

A graphic consisting of two overlapping circles, one dark grey and one light blue.

EXPANDING HORIZONS

An Economic Development Strategy for a Global City

Vision:

The City of Joondalup has a high performing economy underpinned by a culture of entrepreneurship, innovation and investment

Final Draft

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CEO/MAYORAL WELCOME/FOREWORD

To be added.



EXECUTIVE SUMMARY

The City of Joondalup is a deliberately planned commercial and residential hub for the North-West Metropolitan Region of Perth. Its economy is driven largely by the services and knowledge sectors, where employment is strong and economic value is high.

Commercial investment within the City is also strong with approximately \$1 billion worth of construction projects approved or underway in 2012-13, which is stimulating economic growth and creating new job opportunities within the region.

Whilst this trajectory of success is positive and rewarding, it is incumbent upon the City to provide appropriate strategic direction to steer the economy in such a way that opportunities are maximised, competitive advantages are leveraged and employment is sustainably grown and managed.

This Economic Development Strategy considers the issues and challenges that face the City in realising its potential and aspiration of becoming 'A Global City: bold, creative and prosperous' (*Joondalup 2022*). The most important challenge for the City being, the unsustainable level of commuting outside of the City for employment due to the current misalignment of local available jobs to local resident workers. It is a major aim of the Strategy to address this issue by increasing local employment opportunities.

The Strategy also aims to provide targeted responses to key areas within the economy that are consistent with the City's ambitions of establishing itself as the first Primary Centre within the Perth Metropolitan Area. They include:

- Business growth and innovation
- Business clusters and investment
- Employment and skills development
- City and regional infrastructure

Furthermore, the City aims to develop specialist themes from which its economy can grow, namely:

- Global City
- Digital City
- Destination City

The City's 'step change' approach to economic development recognises the importance of partnerships and ensuring that it leverages its physical, technological and intellectual assets to grow the economy, enhance productivity, promote research and innovation and ultimately achieve greater employment self-sufficiency in the future.

The logo for "Expanding Horizons", consisting of two overlapping circles, one dark grey and one light blue.

EXPANDING HORIZONS

An Economic Development Strategy for a Global City

Vision: *The City of Joondalup has a high performing economy underpinned by a culture of entrepreneurship, innovation and investment*

INTRODUCTION

At the time of developing this strategy (2013-14), Western Australia had been experiencing the highest economic growth of any State, almost double the growth of the national economy with an economy (as measured by Gross State Product) valued at almost \$239 billion for 2011-12. Although ongoing structural changes are expected for a number of business sectors and challenging times ahead in some areas, overall, continued economic growth is expected for the State.

This however needs to be set in the context of ongoing uncertainty over the global economy across many countries and uncertainty over forecasts for demand from the resources sector, particularly from countries such as China. The political dimension is also another potential factor of change and influence.

Despite the range of variables and externalities potentially influencing economic growth in Western Australia, this Economic Development Strategy for the City of Joondalup takes a long term perspective and presents a vision and plan for strategic economic growth through maximising business, investment and employment opportunities via a clear, measured approach to diversifying the economy, working in partnership with others.

The City of Joondalup has approached the development of this strategy with a clear mandate to identify strategic comparative and competitive advantage to enhance the local economy. The national and global economic opportunities are enormous and developing innovative, creative and productive local businesses as well as attracting new investment to the area is the primary focus to ensure that we maximise commercial opportunities for local businesses which will then benefit the regional economy and enhance local job creation.

As part of the background development of this strategy, the City of Joondalup has identified best practice from around the world and translated and applied key principles and learning to ensure that our local and regional approach to economic development is more innovative, more creative and more business focused than ever before.

Although generally it is businesses that create wealth and employment and drive local economic development, the role of other agents, in particular Government and Universities, has become increasingly more important in recent times. Universities for example are regularly viewed as drivers of economic and social agendas to underpin the growth of knowledge-based economies and Government has an important role to play in facilitating and coordinating activity to support business and community needs.

In order to fully realise the business and jobs growth that is required within the region, to meet State and local targets, a *step change* is required and one that will rely on a more regional, collaborative and partnership led approach to economic development. Ultimately the success of the delivery of this strategy is the responsibility of not one organisation but a multitude of partners from across Government, business, education and the not for profit sectors.

The City of Joondalup, guided by its 10 year Strategic Community Plan, Joondalup 2022, has set out a clear framework with a *more regionally focussed*, partnership approach to economic development and one that has much greater emphasis on *delivery* and *measurable outcomes*.

This *step change* by the City of Joondalup also recognises and responds to the increasing importance of digital technologies and infrastructure as a fundamental enabler of economic development and City services. As more and more people, devices and things become connected there is enormous potential to make public service infrastructure and business processes significantly smarter as well as enabling and transforming our City into a more innovative and globally focused hub of economic activity.

This economic development strategy and model intends to be more reflective of and responsive to local and global issues and opportunities. It aims to leverage the City's physical, technological and intellectual assets and encourage a culture of innovation, investment and entrepreneurship.

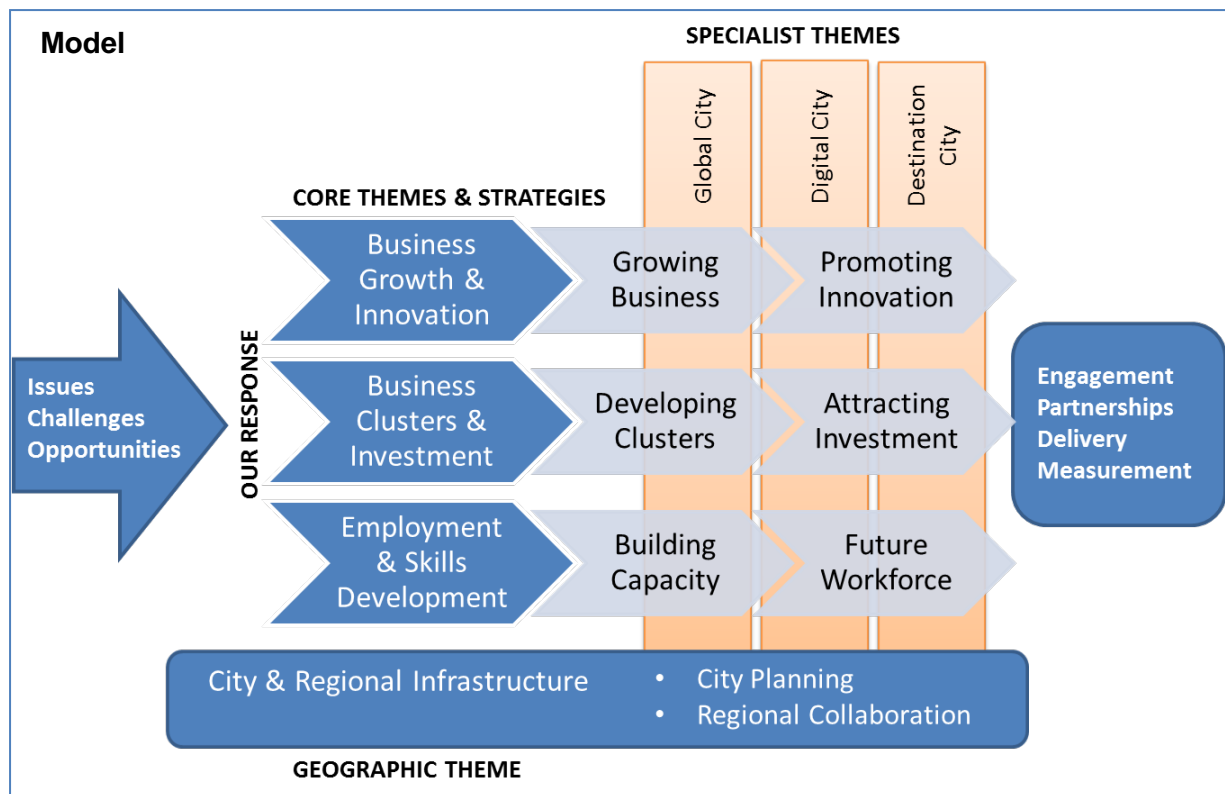
Ultimately this approach will expand the horizons of the local community, businesses, students, workers and potential investors.

The ambitions of this strategy have a direct alignment with the 10 year Strategic Community Plan 'Joondalup 2022' and seeks to advance us in realising our over arching vision of being a 'Global City: bold, creative and prosperous'.

Economic Development Strategy Overview

Key Issues	<ul style="list-style-type: none"> • Low level of net growth in business stock (business registrations minus business exits) • Lower than average number of small-medium sized businesses (greater than 5 employees) • Limited presence of major corporate organisations within the City • Lower than average number of home based businesses • Local jobs - lower paid and lower qualified than metropolitan Perth average • Local residents – higher paid and higher educated than metropolitan Perth average • More resident workers in higher age groups than average • Local business owners with higher average age • Higher proportion of local jobs in population driven activity • Higher proportion of local jobs in sectors undergoing structural change due to technological advances • Lower proportion of local jobs in strategic employment activity • Almost three quarters of the local labour force commute out for employment • Mismatch of local skills and qualifications with local employment • Low Regional Employment Self Sufficiency • Low levels of business productivity (national) • Declining worker productivity (national)
Key Opportunities	<ul style="list-style-type: none"> • Attraction of new strategic investment and employment creation in key sectors • Development of new infrastructure to support business start-up and growth activity • Development of new commercial space within City Centre for growing businesses • Promotion of business clusters built on strengths in research, human capital and business activity • Development and promotion of programs to enhance business growth, productivity and innovation • Promotion of programs to support sustainable, low carbon business activity • Enhanced national and international profile and connections • Greater leverage of the Perth national and international brand profile • Activation and promotion of key areas to increase visitor numbers and promote businesses • Development of potential commercial innovation precinct • Enhanced promotion and connection of economic precincts within City Centre • Enhanced promotion of arts, culture and creative activity within the City • Promotion of visitor attractions, environmental assets and cultural activity to enhance visitor numbers • Adoption, application and promotion of new digital technologies to enhance economic activity • Attraction of major commercial investment (public and private) to City Centre • Greater connection of local education, training and research activity with industry

Response	The response is a 'step change' economic development model, aligned with Joondalup 2022, that helps address the key issues and enhance and leverage the opportunities to grow the local economy and provide greater local employment opportunities for all
Delivery	Clear leadership and best practice will be demonstrated, engaging and working in partnership with Government, education, industry and the community, to deliver and facilitate effective services and programs to enhance local business and employment opportunities
Success	Success will be measured through monitoring and tracking of Key Performance Indicators and critical metrics linked to each of the strategic themes, reporting periodically and responding appropriately
Aspirations	<ul style="list-style-type: none"> • Greater number of higher growth, innovative businesses; • Development of specialist clusters of business and research activity that have national and international reach; • Greater application of digital technologies to enhance innovation and productivity and community benefit; • Greater economic value leveraged from major projects and precincts within the City; • Enhanced street level commercial activation and vibrancy within City Centre; • Attraction of more visitors to the City and increase in local visitor spend; • Attraction of more investment to the City and increase in local commercial activity; • Increased levels of local strategic employment opportunities for all created within the City; • Greater recognition, attraction and promotion of creative talent
Vision	The City of Joondalup has a high performing economy underpinned by a culture of entrepreneurship, innovation and investment



LONG TERM OUTCOMES – SUMMARY

- Attract and establish over 2,000 new businesses in the City
- Create over 20,000 new local jobs
- Meet the local target of 60% self sufficiency
- Generate more jobs in the knowledge/service sectors
- Grow and support small to medium sized businesses
- Attract large businesses and public sector organisations
- Raise global awareness of research and innovation activity
- Enhance local skilled job opportunities, increasing self containment
- Raise profile of Joondalup and increase visitor numbers
- Maintain unemployment under the State average rate
- Grow the size of local economy, exceeding five year trend for GRP
- Achieve Primary Centre Status

BACKGROUND TO THE CITY OF JOONDALUP

The City of Joondalup includes the suburbs of Beldon, Burns Beach, Connolly, Craigie, Currambine, Duncraig, Edgewater, Greenwood, Heathridge, Hillarys, Iluka, Joondalup, Kallaroo, Kingsley, Kinross, Marmion, Mullaloo, Ocean Reef, Padbury, Sorrento, Warwick and Woodvale.

The City of Joondalup is located in the northern suburbs of Perth, between 15 and 30 kilometres from the Perth Central Business District. The City of Joondalup is bounded by the City of Wanneroo in the north and east, the City of Stirling in the south, and the Indian Ocean in the west with 17km of pristine coastline.

The original inhabitants of the Joondalup area were the Mooro people. Joondalup is named after Lake Joondalup, which is named from an Aboriginal word meaning "place of whiteness or glistening". European settlement dates from 1838, with land used mainly for farming and market gardening. Growth was minimal until the late 1960s, with development initially in the southern areas, then moving northwards over time.

Significant development occurred from the 1970s, spurred by the Government's North-West Corridor Plan. Rapid growth took place in the 1980s and 1990s, with the population more than doubling between 1981 and 2001. During the 1990s substantial growth occurred in the northern and coastal suburbs, with the population increasing from 123,000 in 1991 to 147,000 in 2001. The population of the City was relatively stable between 2001 and 2006, although expansion continued in the suburbs of Burns Beach, Iluka, Joondalup and Kinross, and to a lesser extent in Currambine and Hillarys.

A significant proportion of population growth within the North West Metropolitan Region is driven by immigration from overseas with skilled migrant families relocating to the area for enhanced employment opportunities and lifestyle.

The City of Joondalup, with an estimated residential population of 164,737 (ERP, 2012 ABS), is the primary employment centre for the North West Region of Metropolitan Perth and therefore services a growing regional population of 333,421 (City of Joondalup and City of Wanneroo combined ERP 2012). This regional population is expected to increase to 395,000 by 2031.

The City of Joondalup encompasses a total land area of about 96 square kilometres, including substantial areas of coastline, parkland, foreshore reserves and bushland. The City has significant residential areas, with some commercial, educational and industrial areas.

Key employment sectors include health, education, retail, business services, public administration and tourism. Major retail centres include Joondalup City Centre, Whitford City, Lakeside Joondalup and Centro Warwick, with numerous smaller centres.

The City has several medical facilities including a major health campus with both public and private facilities in Joondalup and a number of additional specialist centres. Joondalup features several education and training institutions including Edith Cowan University, West Coast Institute, Automotive Institute of Technology, National College of Electrical Training (NECA), numerous private and public schools, and the Western Australia Police Academy.

The City is experiencing significant levels of commercial investment and land development, particularly in the health and education related sectors with commercial investment levels of around one billion dollars either, committed, underway or completed in 2012/13 within the Joondalup City Centre area.

JOONDALUP 2022

The City of Joondalup Strategic Community Plan 2012-2022 '*Joondalup 2022*' is the City's overarching guide for the future that outlines and drives a new vision for Joondalup as we seek to become a bold, creative and prosperous City on the global stage. The long term strategic planning document highlights the City's commitment to achieving the vision and aspirations of its community as Joondalup continues its impressive growth and development.

Launched at the end of 2012, Joondalup 2022 aims to be transformational and expand on the City's role as the commercial, civic and cultural hub of Perth's north-west region. The six key themes of Joondalup 2022 are as follows;

Governance and Leadership – Effective Representation, Active Democracy, Corporate Capacity, Strong Leadership

Financial Sustainability – Financial Diversity, Effective Management, Major Project Delivery

Quality Urban Environment – Quality Built Outcomes, Integrated Spaces, Quality Open Spaces, City Centre Development

Economic Prosperity, Vibrancy and Growth – Primary Centre Status, Activity Centre Development, Destination City, Regional Collaboration, Business Capacity

The Natural Environment – Environmental Resilience, Community Involvement, Accessible Environments, Environmental Leadership

Community Wellbeing – Quality Facilities, Cultural Development, Community Spirit, Community Safety

This economic development strategy relates to all of these six themes with a particular emphasis on delivering and supporting objectives under Economic Prosperity, Vibrancy and Growth, Quality Urban Environment, Community Wellbeing and Financial Sustainability.

Economic development enhances prosperity and improves quality of life across the whole community and is achieved via a range of value-adding initiatives and services that foster and support a sustainable and prosperous business environment. The value of economic development to the local community within the City of Joondalup is multifaceted and includes the following;

- Fosters economic growth and vitality
- Fosters local commercial activity and business prosperity
- Maximises local economic multiplier effects from major investment projects

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- Enhances vibrancy and liveability of the area for local people
- Improves visual and aesthetic appeal of the built environment
- Develops skills, knowledge base and educational opportunities
- Presents increasing employment opportunities for all local residents
- Raises the profile of the City as a business and visitor destination
- Promotes environmental responsibility through low-carbon initiatives and sustainable business practices
- Promotes environmental and social benefits through encouraging local jobs for local people and minimising impact on transport infrastructure
- Generates financial benefit and reinvestment by the City for community projects and enhancement of services.

These outcomes underpin and support the vision and aspirations of the Joondalup 2022 Strategic Community Plan.

In order to drive strategic improvement and the re-positioning of the City and its community as leaders in excellence, **Joondalup 2022** requires the adoption of distinguishing values to guide the direction and operations of the City of Joondalup Local Government in the future. They include:

Bold – We will make courageous decisions for the benefit of the community and future generations

Ambitious – We will lead with strength and conviction to achieve our vision for the City

Innovative – We will learn and adapt to changing circumstances to ensure we are always one step ahead

Enterprising – We will undertake ventures that forge new directions for business and the local economy

Prosperous – We will ensure our City benefits from a thriving economy built on local commercial success

Compassionate – We will act with empathy and understanding of our community's needs and ambitions

ECONOMIC DEVELOPMENT – A STRATEGIC APPROACH

DRIVERS OF CHANGE

Across the world, communities are being impacted upon by major shifts in environmental, social, economic, technological and political conditions that are effectively changing the way people live and work. Understanding and responding appropriately to these changes is vital in ensuring our local communities continue to evolve in a sustainable way.

From an economic development perspective there are a number of trends that present both opportunities and challenges for Western Australia and locations such as the City of Joondalup.

Factors such as the sustained strength of the Australian dollar and other pressures impacting on business growth including rising energy prices and recruitment and retention of skilled staff affect the Australian economy generally.

Innovation and greater productivity within businesses can help industry buffer against some of these global and national pressures. Any potential decline in productivity can increase the level of vulnerability for the Australian economy in the future. This is one particular area that could potentially be influenced through specific actions to benefit local businesses.

A shift in global economic activity with significant growth in countries such as China, Brazil, India and Russia presents new challenges but also new opportunities, particularly for businesses located in Western Australia with relatively easy access to some of these emerging economies (compared with Europe and North America) for trade and investment attraction.

Global businesses are continually evolving their business models in response to global trends. Outsourcing non-core activities and seeking new locations for new activities continues as a trend with a particular focus on adding value through partnering and collaborating, expanding via acquisition and increasing partnership activity in relation to research and development.

This presents opportunities for attracting Foreign Direct Investment (FDI) for Western Australia and locations such as Joondalup, capitalising on existing strengths related to specific research and development activities for example.

Diversification of a local economy is also critical to ensure greater resilience and minimises risk associated with economic downturns in a particular market or business sector. Identifying new emerging business sectors and responding to the structural changes being experienced in more traditional sectors is important in supporting the sustainable growth of a local economy.

One of the major areas of change impacting on society and the global economy is technological with increasing shifts in the ways we are using new technology to do things very differently. Digital technologies are both disruptive and transformative, for communities and businesses, and again, present significant opportunities and challenges.

The rapid adoption of new technologies and access to information will continue to transform society; for individuals, communities and businesses. As a result there is a strong drive to a globalised society with a much greater international perspective than ever before. Despite this and the massive rise in virtual networks and social media activity, the importance of *physical place and local communities* is as strong as ever and should not be underestimated.

Overall the Strategic Community Plan for the City, 'Joondalup 2022', highlights a number of challenges that we face locally (and many of these relate to the global and national drivers highlighted above). These include *climate change, transport congestion, ageing infrastructure, financial sustainability, competition for investment attraction, ageing population and sustainable tourism*.

It is therefore important to understand these local and regional challenges and drivers as well as the national and global issues impacting on and affecting our communities, particularly with regard to local economic development.

MEGA TRENDS

A Megatrend is defined as a major shift in environmental, social and economic conditions that will substantially change the way people live. [CSIRO]

The earth has limited supplies of natural mineral, energy, water and food resources that are essential for human survival and maintaining lifestyles. Many of these resources are being depleted at sometimes alarming rates. Climate change will place pressure on water and food production systems. At the same time population growth and economic growth are placing upward pressure on demand. For some natural resources, demand is going up and supply is going down. Many other resources are under much pressure. [CSIRO Our Future World report 2012]

- **More from less** – The earth has limited supplies of natural minerals, energy, water and food resources essential for human survival and maintaining lifestyles
- **Going, going...gone?** Many of the world's natural habitats, plant species and animal species are in decline or at risk of extinction
- **The silk highway** – Coming decades will see the world economy shift from west to east and north to south
- **Forever young** – The ageing population is an asset. Australia and many other countries that make up the Organisation for Economic Cooperation and Development (OECD) have an ageing population
- **Virtually here** – This megatrend explores what might happen in a world of increased connectivity where individuals, communities, governments and businesses are immersed into the virtual world to a much greater extent than ever before
- **Great expectations** – This is consumer, societal, demographic and cultural megatrend. It explores the rising demand for experiences over products and the rising importance of social relationships

NORTH WEST METROPOLITAN PERTH – THE ECONOMIC CHALLENGE

It is estimated that by 2031 the population of the North-West Metropolitan Region will have grown to 395,000. The regional level of Employment Self Sufficiency must increase from the current level of 45% to at least 60% if the negative impact of a relatively weak local employment base is to be moderated. Attracting the additional jobs required to achieve this level of employment self-sufficiency presents a significant challenge for the sub-region in the coming decades. This equates to around 146,000 jobs in the region by 2031, or approximately double the number of jobs currently available in the Cities of Wanneroo and Joondalup. [Source: *Directions 2031 and Beyond*].

Expanding Horizons Economic Development Strategy aligns with the State Government Planning framework document *Directions 2031 and Beyond* which sets a hierarchy of activity centres within Metropolitan Perth. Joondalup is currently recognised as a 'Strategic Metropolitan Centre' and a focus of *Expanding Horizons* is to support the case for Joondalup evolving to a higher order Primary Centre.

A focus for this Strategy is also on those other key activity centres within the City of Joondalup, including Secondary Centres at Warwick and Whitfords. The core and specialist themes and catalyst projects aim to enhance, where appropriate, economic development in these centres.

NORTH WEST METROPOLITAN PERTH REGION

The North West Metropolitan Region comprises the Cities of Joondalup and Wanneroo. There are a number of key Activity Centres located within this sub region.

ACTIVITY CENTRE – Commercial focal points which include a combination of activities such as offices, retail, higher-density housing, entertainment, civic/community, education and medical services

Within the Western Australian planning context, there is an Activity Centres Policy which defines 'Activity Centre Hierarchy' essentially differentiating activity centres and their fundamental planning principles.

Joondalup is classed as a 'Strategic Metropolitan Centre' by the State Government (*Directions 2031*) and one of ten such centres within the Perth metropolitan area.

STRATEGIC METROPOLITAN CENTRE – Main multipurpose centres that provide a diversity of uses. These centres provide the full range of economic and community services necessary for the communities in their catchments.

SECONDARY ACTIVITY CENTRE – Centres sharing similar characteristics with Strategic Metropolitan Centres but serve smaller catchments and offer a more limited range of services, facilities and employment opportunities.

EMPLOYMENT SELF-SUFFICIENCY – This is the total number of jobs within the City of Joondalup divided by the total number of employed residents of the City of Joondalup, regardless of where those residents work (Western Australian State Government definition).

Population driven vs strategic employment

Strategic Employment is a result of economic activity related to the transfer of goods, services and knowledge to an external market i.e. of value to markets outside the immediate catchment

Population Driven Employment can be defined as employment resulting from economic activity servicing the needs of a local population

Strategic economic activity tends to include higher value-add activities and higher wage productivity for employees and thus is more likely to have greater positive multiplier effects on the local economy. A more diverse range of economic activity also ensures greater resilience as minimises risk associated with economic downturns in a single market.

This strategy places a higher priority on developing and attracting strategic employment and these types of jobs are typically associated with sectors such as education and research, professional and scientific services, ICT and higher level specialised services (including business consultants and specialist health professionals). Supporting the growth of strategic employment is critical to the long term prosperity of a local economy and also its resilience.

The City of Joondalup has, however, a high dependence on population driven employment activity as a result of its role as a major regional centre servicing a growing population. This is an important function and so jobs related to more local services including retail, Government services, healthcare and social assistance etc. will continue to represent a major proportion of the local employment base in the future.

JOONDALUP – LEVERAGING STRATEGIC ASSETS

It is important to create and promote comparative advantages around which strategic employment may be based for activity centres and the City overall.

There is significant value and potential benefit in identifying our key strategic assets such as the Joondalup Learning Precinct and the various research institutes and specialist centres, Joondalup Health Precinct as well as some of the natural assets that contribute to the visitor economy including Yellagonga Regional Park and the 17km of pristine coastline.

These are all key assets underpinning the attraction of new businesses and investment, tourism spend and people therefore it is important to leverage economic value from them but at the same time putting in place strategies to ensure long term sustainability.

The liveability and high quality of life valued by both local residents and visitors to the City of Joondalup can be regarded as one of our most important 'assets'. The components that form this however can be wide and varied ranging from the cleanliness of the streets, availability of leisure facilities and quality cafes and restaurants through to the natural attractions such as the wide variety of flora and fauna and quality of the beaches and parklands.

Sustaining the high level of liveability is critical for economic development as increasingly a quality lifestyle is the major draw card for attracting and retaining people (and importantly a talented and creative workforce), which in turns attracts new business investment and commercial opportunities.

This economic development strategy recognises the importance of leveraging our strategic assets and maintaining and enhancing our lifestyle attractors, an important responsibility shared across the City of Joondalup and with other organisations, businesses and community groups. Pride of place and community ownership have proven to be important factors in successful local economic development in many parts of the world.

JOONDALUP CITY CENTRE - A PRECINCT APPROACH

The Joondalup City Centre contains a number of 'precincts of economic activity' and these are outlined on the following map to include;

- Joondalup City Centre - Central Area*
(commercial/retail/leisure/housing/public)
- Joondalup Health Campus (pink)
- Joondalup Learning Precinct (yellow)
- Lakeside Joondalup Shopping Centre (red)
- Joondalup Business Park (orange)
- The Quadrangle Business/Retail Park (salmon)
- Joondalup Gate Retail Park (grey)

** The main central area of the Joondalup City Centre is broadly bounded by Boas Avenue, Lakeside Drive, Shenton Avenue and McLarty Avenue and contains a high variety of activity including office commercial, retail, services, leisure, residential, public space and public administration/library.*

The various projects and priorities outlined within this Economic Development Strategy aim to enhance connections between these various precincts, maximising business promotional opportunities, raising profile and leveraging economic value.

Approximately one billion dollars of commercial investment was either approved, under development or was completed during the financial year 2012-13 within the Joondalup City Centre area alone with further potential commercial development opportunities in the pipeline.



Map showing main areas of economic activity (precincts) within the Joondalup City Centre.

Note: This map has been designed by the City of Joondalup for illustrative purposes only to highlight the layout of the key areas referenced within this Strategy but has no formal status in relation to Local Structure Plans.

