTH EAST	89,000	112,000	+23,000	26%
WEST CENTRAL	322,000	420,000	+98,000	30%
NORTH WEST	266,000	411,000	+145,000	55%
SOUTH WEST	133,000	274,000	+141,000	106%
CENTRAL COAST	104,000	158,000	+54,000	52%
TOTAL	2,092,000	2,852,000	+760,000	36%
Share in Western Sydney	34%	39%	50%	

Note: all employment targets are rounded to the nearest 1,000. Source: Department of Planning 2010

FIGURE 12.4: METROPOLITAN PLAN REVIEW 2009

SUBREGION	2006 POPULATION	2036 PROJECTED POPULATION	2008-2036 POPULATION INCREASE	CHANGE
	'000	'000	'000	%
SOUTH WEST	410.5	874.8	464.3	113.1
SYDNEY CITY	165.6	264.8	99.2	59.9
NORTH WEST	761.1	1,155.6	394.5	51.8
INNER WEST	227.4	307.0	79.6	35.0
WEST CENTRAL	679.6	896.6	217.0	31.9
INNER NORTH	302.9	378.9	76.0	25.1
NORTH	261.9	321.2	59.3	22.6
NORTH EAST	235.0	277.0	42.0	17.9
EAST	281.8	334.0	52.2	18.5
SOUTH	651.4	747.6	96.2	14.8
CENTRAL COAST	304.7	424.7	120.0	39.4
SYDNEY	4,282.0	5,982.1	1,700.1	40%

METROPOLITAN SYDNEY 2036



could be the focus of finance, insurance and government offices.

The Glenfield site, focused on Hurlstone Agricultural High School, with a possible TAFE presence could facilitate the growing linkage between schools and vocational courses at TAFEs. This report makes the case for considering surplus areas of this site as a possible location for a business park that complements its

The following tables highlight the employment deficit within Western Sydney and the South West Subregion between 2006 and 2036. The data is sourced from Figure 12.3 and 12.4.

Western Sydney
South West, North West and West Central Subregions

12.4
EMPLOYMENT SELF CONTAINMENT

The aim of the Metropolitan Plan is to achieve the highest level of self containment in Western Sydney, prompting half of the Sydney region's employment growth to be targeted for Western Sydney, ie 380,000 of the total 760,000 jobs.

2036

Population	2, 927, 000 people
Employment Target	1,105, 000 jobs
Workforce	(48%) 1,405, 000 jobs

Notwithstanding this target, by 2036, Western Sydney will have a deficit of 300,000 jobs. The deficit is based on the Metropolitan Plan's employment targets (Figure 12.3) and the 2009 Metropolitan Strategy Review's population forecasts (Figure 12.4).

Deficit	300, 000 jobs
---------	---------------

Whilst employment numbers for Western Sydney are targeted to constitute half of Sydney's total, the shortfall in jobs to achieve a balance of jobs to the workforce doubles between 2006 and 2036.

South West Subregion

Campbelltown, Camden, Liverpool, Wollondilly LGAs

2036

Population	875, 000 people
Employment Target	274, 000 jobs
Workforce	(48%) 420, 000 jobs
Deficit	146, 000 jobs

The South West Subregion will therefore have almost 50% of Western Sydney's short fall in jobs by 2036. This expected shortfall by 2036 compares unfavourably with the 2006





13

Employment Lands Projections

13 Employment Lands Projections

THE SECTION LOOKS AT THREE APPROACHES TO ESTIMATING EMPLOYMENT LAND REQUIREMENTS IN CAMPBELLTOWN.

13.1 METROPOLITAN CATCHMENT SHARE

This approach is based on the Campbelltown LGA maintaining its current share of total metropolitan employment lands. Campbelltown currently has 741 hectares of zoned employment land, out of a total of 16,000 hectares for metropolitan Sydney, or 4.6%. The Metropolitan Strategy 2005 estimated that between 4,000 and 7,500 additional hectares would be required in Sydney by 2031 and the 2010 Sydney Metropolitan Plan estimates 8,000 additional hectares will be required by 2036. This translates into an additional 160 to 300 ha per year by 2031.