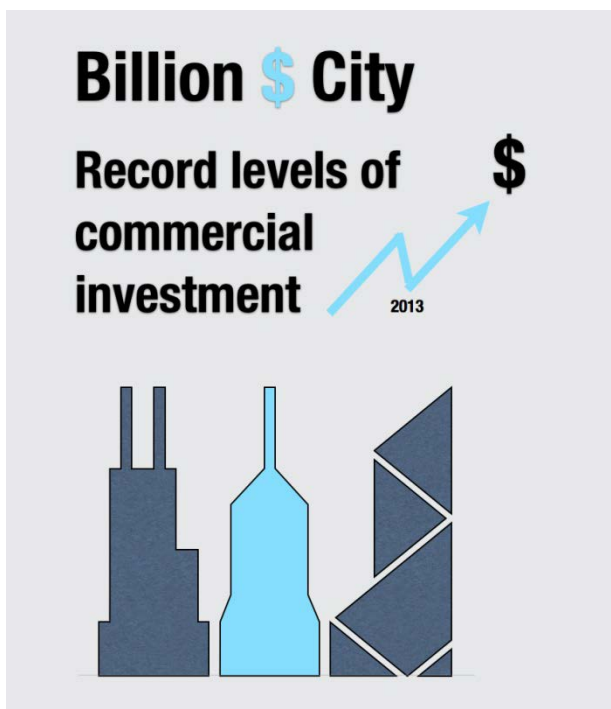
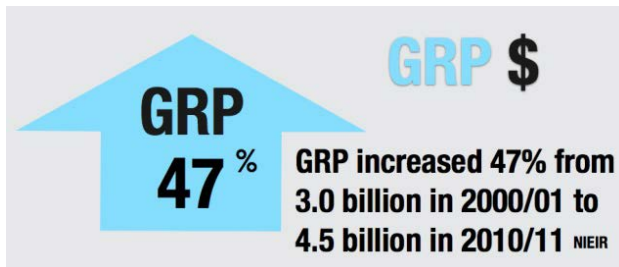
JOONDALUP ECONOMIC PROFILE

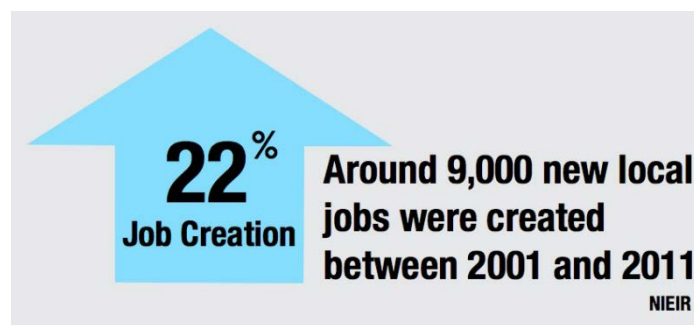
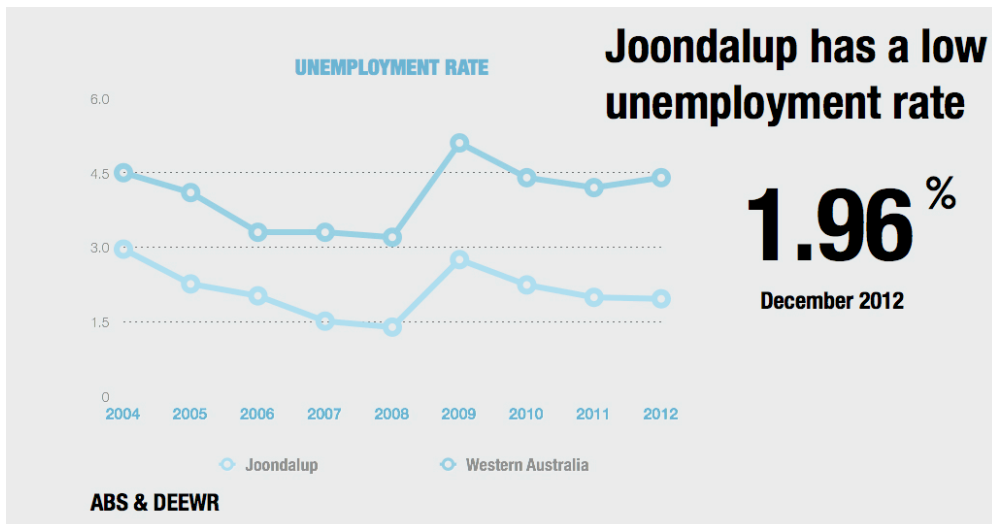
The City of Joondalup has experienced a decade of economic growth with the local economy, measured by Gross Regional Product (GRP) increasing in size by over 47% between 2001 and 2011 creating around 9,000 new jobs locally.

During this period, employment in the services sectors increased by 30% and knowledge intensive employment activity by 23% (although the latter was driven largely by the education sector). The retail, health and construction sectors continue to generate significant economic value and sustain a large number of jobs.

In 2012-13, the City was receiving record levels of investment with around one billion dollars worth of commercial projects that were completed, underway or approved during that year.

The City of Joondalup needs to diversify economic activity and generate new employment for local residents to increase levels of Self Sufficiency and Self Containment.



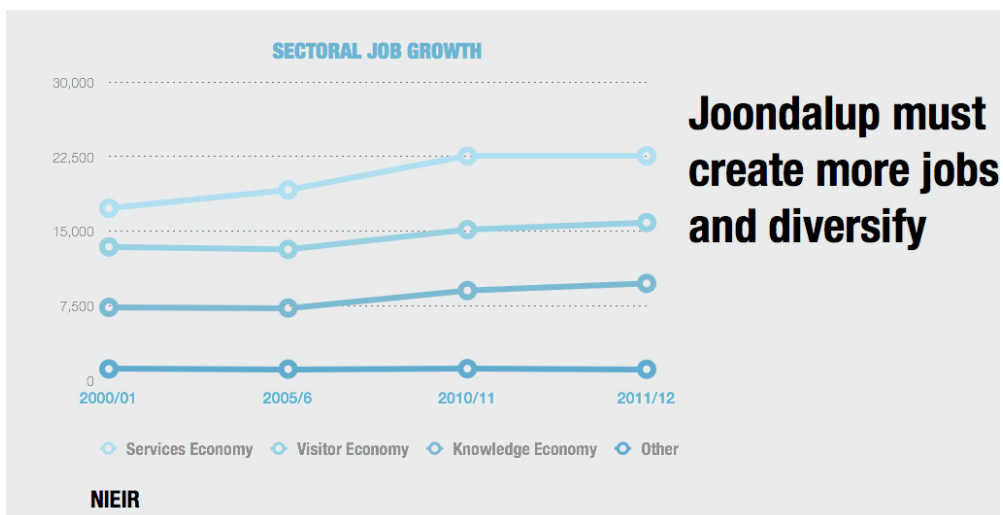


13,470
businesses...

ABS 2012

...in 2012 the City had almost
50 thousand
local jobs

NIEIR



Employment Growth

The 2011 Census
revealed.....

46.4%

Self Sufficiency

In 2011 there were 83,033 employed residents and 38,561 local jobs

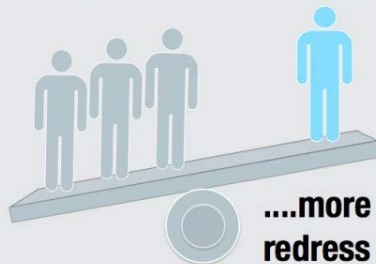
26.7%

Self Containment

In 2011 there were 22,191 residents working in jobs within the City of Joondalup out of 83,033 working residents. This means that 60,842 residents leave the area to work elsewhere

Jobs Imbalance

Almost 3 out of every 4 working residents commute out of the City of Joondalup for work located elsewhere....



....more local jobs are required to redress the balance - particularly high value knowledge and service sector roles

Local Jobs by 2031

To achieve 60% employment self sufficiency in the North West sub region* the total number of jobs needs to increase to.....

**146,000
jobs**

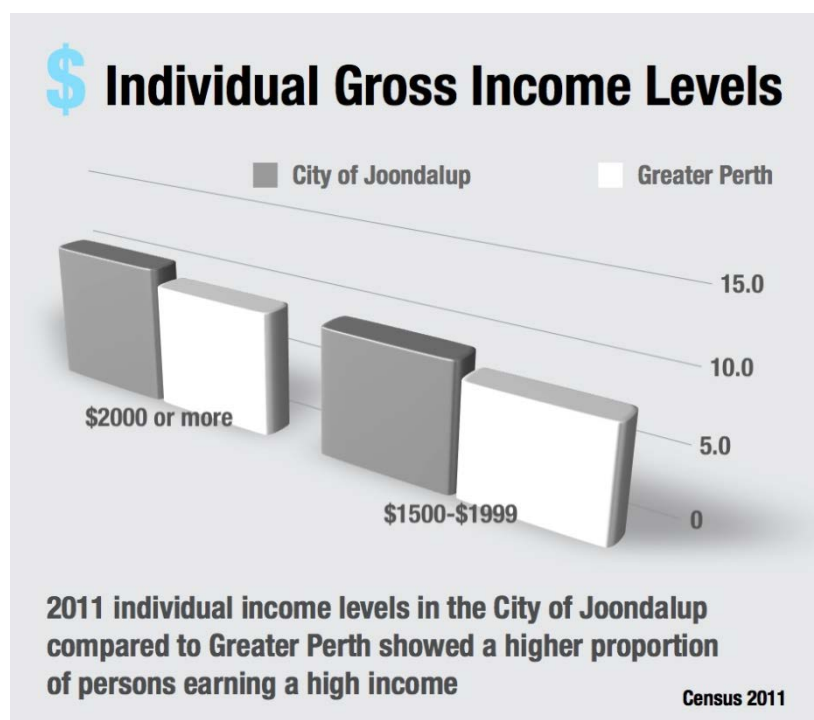
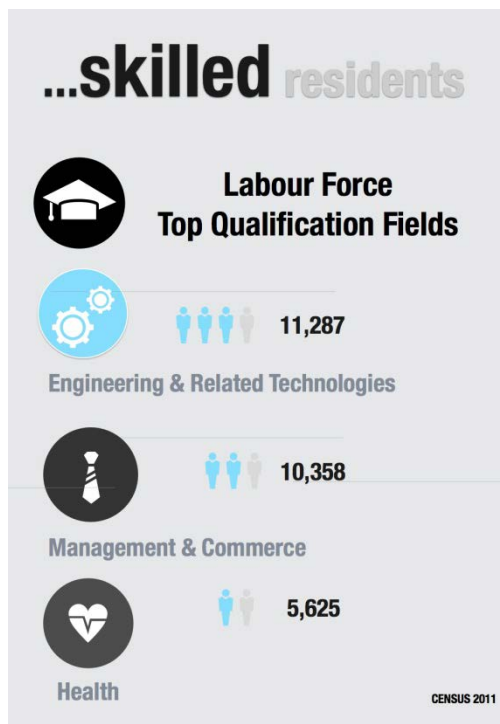
* Cities of Joondalup and Wanneroo
(Based on Directions 2031)



Local Labour Force – refers to the people who reside in the City of Joondalup and are available to work. They may currently be either employed or unemployed. They may work either in the City of Joondalup or elsewhere.

Work Force – refers to the number of people who work in the City of Joondalup, regardless of where they live i.e. an indicator of the number of local jobs.





THE ROLE OF THE CITY OF JOONDALUP IN ECONOMIC DEVELOPMENT

Economic development in its broadest sense can be defined as increasing an areas level of income and capital and distributing that wealth throughout the community through local expenditure and job creation.

Local Government plays a pivotal role in economic development through local engagement with community and business stakeholders, enabling and promoting business investment and employment growth and facilitating and coordinating development and investment. Ultimately, this activity creates and sustains local employment opportunities enhancing community wellbeing and quality of life.

The City of Joondalup is one of Western Australia's most proactive and dynamic local governments and continues to encourage and promote a 'pro-business', investment culture which has enabled significant growth and employment creation in recent years. The main roles of the City of Joondalup with regard to economic development broadly cover the following key areas;

- **Facilitator** – Providing an 'enabling' environment for local development by delivering an effective development approval process and business enquiry handling process and providing clear direction and policies in relation to future development and growth objectives
- **Communicator** – Facilitating effective dialogue between the City and the local business community and positive promotion via a range of channels including Business Forums, networking events, business newsletters and online/social media activity as well as via partnership and cross referral activity with key business associations and organisations
- **Promoter** – Generating positive 'external' marketing activity to raise the profile of Joondalup to attract investment, employers, entrepreneurs, visitors and new residents and 'internal' promotion to existing businesses and local community to raise awareness of economic and employment activity
- **Coordinator** – Proactively engaging with key Government, private sector or community stakeholders to enable new business development and investment at a regional and local level through the provision of infrastructure, services or programs where Local Government is not directly responsible
- **Developer** – Instigating major development, transformational and innovative projects within the City, either solely or via a partnership arrangement, to create and leverage economic value in key activity centres, strategic locations and business clusters
- **Leader** – Showing clear leadership to the local business community and key partner organisations, whilst demonstrating best practice through a creative and innovative approach to economic development

Local Government has an important influential role in shaping the future of an area. The governance and quality of life that exists in urban spaces has a highly significant impact on their communities and individual prosperity. A long term vision with effective strategic planning and governance is essential to instil confidence and leadership within the local community.

CITY OF JOONDALUP 'STEP CHANGE' ECONOMIC DEVELOPMENT MODEL

This City of Joondalup Economic Development Strategy enables a *step change* approach to economic development but recognising the importance of a *long term strategic* view. This Strategy places greater emphasis on a more collaborative, partnership approach working with neighbouring Local Governments such as the City of Wanneroo with a greater regional focus than in the past.

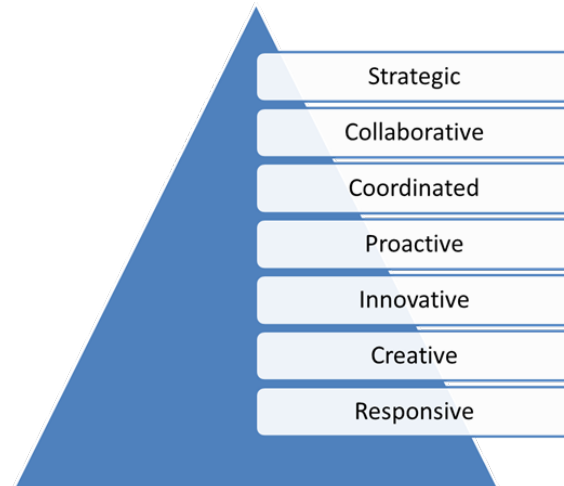
This Strategy also outlines a more collaborative approach to working with other key agencies and organisations in State and Federal Government and in the not for profit and private sectors where appropriate. This Strategy seeks to integrate and link more with existing and potential activity led by a range of organisations including business associations, research centres and education and training organisations.

Through this Strategy, the aim is to bring together organisations working in economic development, planning, business support, research, innovation, education and workforce development in a more integrated way, encouraging a more multi-disciplinary approach. Promoting and encouraging collaboration and knowledge transfer and cross referring services to support local business growth is vital to sustain effective regional economic development.

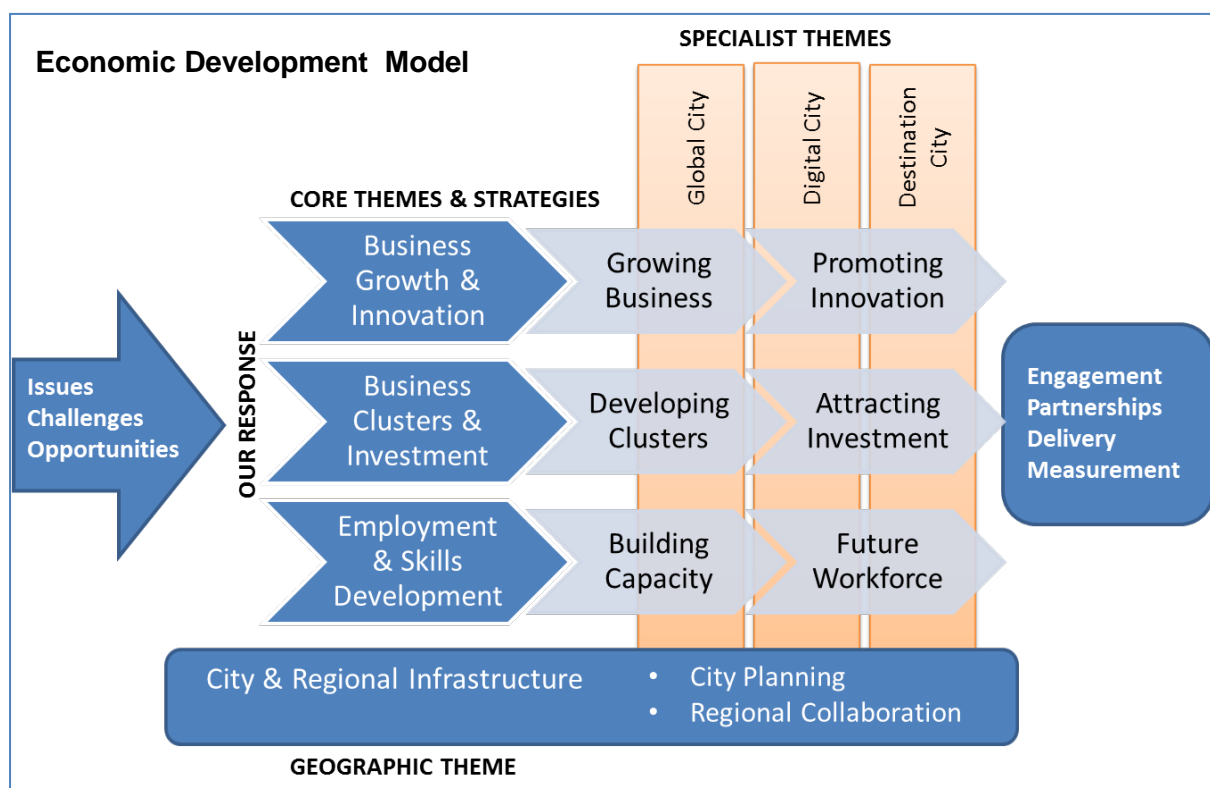
This approach aims to limit overlap in service provision and create greater synergies and ultimately present a more cohesive approach to supporting local business, leveraging and adding value wherever possible.

Finally, the Strategy places a stronger emphasis on identifying, unlocking or leveraging potential value from current and future economic activity, major projects and new developments that occur within the City and the region, applying lateral and creative thinking wherever possible.

‘Step Change’ approach – an enhanced emphasis on the following:



The City of Joondalup Economic Development Strategy has a sectoral, geographic and thematic approach including specialist cross cutting themes, all aligning with the Joondalup 2022 Strategic Community Plan and Corporate Business Plan. The following graphic illustrates the overall economic development model for the City highlighting the key themes and areas of focus (detailed in the next section).



QUALITY GROWTH: QUALITY JOBS

An important foundation of this strategy is the premise of a *quality* approach to sustainable growth. The City of Joondalup is not simply pro-development but pro-‘quality’ development and an important factor in continuing to define its identity as a place to do business and to live.

This premise also applies to the approach to job creation. In order to fully realise its long term aspirations as a Primary Centre as outlined in Joondalup 2022, the City needs to mature and attract and grow the local employment base. The major focus of this strategy however is on the development and attraction of ‘quality jobs’, by this we mean strategic employment including the knowledge based, higher value add jobs mentioned previously.

With a finite resource in terms of commercial development land available within the City of Joondalup, there is a significant ‘opportunity cost’ to be considered with any new proposed development. Further utilisation of commercial land for *population driven* employment such as retail and food services jobs should be considered carefully in light of potentially forgoing a future opportunity to attract more *strategic level* employment such as Information and Communications Technology, scientific and professional services, specialist health and creative media jobs.

These strategic level jobs tend to be of higher skill level, with greater levels of remuneration and ultimately have greater economic value and impact as higher disposable incomes are generally spent locally on goods and services. With continued investment in education, training and research and development in Joondalup, and the continued attraction of skilled migrants, the area will continue to benefit from a growing educated and talented local population base.

With this in mind, the City needs to ensure that new employment creation activity in future has a much greater focus on attracting and developing businesses in these higher level sectors with strategic level jobs, with some of these opportunities being realised from the growth of niche industry clusters and areas of specialisation.

Creating and developing comparative and competitive advantages around key economic assets and activity that have potential to grow strategic employment within the City is a key priority ensuring that we maximise job opportunities for the local skilled, labour force.

A greater focus on innovation and productivity to enhance growth in local businesses, leveraging commercial opportunity from our local research and development activity, where possible, will help drive a more knowledge based local economy in the future.

OUTCOMES – IN SUMMARY

- Greater number of higher growth, innovative businesses;
- Development of specialist clusters of business and research activity that have national and international reach;
- Greater application of digital technologies to enhance innovation and productivity and community benefit;
- Greater economic value leveraged from major projects and precincts within the City;
- Enhanced street level commercial activation and vibrancy within City Centre;
- Attraction of more visitors to the City and increase in local visitor spend;
- Attraction of more investment to the City and increase in local commercial activity;
- Increased levels of local strategic employment opportunities for all created within the City;
- Greater recognition, attraction and promotion of creative talent

CORE THEMATIC STRATEGIC PRIORITIES

BUSINESS GROWTH & INNOVATION

GOAL: To support and encourage the growth of more sustainable, innovative and productive businesses to enhance local strategic employment in key regional business clusters



Background

In Australia, small businesses (less than 20 employees) account for 96% of all businesses, employ 4.8 million people or 46% of the private, non-agricultural sector workforce and generate an estimated 39% of Australia's economic production. Their continued success in generating economic wealth at both a local and national level, and as a key provider of local employment is therefore vital.

There are approximately 13,470 registered businesses in the City of Joondalup area (ABS 2012) with the vast majority being Small and Medium Enterprises (SMEs) and home based businesses. Facilitating the growth of these local businesses and supporting new start-up activity is critical to the continued diversification of the local economy and the drive towards higher self sufficiency through the creation of local jobs. Identifying and nurturing the businesses with higher growth potential and enhancing their levels of innovation and productivity is key to unlocking greater wealth creation locally.

Productivity growth is a critical driver of economic growth and living standards. Productivity measures the efficiency with which an economy or corporate entity or organisation uses its limited supplies of land, labour, capital, knowledge and expertise to produce goods and services.

The Productivity Commission has identified a range of factors which contribute to national productivity growth. In the short term, those factors that have immediate impact on productivity include technological change, organisational change, industry restructuring and resource allocation. Over the longer term, investment in education and training and research and development and innovation are significant factors.

In recent times, Australia's wealth has been driven largely by the boom in global mineral and energy markets which has had a significant positive impact on Western Australia. At the same time, Australia's productivity growth has slowed and a long period of static or falling productivity growth is being experienced across a number of business sectors within Australia.

A wide variety of stakeholders are involved in encouraging and supporting the growth of the small business sector. The Government whether Federal, State or Local is a key player in this space, in particular the area of supporting new start-up business activity and encouraging the growth of home based enterprises into small and medium sized businesses.

All levels of Government have an important role to play with this group in particular as it is often recognised that there is a market gap here in the delivery of services from the private sector as few start-ups and micro enterprises have the resources to pay for advice and consultancy hence the need for low cost (or free) services provided by organisations such as Small Business Development Corporation (and the local Business Enterprise Centres or the Small Business Centres).

The Small Business Centre North West Metro has for a number of years delivered core services for local start-up and growing businesses. This typically takes the form of more generic advisory services to business such as face to face support and workshops covering

topics such as business planning, marketing, procurement, legal and finance as well as online activity.

A range of other organisations are involved in supporting the growth of the small and medium business sector including banks, accountants, lawyers, marketing specialists, business associations, Chambers of Commerce and other dedicated organisations and Government Departments such as AusIndustry, Enterprise Connect, Department of Commerce and Innovation Centre WA and also educational/training organisations such as Edith Cowan University, West Coast Institute, NECA, Automotive Institute of Technology etc.

It is important to have a holistic view on this area of activity to ensure that there is a greater partnership approach with less reliance on one or two organisations. This strategy aims to ensure ongoing delivery of more generic business support and advice activity but enhancing this through the delivery of more specialist program activity, which may involve various organisations or business associations, with a focus on promoting innovation and on the small number of companies with high growth potential.

There is greater opportunity to increase the level of business start-up and business growth activity in the City of Joondalup as the *net* stock of businesses has remained relatively static over the past five years, despite the continued growth of the regional population and thus enhanced potential for new business opportunities. Further ongoing analysis of the reasons for success and failure of local enterprises is required.

Encouraging a more dynamic 'start-up ecosystem' and facilitating the right environment conducive for business growth is vital in helping to develop an entrepreneurial culture and accelerate economic development in the region.

This may involve establishing infrastructure that encourages and enhances collaboration, networking and knowledge transfer between entrepreneurs, SMEs and researchers for example. The provision of relevant information, contacts and dedicated support (whether in the form of training, mentoring or coaching) at the appropriate stages is also vital.

Local Business Issues

The ECU Small and Medium Enterprise Research Centre carried out an independent analysis of local businesses within the City of Joondalup during 2012 and highlighted a number of key issues raised by the sample surveyed. This economic development strategy aims to address these issues through the various actions and strategies highlighted within this section. A summary of the key issues raised and potential barriers to future growth are as follows;

- Succession planning and business continuity
- Online Business (ecommerce, digital marketing, social media etc.)
- Energy saving / environmental practices
- Employing trainees and apprentices
- Sustainable transport
- Business crime and security

Innovation

The Organisation for Economic Co-operation and Development (OECD) interprets innovation as “the implementation of a new or significantly improved product (good or service), process, new marketing method or a new organisational method in business practices, workplace organisation or external relations”.

Essentially innovation is our *ability to generate and adopt new knowledge and ideas*. The concept therefore has a much broader application than something that is unique and scientific or technological in nature.

Research from across the world has shown that innovation is the most important driver of long term productivity and prosperity. Innovative businesses create more jobs, grow faster and ultimately contribute more to regional economic growth.

Traditional indicators of innovation such as R&D investments and patent registrations, fail to capture a wide range of innovative activities in key business sectors such as business services and creative industries which can often be regarded as intangible and difficult to measure. Examples include adoption of new organisational arrangements and processes as well as client facing and market innovations which enhance productivity.

National innovation policy in most countries generally pays attention to facilitating linkages between the various agents within the innovation system, including between firms and across sectors. Importantly the role of the university in economic development, regional development and innovation is receiving greater attention.

Evidence shows that universities contribute to local innovation processes in a variety of ways and are an important influence on diversifying the local economy, new business creation, development of industry clusters and knowledge transfer as well enhancing opportunities for the commercialisation of research.

So in addition to the university’s most obvious important contribution being education, they do have a variety of indirect roles as well in contributing to the local innovation process and economic performance of a region.

This economic development strategy recognises this fact and more broadly the important role of the various organisations involved in the Joondalup Learning Precinct and other education/training organisations connected with the City.

The ultimate aim of this section of the economic development strategy is to support and encourage new start-up activity, leverage business collaboration, retain and nurture high growth companies and promote innovative business activity to generate new wealth and in turn support local job opportunities.

‘Innovation is the key to making Australia more productive and more competitive. It is the key to answering the challenge of climate change, the challenge of national security, the challenges of disease and want. It is the key to creating a future that is better than the past. It has the power to transform existing industries — enabling them to operate more efficiently, to deliver improved products and services, and to win new market’ – (The Department of Innovation, Industry, Science and Research)

The Joondalup Small Business Sector

The City of Joondalup has approximately 13,470 registered businesses located within its boundaries (ABS 2012). Latest ABS figures show 96.9% of businesses within the City were classed as micro or small businesses employing less than 20 employees.

Home based businesses

The percentage of home based businesses in the City of Joondalup, according to the latest Census data, is below the Perth metropolitan, State and National averages and there is an uneven spatial distribution within the City. Further analysis of the City's home based business categories is required to better understand this important sector within the local economy. A more regional approach to supporting these businesses could be considered as the current level of home based business employment within the North West Metropolitan Perth Region is only 2.2%. Priority will be given to the knowledge and professional business services sector home based businesses and sole traders and providing support for their future sustainable growth 'beyond the home'.

Home Based Business Hotspots

Highlight top 5 suburbs for home based business registrations

1. Duncraig – 281
2. Hillarys – 195
3. Kingsley – 159
4. Sorrento – 157
5. Greenwood – 145

The following table (source: Atlas ID 2011) highlights the overall position in actual numbers of those employed in home based businesses and as percentages of the workforce:

GEOGRAPHIC AREA	JOB NUMBERS - HOME BASED BUSINESSES	TOTAL EMPLOYED PERSONS AGED 15+	PERCENT %
City of Joondalup	2,055	81,098	2.5
North West Metropolitan Region	3,423	152,554	2.2
Greater Perth	38,627	842,582	4.6
Western Australia	55,837	1,104,184	5.1
Australia	557,824	10,056,758	5.5

The Start up economy

There is significant opportunity for growing the start up business community in Western Australia, particularly in the technology sector. Much of the tech start up activity in Australia is generally focussed in Sydney and Melbourne and Perth has some way to go in achieving its full potential. According to a PWC report commissioned by Google (April 2013), Perth is home to only 2% of Australia's tech start-up community.

The City of Joondalup has capacity to nurture and enhance its 'enterprise ecosystem' for new business growth giving even greater focus to existing assets such as the ECU Business and Innovation Centre (and potential linkages with the various ECU Research Centres) as well as other infrastructure such as the Academy of Digital Technologies (West Coast Institute).

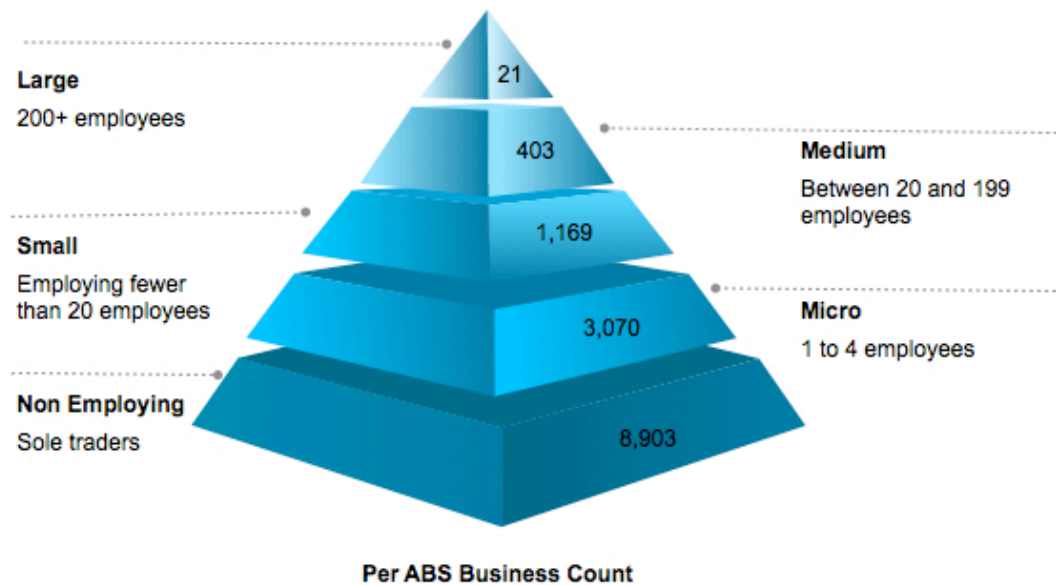
Facilitating greater communication with networks of entrepreneurs within Metropolitan Perth and beyond and enhancing connections with the Joondalup business community is a key area of focus for this strategy to help enhance the business start-up activity within the region.

The opportunity to support new and innovative infrastructure such as 'coworking spaces' to encourage greater collaboration and networking between entrepreneurs, micro enterprises, social enterprises/entrepreneurs, educators and researchers is considered within this strategy. A greater focus on nurturing innovative and creative companies and the overall enterprise ecosystem will enhance the local entrepreneurial culture and generate more strategic employment in future.

Identifying and supporting high growth companies is also important. There are fewer businesses in the City of Joondalup employing five or more employees than the Perth metropolitan average and so this strategy will seek to identify ways of enhancing and accelerating the growth of existing micro and small businesses, potentially into medium sized enterprises.

Gaining a better understanding of the business growth cycle (from pre-start up to mature businesses) and the critical intervention points is very important. Analysing and tracking the key statistics and metrics will help inform the City of Joondalup and key stakeholders on 'targeted intervention' - assisting the right businesses at the right time to maximise their potential for success.

City of Joondalup Businesses by Employment Size June 2012

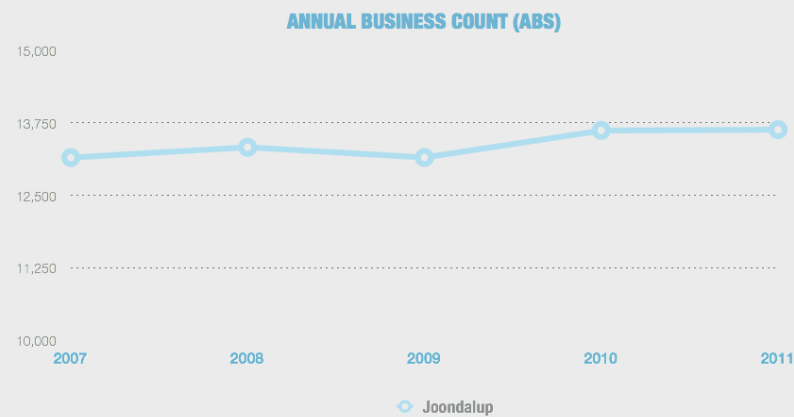


Business Snapshot

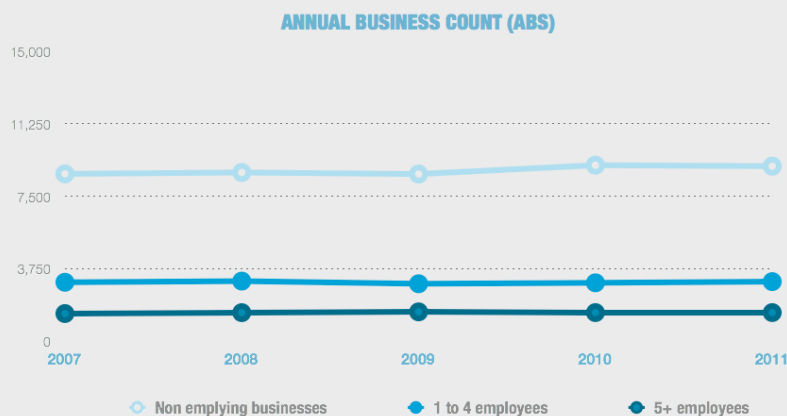
13,470 businesses...

ABS 2012

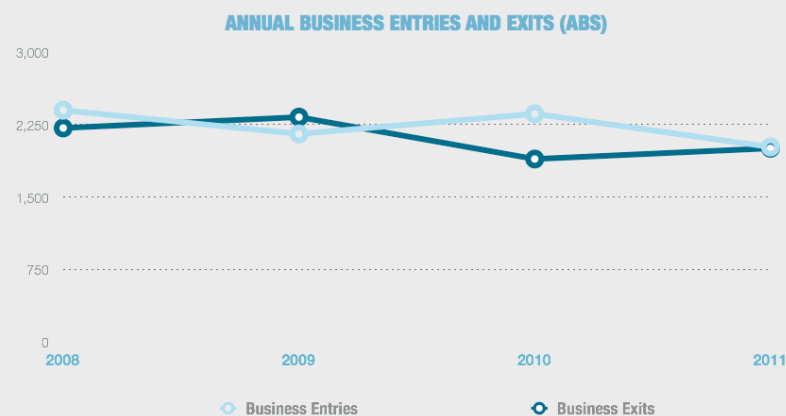
ABS data reflects minimal growth in business numbers in recent years



There are few businesses employing 5 or more people

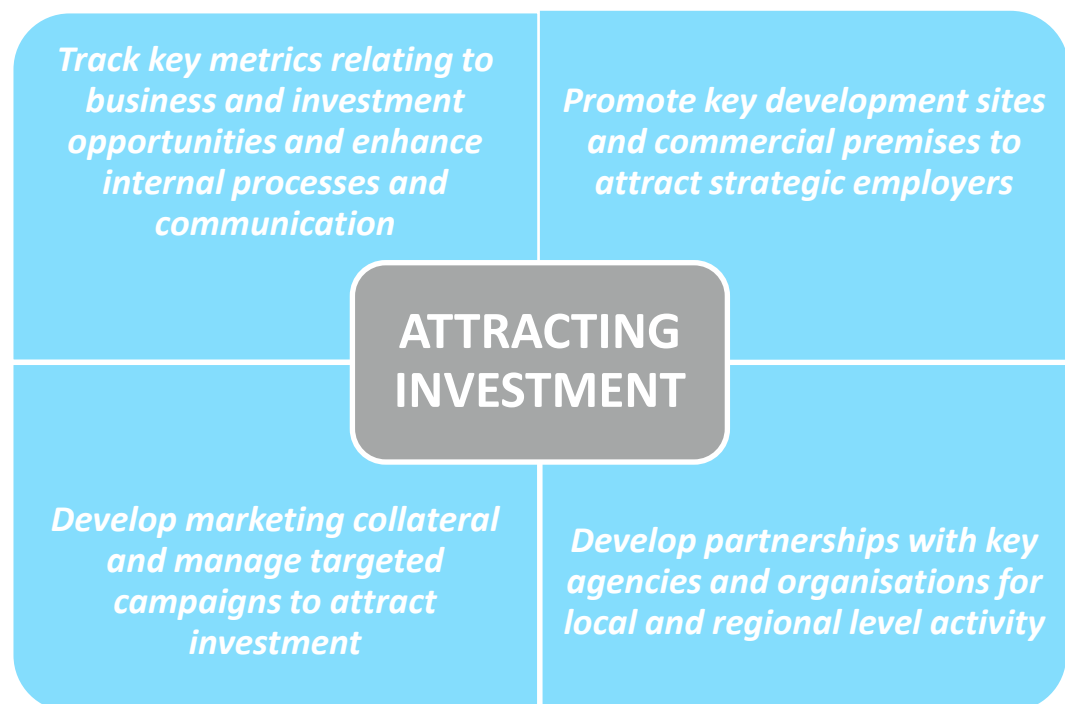
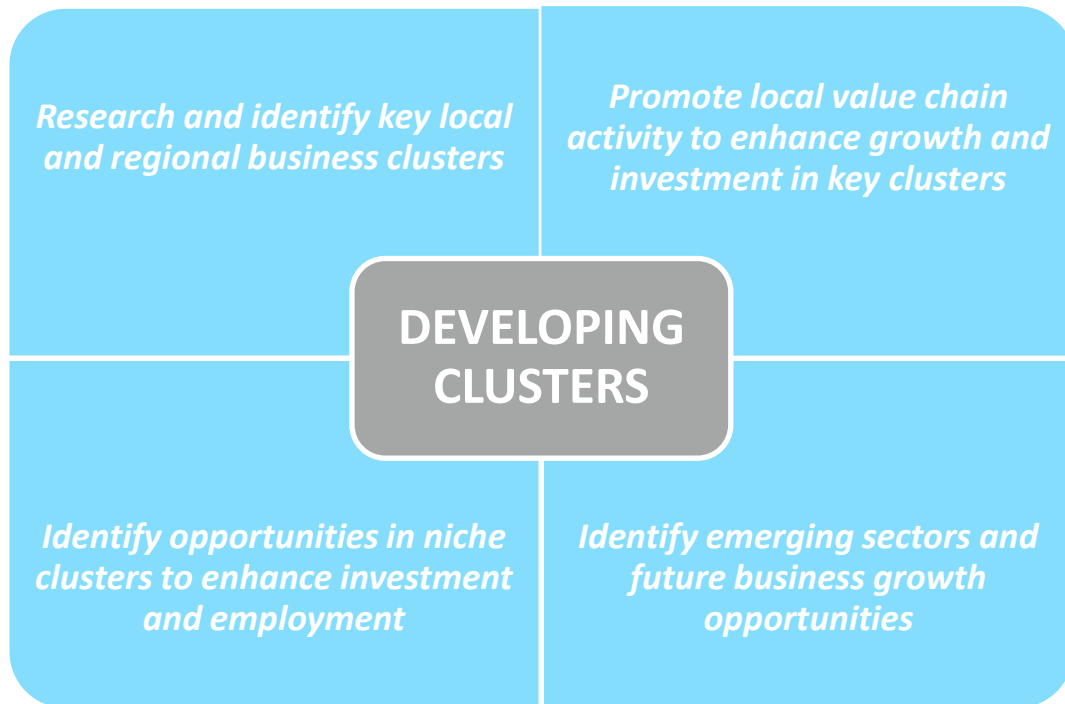


Business entries and exits run at similar levels



BUSINESS CLUSTERS & INVESTMENT ATTRACTION

GOAL: To diversify the local economy and increase strategic employment opportunities through enhancing growth in key regional business clusters and targeting and attracting new investment to the City



A Cluster Approach to Economic Development – The Added Value

Clusters are important to a local economy. However it is important to recognise that industry clusters are more than just a group of firms within the same industry sector. There are a range of potential stakeholders such as Government, education and other supporting organisations vital to the success of economic clusters. Most importantly it is the synergy and dynamic relationships and networks that underpin a successful approach to developing clusters within a local economy.

Groups of inter-related, co-located industries present a number of spin-off benefits including the formation of contacts between businesses and enhancement of the value creating benefits arising from networks and agglomeration. It is important to be mindful though that the geographic area covered by clusters can vary dramatically. There may even be multiple operating scales, with regional, national and even international dimensions to some clusters.

Clustering is one of the key drivers of economic growth in localities, cities and regions. However, adopting a cluster approach is not the only way of encouraging regional economic growth. Developing supply chains, promoting innovation and research, improving workforce skills and informal networking all have a part to play in improving competitiveness and creating growth.

The Joondalup 2022 Strategic Community Plan recognises the importance of clusters and promoting industry niches and this economic development strategy places a high priority on identifying and creating competitive advantage around key industry niches and clusters of economic activity to help drive future economic growth and investment within the City.

"A cluster is defined as geographic concentration of inter-connected companies and institutions working in a common industry" – Professor Michael Porter, Harvard University

Evidence from a wide range of global research suggests three main critical factors for the successful development of clusters. These are;

- **The presence of functioning networks and partnerships;**
- **A strong innovation base, with supporting R&D activities where appropriate; and**
- **The existence of a strong skills base**

It is very difficult to build a successful business cluster from a zero base. Typically there exists some research activity, skills base or a small cluster of businesses operating in a particular sector.

Other critical success factors might include; adequate physical infrastructure, presence of large firms, strong entrepreneurial culture, access to sources of finance and access to specialist services / business support.

How a cluster is branded and promoted and the activity (such as networking events) that sits behind this is often important in helping to build a community or network and subsequently attract new business and investment.

There are several international examples of 'membership or virtual networks' that have evolved around clusters (particularly in the technology related sectors) e.g. Cambridge Network (UK), MassBio (USA), BioMelbourne Network (Australia). The activities and events that happen as part of these networks are important to help give life to, grow and sustain clusters over time.

Other international research on clustering highlights the importance of industry, government and universities i.e. an effective partnership between these is essential.

Developing Knowledge and Innovation Clusters

More than ever before, the traditional 'bricks and mortar' drivers of economic growth are giving way to an economy based on 'brains and creativity'. The skills, aptitude, knowledge, creativity and innovation of a workforce – which can collectively be viewed as the talent pool in the economy – have become increasingly important drivers of economic growth and activity. Cities, as hubs of the global economy, are the focal points for this transformation. [IBM Institute for Business Value Global Center for Economic Development Research 2011].

Over the past decade, a global shift toward a knowledge-based economy has accelerated dramatically. Superior talent – embodied in higher education, training, skills, creativity, aptitude, innovation capacity, and the cultural and social skills of the workforce – is rapidly becoming the key driver of economic growth and activity. New businesses are created, attracted and retained, driven by this new breed of talent which ultimately drives the growth of knowledge based clusters.

Highly educated, mobile international workers are expected to triple to almost 99 million by the next decade 2020-2029 and data indicates that these workers are electing to follow specific jobs and make their decisions on location based on complex criteria, including considerations of financial and career returns, as well as quality of life, the latter becoming an increasingly important factor.

Equally important to attracting new talent to the City of Joondalup and North West Corridor region, is the retention of its 'domestic talent base' and in particular the desire to reduce the 'daily leakage of workers' with over two thirds of the workforce leaving the region each day for employment elsewhere (and even higher in some of the knowledge intensive sectors).

Potential strategies to develop and grow a future workforce with an emphasis on enhancing education and training to more closely match the demands of local industry (present and future) are important to help increase levels of employment self sufficiency and self containment. This area of activity is covered within the section Employment and Skills Development.

Attracting Investment

Attracting investment and diversifying a local economy is no longer just about providing adequate physical infrastructure and land to attract new business ('build and they will come' approach). The attraction and retention of creative talent, knowledge and innovation is critical. A location with a higher quality of life will attract skilled, creative and diverse groups of workers which in turn improve the attraction and retention of innovative businesses and the sustainability of clusters.

With the City of Joondalup in 2011 rated as the Most Liveable City in the World, of its size category, it already has strong attributes on which to build a case to attract and retain a talented and creative workforce. The City of Joondalup also ticks many of the boxes for the critical success factors required in developing a successful approach to cluster development as highlighted earlier.

The direct involvement of the various educational and research institutions and activity such as those located within the Joondalup Learning Precinct and Joondalup Health Campus is critical in developing and promoting successful cluster activity and related investment attraction activity.

Although numbers employed in some of the more traditional and primary sectors such as energy, mining, manufacturing are low for the City of Joondalup, many of the business services, education and research activities in the City support these sectors in a variety of ways.

There is an opportunity to develop and promote the City of Joondalup as a technical knowledge and research centre to support the growth and evolution of these important sectors within and beyond the State. City of Joondalup businesses and institutions are more likely to be part of and servicing much wider supply chains and clusters which may be national or international.

Attracting new investment to the City is one of the major priorities of Joondalup 2022 with a major focus on 'Activity Investment' which recognises that 'establishing a culture of proactive engagement with potential investors is imperative to the successful attraction of significant built and social infrastructure within the City'.

It is important to recognise that 'investment attraction' can take a number of forms including;

- International or Australian owned firms physically relocating or expanding into Western Australia
- Merger, takeover or acquisition of an existing local firm by a corporate outside of the area
- Collaboration or partnership with an existing local firm or research centre to access intellectual property (IP), intellectual capital (staff/researchers etc) or existing customer base or supplier network

Creating a ‘value proposition’ or business case based on the City’s key areas of comparative advantage including specialist knowledge and collateral as a result of research and development and existing business clusters will present the greatest opportunity to attract further investment, whichever form that may take.

In terms of the international perspective, inward foreign direct investment (FDI) flows into Australia have more than doubled over the five years to 2012 to US\$231 billion (source: United Nations Conference on Trade and Development).

Australia’s FDI has outpaced global growth of 28% over the same period with significant levels of investment from countries such as the USA and the UK. These remain important sources of investment flow, although emerging economies, including those in Greater Asia and South America present significant opportunities in the future.

Building on existing relationships, for example with China, will help enhance further investment into Western Australia across a number of business sectors (in addition to the resources sector).

Australia ranked sixth in AT Kearney’s 2013 Foreign Direct Investment (FDI) Confidence Index and has moved up steadily in the index from 11th place in 2007 as resource development has driven economic growth for the Country and in particular, Western Australia. The Index ranks countries on how political, economic and regulatory changes will affect FDI based on the views of more than 300 executives in 28 countries.

The Australian Trade Commission (Austrade) is proactively promoting opportunities in key sectors of clean energy, innovation, major infrastructure, tourism infrastructure, agricultural science, food technology and processing, resources technology, services and processing and digital ICT.

Various studies have highlighted broader benefits of Foreign Direct Investment including wider productivity benefits and knowledge transfer to local businesses in the supply chain.

In terms of strategic marketing and brand development, leveraging the national and international profile of the Perth and State branding is important to consider in any strategic marketing activity to attract overseas investment.

It is also important for the City of Joondalup, as a place, to develop and enhance its own ‘brand’ as a destination for business and investment. The opportunity exists for the City to develop a dedicated ‘business brand or identity’ to be used on investment attraction related campaigns.

The concept of ‘place branding’ is important to consider as there are numerous examples internationally of strong, successful place brands that add value to investment attraction activities. There is also scope for a more regional approach and consideration of developing a stronger identity for the North West Metropolitan Perth sub region.

Finally, ‘reinvestment’ by existing firms is also important to identify, track and support as this level of investment is typically very significant. The positive relationship built up between the local government and the business community is important in strengthening further confidence in the area for ongoing business investment as well as having a clear long term

strategic planning framework (such as Joondalup 2022) and a 'business friendly' attitude towards development. A more effective approach to business engagement and communication is outlined later in the strategy.

In summary there are potentially significant commercial, employment and community benefits as a result of attracting investment and fostering business activity around key innovative clusters of economic activity.

There is both opportunity and capacity for the City of Joondalup to identify strategic land for high value added commercial activity and the provision of strategic employment. For example an 'innovation or technology precinct' within the City would provide a physical focal point for the development and promotion of key business clusters in the future. In addition it would also position the City as the key primary hub for knowledge based activity within the northern region of Perth and a primary destination for strategic investment in future.

This concept of an innovation or technology precinct is referenced within the section City and Regional Infrastructure and correlates strongly with the Digital City theme.

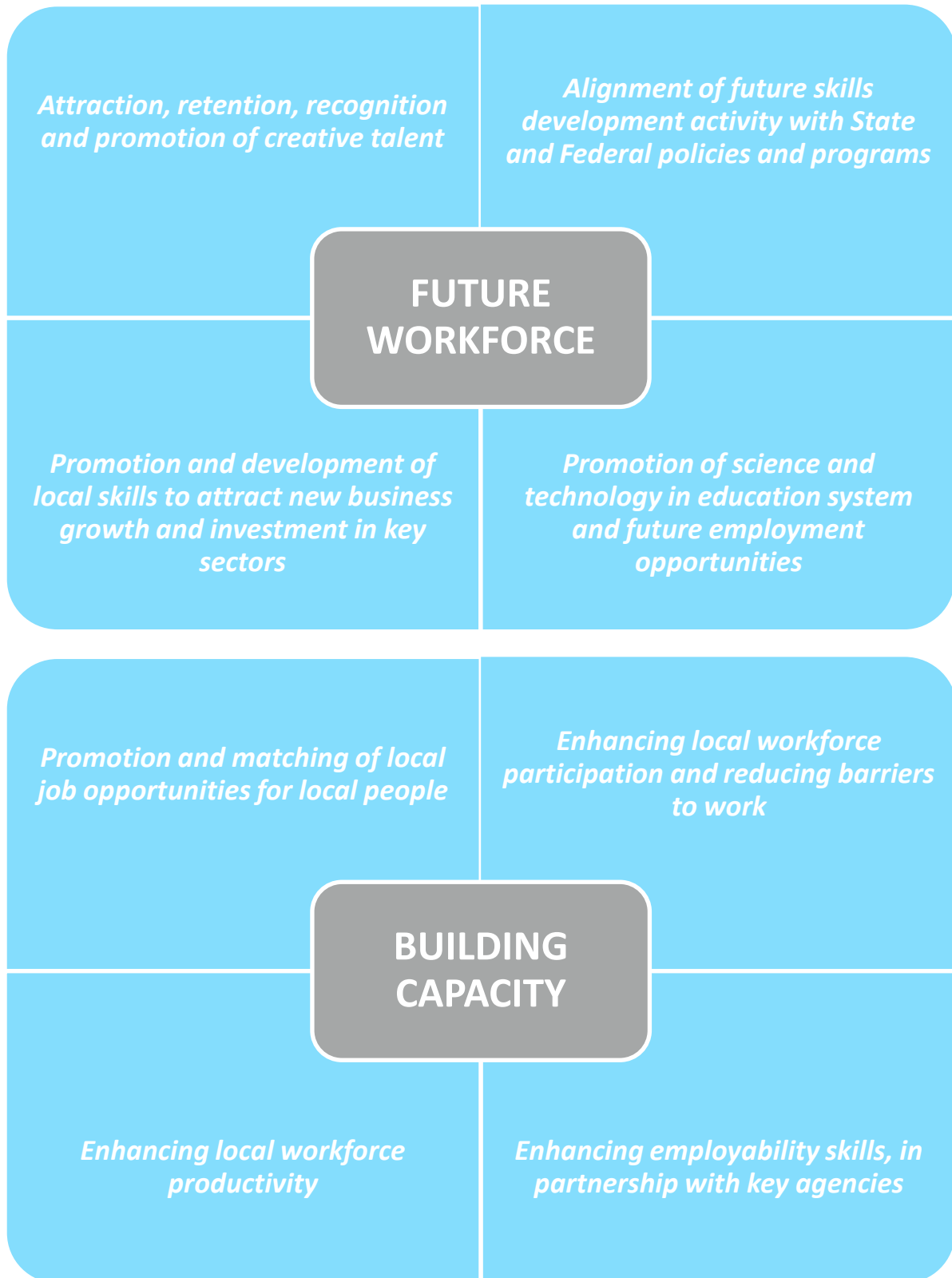
Finally, the City of Joondalup has significant capacity to grow its medium to large employer base with opportunity for attracting larger scale corporate and Government organisations to the City and this strategy encourages a stronger focus on this activity.

Large and medium sized registered businesses within the City number less than 450 (ABS 2012) yet the City has greater capacity to grow this sector further. There is an opportunity to develop a stronger business case to attract new corporate and Government investment, particularly in terms of the offer for affordable commercial land and property, locally based skilled labour and population growth projections.

The decentralisation of corporate and Government activity from the central Perth metropolitan region offers new investment attraction opportunities for the City of Joondalup in the medium to longer term.

EMPLOYMENT AND SKILLS DEVELOPMENT

GOAL: To encourage, attract and retain a creative, talented and skilled workforce, enhancing productivity and participation, to meet the needs of current and future business growth opportunities



Introduction

'Human Capital' is as one of the key components of a local economy and understanding the dynamics of the local labour market is vital, in particular the trends in relation to educational attainment, local skills and educational provision as well as trends in industry skills needs, current and future. More importantly the matching of local jobs to local skills and employment capacity is highly important in sustaining a high performing, resilient local economy.

DEFINITIONS

Human Capital – the stock of knowledge, expertise and abilities of a population

Local Labour Force – refers to the people who reside in an area and are available to work. They may currently be either employed or unemployed. They may work either in the local area or elsewhere

Local Workforce – refers to the number of people who work in an area, regardless of where they live i.e. an indicator of the number of local jobs

Employment Self-sufficiency -This is the total number of jobs within the City of Joondalup divided by the total number of employed residents of the City of Joondalup, regardless of where those residents work. (Western Australia government method)

Employment Self Containment – is defined by the number of residents working within the City of Joondalup divided by the total number of employed residents of the City of Joondalup, regardless of where those residents work.

The City of Joondalup has an estimated population of 164,737 (June 2012 ABS) with 83,033 total employed residents. Of these employed residents, only 22,191 (26.7%) actually work in the City with a significant proportion therefore leaving each day for employment elsewhere. This measurement of local residents working within the Local Government Area is typically referred to as 'self containment' and is an important measure of how closely local jobs match the local available labour force.

Self Sufficiency is another important measure and is a measure of local jobs to the local labour market and expressed as a percentage. The employment self sufficiency for the North West Metropolitan Region is the lowest of all of the metropolitan sub regions, currently at 45% (2011 census) with a high proportion of the resident labour force exported to the central sub-region primarily on a daily basis.

The State Government Directions 2031 has a target figure of 60% Employment Self Sufficiency for the North West Metropolitan Region. The figure for the City of Joondalup is above the regional average at 46.4% (2011 census).

Both self containment and self sufficiency give an indication of how sustainable an area is in terms of availability of local jobs for local people. They can also provide an indication of the social and environmental consequences with a high level of out commuting of workers impacting on transport infrastructure and public transport services as well as on personal family and community life. There are a whole range of negative externalities as a result

including traffic congestion, pollution, lost productivity, financial cost, stress and other negative social impacts.