Based on current take-up rates and structural demand, we estimate that Sydney will require 23,000 ha by 2036. If Campbelltown maintains its share of metropolitan employment lands, the area will require an additional 317 ha of additional employment lands by 2036, taking the local total to 1,058 ha by 2036.

13.2 EMPLOYMENT LANDS SHARE OF TOTAL LOCAL EMPLOYMENT

The Metropolitan Strategy Review emphasises the role of new employment lands, particularly in Western Sydney, in accommodating employment growth. It is assumed that, on average, around 25% of all of Sydney's new jobs by 2036 will be accommodated in employment lands, including traditional industrial estates and business parks. In Western Sydney, the proportion of all new jobs is likely to be higher.

The Campbelltown LGA is a relatively established area, and is expecting reasonably modest population growth. But rapid growth of South West Sydney is likely to result in increased demand for employment lands in Campbelltown. This is because Campbelltown LGA is located on a major transport corridor.

The Transport Data Centre's employment projections for the Campbelltown LGA estimate employment will increase from 45,926 in 2006 to 75,083 in 2036. Based on the assumption that 25% will be located in employment lands, the Campbelltown LGA's local employment lands will need to accommodate an additional 7,300 jobs. In the absence of new business park capacity in Campbelltown, all

of the additional jobs will need to be located in existing and greenfield sites. Most will be accommodated in new greenfield sites with industrial zonings IN 1 or IN 2. Some of these jobs will be located in existing industrial areas (eg vacant industrial land in Minto, higher employment densities around key rail stations), but it is most likely that employment densities in existing areas will remain stable rather than increase. This is because demand for low employment density warehouse and distribution centres is likely to continue to outstrip demand for higher employment density manufacturing in existing areas – resulting in only small employment increases in existing industrial areas. In this event, the Campbelltown LGA will need to commence planning for major greenfield lands to accommodate around 300 hectares. Because some key local and subregional issues are yet to be resolved such as the proposed Moorebank Intermodal Facility and investigations into new business park capacity, the allocation of 300 hectares of additional land may not be required in the first cut of the Campbelltown LEP.

Given the growth of the Campbelltown-Macarthur Centre, the highest priority should be to ensure that planning and infrastructure priorities are focused on building on the extraordinary success of this centre and creating a

white-collar knowledge based centre in the South West. Further priority should be given to establishing a new business park – either around Glenfield or the Bethlehem Monastery, closely integrated into UWS and TAFE campuses and Campbelltown Hospital. The establishment of business park capacity of around 100 hectare has the potential to create around 10,000 - 15,000 predominantly skilled jobs.

13.3 SECTORAL SHARES OF EMPLOYMENT

This approach looks at the type of jobs that are likely to be accommodated in employment lands. Employment trends over the period 1996 to 2006 indicate that both manufacturing and transport and storage are experiencing solid growth. Although manufacturing employment is declining in the metropolitan area overall, in outlying areas such as Campbelltown it is expected to continue to grow, from around 7,000 to 8,500 jobs by 2036. In fact, the increase may be more significant. For example, manufacturing employment increased by close to 1,700 jobs between 1996 and 2006. Further, the position of Campbelltown in relation to the main Sydney-Melbourne rail and road transport corridors, along with the development of the Moorebank Intermodal Facility, is likely to spur

solid growth for transport intensive industries in The Campbelltown LGA.

TDC employment forecasts for the Campbelltown LGA suggest that employment in manufacturing will increase by 1541 jobs by 2036 and employment in transport, postal and warehousing will almost double, from 2,461 to 4,649 jobs by 2036, or by 2,187 jobs.

Translated into possible demand for industrial sites for industry, we can make the following assumptions.

100% of new manufacturing jobs will be located in existing and new employment lands at 35 jobs/ha.

70% of transport, postal and warehousing jobs (which includes taxis drivers, couriers etc.) will be located in existing and new employment lands at 15 jobs/ha.