Although these indicators are a useful guide, they only tell part of the story. The creation of any new jobs in an area is obviously important, however, creating jobs to meet local requirements and matching skills provision is critical. The 'quality' of jobs is a key factor particularly for the City of Joondalup where in order to fully mature as a Primary Centre servicing the North West Metropolitan Perth Region, it requires a dedicated approach to enhance the level of higher value added economic activity and greater levels of strategic level employment.

It is commonly reported that the three supply-side contributors to economic growth are;

- Population – the number of people of working age
- Participation – the share of those of working age (who are willing to work)
- Productivity – the value generated by an hour's work

This strategy seeks to identify areas that can be influenced, in particular those actions related to enhancing participation and productivity within the local workforce. There are however a number of national and global changes to be considered and highlighted below.

Demographic Gap

Australia is faced with a '**demographic gap**' over the next decade with the pace of retirement rising from baby boomers and the number of students leaving education projected to level off until at least the early 2020's according to forecasts.

The period 2012-17 is projected to see fewer than 125 people exiting education for every 100 people retiring – the highest ratio of job market retirements to new entries in Australia's history [Deloitte Access Economics estimates 2011].

"Businesses should seek the opportunity to capture quality talent early, and to shape the learning and harness the innovative thinking of 'Generation Next' in order to ensure future employees have the skills to meet their business needs" - Deloitte report 'Where is your next worker' (November 2011)

Encouraging a closer relationship and alignment between industry and education and training institutions within local communities will become increasingly more important and this section of the strategy introduces actions to ensure that future opportunities are captured more effectively to help grow a more sustainable workforce.

Labour Shortages

In recent years, labour shortages has emerged as a key issue facing businesses, particularly in Western Australia, and is likely to continue to be an issue in key growth sectors in the immediate future.

Labour shortages can have a substantial impact on the productivity of a business with key factors such as wage pressures, increased staff turnover and job vacancies all affecting productivity.

Addressing labour shortages is a challenge in the short term, however more medium to long term strategies can be put in place to help address this issue – these can include activity to increase the participation rates and also to attract skills and talent from overseas.

Participation

A range of strategies and incentives can be implemented by Government and employers to improve the participation rates of people from underrepresented and diversity groups within a local community.

Although participation rates are already relatively high in the City of Joondalup, supporting and promoting employment opportunities to people with disabilities and mature age workers, for example, can help raise participation rates further and provide businesses with a source of untapped potential at the local level.

Equally it is important that businesses are provided with the relevant information and advice on how to introduce *flexible* work options to encourage greater participation of people from diversity groups in the workplace.

Other activity to increase participation rates could include promoting greater employment opportunities and minimising barriers to employment for other underrepresented groups which include women and Indigenous Australians.

“Estimates show that Australia could increase its GDP by 13%, or \$180 billion, if it closed the gap between male and female participation rates” [Goldman Sachs Economic Research August 2011]

Skilled Migration

As with many Cities within Australia, Joondalup has a community that places a high value on skilled migration. Approximately 38% of the population of the City was born outside Australia with a particularly high proportion of residents from the UK and a number from countries such as South Africa and New Zealand (2011 Census).

Encouraging skilled migration is an important strategy for Western Australia overall to grow the size of the labour force and has been the largest source of population growth in recent years. It does however face increasing competition from other economies seeking skilled migrants.

It can also have positive benefits in terms of contributing to productivity growth over time, facilitating the transfer of knowledge and innovation from overseas and raising the overall education level of the workforce.

The number of highly educated international migrants around the world is expected to more than triple, from 29.5 million workers in the 1990s to almost 99 million in the next decade (2020-2029) [source: IBM Smarter Cities for Smarter Growth report].

Highly skilled workers are increasingly mobile and data indicates that these workers are frequently electing to follow specific jobs and make their decision on location based on complex criteria (which includes financial returns as well as quality of life).

Fly-In Fly-Out Workers

The City of Joondalup has a significant number of resident workers who frequently work in remote locations within the State, primarily within those regional mining areas in the north and central parts of the State. It is assumed that the main proportion of these workers are directly employed within the resources sector.

An analysis of the employment statistics from the 2011 census indicates around 1700 people working at locations elsewhere within the State, possibly FIFO workers, representing almost 2% of the local working population.

Education and Training

Education and training has an important role to play in encouraging a more productive workforce and enhancing economic growth.

The Productivity Commission, through recent studies, have emphasised that increasing levels of education are likely to lead to increases in individuals' labour productivity and earning potential.

"Governments and the business community have an important role to invest in a robust and efficient education and training system that will improve educational attainment and deliver productivity improvements over the longer term" [CCI WA 2012 Paper - Boosting Australia's Productivity]

The City of Joondalup has one of the highest concentrations of education and learning activity within the State and promoting these institutions, individually and collectively, and encouraging closer links with industry and Government is an important focus for this economic development strategy.

The number of people within the City of Joondalup available local labour force without a qualification has decreased by 9.8% between 2006 and 2011. This is an encouraging sign and one that highlights the positive impact of our local educational and training institutions.

However, the number of unqualified people (regardless of residential location status) within the City's workforce has risen over this same period by 12%. This indicates that local employers are employing more people without qualifications and qualified residents are seeking employment elsewhere.

Employability Skills

Employability Skills are the non-technical skills and knowledge necessary for effective participation in the workforce. They can include skills such as communication, self-management, planning and organising, problem solving and teamwork.

They are also sometimes referred to as generic skills, capabilities, enabling skills or key competencies. A greater understanding of local employability skills is important to identify any potential barriers to employment. The Department of Education and Workforce Training has an Employability Skills Framework www.deewr.gov.au/employability-skills and requires consideration in relation to local and regional activity.

Ageing Working Population

The City of Joondalup has a higher proportion of younger people (15-24 years) within the local labour force than the Perth metropolitan average which is positive. However a key consideration for Joondalup is its ageing population and in particular the age groups of 45-54 and 55-64 where locally there is a higher proportion of workers than the Perth metropolitan average.

Australia has several reasons to encourage mature-age workers to remain in productive employment (for as long as they wish to). Mature age workers are typically the most reliable and most experienced but when they leave a business, their industry knowledge, market experience and technical expertise typically leaves with them.

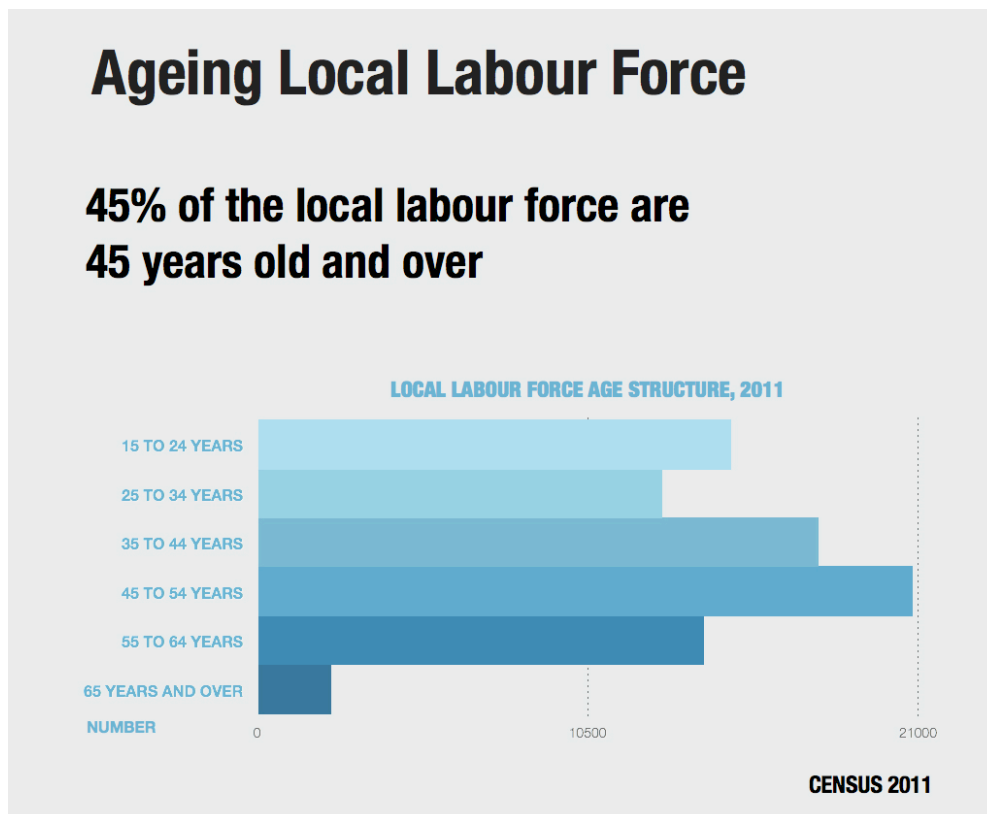
According to research and various reports, the 55-70 age population group is a major untapped source of productive capacity. Deloitte Access Economics estimates that there will be over 5 million Australians in this age bracket in 2030. Based on current participation rates for those over 55, only 1.73 million people would still be in the workforce in that year.

The Joondalup business survey undertaken by the ECU Small and Medium Enterprise Research Centre in 2012 also highlighted a high average age for business owners and this has implications for the succession planning and continuity for the local business community.

This strategy recognises this issue and identifies areas of intervention to minimise negative impacts and maximise the positive benefits.

Ageing Local Labour Force

45% of the local labour force are 45 years old and over



Summary

Understanding the future skills requirements of our key business sectors and matching with this evolving, local labour force is challenging. Ensuring that the local labour force is productive, resilient to change and fully engaged with the opportunities that arise within the local business community is the ultimate aim.

A joined up approach engaging local schools and educational institutions such as ECU, West Coast Institute and training organisations such as NECA, Automotive Institute of Technology and the WA Police Academy is fundamental to achieving this aim.

A continued shift to a more knowledge based, digital economy also has significant implications and preparing our future workforce for this is critical. Promoting Science, Technology and Maths in schools as well as enhancing digital literacy skills across all sections of society is important to ensure that the community is engaged with the various social, economic and educational opportunities that flow from this activity.

National reports* indicate that women occupy less than 20% of positions in the majority of ICT occupations which is well below the percentage of women employed in all occupations which is just over 45%. A concerted effort is required to raise the profile of this important sector to women and in particular targeting female students in schools and tertiary institutions early on. * **Source: Australian Workforce and Productivity Agency – ICT Workforce Study July 2013**

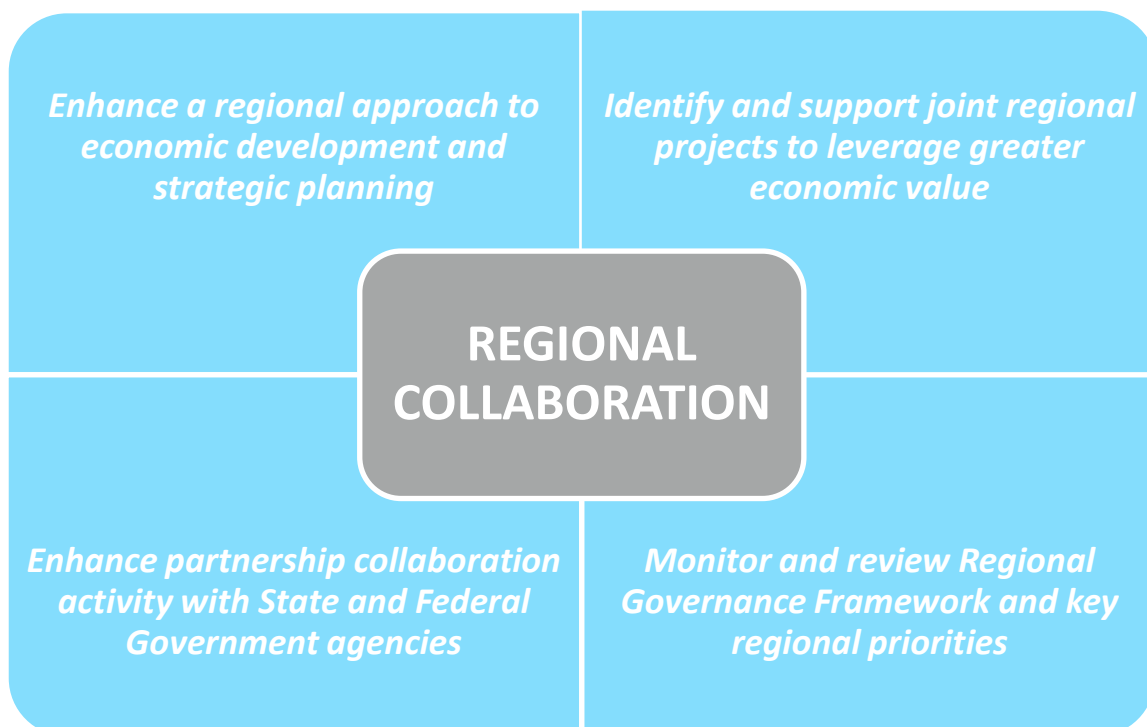
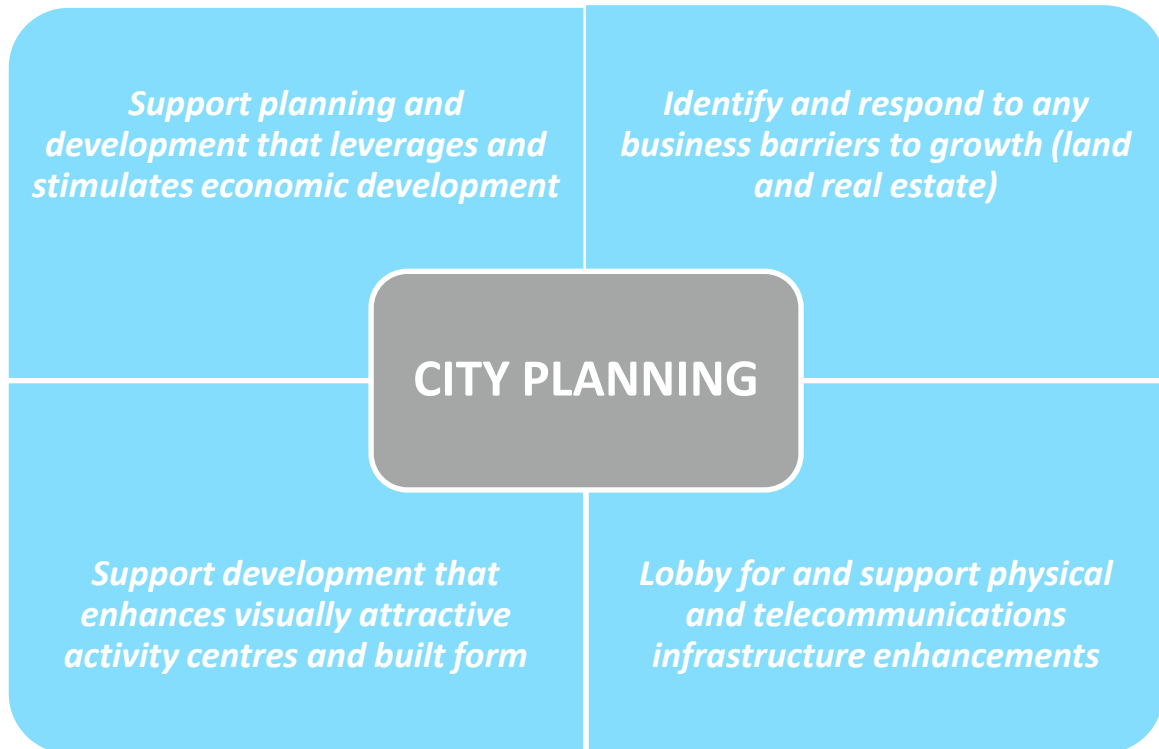
DRAFT

Quality of life is increasingly important – a liveable community with a high quality of life has a greater opportunity to attract mobile knowledge workers which will continue to increase mobility in the future. The City of Joondalup has an opportunity to leverage its' environmental and community assets to attract more knowledge workers in future as well as retaining existing local talent.

The vibrancy of the Joondalup **CBD City Centre** is particularly important and in order to attract the workers a concerted effort to attract quality restaurants, cafes and leisure activities in public open spaces and encouraging a more vibrant evening economy is a key factor and is addressed later within the Strategy under the sections City and Regional Infrastructure and Destination City.

GEOGRAPHIC PRIORITY: CITY AND REGIONAL INFRASTRUCTURE

GOAL: To encourage and promote vibrant activity centres, coordinate regional economic development & infrastructure planning and enhance State and Federal Government engagement and support



The quality of the physical urban environment or built environment is a critical factor in developing a local and regional economy as it influences liveability, quality of life, connectivity, useability and accessibility and has a direct impact on business and investment decisions and future economic growth.

For the City of Joondalup to meet its employment self-sufficiency target it must attract economic activity that is beyond local population driven and have a greater focus on regional and strategic employment driven activity. Effective spatial planning in key centres will ensure greater diversity and density of economic activity and thus provide wider agglomeration benefits as a result of the clustering effects of co-location and mixed use activity.

The benefits of economic agglomeration result from the physical integration of residential and commercial uses which instil greater vitality and activity in urban centres. Some flexibility in the planning controls in key centres is important, particularly for the ongoing sustainable growth and vibrancy of the Joondalup City Centre which provides the only environment within the Local Government Area that can develop to the scale to attract the significant and diverse economic activity that is required.

Joondalup has the capacity to develop into a primary level activity centre with the further development of floor space and activation of City Centre commercial and mixed development sites on a larger scale within the short to medium term. This will further enhance economic activity and vibrancy as it reaches a 'critical mass'.

The encouragement of 'ancillary activity' in relation to major commercial office developments is also important and includes activity such as convenience retail, cafes and restaurants. This is important for both worker amenity during the working week but also presents some additional opportunities to generate economic activity during weekends and evenings and enhancing vibrancy and liveability within the City Centre.

A longer term focus on the development of major strategic projects including Ocean Reef Marina and the Joondalup Performing Arts and Cultural Facility will also enhance Joondalup as a major destination location and provide greater recognition of the City as meeting the requirements of a Primary Centre as defined by State Government.

A robust, flexible planning framework is essential in facilitating economic growth. Activity Centre Structure Plans should enable a strategic, sustainable and flexible approach to commercial development and, in the longer term, allow for potential transition in use of space, as the need arises.

Joondalup 2022 – Key Priorities

The City of Joondalup Strategic Community Plan, Joondalup 2022, provides a strategic perspective on the physical *urban environment* and involves the following areas of focus;

Quality open spaces – to have urban and green spaces which are attractive, well-utilised and enrich the lives of the community

Integrated spaces – to have land use and transport planning that provides convenient and efficient movement across the City

Quality built outcomes – for the City’s commercial and residential areas to be filled with quality buildings and appealing streetscapes

City Centre development – to have quality and diverse landmark buildings within the Joondalup City Centre that enhance the vitality and vibrancy of the urban space

Joondalup 2022 also provides a strategic perspective on *economic prosperity, vibrancy and growth* and involves the following areas of focus which all relate in some way to physical development and infrastructure enhancement at a City and Regional level;

Primary Centre status – for the Joondalup City Centre to be the first Strategic Metropolitan Centre in Western Australia to achieve Primary Centre status

Activity Centre development – to have revitalised Activity Centres that are multi-purpose and provide for housing diversity and enhanced liveability

Regional collaboration – to be immersed within a region that is complementary and supportive of broader strategic outcomes

Destination City – to become a ‘Destination City’ where unique tourism opportunities and activities provide drawcards for visitors and high amenity for residents

Business capacity – for the City’s business community to have the technology and communication capability necessary to thrive within a competitive environment

As a result of Joondalup 2022, *priorities for the City include;*

District Planning Scheme No.3 – The implementation of the new planning framework will increase flexibility to achieve built outcomes that meet the strategic objectives of the City and the future needs of its community

Integrated transport planning – Developing a plan that identifies gaps in the current transport network will be necessary as a basis for successful funding and resource requests in the future **City Centre commercial office development** – In order to stimulate investment within the Joondalup City Centre and set a new standard in iconic building design, the City will need to demonstrate leadership in facilitating the construction of a unique commercial office development in the short term

Joondalup Performing Arts and Cultural Facility – The construction of a Performing Arts and Cultural Facility within the Joondalup City Centre is critical to achieving the City’s aspirations of establishing a thriving cultural scene within the City. It will also aid in encouraging greater activity within the City Centre to improve economic growth and investment

Activity investment – establishing a culture of pro-active engagement with potential investors is imperative to the successful attraction of significant built and social infrastructure within the City

Regional Governance Framework – finalising and implementing a Regional Governance Framework, in partnership with the City of Wanneroo and State Government, will provide a forum from which to progress transformational regional projects. It will also strengthen the City's position to lobby for increased funding and support for large-scale infrastructure projects, due to their demonstrated regional implications

Communication technology infrastructure – if the City is to effectively support business growth, investment attraction and employment self-sufficiency targets, advanced communication technology infrastructure will become a necessary resource in the future

Ocean Reef Marina – developing the Ocean Reef Marina site will be an essential catalyst for regional tourism development and the provision of diverse housing and accommodation options across the City in the future

The North West Metropolitan Perth Region comprises the local government areas of the City of Wanneroo and City of Joondalup. This sub-region has a high population base, and is projected to grow rapidly posing challenges to meet various strategic planning goals particularly with respect to Employment Self-Sufficiency (ESS), as set by Directions 2031 and Beyond.

Joondalup has been identified in Directions 2031 and Beyond as a Strategic Metropolitan Centre. A significant amount of investment by State and local government and the private sector has been directed to the City of Joondalup in recent times, and this is set to continue into the future. [source: Economic and Employment Lands Strategy]

Aspirational Outcome: "The City's built environment is planned for enduring relevance through quality, modern design that is creative, flexible and diverse. Design of its urban landscapes promotes connectivity, useability and accessibility; contributing to the highest standards of liveability"

Planning Policy Activity Centres for Perth and Peel

The Statement of Planning Policy Activity Centres for Perth and Peel (SPP 4.2) was released in conjunction with Directions 2031 and Beyond in 2010 by the Western Australian Planning Commission. This represents a strategic direction for the Perth Metropolitan Area which aims to realise the benefits of a more consolidated city, which include;

- A reduced overall need for travel;
- Support for the use of public transport, cycling and walking for access to services, facilities and employment; and
- A more energy efficient urban form

Draft Local Commercial Strategy

The purpose of the draft Local Commercial Strategy is to provide guidance for decision making in regard to commercial activity with respect to future rezoning applications, development applications, centre plans and amendments to existing structure plans.

The draft strategy outlines recommendations that would be implemented through the new Local Planning Scheme, policy measures, or other appropriate mechanisms.

Draft Local Housing Strategy

The purpose of the draft Local Housing Strategy is to provide a firm rationale for determining future housing needs within the City of Joondalup. The draft Local Housing Strategy will provide a context for the preparation of the new Local Planning Scheme in respect of the residential development and density provisions to be contained in the new scheme and associated policies.

This draft strategy identifies 10 Housing Opportunity Areas in the City as being suitable for higher residential densities, where blocks could be subdivided and developed to accommodate a greater diversity of housing. These sites, plus many others, will contribute significantly to the City's population growth over the forecast period.

Regional Governance Activity in Metropolitan Perth

The Western Australian Planning Commission Spatial Framework for Perth and Peel '*Directions 2031 and Beyond*' (Directions 2031) was released in August 2010. Planning at the sub-regional level forms the basis of future planning and policy development. The growth management strategies and structure plans for each sub-region will provide a clear direction regarding the planning, management and staging of urban growth for the entire Perth and Peel region.

Directions 2031 provides future orientated and publicly available long term strategic plans to manage population and economic growth and meet the national criteria for Capital City Strategic Planning Systems such as:

- Integrated across functions (land use, infrastructure and transport) and coordinated between all three levels of government;
- Clearly identifying priorities for future investment and policy efforts by governments;
- Providing for effective implementation arrangements and supporting mechanisms; and

- Supporting and facilitate economic growth, population growth and demographic change.

Directions 2031 enables the development of a growth management strategy and sub regional structure plan for the North West Metropolitan Region. This structure plan will respond to the Strategic Metropolitan Centre status of Joondalup and Yanchep and other activity centres in the region.

Since 2009 the Cities of Joondalup and Wanneroo have been jointly working together to progress regional economic development initiatives. In this regard both Councils endorsed a 'Regional Governance Framework for the North West Metropolitan Region' in 2010. The purpose of the Framework was to *"establish a regional governance body to coordinate and manage economic development and infrastructure planning in the North West Metropolitan Region"*.

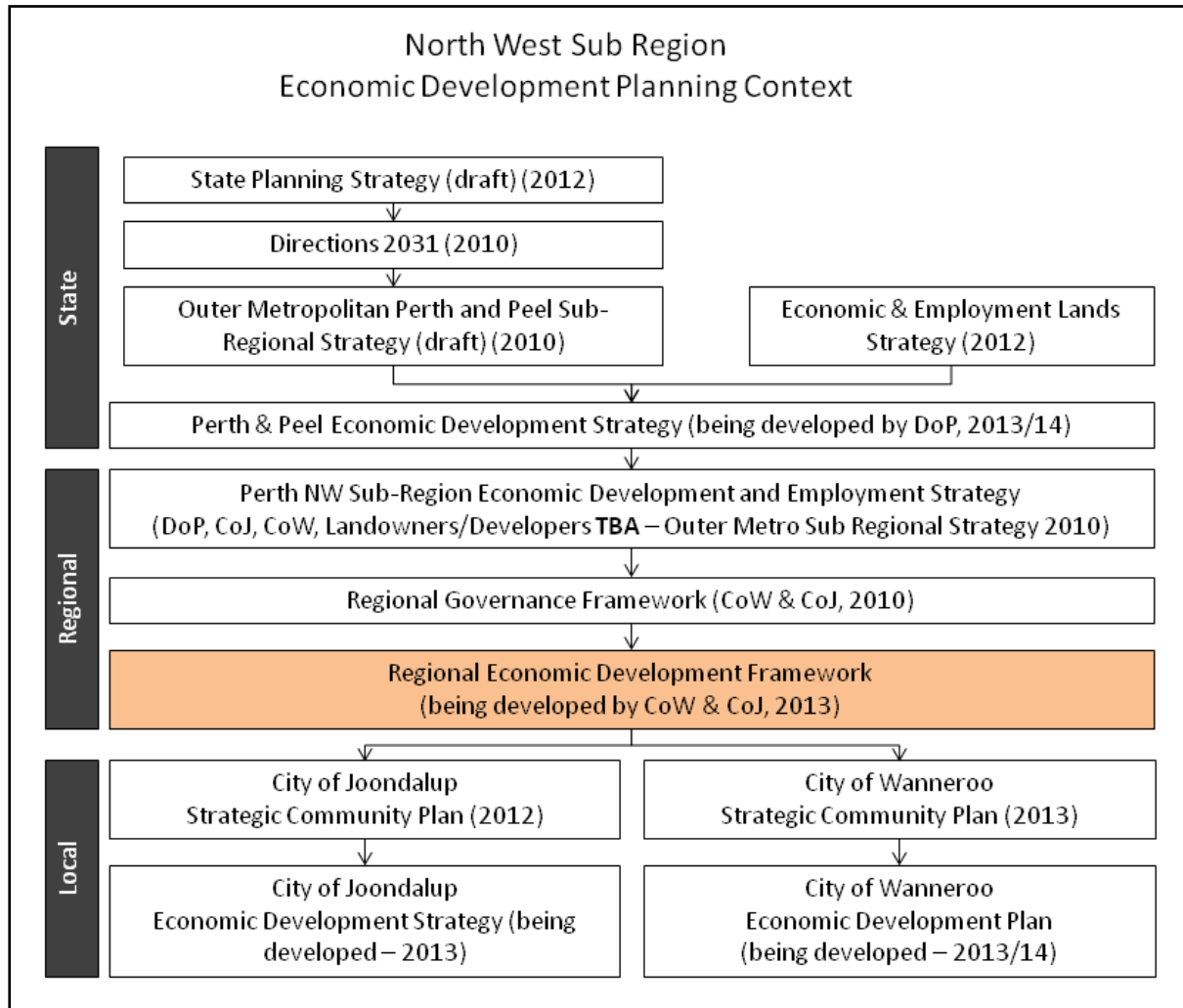
The current regional approach is confined to regular liaison between the Cities of Joondalup and Wanneroo and it is the City's view that a regional governance body would do much to enhance the strategic capacity of the Cities of Joondalup and Wanneroo and provide a mechanism for both Local Governments relating more efficiently and effectively to the Federal and State Governments.

As a minimum, this Economic Development Strategy proposes regular meetings (minimum twice yearly) between the City of Joondalup and the City of Wanneroo, involving Mayors, Chief Executive Officers and other senior representatives as required.

REGIONAL PLANNING AND DEVELOPMENT FRAMEWORK

A FRAMEWORK FOR REGIONAL PLANNING AND DEVELOPMENT

(NORTH WEST METROPOLITAN PERTH SUBREGION)



Regional Governance Framework – Strategic Intent

- An effective, transparent and co-ordinated implementation mechanism to strategically respond to the needs of the Corridor;
- A reporting mechanism to State and Federal Government;
- Engagement and commitment from key stakeholders;
- A high level of consensus of direction in infrastructure priorities;
- Mechanisms and planning strategies to generate timely key employment land supply;
- Integrated infrastructure planning to activate economic development in a timely manner;
- Clarification of roles for Federal, State, local government and agencies.

Regional Governance Framework - Deliverables

- To coordinate and manage economic development and infrastructure planning in the NW Corridor.
- To develop the North West Corridor Structure Plan.
- To develop a North West Corridor Transport Strategy.
- To develop and implement strategies to deliver employment and skills outcomes.
- To develop and implement investment attraction strategies and action plans.
- To identify and prioritise major projects required for a healthy NW Corridor economy.
- To lobby key stakeholders for commitment to major projects.
- To ensure that key projects are included in treasury forecasts.

Regional Economic Development Framework

At time of writing this Economic Development Strategy, a draft Regional Economic Development Framework was under development which aims to highlight and provide focus on some key potential areas of collaboration and joint partnership activity. This Framework directly aligns with the Cities' respective Strategic Community Plans and key State and Federal Government priorities.

This Draft Framework has been developed by the City of Joondalup and City of Wanneroo during 2013 and covers the following 10 key strategic areas of potential activity:

- Business Growth
- Regional Investment Attraction

- Regional Tourism
- Cluster Development
- Digital Futures and Innovation
- Infrastructure Improvements
- Low Carbon Economy
- Workforce and Skills Development
- Regional Data Observatory
- Lobbying and Advocacy

Transport Infrastructure

Effective and integrated transport planning is an important factor unpinning the sustainable economic growth of the State and Metropolitan Perth.

At the regional and local level, the Joondalup 2022 Strategic Community Plan highlights 'integrated transport planning' as a major priority for the City in achieving its Quality Urban Environment aspirations and an action is to develop a transport plan.

'Understanding the interaction and use of current transport modes is required to plan for future people movements. Developing a plan that identifies gaps in the current transport network will be necessary as a basis for successful funding and resource requests in the future' – Joondalup 2022

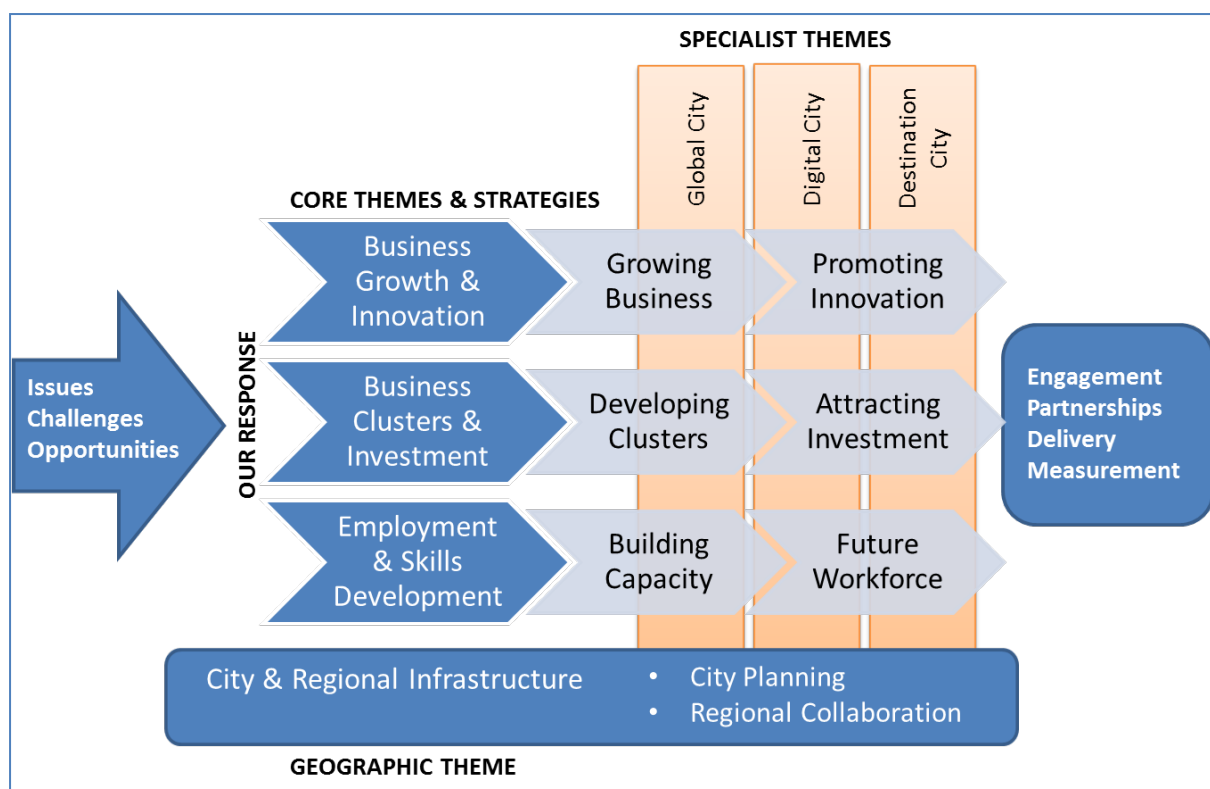
Regional level activity between the City of Joondalup, City of Wanneroo and State Government aims to progress transport infrastructure improvements which have an impact on the future economic growth of the North West Metropolitan Perth region. A key deliverable highlighted within the Regional Governance Framework is to develop a North West Corridor Transport Strategy.

SPECIALIST THEMES

Three specialist themes have been identified within this strategy which have a high priority and relate directly back to the Joondalup 2022 strategic community plan. These themes are 'cross cutting' i.e. they relate to all of the core themes covered earlier but present a specialist focus for each.

Therefore the core themes of Business Growth and Innovation, Business Clusters and Investment, Employment and Skills Development and City and Regional Infrastructure each have a specific dimension and project activity that relate to these specialist themes.

The three specialist themes are: Global City, Digital City and Destination City.



GLOBAL CITY

TO POSITION AND FOCUS THE CITY'S ECONOMIC ACTIVITY IN AN INTERNATIONAL CONTEXT

Fundamental shifts in the structure and influence of the global economy present many challenges but also many opportunities for Australia. The 'BRIC' economies (Brazil, Russia, India and China) in particular will generate new sources of competition and also potentially providing significant trade and investment opportunities for Western Australia.

There is an opportunity to rethink the positioning and global focus of Western Australia and Cities such as Joondalup. The location of the State and Joondalup in the same time zone as a significant and growing proportion ~~(almost a quarter)~~ of the world's population presents a very strong and compelling business case and an exciting opportunity to promote investment and trade flows as well as the attraction of highly skilled workers.

The following countries are located within the GMT+8 time zone shared with Western Australia:

China, Hong Kong, Malaysia, Mongolia, Philippines, Singapore, Taiwan, Brunei Darussalam and parts of Indonesia.

In addition there are parts of Russia either sharing or close to this time zone also presenting significant potential trade and investment opportunities.

Global City

The City of Joondalup is located within 15 minutes of Perth, Western Australia and is part of the GMT + 8 Time Zone

Also in GMT + 8 Time Zone;

- Brunei Darussalam
- China (includes Hong Kong)
- Indonesia
- Malaysia
- Mongolia
- Philippines
- Singapore
- Taiwan

GMT + 8

Mongolia

China

Taiwan

Hong Kong

Philippines

Brunei

Malaysia

Singapore

Indonesia

Perth

GMT + 8

The Asian Century

The 'Australia in the Asian Century' White Paper (2012) identified Asia as a growing global centre of innovation, investing in skills, infrastructure and science.

Due to its geographical position (distance and time zone) Western Australia has a competitive advantage over other States and countries to capitalise upon potential opportunities presented by the growth of the Asian economies.

There are also challenges however and Australia cannot assume it has an advantage over Asian economies in higher value-added activities. The White Paper identified actions that will help Australian industries capture the opportunities from growth in Asia. These include:

- Supporting the capabilities of our people
- Developing innovative firms with better connections to Asia
- Improving collaboration between business and the research sector
- Developing the financing of innovation, and
- Boosting the value of domestic and international engagement between firms and sectors

This is an important strategic global shift in focus on the Asian economies and one that needs to be considered across all areas of activity within this economic development strategy hence inclusion within this specialist theme 'Global City'.

Joondalup - Jinan Sister Cities Relationship

Since 2004 the City of Joondalup has maintained a formal sister cities relationship with the City of Jinan of Shandong Province of the People's Republic of China.

The City of Joondalup has in place a Joondalup-Jinan Relationship Plan 2006-2016.

Objectives of the Joondalup–Jinan Relationship Plan are to:

1. Provide overall strategic direction for the growth, development and management of the Joondalup-Jinan Sister City Relationship
2. Position the City of Joondalup as a facilitator for economic, socio-cultural and environmental exchanges between the two Cities
3. Ensure all interactions between the Cities maintain a civic purpose and involve the community to advance friendship and cross cultural awareness

The Sister City relationship with Jinan is expected to bring about economic, socio-cultural and environmental benefits between the two Cities. To realise these benefits the City's role will be to:

1. Encourage and facilitate economic, socio-cultural and environmental exchanges
2. Facilitate regular visits between the two Cities
3. Develop liaison networks and promote the relationship at the local, State and National level
4. Foster a sense of local pride which can lead to greater community participation
5. Ensure regular dissemination of information about the relationship to the community
6. Allocate sufficient resources to provide capability to the relationship

The key focus areas are:

1. *Relationship Management:*
The City of Joondalup will maintain leadership by ensuring the accountability, transparency and consistency of the Relationship. The City of Joondalup will promote the relationship locally, nationally and internationally with the people of Joondalup and Jinan
2. *Socio-cultural exchange:* The City of Joondalup will enhance mutual understanding, friendship and goodwill; maintain effective and efficient communication channels; and facilitate the sharing of traditions, customs, and culture between the two cities
3. *Environmental exchange:* The City of Joondalup will share knowledge with the City of Jinan in leading practice environmental management techniques and approaches
4. *Economic exchange:* The City of Joondalup will proactively facilitate and support a range of exchanges and business cooperation between the two cities within existing financial constraints of the City. Education, training and tourism exchange will be seen as an important part of economic development of the Relationship

There has been a positive and proactive relationship built up between the two cities, particularly in the area of socio-cultural exchange and educational related activity. Education establishments such as Woodvale Secondary College and West Coast Institute in particular have engaged in a range of activities with multiple benefits for both Cities.

This economic development strategy presents a number of focus areas which have a global dimension, in particular attracting investment, promoting trade links, developing clusters and promoting and attracting 'global talent'.

Through this activity, consideration will be given to explore any potential economic links with Jinan, via continued education/research activity and potential opportunities to connect with industry through, for example, the Jinan hi-tech business incubator and Qilu software park and Jinan Hi-Tech Industrial Development Zone.

Each of the core strategic themes of this strategy has a ‘global city’ dimension with examples including the following;

- Internationally focused investment attraction campaigns with propositions based around key niche clusters of business and research expertise (targeted by sector and global geographic regions)
- Support for locally based small and medium sized companies in developing trade links overseas and eCommerce activity focused on a global market place
- Development of partnership activity to attract international talent to the City – students, researchers, entrepreneurs etc.
- Physical development of the City in line with best practice design principles identified nationally and from overseas
- Recognition of the high number of overseas migrants living within the City of Joondalup and the potential positive impact of the Visiting Friends and Relatives tourist market (considering multiple language translations for tourism marketing)

DIGITAL CITY

TO SUPPORT THE APPLICATION OF NEW TECHNOLOGIES AND INNOVATION TO ENHANCE BUSINESS GROWTH

Australia has strong aspirations to be among the world's leading digital economies based on key indicators such as broadband penetration and usage rankings. The recent commitment to build the enabling infrastructure for the digital economy, including the National Broadband Network (NBN), will allow Australia to participate in and enjoy the benefits of the global digital economy.

Although approximately 92% of businesses in Australia surveyed by the ABS in late 2012 have internet access, only in the region of 45% have a web presence such as a website. For micro businesses (less than 5 employees), the figure is much lower at around 34%.

The potential for Western Australian business online is enormous. Part of the challenge is building the capacity of local SME's to ensure that they maximise the benefits of the internet and the future roll out of the National Broadband Network or other infrastructure improvements. Some recent indicative research carried out by the SME Research Centre at ECU and also Explor Consulting indicates that Joondalup based businesses have a relatively low level of online uptake e.g. use of social media and online marketing tools, and lack deep capability in building their own digital strategy.

There are currently in the region of 13,500 registered businesses within the City of Joondalup with the majority of these being micro enterprises employing less than 5 employees (or no employees). These companies would benefit greatly from an internet based presence (or an enhanced presence) and is probably critical to their future survival.

Also significant is the use of mobile technologies with a recent study by Ipsos OTX MediaCT, commissioned by Google, finding that 95% of people use their smartphones to search for local business or services information. Encouraging local businesses to at least have an effective mobile web presence to inform potential customers is essential in a City such as Joondalup which has a number of different business precincts and shopping centres and multiple business types.

The local Small and Medium Enterprise sector – particularly in retail and tourism – face challenges in getting online and building a strategy that is profitable for their enterprise. They also face threats from global online retail and 'collaborative consumption' trends in tourism.

With almost one in three City of Joondalup based jobs relating to the retail, hospitality and leisure related sectors, *almost twice the Perth average*, the implications, challenges and risks for the local economy are pertinent if we take the 'business as usual' approach. Promoting the benefits of the digital economy moving forward will enhance the productivity and competitiveness of businesses in these sectors and strengthen the local economy.

The City of Joondalup is committed to exploring and promoting the opportunities with the digital economy to benefit its local community. The new *Discover Joondalup* Wi-Fi precinct within the City Centre already demonstrates leadership in this area to encourage greater connection and activity between people and businesses within the City via mobile technologies.

“70% of Australia’s 509 industries will benefit from generalized productivity gains through high speed broadband, leading to the transformation of their business models” – IBM, A Snapshot of Australia’s Digital Future to 2050 (June 2012)

Joondalup: Digital City Strategy

The City of Joondalup and its stakeholders, institutions and citizens have been engaged in broad and deep consultation about life in the City through the City’s consultative processes. The participants’ resulting aspirations were documented in the Strategic Community Plan (Joondalup 2022). This plan and the use of digital technologies will enhance and accelerate the City’s pathway toward those aspirational outcomes.

The Joondalup: Digital City Strategy was developed during 2012-13 following extensive consultation with the local business community and key stakeholders from education, health, Government and the local community. This strategy has a direct alignment with the Joondalup 2022 Strategic Community Plan (refer to table 1).

The City of Joondalup was the first metropolitan Perth Local Government to develop a digital strategy. The City has an important leadership role in working with the Federal and State Governments and all of the significant local stakeholders to support advanced technology opportunities that foster a thriving environment for business, education and health as well as positioning the City as the primary centre of the region and an innovative, ‘Digital City’.

This leadership role includes making sure that the City has the infrastructure and the right training and skills to take advantage of technology, as well as a clear direction for the City’s involvement in the emerging digital economy sectors in order to assist businesses, residents and visitors to realise the full potential available through the new technologies.

The Digital Economy presents fantastic opportunities – how we engage with broadband technology and the digital economy to connect with each other, improve our health, access learning and educational opportunities, transact business and grow small businesses from ‘start-ups’ to global businesses.

About Digital Technologies

Joondalup is among a number of leading Australian communities gaining high-speed broadband connectivity of the NBN and focused on achieving economic, social and environmental benefits from the new infrastructure.

High-speed broadband is only one element in the array of digital technologies that are transforming the way we live and work. Over recent decades there have been dramatic developments in these digital technologies:

- High speed computing
- The miniaturisation of electronic equipment
- Mobile phones and mobile devices
- The Internet
- The digitisation of information and audio-visual materials.

- Online services to communicate with suppliers and partner businesses, some of who may be overseas.
- Place based services

Many people regularly use email, the web, social media (such as Facebook and Twitter), smartphones and tablet computers. Importantly, these technologies have become affordable, pervasive and inter-connected.

However, the changes are not only in the availability of the new technologies: the significant changes are in the way we are using the technologies to do things very differently. Individuals of all ages have changed the way they work, relax, communicate, learn and shop.

Many businesses have changed the way they interact with their customers, their suppliers and their staff. Governments have changed the way they deliver their services and engage with their citizens. Digital technologies are both disruptive and transformative.

The growth in 'connected devices' and 'things' is also highly significant and new infrastructure is allowing millions of devices to be linked via sensors presenting new opportunities to manage Cities from monitoring traffic flows to managing our environment.

Finally, with the massive explosion in cloud computing, data centres have been following a parallel trend, particularly smaller data centres which can include cloud and IT services, content hosting and co-location facilities. The NBN has provided a boost to the data centre market and this trend is set to continue and needs to be considered in the context of Joondalup's aspirations to become a leading digital city with the potential to attract a data centre to the region.

Broadband Infrastructure

While it is important for the City to invest attention, energy and resources into the smooth roll out and integrated approach to telecommunications infrastructure – the Joondalup: Digital City Strategy starts to focus the City on other necessary preconditions for success in the digital economy. By investing energy and resources on 'narrative' and 'digital strategy' the City will eventually drive better infrastructure outcomes as a result.

The benefits of digital technologies relate directly to the aspirational outcomes documented in Joondalup's Strategic Community Plan 2012–2022.

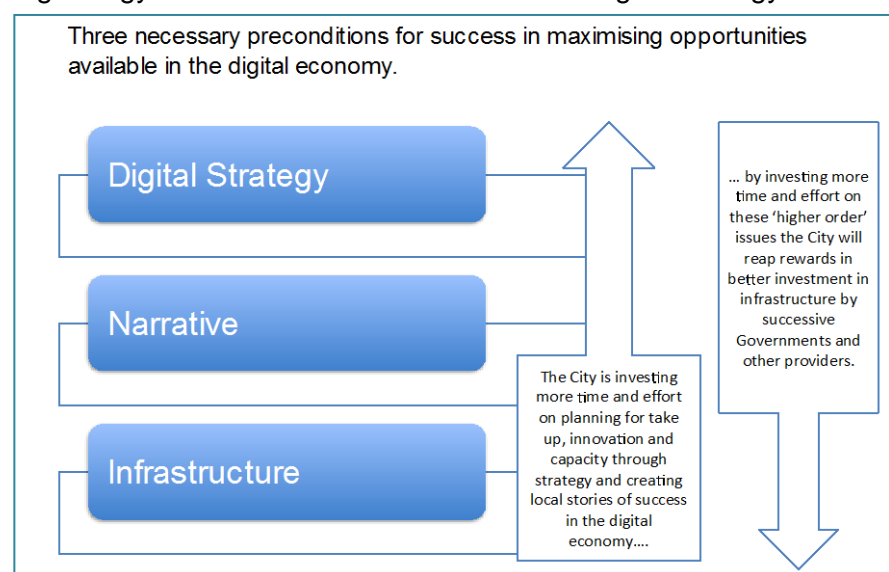


Table 1.

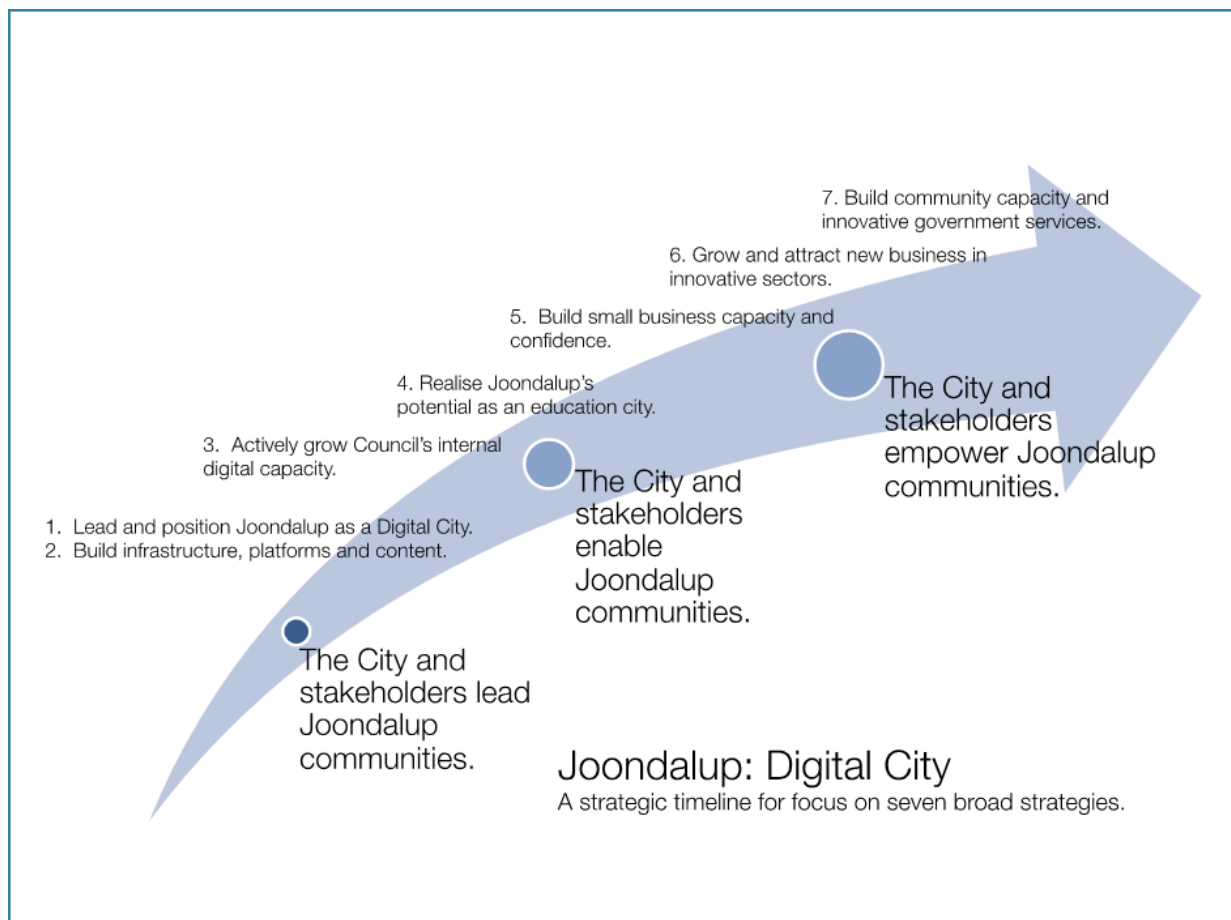
Aspirational outcome	Benefits of Digital Technologies
Governance and leadership	Digital tools can be used by governments to extend the way they engage with their citizens, to support collaborative decision making and to improve transparency through access to rich sets of government information.
Financial sustainability	Carefully designed online government services are integrated, efficient, timely and citizen centric.
Quality urban and natural environments	Technology enabled buildings and infrastructure can reduce environmental impacts through better management of energy consumption and through reductions in required travel.
Community wellbeing	<p>Confident and capable people living in households with good broadband connections and digital services can have better access to services and are able to be more flexible in how, when and where they work.</p> <p>Rich local information, delivered through interactive digital services, allows people to be more informed, supports greater community participation and helps to bring communities together.</p> <p>Access to education and training can be improved for students and learners of all ages through access to digital resources and online services in their homes, workplaces and other locations.</p> <p>Online services can provide better community access and sharing of information about local safety, security risks and critical incidents.</p> <p>Online services can help socially excluded people to connect to other people, to access support services and to develop basic skills.</p>
Economic prosperity, vibrancy and growth	<p>Digital tools and online services are critically important for larger businesses and are used to support customer interactions, supplier interactions and internal operations.</p> <p>For smaller businesses, digital tools and online services support customer interactions and other operations.</p> <p>The presence of successful local ICT businesses provides employment opportunities for professional creative people and provides important technical support for other businesses and organisations.</p>

DRAFT

The Joondalup: Digital City Strategy identifies seven broad strategies to help lead, enable and empower the Joondalup communities in advancing a digital future.

Joondalup: Digital City proposes seven distinct strategies to achieve the aspirational outcomes set out in the strategic community plan (Joondalup 2022):

Digital City Strategies
1. Lead and position Joondalup as a digital city
2. Build infrastructure, platforms and content
3. Actively grow the City's internal digital capacity
4. Realise Joondalup's potential as an education city
5. Build small business capacity and confidence
6. Grow and attract new business in innovative sectors
7. Build community capacity and innovative government services.

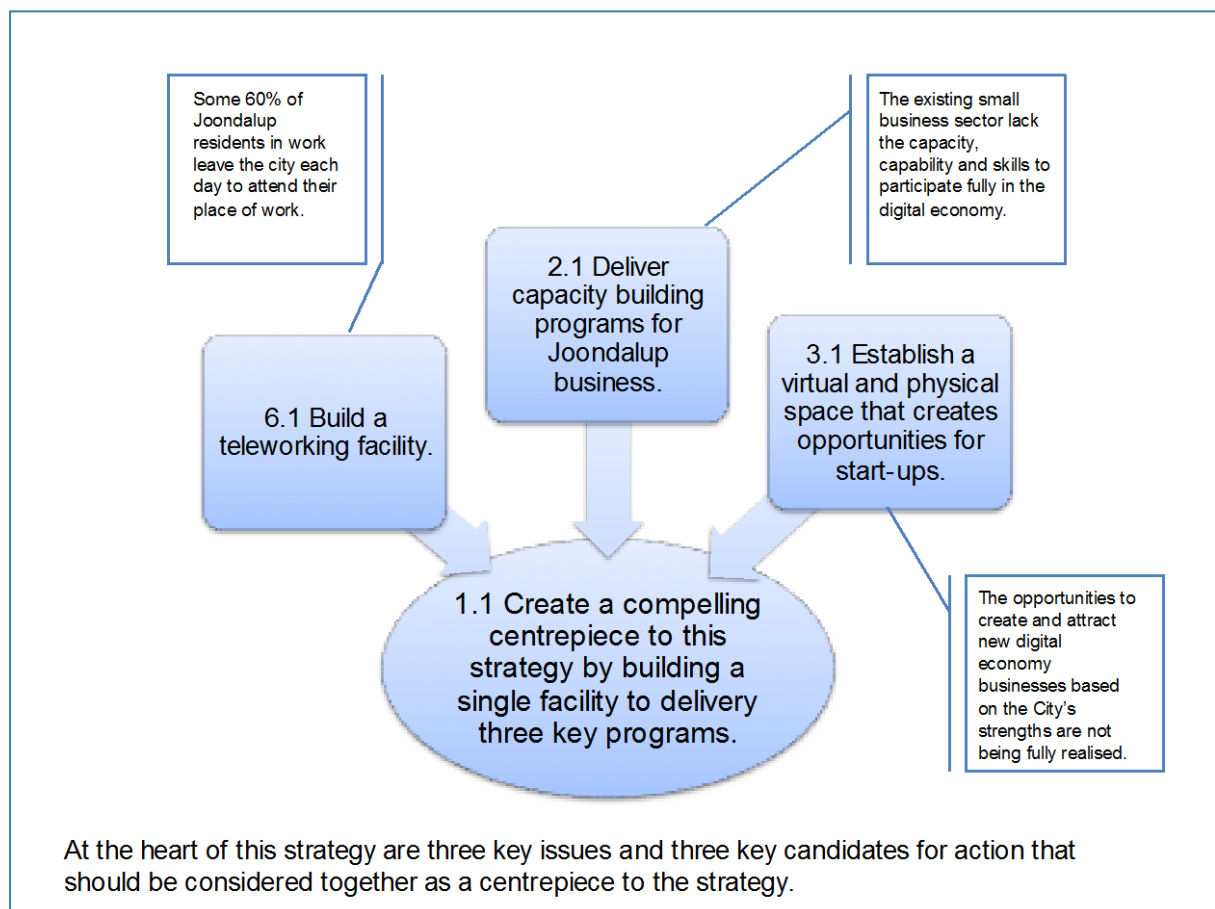


Digital City Hub

Three priority key actions

Joondalup: Digital City proposes three key priority actions contained in seven broad strategy groupings to address these three disparate issues:

1. Build a teleworking facility
2. Deliver capacity building programs for Joondalup business
3. Establish a virtual and physical space that creates opportunities for start-ups.