An additional 10% of jobs will be created for non-industrial uses at 30 jobs/ha.

Comparing the two approaches, the estimates suggest that Campbelltown needs a minimum of an additional 141 hectares (for manufacturing, transport and storage) and a maximum of an additional 300 hectares for all employment land related activities. In this review, we are proposing that Campbelltown City Council establish a target of 1,000 hectares of employment lands by 2036, this is 741 hectares of existing employment lands, plus an additional 259 hectares of new greenfield employment lands. Planning for growth in greenfield sites are required to underpin Campbelltown's economic future.

**TABLE 13.1 EMPLOYMENT LAND REQUIREMENTS
BASED ON TDC FORECASTS**

Sector	Additional Jobs	Jobs/ Hectare	Additional Hectares
Manufacturing	1,541	35	44
Transport and Warehousing	1,312	15	87
Other Jobs in Employment Lands	285	30	10
Total	3,138		141

SOURCE: TRANSPORT DATA CENTRE





14

Strategic Opportunities

14 Strategic Opportunities

IF PARRAMATTA IS CONSIDERED THE “CAPITAL” OF GREATER WESTERN SYDNEY THE REMAINDER OF THE REGION COULD BEST BE SERVED BY FOUR REGIONAL CITIES, BLACKTOWN, CAMPBELLTOWN-MACARTHUR, LIVERPOOL AND PENRITH.

Campbelltown City Council should make a case to the Department of Planning to have Campbelltown-Macarthur designated as a Regional City at the next review of the Metropolitan Plan.

14.1 REDEVELOPMENT OF EXISTING EMPLOYMENT LANDS

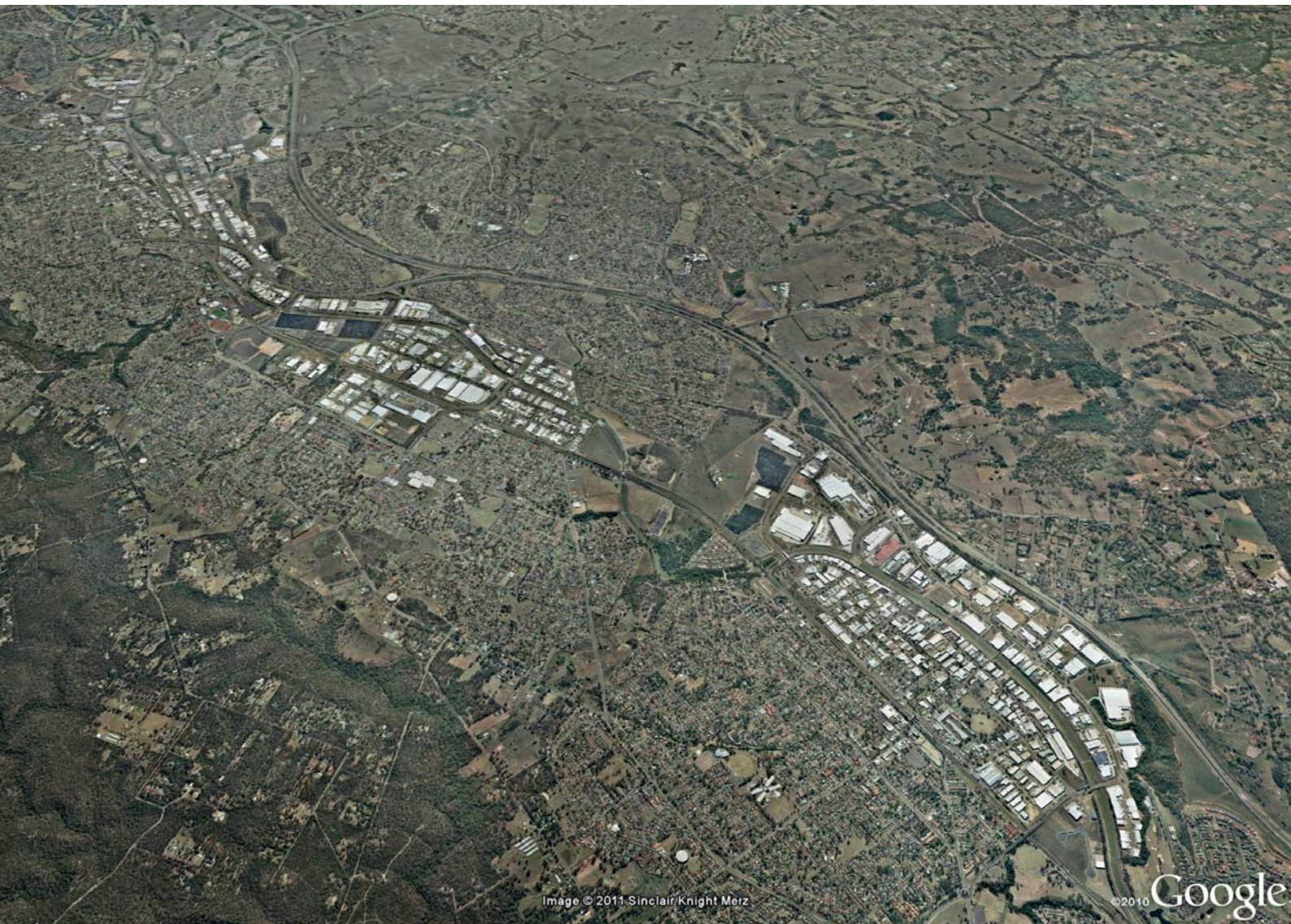
The challenge is how to increase the density and therefore the numbers of employees in the existing employment lands, specifically Campbelltown (Blaxland Road), Minto and Ingleburn.