These three issues and associated candidates for action could be seen in isolation from each other. However at the heart of the digital strategy is the notion that they be considered together and the potential need for three physical spaces, three virtual spaces and three suites of program delivery be brought together under one roof: the Digital City Hub. This is a key proposal of the Digital City strategy.

This project and related activity have been embedded within the overall economic development strategy and included in sections relating to business growth and innovation and employment and skills development.

Teleworking

There is an extensive workforce in the North West Metropolitan Perth Region which commutes from within and outside of the geographic area. Faster broadband services will create more opportunities to work from home or from a location away from the traditional workplace in a more flexible and sustainable way.

In some of the higher end knowledge intensive and service sectors such as Scientific and Professional Services and Financial and Insurance Services, as much as 80% of the resident workers of the City of Joondalup commute out on a daily basis to work elsewhere.

- At this stage, only 6% of Australians telework, compared with 11% in the United States and 10% in Europe (Access Economics, 2010).
- Increasing the rate of teleworking can have benefits for the nation.

For employers and individuals;

- The estimated value of just a 10% increase in employees that telework, for 50% of the time, is between \$1.4 billion and \$1.9 billion a year (savings in carbon emissions, transport, infrastructure).
- Employers can benefit from savings in office space and equipment, and employ highly skilled people regardless of their location or mobility.
- For people who telework, the benefits in time and cost savings and increased flexibility are ongoing (Access Economics, 2010).

This economic development strategy places a priority on developing and promoting teleworking activity and encouraging greater work flexibility, which has a wide range of potential benefits in terms of productivity, cost, environmental as well as social and health benefits.

DESTINATION CITY

TO RECOGNISE THE VALUE AND OPPORTUNITY OF THE VISITOR ECONOMY AND TOURISM ACTIVITY

The specialist cross cutting theme 'Destination City' provides a specific focus on activities related to the visitor economy and tourism.

This approach takes a broader perspective recognising the 'visitor economy' to include not only the more 'traditional tourism activities' such as accommodation and hospitality, but also retail and arts and recreation services identifying that a wide range of people visit Joondalup for a variety of reasons. A more regional perspective also presents greater partnership opportunities and activity to raise the profile of the Sunset Coast as a destination region.

This overall approach also recognises the -

- arts and cultural activity (festivals, events and the Joondalup Performing Arts and Cultural Facility);
- major infrastructure developments (such as Ocean Reef Marina);
- growing retail and hospitality offer and;
- regional attractors including Yellagonga Regional Park and coastal destinations/features such as Hillarys Boat Harbour and the dual use pathway

- as major attractors for the City and drivers of the local economy. With approximately a third of local jobs currently related to the 'visitor economy', this is an important area of economic activity to sustain and promote.

Total Visitor Estimates – Western Australia (Year ending March 2013)

- 21.6 million visitors
- \$7.5 billion spend
- 56.3 million nights

Source: Tourism WA Quarterly Visitor Snapshot

The Strategic Economic Opportunity

The economic value of tourism to Western Australian is highly significant and a plan developed by Tourism WA, and released at the end of 2012, places a stronger emphasis on developing the economic opportunity of the national and international tourism market with the goal of doubling the value of tourism in WA – from \$6 billion in 2010 to \$12 billion in 2020.

The seven strategic pillars for growth identified within the State plan are;

1. Brand – with the Experience Extraordinary brand
2. Indigenous Tourism – supporting Aboriginal tourism experiences
3. Infrastructure – with a focus on hotels, aviation and workforce development
4. Asia – targeting high yield Asian markets
5. Business Travel – increasing overall yield
6. Regional Travel – increasing travel to regional WA
7. Events – supporting events for locals and visitors

Current tourism marketing activity

The Sunset Coast is one of the key areas within the 'Experience Perth Region' identified by Tourism WA and it is important that there is a consistent approach to marketing and leveraging this branding. The current Sunset Coast region extends from Cottesloe area in the south right up to Lancelin in the north so covers a particularly wide area (metropolitan and regional) and promotes a wide range of tourism assets and destinations.

Undertaking tourism activity and marketing at a Local Government Area only limits the opportunity to cross promote major tourism attractors and destinations and fails to identify the fact that visitors typically demand a range of activities and experiences often over a relatively wide geographical area.

Currently the City of Joondalup, along with the City of Wanneroo and City of Stirling work collaboratively with Experience Perth to develop an annual Holiday Planner utilising the branding '*Sunset Coast*'. The guide aims to capture a growing share of the WA tourism market with a targeted distribution of 60,000 copies throughout the State and selected visitor centres and travel agents across the country, with additional promotion online.

The Holiday Planner also forms a section within a more substantial marketing brochure, Holiday Guide to Perth, developed by Experience Perth, to profile the wider Perth Metropolitan and neighbouring areas. Approximately 120,000 copies are printed annually for national and international distribution also benefitting from additional promotion online.

EXPERIENCE PERTH TOURISM MARKET (Year end March 2013)

- 3.6 million visitors – 6% increase over 3 years
- 32.5 million nights
- 53% Intrastate visitors
- 27% Interstate visitors
- 20% International Visitors

Source: Tourism WA Quarterly Visitor Snapshot

WESTERN AUSTRALIA TRENDS AND OPPORTUNITIES

- Top 5 international source markets (by visitor estimates): United Kingdom, New Zealand, Singapore, Malaysia and USA
- Top 5 international source markets (by spend estimates): United Kingdom, New Zealand, Singapore, Malaysia and China
- International visitors to WA outperform the national average in terms of number of nights stay
- WA's international visiting friends and relatives (VFR) segment grew by 7.3% to March 2013 driven by increases in VFR visitors from New Zealand, China and Malaysia
- Visiting Friends and Relatives (VFR) – international and domestic – for Western Australia continues to outperform the country in terms of increases in visitor numbers, spend and nights stay
- Perth International Airport has seen a 10.9% growth in foreign national passengers in 12 months (to end March 2013) with the top 5 source countries being UK, New Zealand, Malaysia, Singapore and Indonesia

Source: Tourism WA Quarterly Visitor Snapshot

City of Joondalup Destination City – Strategic Focus Areas

To fully realise the economic opportunity and to maximise the benefit to local businesses, a more regional approach to promoting the tourism offer is given priority within this strategy. This includes, but is not limited to, the following areas of focus, which also align with the State priorities outlined previously;

Main Strategic Focus Areas	
	<ul style="list-style-type: none"> Identify and cross promote Key Regional Attractors - these may include popular areas such as Scarborough and Mullaloo beaches, Hillarys Boat Harbour and Yanchep National Park.
	<ul style="list-style-type: none"> Identify opportunities to support tourism related businesses, build capacity and enhance standards of service delivery
	<ul style="list-style-type: none"> Identify global tourism trends and develop targeted product and marketing collateral aimed at key groups including; <ul style="list-style-type: none"> Asia market – focus on higher yield markets such as China, Singapore and Indonesia Visiting Friends and Relatives (VFR) - targeting specific campaigns to the local community is vital to ensure that the local economic impact of this growing market is maximised. Cities such as Joondalup have approximately 38% of the population born overseas and the opportunity should not be underestimated. Cruise Ship market – leveraging day visits to Sunset Coast destinations from short term cruise ship visitors from Fremantle Day Visitors to the Joondalup City Centre including students, academics, business people, health professionals, Government workers and general population accessing local services, retail stores and cafes, restaurants etc
	<ul style="list-style-type: none"> Work with local businesses and key organisations to enhance the day and evening economy within the Joondalup City Centre and specific precincts such as Central Walk and key coastal locations such as Hillarys
	<ul style="list-style-type: none"> Identify and target Short to Medium Term Stay Visitors including students and academics, health professionals and business people as well as recent overseas migrants seeking to potentially establish a longer term base within the area
	<ul style="list-style-type: none"> Enhance the diversity of accommodation provision in the area and establishing new infrastructure
	<ul style="list-style-type: none"> Recognise the importance of both nature based tourism to the region, presenting

opportunities to promote; <ul style="list-style-type: none">○ Eco Tourism and nature based trails and activity○ Coastal paths and trails○ Marine related tourism (including AQWA and Marine Centre)
<ul style="list-style-type: none">• Recognise the importance of heritage and cultural based tourism presenting opportunities for theme based activity, particularly in relation to;<ul style="list-style-type: none">○ Indigenous Cultural Heritage○ Cultural Events Activity (music, performing arts, festivals etc)

Brand Development and Marketing

<ul style="list-style-type: none">• Work in partnership with other Local Government Areas, Experience Perth, Tourism WA and local industry to promote the Sunset Coast branding
<ul style="list-style-type: none">• Produce high quality marketing collateral including hard copy, digital and video based information and promote via key channels and target groups

Infrastructure and Investment

<ul style="list-style-type: none">• Support the development of major regional infrastructure that enhances the destination product and experience for the visitor including development of;<ul style="list-style-type: none">○ Ocean Reef Marina○ Joondalup Performing Arts and Cultural Facility○ Coastal kiosks and cafes
<ul style="list-style-type: none">• Attract investment and new development to enhance and diversify the 'destination experience' and vibrancy of the Joondalup City Centre including;<ul style="list-style-type: none">○ Joondalup City Centre restaurants/cafes - attraction of investment and new developments to enhance diversity and quality○ Joondalup City Centre retail and leisure offer - including the attraction of independent/boutique, high end and international retailers○ Enhance and diversify the accommodation provision
<ul style="list-style-type: none">• Investigate and evaluate potential for Sunset Coast Information Point(s) and/or 'Smart Signage' enabling easier access to digital based information and promotion of key destinations, attractions and businesses

- **Develop a targeted approach to attracting higher end and specialist/boutique retailers to the City of Joondalup in specific shopping centres and precincts, working with key agencies and Shopping Centre owners/managers**

Business Capacity Building

- Raise awareness of accreditation scheme(s) and programs to enhance local tourism businesses and promote quality visitor experiences (for e.g.T-QUAL, China Ready etc.)
- Enhance digital literacy and skills e.g. online and mobile marketing, ecommerce etc
- Promote hospitality and retail training programs – customer service, food and drink service, retail service etc.

Specialist Focus Areas – An Overview

Recognise the importance of and opportunities presented by theme based tourism activity, particularly in relation to;

- Nature / eco tourism,
- marine,
- heritage/cultural tourism,
- retail / leisure
- Cultural events

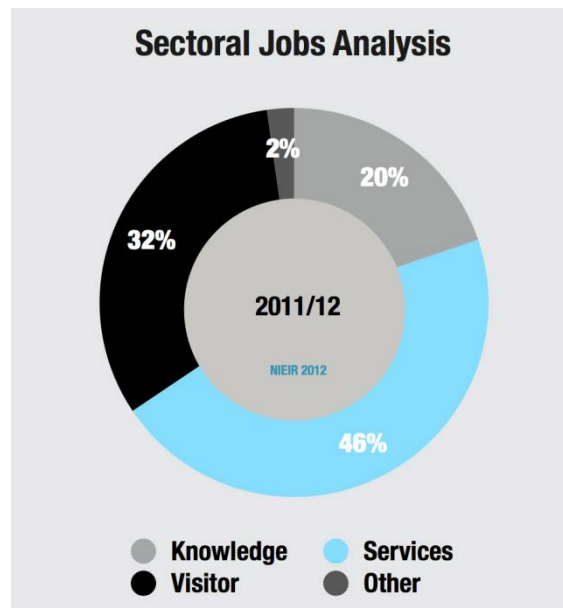
With a focus on;

- Leveraging existing activity
- Investigating Smart Signage (QR codes)
- Investigating new digital based product development e.g. use of augmented reality and 3D animation, app development
- Digital and mobile based marketing and video promotion
- Cross promotion of key attractions
- Online translation into key languages

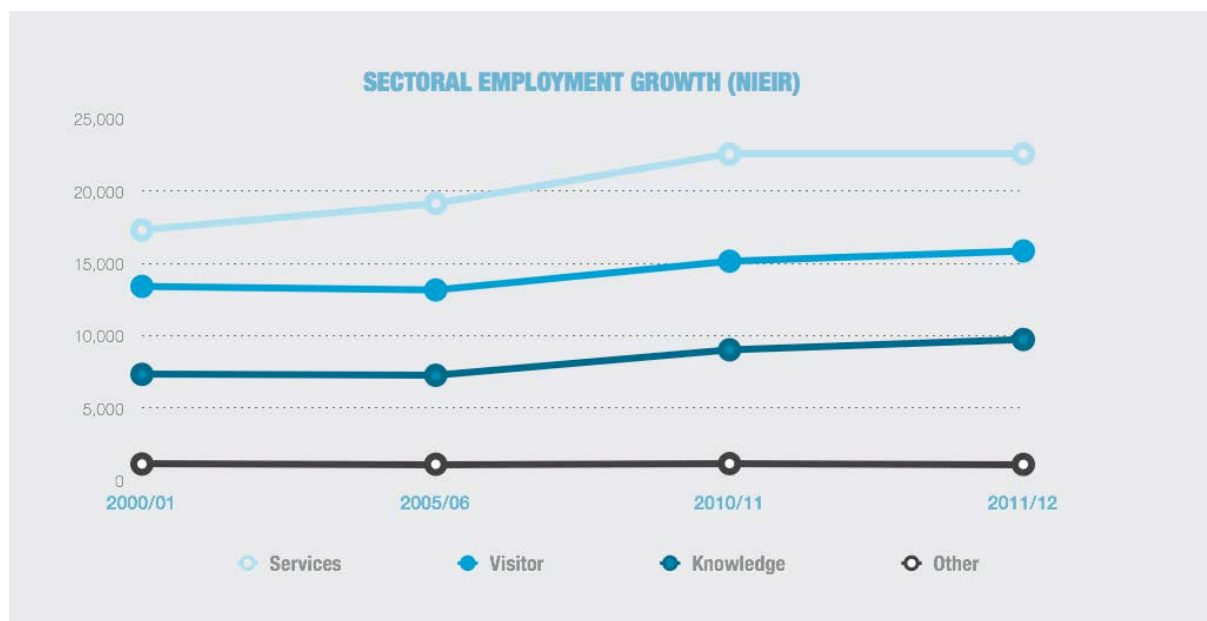
BUSINESS SECTORS

The City of Joondalup Economic Development Strategy presents not only a greater focus on creating strategic employment in knowledge based and service sectors, it also places a stronger emphasis on diversifying the local economy and therefore enhancing future resilience by reducing an over reliance on one or two industry sectors.

The framework behind this strategy provides a methodology of grouping sectors under broad headings for ease of presentation, reporting and measurement. The main groupings are denoted as Visitor Economy, Services Economy and Knowledge Economy.



For the purposes of this strategy the grouping referred to as 'Other' includes local employment in sectors such as agriculture and manufacturing.



VISITOR ECONOMY

The Visitor Economy represents economic activity that relates to attracting and servicing visitors in the City either on a regular basis e.g. daily shopping trips, or unique visitations e.g. tourists visiting the area and attracted to the destination for a specific reason(s) e.g. an event, restaurant(s), retail shop(s), natural environment etc.

This is broader than the term 'tourism' as places a greater recognition of Joondalup as a major regional centre drawing in visitors from a wide geographical area for a diverse range of reasons – work, business, leisure, recreation, social, educational and family.

For the purposes of this strategy the term applies to the following key sectors (although it is acknowledged that other activities within the services sectors attract visitors to the City);

- Accommodation and Food Services
- Arts and Recreation Services
- Retail Trade

There are currently around 15,850 people employed within the City of Joondalup in the Visitor Economy representing 32.2% of all employment (mid-2012 NIEIR). Applying DEEWR national forecast figures for the industry sectors above, local employment in the Visitor Economy is expected to grow by a further 8.9% to mid-2017 with an additional 1,409 jobs (although overall share of employment remains broadly the same at 32.3%).

The retail sector, although facing significant structural change as a result of the growth of online retail, is an important driver of economic development for the City. The City already has one of the largest concentrations of retail activity within the State with major shopping centres at Whitfords and Joondalup but by the end of 2014, Joondalup will be home to the largest shopping centre in Western Australia (Lakeside Joondalup).

This activity continues to draw in visitors to the City from a very wide geographical area from across the Perth metropolitan area and from more regional areas including Gingin and Lancelin for example. There is also anecdotal evidence of people travelling from as far as Geraldton for shopping trips to Joondalup.

The growth of shopping centres such as Lakeside Joondalup, which is increasing from 71,000 to 96,000 square metres of retail space to accommodate approximately 320 retailers, including a major department store (12,000 sq m), may further impact this gravitational pull. This redevelopment activity (due for completion end of 2014) will also generate approximately 900 additional employment opportunities.

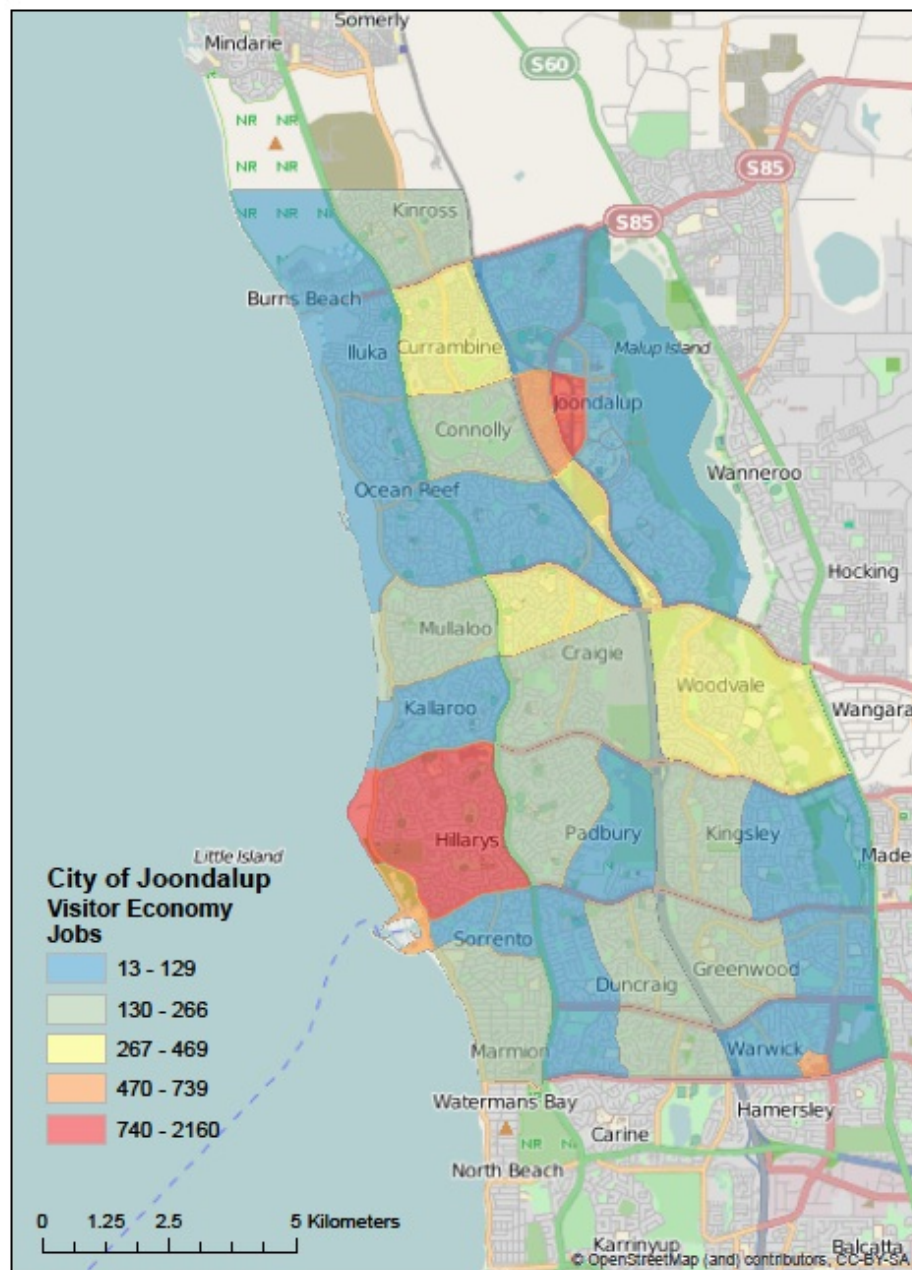
The retail sector is important to the City and will continue to be recognised as a major attractor for visitors, residents and businesses. However, whilst further growth in direct retail jobs is expected, it is important to consider that these activities tend to focus more on casual and lower paid employment. Retail jobs in particular are now equally shared between full and part time employment and around half of the retail workforce is also employed on a casual basis.

This sector is also experiencing a structural shift and changing business models as a result of the impact of the digital economy and increasing global competition. This presents both challenges and new opportunities for locally based retailers. Supporting local businesses through this transition is emphasised within this strategy, particularly through promoting digital solutions to raise profile and enhance customer base, on and offline.

Diversifying the retail offer for the ~~Joondalup City Centre~~ City of Joondalup with the attraction of more independent boutique, high end and international retailers, for example, will enhance the attractiveness of the City as a retail destination. This is particularly important for the Joondalup City Centre and other key activity centres including Whitfords and Warwick.

Supporting developments which create potential for a wider range of cafes and restaurants within the Joondalup City Centre area, including higher end establishments, will also greatly enhance the 'destination experience' and vibrancy of Joondalup, as the City continues to mature and evolve.

The specialist cross cutting theme 'Destination City' is outlined earlier within this economic development strategy and provides a specific focus on activities related to the visitor economy including potential future major projects such as the Ocean Reef Marina development and the Joondalup Performing Arts and Cultural Facility.



SERVICES ECONOMY

The Service Sectors form the greatest share of employment for the City of Joondalup with 22,571 jobs (mid-2012 NIEIR) representing almost 46% of all local employment. Much of this employment is centred around key activity centres and primarily the Joondalup City Centre in terms of commercial office based activity such as financial services, real estate and administration.

The key sectors included within the definition of the Services Economy are as follows;

- Administrative and Support Services
- Construction
- Electricity, Gas, Water and Waste Services
- Financial and Insurance Services
- Health Care and Social Assistance
- Mining Services
- Other Services
- Public Administration and Safety
- Rental, Hiring and Real Estate Services
- Transport, Postal and Warehousing
- Wholesale Trade

The most significant service sectors (by employment) for the City of Joondalup are;

1. Healthcare and Social Assistance (7,757 jobs)
2. Construction (4,760 jobs)
3. Public Administration and Safety (2,362 jobs)

Applying the anticipated national employment growth rate of 9.4% by mid-2017 provides an indication of the potential local growth within the broad 'Services Economy' sectors. Whilst not an exact science (and should be viewed with an element of caution), applying this rate to the existing local employment numbers in this sector would give rise to over 2,100 additional services jobs created within the City of Joondalup.

At the national level the industries projected to grow most strongly in percentage terms to 2017 are Healthcare and Social Assistance (13%), Construction (10.1%), Other Services (8.5%), Transport, Postal and Warehousing (7.1%), Administrative and Support Services (6.6%).

In addition to these top 5 growth service sectors, it is anticipated that the **Public Administration and Safety** sector is set to grow by a further 6.3% nationally. This sector also has a particularly high level of daily out commuting for Joondalup. For example there are almost 5,300 people living in the City employed within Public Administration and Safety yet only 17% are actually working locally.

Whilst a challenge, this also presents a significant opportunity to develop and promote a positive case for the City of Joondalup as it seeks to attract further expansion of this activity with the potential relocation of a State Government department to the Joondalup City Centre.

Financial and Insurance Services is another important sector that shows a high level of out commuting for the City with only 18% of people working in this sector working locally within the City and a major proportion commuting out to Perth CBD. Again there is an opportunity to attract companies in this sector with the City's competitive advantage built around the fact that it has an existing, skilled labour force with local people potentially attracted by the opportunity to work closer to home.

The **Healthcare and Social Assistance sector** presents possibly the most significant opportunity for the City of Joondalup to leverage economic benefit in the future. Although for the purposes of this strategy, this sector has been included under the Services sector grouping, it is recognised that employment is knowledge intensive and requires notable high educational and skill levels.

Already providing employment for almost 7,800 people and an important economic contribution to the local economy, the healthcare and social assistance sector is forecast to grow nationally by 13% by mid 2017.

The City of Joondalup has a broad range of healthcare services similar to those found in other major metropolitan centres resulting in skilled service jobs such as General Practitioners, nurses and dentists providing vital medical services to the growing population.

There is a key focus on the Joondalup Health Campus, in the heart of the Joondalup City Centre, which has an extensive range of public and private facilities. The Campus has recently undergone a major \$393 million development which includes the Joondalup Private Hospital (completed 2013).

However, Joondalup is also home to some world leading research and unique educational facilities including;

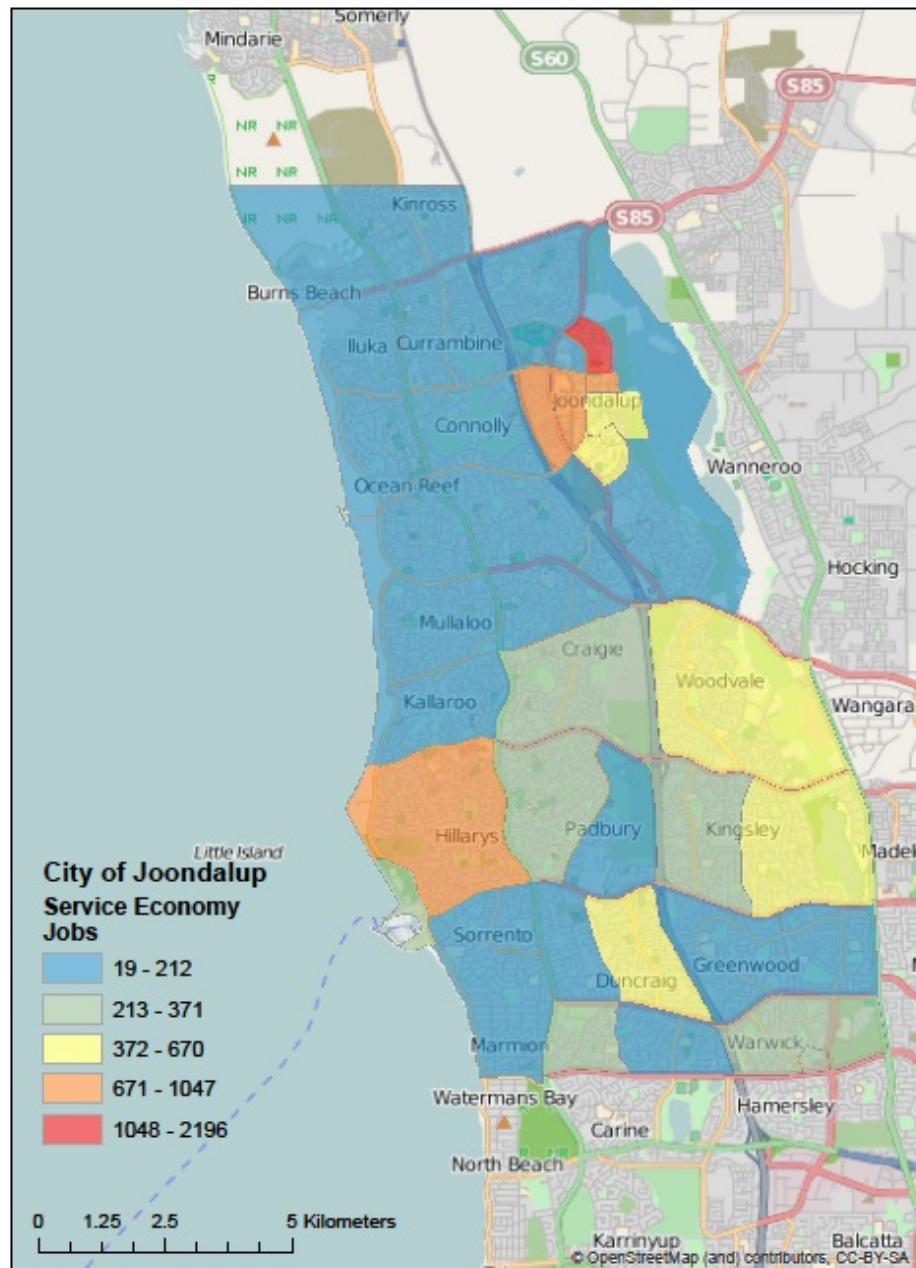
- ECU Health and Wellness Institute – cross-disciplinary alliance of research centres and expertise with extensive national and international linkages, promoting a holistic approach to health and lifestyle
- ECU / Genesis Cancer Care and Exercise Clinic – only onsite exercise therapy clinic in Australia designed to complement radiation and chemo therapies

Joondalup is leading in a number of key areas of specialist health and there are significant opportunities to attract new investment, grow new businesses or to export services and knowledge globally (via telehealth opportunities in future). These areas of expertise include, but are not limited to, the following;

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- Chronic disease prevention (through clinical trials and leading research)
- Cancer care and treatment
- Cardiovascular disease and type 2 diabetes
- Mental health
- Exercise and Sports Science

Priority will be given to support potential future bids to attract investment, new research activity or to develop new centres of excellence for specialist health activity e.g. Cooperative Research Centres (CRC), working in partnership with key organisations including Edith Cowan University, Joondalup Health Campus, Genesis Care, West Coast Institute and other public/private service providers.



KNOWLEDGE ECONOMY

The Knowledge Economy is difficult to define and cannot be fully described in the industrial classification system and knowledge often forms part of the activities of a business or organisation yet is not its main activity. However for the purposes of this strategy and for ease of measurement and reporting, we have taken a very narrow view of the term 'knowledge' and have grouped only the higher end *specialist knowledge intensive* activities to include the following industrial sectors:

- Information and telecommunications
- Professional and Scientific Services
- Education and Training

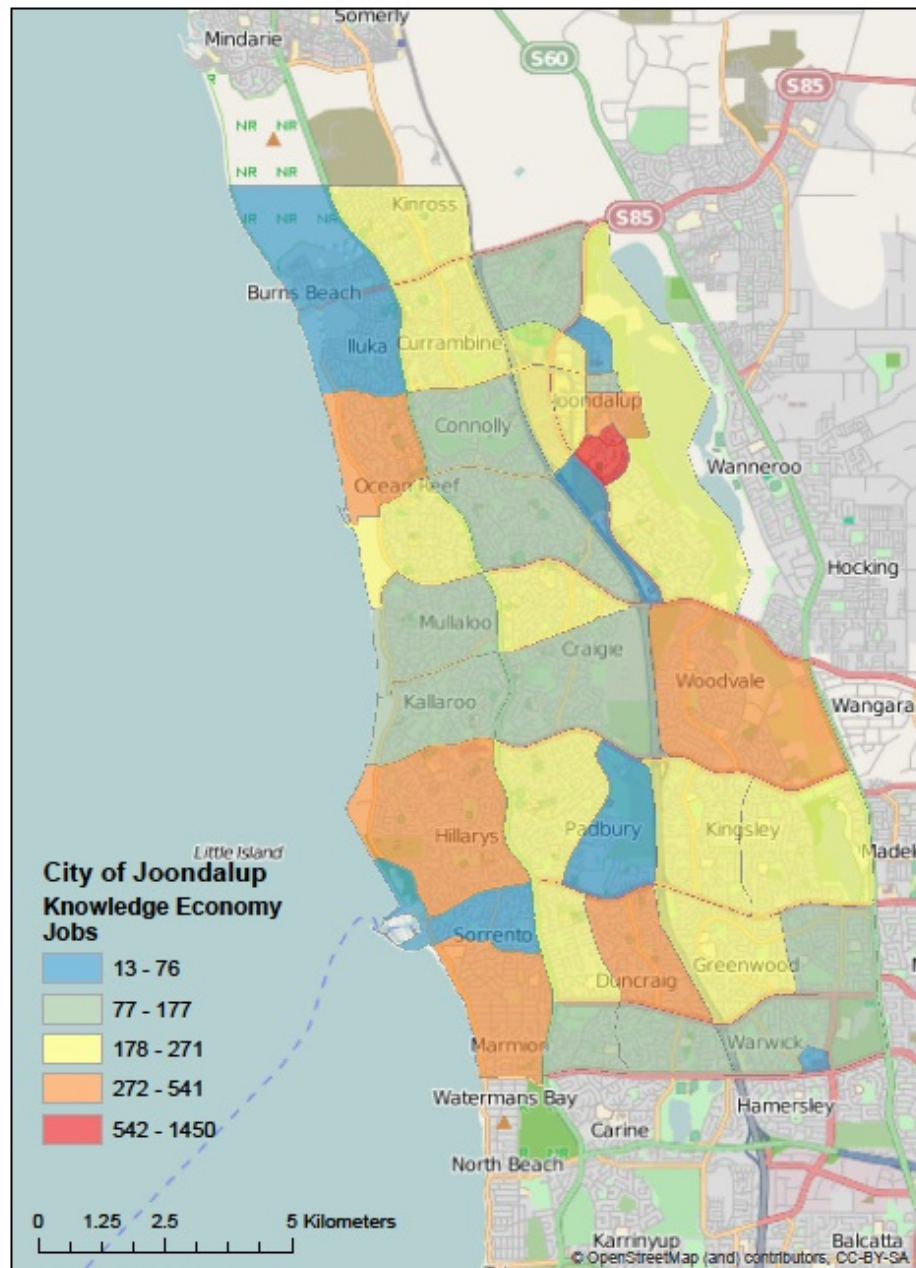
Of course other knowledge based activities and strategic employment exists in other service sectors in particular health (such as specialist research activity), mining support services and finance and insurance but for the purposes of this strategy these have been included under the services grouping.

Employment in the Knowledge Economy within the City of Joondalup therefore results in 9,737 jobs representing approximately 19.8% of local employment. Applying national forecast data there would be an increase of around 679 jobs by November 2017 although the overall share of employment would decrease slightly to 19.5%.

However, this economic development strategy presents a much greater opportunity to leverage additional employment creation in key sectors as a result of the various activities outlined and to exceed national trends where possible. In particular the focus on leveraging research strengths, agglomeration benefits from clustering activity and an enhanced approach to investment attraction and promotion will ensure that we maximise local jobs growth in the key areas identified.

The City of Joondalup contains a significant local labour force working in these key knowledge sectors, not only education but in particular areas such as professional and scientific services and information media and telecommunications where there is a particularly high level of daily out commuting.

Taking Professional and Scientific Services as an example, of the 7,088 people living in the City of Joondalup working in this sector, 78% of them commute out for work daily to Perth CBD and the Subiaco and Osborne Park areas. Whilst a challenge, this also presents a significant opportunity to develop and promote a positive case for the City of Joondalup as it seeks to attract further expansion of this business activity and local job creation.



CREATIVE INDUSTRIES

Creative Industries are worth a specific mention, although technically there is no universal agreement about the composition of the sector, and it does not neatly align with the broad sector definitions outlined within this Strategy. However, this collective provides a significant contribution to the nations' economy and culture and is vital to Australia's prosperity.

Creativity is key to innovative activity and 'creative innovation' comes from a range of sources – the arts, science, business, research and development and local communities. Creative industries draw on the creative skills and talents of a local workforce and can drive new ideas and change within local communities.

There are some key business sector classifications such as advertising and marketing, architecture, design and the visual arts that are obviously directly related to the creative industries sector. However creative activity can also be 'embedded' within a number of other sectors either directly through specific 'creative' occupations, e.g. graphic designers, or specific creative based activity.

It is therefore difficult to quantify exactly the level of creative activity within a local economy and further work is required in this important area to ascertain the size of the creative sector within the City of Joondalup and the future opportunities for growth.

There is already some educational and research related activity in Joondalup which has a direct link to the creative industries sector and this includes the Academy of Digital Technologies at West Coast Institute. There are potential opportunities in areas such as digital media, including 3D animation and augmented reality for example, that could be explored, developed and promoted for economic benefit to the region.

In addition, performing arts, acting and film are also growing areas of interest and activity for Western Australia and offer significant potential for locations such as Joondalup. Not only does the City have plans to develop a major Performing Arts and Cultural Facility in the City Centre, there is also much scope to develop stronger relations with organisations such as Edith Cowan University (Western Australian Academy of Performing Arts and Joondalup Pines Picture Theatre), West Coast Institute (Academy of Digital Technologies) and ScreenWest.

FORECAST GROWTH SECTORS

The main sectors that have experienced jobs growth in recent years are retail, health, education and construction. These sectors will continue to provide significant employment in the local area as well as being a major contributor to economic growth in terms of value added to the local economy.

Based on ABS employment data for November 2012 and the Government's forecasts and projections in the October 2012 Mid-Year Economic and Fiscal Outlook, DEEWR projects employment to grow overall by 7.1% nationally over the five years to November 2017 (across all sectors).

The key forecast areas of growth nationally (in terms of employment contribution) are;

- Health Care and Social Assistance (177,800 jobs or 13%)
- Retail Trade (109,100 jobs or 8.9%)
- Construction (100,200 jobs or 10.1%)
- Accommodation and Food Services (66,800 jobs or 8.5%)

Together, these four industries are projected to provide more than half the employment growth nationally to November 2017. This is encouraging for the City of Joondalup with these sectors locally already providing 54.9 % of local jobs.

There are also a number of positive trends in relation to opportunities for growth in other key sectors;

Professional, Scientific and Technical Services – nationally, this sector has increased strongly over recent years (linked to mining investment), particularly in areas such as Computer System Design and Architectural Engineering and Technical Services. Although 5 year forecast growth is expected to be more moderate, the national percentage projected increase is reported as 6.9% and this presents opportunities for the City of Joondalup to increase its local economic activity in this sector as provides a significant value add to the local economy.

Construction – although this sector nationally has been subdued over the past five years it is projected to grow by 10.1% over the next five years. In terms of value add to the local economy in the City of Joondalup, this sector has the biggest economic impact and so further growth will enhance business investment and job creation in the local area.

Education and Training – a 7.2% increase over the next 5 years is forecast nationally and this is already a vital sector for the City of Joondalup employing 14.6% of the local working population. Further investment within the Joondalup Learning Precinct, growth in local schools and greater activity by specialist training organisations such as NECA, will see this sector continue to provide a solid economic foundation and one less prone to negative impact in the future from any volatility in the economy. The medium to long term opportunity for the growing 'international education' market presents a significant opportunity for the City.

Information and Communication Technologies (ICT) – ICT activity has a far reaching impact on a number of sectors and IBISWorld predicts that 13 out of Australia's 19 industry sectors will be either transformed or derive significant benefits from ICT by 2050. Australia's ICT workforce is projected to grow by 33,200 workers or 7.1% between 2012 and 2017 up to a total of 461,000*. With a greater focus on this sector enabled by the Joondalup: Digital City Strategy, it is anticipated that there will be some further employment growth locally, driven primarily by the small business sector. * **source: Australian Workforce and Productivity Agency – ICT Workforce Study July 2013**

Overall, it is worth noting that some sectors have a local workforce that show a stronger willingness to work locally and there is an opportunity to prioritise these target industries to help fill the 'employment gap' within the City to increase the levels of employment self sufficiency and self containment. These sectors include; health care, retail, education and training, public administration and scientific and technical services.

There are existing and emerging opportunities for the City of Joondalup to focus on some niche or specialist areas of activity including:

Advanced Engineering – Position and promote Joondalup as a specialist hub servicing industrial growth areas of Neerabup, Wangara and Landsdale in the fields of engineering research, product design and development, materials science, electrical engineering and trades and potential 3D printing and manufacturing services

Automotive Engineering – Opportunity to support a more coordinated approach to this specialised sector working with key partners such as ECU Automotive Engineering Centre, WA Automotive Institute of Technology, Barbagello Raceway, State Government and key regional companies

Mining - Position and promote Joondalup as a specialist hub for areas such as electric automation and control systems, nanotechnology and materials science for the major regional mining areas. Mining was responsible for about 35% of WA's Gross State Production 2011/12* and so despite structural shifts being experienced within this sector it remains a major economic driver. [*Source: August 2013 Western Australia Economic Profile -- Department of State Development]

Energy – Position and promote Joondalup as a specialist hub for environmental technologies, alternative and renewable energy, water management, natural gas exploration etc, in particular leveraging off existing research capabilities and expertise

Public Administration - Position and promote Joondalup as a strategic location for State and Federal Government agencies, particularly in relation to the decentralisation of Government office accommodation also potential to attract 'back office' administration and service functions of major corporate organisations

Support Services – includes business support operations, with a particular focus on those that interact primarily through electronic communication. Typical operations include inbound call centres (e.g. customer enquiries, IT helpdesks), outbound call centres (e.g. telemarketing, telerecruitment), centralising business processing centres, and centralised administrative centres. Support services operations may be subsidiary operations of a parent firm, or may be outsourced to an independent service provider

Specialist research/knowledge areas – Including, but not limited to, simulation and modelling, photonics and nano-technologies, cyber security, digital animation, and multimedia and film, low carbon environmental activity and specialist health and medical research e.g. telehealth, oncology and exercise science. Other future opportunities may exist in growth niche sectors; examples include agribusiness, ocean resources and wealth management[^].

[^]Deloitte Positioning for Prosperity? Catching the Next Wave Report (March 2014).

COMMUNICATION AND ENGAGEMENT

With regard to engaging with the business community, Local Government not only has a regulatory role but also a broader, more strategic responsibility in defining a long term vision and strategy for a local area and underpinning business confidence to generate long term investment. Local businesses are key stakeholders as they broadly create wealth and employment in the local area and thus generate wider community benefits.

Engaging and communicating with business owners and managers is important in local economic development but typically a challenge, as for most, their time is very precious and generally focused on running their own enterprise.

The approach to communication underpinning this strategy shifts from a traditional marketing push approach to a focus on engagement and relationship building via multiple channels and across various levels engaging with a wide variety of organisations.

The communication and engagement activity underpins the core and specialist themes covered within this Economic Development Strategy. For external communication, this includes promoting business support activity, investment attraction marketing and tourism promotion.

External Communication and Coordination

Key Action: Establish Joondalup Economic Futures Partnership *[final name to be determined]* with key external representatives from major employers in the local area including, but not limited to, the City of Joondalup, Joondalup Health Campus, Edith Cowan University, Lend Lease, Joondalup Resort, RAC and small business sector to oversee, inform and support the key economic development and investment activity within the City. It is proposed that the partnership would be chaired by the CEO of the City of Joondalup.

In addition a key action will be to develop a Communications Plan supporting the following external activity (current and proposed):

KEY ACTION AREAS
<ul style="list-style-type: none"> • Business Forum Events (hosted by the City of Joondalup)
<ul style="list-style-type: none"> • Business seminars and events (with partner organisations)
<ul style="list-style-type: none"> • Business networking and business support events (partnership activity) e.g. JBA Business Breakfast Series, CCI WA, SBDC etc
<ul style="list-style-type: none"> • Hard copy Joondalup Business Edge publication (twice yearly)
<ul style="list-style-type: none"> • e-copy Joondalup online business bulletin (every 2-3 months)
<ul style="list-style-type: none"> • Continued development of City of Joondalup website (business section)

DRAFT

<ul style="list-style-type: none">• Online business presence (internet, mobile, specialist apps)
<ul style="list-style-type: none">• Regional Business/Investment Online Gateway (joint City of Joondalup and City of Wanneroo)
<ul style="list-style-type: none">• Specialist business network groups e.g. Joondalup Digital City group, specific niche sector groups (potential)
<ul style="list-style-type: none">• Leveraging external stakeholders communications activity e.g. JBA Business Focus publication
<ul style="list-style-type: none">• Proactive program of media releases - positive news stories e.g. new investments, business relocations, new initiatives, new funding and project activity, awards, statistical trends
<ul style="list-style-type: none">• Social media activity (in line with City of Joondalup Social Media strategy)
<ul style="list-style-type: none">• Promotion of business case studies and positive testimonials from business leaders
<ul style="list-style-type: none">• Research into perceptions of Joondalup as a business and tourism destination
<ul style="list-style-type: none">• Development of Joondalup business branded campaign and application to specialist sector based investment attraction campaigns
<ul style="list-style-type: none">• Development of Joondalup Destination City campaign / branding for visitor/tourism activity (in line with regional Sunset Coast activity)

Governance and Coordination

North West Metropolitan Region: Regional Governance Framework – City of Joondalup/City of Wanneroo/State Government Departments/Federal Government Departments (where appropriate).

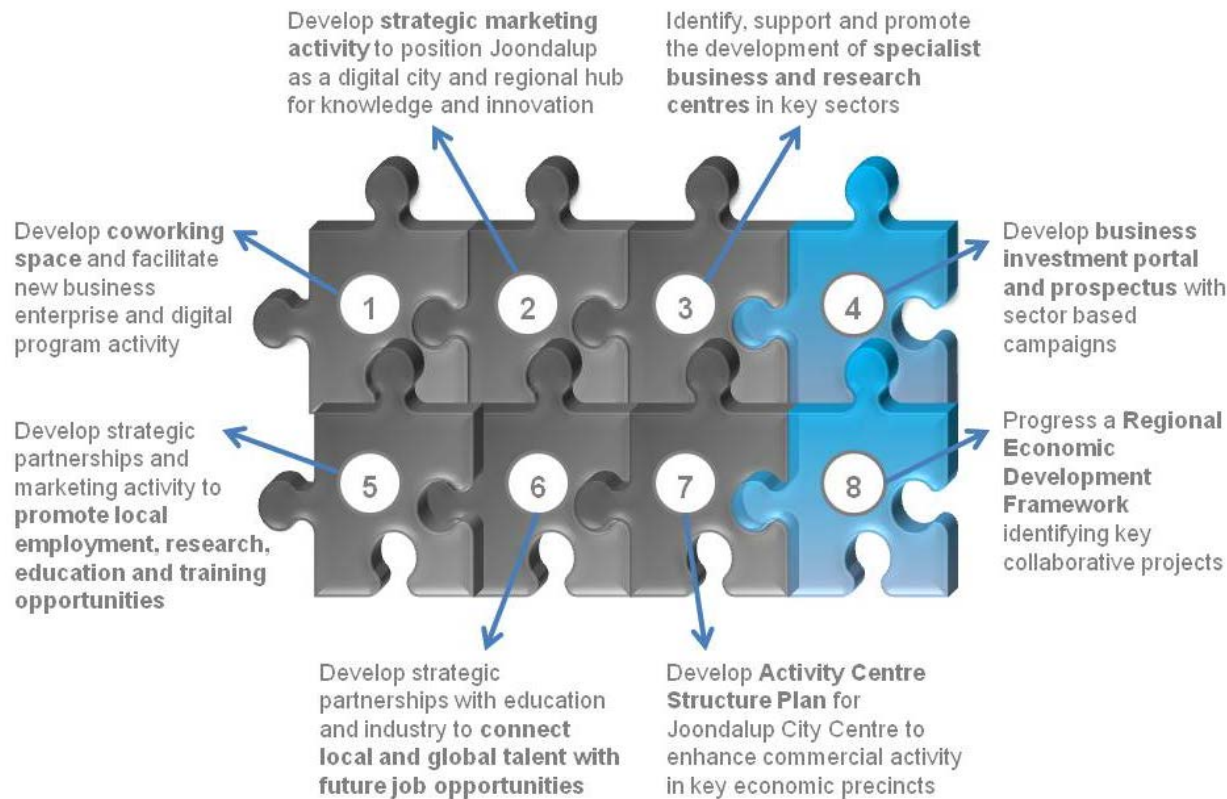
City of Joondalup (external): Establish Joondalup Economic Futures Group involving key external stakeholders and representatives from major employers/business sectors, research/education and small business representatives from niche sectors

APPENDICES

STRATEGIES AND ACTIVITIES

The following tables highlight the key activities proposed under each core strategy area. Under each section, a ‘catalyst project’ is featured and this is defined as a key strategic project that, if progressed, will provide a significant positive impact and will enable and facilitate a number of other activities and projects to occur. A summary of the catalyst projects is shown in the below illustration.

Catalyst Projects



1.1 GROWING BUSINESS**CATALYST PROJECT:
DEVELOP COWORKING SPACE AND FACILITATE NEW BUSINESS ENTERPRISE
AND DIGITAL PROGRAM ACTIVITY****1.1.1 Monitor and review local and regional business issues and trends on a regular basis**

1.1.1.1 Undertake regular survey of local businesses to help identify any key issues and barriers to growth

1.1.1.2 Undertake regular review and analysis of local economic and employment data and trends

1.1.1.3 Review reports and data from key organisations and industry associations including Property Council Australia, CCIWA, Federal/State Government Departments, Universities

1.1.1.4 Develop 'economic metrics' dashboard for the City of Joondalup presenting snapshot of key economic and employment indicators

1.1.1.5 Develop proposals for an online regional Data and Knowledge Observatory in conjunction with City of Wanneroo, State Government and other key partners

1.1.1.6 Monitor commercial real estate within the City of Joondalup identifying availability and affordability of commercial space for businesses to ensure sufficient provision to accommodate future business growth requirements

1.1.1.7 Prepare periodic report on home based business approvals/registrations and monitor trends

1.1.2 Promote business growth and productivity programs with key partners

1.1.2.1 Support the delivery of local business support programs, via partner organisations, with a particular focus on business growth and productivity enhancement

1.1.2.2 Review business support activity and enhance the scope of activity (including encouraging new specialist programs), working in partnership with key agencies, to support the growth of micro and small and medium sized enterprises

1.1.2.3 Improve the accessibility of and promote State and Federal Government programs and private finance and capital investment programs to assist with financing start-up and business growth activity

1.1.2.4 Encourage and promote 'buy local' activity and via innovative solutions including new digital platforms and location based services

1.1.2.5 Develop a 'key account' program to identify and build relationships with key local

businesses with <i>high growth potential or strategic value</i> and support their on-going development and retention of investment within the region
1.1.2.6 Improve the accessibility of and promote State and Federal Government programs to local businesses to support and encourage overseas trade and export activity
1.1.2.7 Facilitate and promote business information seminars/workshops/programs that address or relate to topical and relevant business issues/needs in partnership with relevant organisations. Including but not limited to; <ul style="list-style-type: none"> • Business crime • Cyber security issues • Succession planning and business continuity • Online business and marketing • Energy saving / carbon reduction • Developing a workforce including employing trainees • Finance and investment • Small business management • IT and software skills
1.1.3 Encourage and promote business start-up, incubation and commercialisation activity
1.1.3.1 Develop and support activity to encourage the commercialisation of research and the incubation of new enterprises via the ECU Business and Innovation Centre
1.1.3.2 Identify opportunities to encourage new start-up activity in relation to niche knowledge based sectors including ICT, creative digital media and film , cyber security and specialist health technologies and services
1.1.3.3 Encourage and support the establishment of home based businesses (in specific sectors) within the City through effective provision of relevant information, guidelines and key contacts
1.1.3.4 Identify home based businesses with high growth potential and help facilitate targeted programs and information to assist in their development beyond the home
1.1.3.5 Encourage and promote business start-up training and mentoring programs targeted at specific groups with a higher propensity for entrepreneurial activity including new migrants, women entrepreneurs and recent higher/tertiary education graduates
1.1.3.6 Identify opportunities to encourage and promote <i>social enterprise and social entrepreneurial</i> activity within the City and maximise their level of engagement with key support agencies and funding programs
1.1.3.7 Attract and support new start-up enterprise and business growth programs and

events to the City in collaboration with others
1.1.3.8 Develop proposals to establish innovative coworking space(s) within the City to promote and encourage collaboration between entrepreneurs, local businesses (including home based), social enterprises/entrepreneurs, teleworkers, students/researchers and partner organisations (Government, education, research, not-for-profit organisations etc)
1.1.3.9 Investigate opportunities for a Business Angels Network or leverage similar existing programs to attract and promote co-investment in high growth small and medium sized enterprises and start-up activity
1.1.4 Promote business sustainability and environmental responsibility
1.1.4.1 Develop and promote programs to promote environmental responsibility amongst the local business community to encourage sustainable energy practices, lower energy consumption, lower carbon emissions and sustainable transport activity
1.1.4.2 Promote linkages between research and education in environmental sustainability and the local business community
1.1.4.3 Facilitate business engagement with and support for environmental activity led by the City of Joondalup
1.1.4.4 Promote and raise awareness of any national, state or regional initiatives that relate to the promotion of environmental best practice and low energy use for the business sector

Potential partners:

- **Federal and State Government Departments** including Small Business Development Corporation, Department of Commerce, RDA Perth, AusIndustry, Enterprise Connect and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, JBA, ICWA, Business Foundations, AIIA, ACS Foundation, Property Council
- **Education/Research/Training Organisations** including ECU, WCI
- **Corporate Sector**

1.2 PROMOTING INNOVATION**CATALYST PROJECT:
DEVELOP STRATEGIC MARKETING ACTIVITY TO POSITION JOONDALUP AS A
DIGITAL CITY AND REGIONAL HUB FOR KNOWLEDGE AND INNOVATION****1.2.1 Promote Joondalup as a regional knowledge and innovation hub and Digital City**

1.2.1.1 Undertake statistical analysis of local employment in knowledge based sectors and occupations and monitor trends

1.2.1.2 Develop marketing campaigns to promote and brand Joondalup as a leading WA City for knowledge, innovation and digital technologies

1.2.1.3 Actively engage in, and leverage, government and private initiatives that promote and encourage innovation in business

1.2.1.4 Convene a Joondalup Digital Futures Group bringing together key stakeholders and local champions in implementing the Digital City strategy

1.2.1.5 Investigate and evaluate the creation of a regional Digital City Hub incorporating a collaborative space (coworking) for start-up businesses, digital capacity building programs and teleworking facility

1.2.1.6 Investigate and evaluate proposals for a Knowledge/Innovation/Technology Commercial Precinct within the City for high value add, knowledge based enterprises and potential 'grow on' space for businesses relocating from the ECUBIC

1.2.2 Strengthen collaboration between research and industry in key sectors/niche clusters

1.2.2.1 Work in partnership with key organisations such as the Joondalup Learning Precinct partners, State and Federal Government to strengthen links between industry and research through networking events, collaborative activity, promotion of Government programs and potential development of online digital platforms (information gateway)

1.2.2.2 Profile specialist research and development activity and case studies via generic marketing material (Joondalup Business Edge, website etc) and dedicated niche cluster marketing campaigns as required

1.2.2.3 Support the development and promotion of Centres of Excellence and Cooperative Research Centres related to key areas of research and development within the Joondalup Learning Precinct