Warehousing and logistics are being attracted to sites with good motorway and railway access to enable modal interchanges, particularly on the Melbourne-Sydney-Brisbane routes. The facility at Minto and the Moorebank proposal are examples, however these provide few jobs.

The Minto and Ingleburn industrial areas offer opportunities for increasing densities within the walking distance catchment of each railway station. These areas could be zoned for a more intensive employment use, possibly combining administration,

production and warehousing. Ingleburn could be particularly attractive using this concept given that Ingleburn is emerging as an important Centre serving the northern half of The Campbelltown LGA and will be highly accessible to the future population of Edmondson Park, notwithstanding that Edmondson Park will have its own centre.

The Ingleburn Centre and a more intensive employment area could become an attractive location for businesses to establish.



14.2 BUSINESS PARKS

Three possible locations for business parks have been proposed in this study, the UWS land adjacent to Narellan Road, (part of the Campbelltown-Macarthur Centre), the monastery on the opposite (northern side) of Narellan Road, and the Glenfield Hurlstone Agricultural High School site (including department of Planning land adjacent to this site).

Each of these sites requires agreements by their owners to relocate or co-locate, within prestigious and well designed buildings which make up a business park.

The characteristics which distinguish a business park from other employment lands include good access by road and public transport, natural and social amenities, fine landscaping, well designed buildings, good facilities and proximity to important decision makers. Appropriate zoning needs to be matched with a specific Development Control Plan to achieve the necessary environment required to produce an attractive business park.

14.3 THE FUTURE OF CAMPBELLTOWN- MACARTHUR

The Campbelltown-Macarthur Centre has all the ingredients to become one of Sydney's key Regional Centres. It has a regional shopping centre with 78,179m² of retail space, a hospital, a university, an adjacent Botanic

Garden, a TAFE College, two railway stations, good access to the Hume Highway, a rapidly growing catchment (the fastest growing in the Sydney Region) and has one of the fastest employment growth rates of any Strategic Centre. The latter includes regional cities, specialised centres and major centres.

Lifting its status to a Regional City should attract more government administrative employment and in turn, attract investment from the private sector.

It is important therefore that the State Government recognises the Campbelltown-Macarthur Centre's role in serving the South West Subregion and declares it as a Regional City.