1.2.2.4 Develop relationships with key agencies and organisations nationally and globally e.g. CSIRO, DSTO, to raise the profile of research and development

collaboration opportunities for industry in key sectors/niche clusters
1.2.3 Identify, support and promote strategies and programs that enhance local innovation
1.2.3.1 In partnership with other key organisations such as ECU, State Government, develop proposal for an 'Innovation Leaders Program' with key note speakers from industry, education and research (building on existing programs and events activity)
1.2.3.2 Develop and profile case studies of regional innovators and companies that have adopted and applied innovative processes to enhance business growth
1.2.3.3 Strengthen relationships with key State and National organisations including Innovation Centre WA (ICWA), Business Foundations, CCI WA, Innovation Australia, AusIndustry, Enterprise Connect (and others)
1.2.3.4 Promote State and Commonwealth R&D and Innovation and related venture capital programs in relation to enhancing innovation within local businesses
1.2.4 Identify and develop local, national and global connections with other innovation hubs
1.2.4.1 Support and enhance connections and relationships with key Cities and centres for innovation activity, leveraging existing and potential partnerships via key organisations such as Universities, State Government, Jinan Sister City relationship, Chambers of Commerce, Industry Associations
1.2.4.2 Monitor national and global activity and trends in relation to innovation and review research reports from Governments and major corporates e.g. IBM, GE, Nesta

Potential partners:

- **Federal and State Government Departments** including Small Business Development Corporation, Department of Commerce, RDA Perth, AusIndustry, AusTrade, Innovation Australia, Enterprise Connect, DSTO, CSIRO, Commercialisation Australia and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, JBA, ICWA, Business Foundations, AIIA, ACS Foundation, Property Council
- **Education/Research/Training Organisations** including ECU, WCI and other Universities and Research Institutes
- **Corporate Sector**

2.1 DEVELOPING CLUSTERS

CATALYST PROJECT: IDENTIFY, SUPPORT AND PROMOTE THE DEVELOPMENT OF SPECIALIST BUSINESS AND RESEARCH CENTRES IN KEY SECTORS

2.1.1 Research and identify key local and regional business clusters

2.1.1.1 Undertake research and mapping exercise to illustrate the spatial distribution of employment in key sectors in relation to key activity centres

2.1.1.2 Identify synergies and gaps between emerging research and development activity and niche business clusters

2.1.2 Promote local value chain activity to enhance growth and investment in key clusters

2.1.2.1 Develop regional profile of key business clusters and their interrelationship and value chain activity

2.1.2.2 Identify commercial opportunities in key clusters by enhancing relationships between local businesses, education and research institutions via existing and new networks to enhance local value chain activity

2.1.3 Identify opportunities in niche clusters to enhance investment and employment

2.1.3.1 Identify and support business case(s) for investment and grant funding to develop new infrastructure and specialist centres relating to niche sectors e.g. cyber security, digital media, health, microelectronics and photonics and strengthening partnerships between universities, government and industry

2.1.3.2 Develop strategies and projects to promote and strengthen the role of micro and small enterprises in key specialist niche sectors e.g. digital media and animation, working in partnership with key partners such as ECU, West Coast Institute and industry associations

2.1.4 Identify emerging sectors and future business growth opportunities

2.1.4.1 Promote the City of Joondalup as a technical knowledge, training, research and services centre for the evolving primary sectors and other key specialist sectors including; manufacturing, resources, energy, agriculture, construction, electrical engineering and trades, automotive and hospitality

2.1.4.2 Undertake research to identify the current and future potential for developing and promoting the knowledge based and creative industry sectors

2.1.4.3 Identify and track global trends in emerging business sectors and identify potential opportunities for the City of Joondalup

Potential partners:

- **Federal and State Government Departments** including Small Business Development Corporation, WA Department of Commerce, WA Department of State Development, WA Department of Science, RDA Perth, AusIndustry, AusTrade, Innovation Australia, Enterprise Connect, DSTO, CSIRO and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, Business Associations, ICWA, Business Foundations, AIIA, ACS Foundation, Property Council
- **Education/Research/Training Organisations** including ECU, WCI, NECA, Institute of Automotive Technology and other Universities and Research Institutes
- **Corporate Sector**

2.2 ATTRACTING INVESTMENT

CATALYST PROJECT: DEVELOP BUSINESS INVESTMENT PORTAL AND PROSPECTUS WITH SECTOR BASED CAMPAIGNS

2.2.1 Track key metrics relating to business and investment opportunities and enhance internal processes and communication

2.2.1.1 Research, identify and collate information and data in relation to key sectors/niche clusters

2.2.1.2 Develop business investment propositions for each sector/niche cluster

2.2.1.3 Develop detailed business case for investment attraction (to underpin sector specific propositions) with consistent messages, facts and imagery

2.2.1.4 Identify key target areas (sectoral and geographic) including key international regions

2.2.1.5 Establish an Enquiry Handling System for effective processing and tracking of business investment enquiries

2.2.1.6 Establish internal 'Investment Response Team', multi-departmental, to handle and cross refer investment/business enquiries to enhance external service delivery and communication with potential investors and expanding businesses

2.2.2 Develop marketing collateral and manage targeted campaigns to attract investment

2.2.2.1 Investigate the development of a bold and creative Joondalup brand and associated campaigns to be utilised for investment and/or visitor destination campaign activity to raise the profile of Joondalup

2.2.2.2 Develop generic 'investment prospectus' and information on the City of Joondalup and NW Metropolitan Region (digital and hard copy)

2.2.2.3 Develop brief business attraction promotional video with business testimonials for web and social media based campaigns

2.2.2.4 Develop marketing material for each business proposition (sector specific, generic and site specific) and develop program of campaign activity, promotion and media targeting

2.2.2.5 Research, develop and promote business case(s) for the attraction of key sector infrastructure (such as specialist business incubators, multi-media studios, collaborative work spaces etc)

2.2.2.6 Develop targeted propositions for Asian economies and leverage Asian connections via key partners including ECU, WA-Chinese Chamber of Commerce and Jinan

Sister City Relationship
2.2.2.7 Develop targeted propositions for other key international regions and emerging markets, identified as having significant potential for investment attraction and trade opportunities with the City of Joondalup
2.2.2.8 Develop case studies and testimonials identifying and promoting local business ambassadors, high growth, innovative companies and research institutes and centres related to key sectors and niche clusters
2.2.3 Develop partnerships with key agencies and organisations for local and regional level activity
2.2.3.1 Work with the City of Wanneroo on regional activity including investment attraction campaigns and projects that raise the profile of the North-West region as a key location for international and national mobile investment projects
2.2.3.2 Work with and support State and Federal Departments and Agencies (including overseas) to raise awareness of the City of Joondalup and North West region and identify potential investment projects
2.2.3.3 Develop communications activity with investment and business relocation intermediaries including commercial developers, real estate agents, business services organisations (banks, accountants, legal etc) to ensure a joint consistent approach to marketing the City and supporting potential new and existing investors
2.2.3.4 Develop and promote a range of consistent core messages, facts and imagery to be utilised by key partners and business intermediaries as part of their marketing activity e.g. real estate agents
2.2.4 Promote key development sites and commercial premises to attract strategic employers
2.2.4.1 Research and develop a business case for the attraction of strategic office developments and State Government departments within the City Centre
2.2.4.2 Proactively target and engage industries, businesses and Government departments and agencies to drive City Centre development
2.2.4.3 Develop, maintain and promote a database of available commercial sites and premises
2.2.4.4 Promote key development sites and commercial premises to major employers (anchor tenants) as well as existing, locally based, expanding businesses to capture and retain investment and employment within the City

Potential partners:

- **Federal and State Government Departments** including Small Business Development Corporation, WA Department of Commerce, WA Department of State Development, WA Department of Science, RDA Perth, AusIndustry, AusTrade, Innovation Australia, Enterprise Connect, DSTO, CSIRO and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, Business Associations, ICWA, Business Foundations, AIIA, ACS Foundation, Property Council
- **Education/Research/Training Organisations** including ECU, WCI, NECA, Institute of Automotive Technology and other Universities and Research Institutes
- **Corporate Sector**

3.1 BUILDING CAPACITY**CATALYST PROJECT:
DEVELOP STRATEGIC PARTNERSHIPS AND MARKETING ACTIVITY TO PROMOTE
LOCAL EMPLOYMENT, RESEARCH, EDUCATION AND TRAINING OPPORTUNITIES****3.1.1 Promotion and matching of local job opportunities for local people**

3.1.1.1 Evaluate options for hosting a regional Skills and Careers Expo to engage potential employers, training and educational providers within the local community targeting youth, school leavers, unemployed and potential apprenticeship sectors

3.1.1.2 Investigate and develop online platforms to promote local job opportunities and educational opportunities for local people and new migrant workers

3.1.1.3 Undertake analysis to identify key issues in relation to existing local population and destination of employment with particular regard to the FIFO community and out-commuting activity

3.1.1.4 Promote graduate placement and scholarship schemes to strengthen linkages between local companies and graduates, particularly in the area of ICT and engineering

3.1.2 Enhancing local workforce productivity

3.1.2.1 Promote programs that enhance digital inclusion, digital life skills and digital media literacy within the local community via libraries, community centres, training providers and business support agencies

3.1.2.2 Identify and promote case studies of local businesses that have enhanced productivity through the application of new technology and innovative processes

3.1.3 Enhancing local workforce participation and reducing barriers to work

3.1.3.1 Support and promote programs that enhance workforce participation in key target groups e.g. people with disabilities, mature age, disengaged youth, and in particular via the application of new technology

3.1.3.2 Support and promote programs and the dissemination of information to employers which encourage greater flexibility in workplaces

3.1.3.3 Identify any barriers to work through local surveys, communication with local employers and disengaged workforce and develop strategies, where possible, to reduce barriers and enhance workforce participation

3.1.4 Enhancing employability skills, in partnership with key agencies

3.1.4.1 Identify strategies to enhance and promote employability skills in the local community, working in partnership with key State and Federal Government agencies

and not-for-profit sector, as required
3.1.4.2 Promote schemes to raise awareness and enhance employability skills amongst key target groups, as required

Potential partners:

- **Federal and State Government Departments** including Training WA, WA Dept of Training, Workforce Development Centres, Dept of Education, Dept of Employment, Australian Workforce and Productivity Agency and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, Business Associations, ACS Foundation, Industry Skills Councils
- **Education/Research/Training Organisations** - VET and Higher Education Stakeholders including ECU, WCI, NECA, Institute of Automotive Technology and other Universities and Research Institutes, Schools and Colleges
- **Corporate Sector**

3.2 FUTURE WORKFORCE

CATALYST PROJECT: DEVELOP STRATEGIC PARTNERSHIPS WITH EDUCATION AND INDUSTRY TO CONNECT LOCAL AND GLOBAL TALENT WITH FUTURE JOB OPPORTUNITIES

3.2.1 Attraction, retention, recognition and promotion of creative talent

3.2.1.1 Support programs and initiatives that enhance the profile of the City of Joondalup, nationally and internationally, to attract talent from outside of the region, leveraging existing partnership activity and identifying potential digital solutions

3.2.1.2 Identify opportunities to leverage international profile for the City, working in partnership with key organisations e.g. ECU, West Coast Institute, State/Federal Government to attract international talent (workers, students, entrepreneurs, investors etc)

3.2.1.3 Work with key agencies and major employers to inform and promote opportunities for the employment of skilled migrant workers

3.2.2 Alignment of future skills development activity with State and Federal policies and programs

3.2.2.1 Identify and monitor State and Federal policies and programs in relation to future skills development and promote opportunities to key partner organisations where appropriate

3.2.2.2 Develop and promote programs that enhance technology based skills for employment in ICT and related sectors (and as directed by national and State strategies and policies)

3.2.3 Promotion and development of local skills to attract new business growth and investment in key sectors

3.2.3.1 Identify key skills and occupations within the local community related to key sectors and develop business case(s) to attract future strategic investment

3.2.3.2 Support work experience program activity for school age students and young adults in key business sectors to help promote local skills base and workforce opportunities

3.2.2.1 Support and promote programs that encourage business enterprise skills within schools/ tertiary education and promote young entrepreneurs

3.2.2.2 Support and promote programs that develop basic and core skills relating to key sectors across the knowledge, services and visitor economy including, but not limited to, digital literacy, front line management, customer service and sales

3.2.4 Promotion of science and technology in education system and future

employment opportunities
3.2.2.3 Work with key agencies and organisations to promote events and activity profiling opportunities for future employment in technology based careers to young people (particularly engaging female students to address employment imbalance)
3.2.2.4 Encourage and support strategies and actions that strengthen science, technology, engineering and mathematics (STEM) in the local primary and secondary education system and encourage connections between local schools, Joondalup Learning Precinct and local business activity

Potential partners:

- **Federal and State Government Departments** including Training WA, WA Dept of Training, Workforce Development Centres, Dept of Education, Dept of Employment, Australian Workforce and Productivity Agency and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, Business Associations, ACS Foundation, Industry Skills Councils
- **Education/Research/Training Organisations** - VET and Higher Education Stakeholders including ECU, WCI, NECA, Institute of Automotive Technology and other Universities and Research Institutes, Schools and Colleges
- **Corporate Sector**

4.1 CITY PLANNING

CATALYST PROJECT: DEVELOP ACTIVITY CENTRE STRUCTURE PLAN FOR JOONDALUP CITY CENTRE TO ENHANCE COMMERCIAL ACTIVITY IN KEY ECONOMIC PRECINCTS

4.1.1 Support planning and development that leverages and stimulates economic development

4.1.1.1 Develop, in consultation with key stakeholders, an Activity Centre Structure Plan for the Joondalup City Centre allowing for a strategic, sustainable and flexible approach to commercial development within the City Centre business and retail precincts

4.1.1.2 Ensure potential economic and commercial opportunities are fully identified to inform Activity Centre Structure Plan for Joondalup City Centre and other activity centres

4.1.1.3 Identify opportunities for and set planning standards around the potential regeneration and redevelopment of activity centres and commercial precincts to facilitate future strategic economic growth

4.1.1.4 Work in partnership with key strategic land owners, including State Government, ECU and private, to identify and develop sites and infrastructure for future commercial activity that enhances strategic employment, including but not limited to;

- City Centre Commercial Office Developments
- Potential Innovation/Technology Precinct
- CoWorking/Teleworking Hub(s)

4.1.1.5 Support the development of major infrastructure projects that enhance the City's capacity as a visitor destination, including but not limited to; Ocean Reef Marina, Joondalup Performing Arts and Cultural Facility, kiosks and cafes/restaurants (coastal and Joondalup City Centre)

4.1.2 Identify and respond to any business barriers to growth (in terms of land and real estate)

4.1.2.1 Identify and monitor commercial land and real estate supply and demand and raise awareness of key trends and issues to inform planning and development activity and policy

4.1.2.2 Inform and lobby relevant State Government Departments on key land development issues which may impact on economic growth

4.1.2.3 Monitor commercial applications including building permit approvals and development applications in key activity centres and report periodically on trends and any issues

4.1.3 Support development that enhances visually attractive activity centres and built form

4.1.3.1	Encourage and promote creative and cultural activity and develop appropriate infrastructure within public spaces and centres to enhance the aesthetic appeal, amenity and visual identity of place
4.1.3.2	Support development opportunities that stimulate new and enhanced economic activity to attract visitors to key locations including Joondalup City Centre, coastal sites and natural public space areas
4.1.3.3	Evaluate options for a 'place making' approach to enhance the Joondalup City Centre and its infrastructure, connecting and activating public space and leveraging commercial activity
4.1.4	Lobby for and support physical and telecommunications infrastructure enhancements
4.1.4.1	Work with NBN Co, AARNET and other key organisations to ensure the effective roll out of enhanced telecommunications infrastructure and take up of broadband services
4.1.4.2	Evaluate opportunities for new public Wi-Fi zones in key economic activity areas and potential enhancement of City Centre Wi-Fi service
4.1.4.3	Investigate and evaluate the viability of attracting a data centre to the Joondalup/Wanneroo area to underpin and support the Digital City related commercial activity
4.1.4.4	Develop an integrated transport planning strategy to understand current transport modes and identify gaps in the current transport network
4.1.4.5	Work with and lobby key agencies and Government organisations to ensure that the development of the regional physical infrastructure meets the needs of future population and business growth, including; regional road / freeway development, regional rail and bus infrastructure services, future metropolitan Perth air and seaport infrastructure services, utilities infrastructure (water, power, telecoms)

Potential partners:

- **Federal and State Government Departments** including Department of Planning, Department of Transport, WA Department of State Development, Water Corporation, RDA Perth, Department of Communications and **Local Government** including City of Wanneroo
- **Business/Industry Associations** including CCI WA, Business Associations, ICWA, Business Foundations, AIIA, ACS Foundation, Property Council
- **Education/Research/Training Organisations** including ECU, WCI, NECA, Institute of Automotive Technology and other Universities and Research Institutes
- **Corporate Sector**

4.2 REGIONAL COLLABORATION

CATALYST PROJECT: PROGRESS A REGIONAL ECONOMIC DEVELOPMENT FRAMEWORK IDENTIFYING KEY COLLABORATIVE PROJECTS

4.2.1 Enhance a regional approach to economic development and strategic planning

4.2.1.1 Finalise a regional economic development framework aligning with local Strategic Community Plans and key State and Federal plans

4.2.1.2 Identify key strategic regional issues in relation, but not limited, to infrastructure planning, workforce development, investment attraction, tourism promotion and economic development

4.2.2 Identify and support joint regional projects to leverage greater economic value

4.2.2.1 Identify and prioritise key regional collaborative projects

4.2.2.2 Develop collaborative projects with action plan/business case and support for external funding applications as required

4.2.3 Enhance partnership collaboration activity with State and Federal Government agencies

4.2.3.1 Develop and agree on a formal regional governance framework or body with representatives from Local, State and Federal Government Departments and Agencies as appropriate

4.2.3.2 Identify and prioritise key areas of collaborative activity and agree on methods for delivery

4.2.3.3 Lobby State and Federal agencies on key regional issues and priorities as required

4.2.4 Monitor and review Regional Governance Framework and key regional priorities

4.2.4.1 Monitor and review key regional priorities and adapt as required

4.2.4.2 Monitor and review progress of regional economic development framework and priority projects and report on a periodical basis

4.2.4.3 Review and monitor State and Federal level strategies and policies which may influence/impact on Regional Governance Framework and activities

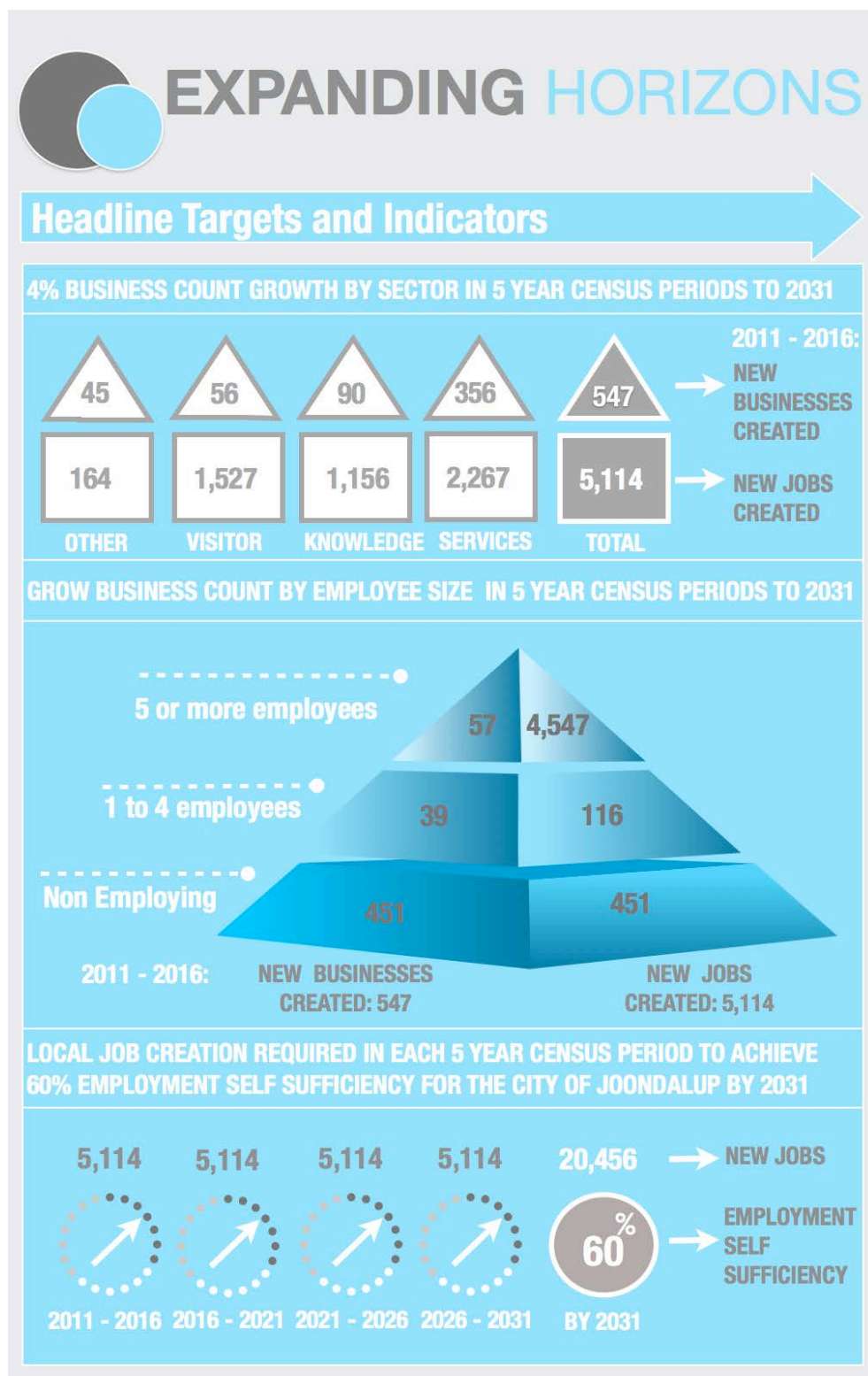
Potential partners:

- **Federal and State Government Departments** including Department of Planning, Department of Transport, WA Department of State Development, Department of

Local Government and Communities, Water Corporation, RDA Perth, Tourism WA, Department of Communications and **Local Government** including City of Wanneroo

- **Business/Industry Associations** including CCI WA, Business Associations, ICWA, Business Foundations, AIIA, ACS Foundation, Property Council
- **Education/Research/Training Organisations** including ECU, WCI, NECA, Institute of Automotive Technology and other Universities and Research Institutes
- **Corporate Sector**

KEY PERFORMANCE INDICATORS





EXPANDING HORIZONS

Headline Targets and Indicators

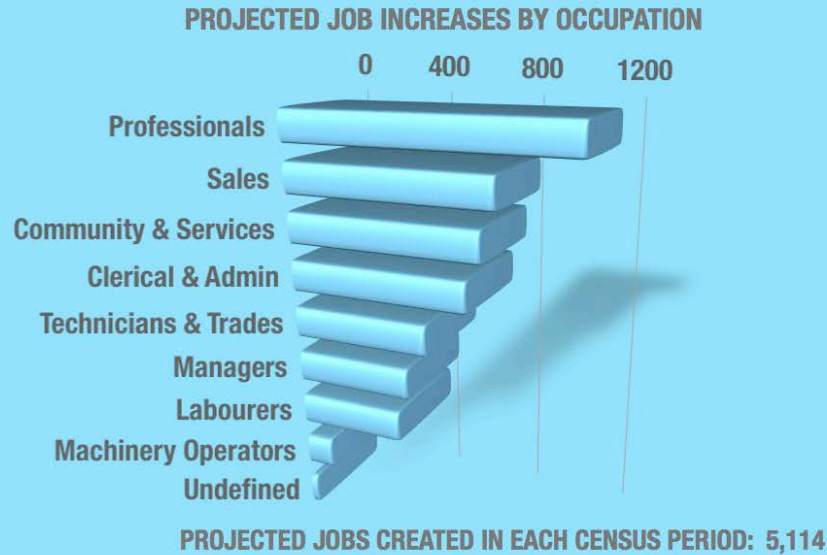
EXCEED THE 2011 CENSUS BASED EMPLOYMENT SELF CONTAINMENT MEASURE OF 26.7% IN SUBSEQUENT CENSUS PERIODS TO 2031



* Residents living and working in City of Joondalup

** Total number of employed City of Joondalup residents regardless of work location

MONITOR JOB GROWTH BY OCCUPATION TYPE TO CITY OF JOONDALUP ESTIMATES OVER 5 YEAR CENSUS PERIODS TO 2031

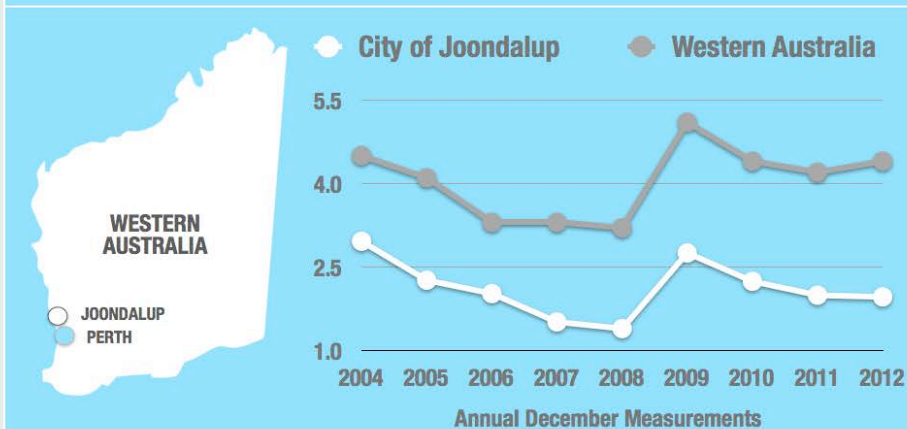




EXPANDING HORIZONS

Headline Targets and Indicators

MAINTAIN UNEMPLOYMENT UNDER THE WESTERN AUSTRALIA AVERAGE RATE



EXCEED THE CURRENT LOCAL GRP TREND IN 5 YEAR CENSUS PERIODS TO 2031

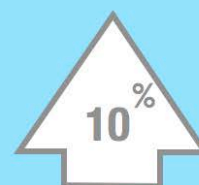
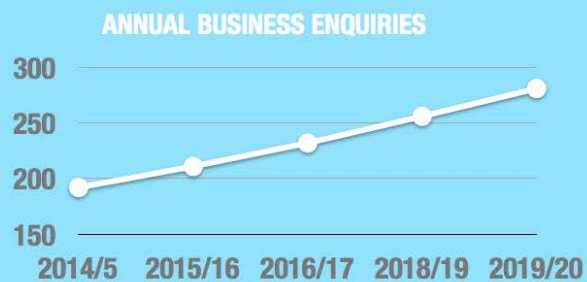
Annual GRP \$ Millions



5 YEAR TREND

Annual average = \$4.1m
 Average annual increase between 2007 > 2011 = 4.4%

INCREASE BUSINESS ENQUIRIES EACH FINANCIAL YEAR BY 10%



CHARTS AND TABLES

CITY OF JOONDALUP JOBS BY SECTOR NIEIR	2005/06	2010/11	2011/12
VISITOR ECONOMY			
Accommodation and Food Services	4,002	4,672	4,927
Arts and Recreation Services	897	1,242	1,343
Retail Trade	8,258	9,229	9,582
Total Employed	13,157	15,144	15,852
% of total employed	32.3%	31.6%	32.2%
SERVICES ECONOMY			
Administration and Support Services	1,914	1,823	1,886
Construction	3,650	5,147	4,760
Electricity, Gas, Water and Waste Services	60	136	149
Financial and Insurance Services	913	813	867
Healthcare and Social Assistance	6,055	7,622	7,757
Mining	80	109	127
Other Services	1,852	2,070	2,221
Public Administration and Safety	1,848	2,323	2,362
Rental, Hiring and Real Estate Services	1,200	1,008	1,060
Transport, Postal and Warehousing	986	955	895
Wholesale Trade	581	531	486
Total Employed	19,140	22,538	22,571
% of total employed	47.1%	47.1%	45.8%
KNOWLEDGE ECONOMY			
Education and Training	5,236	6,867	7,269
Information Media and Telecommunications	404	412	474
Professional, Scientific and Technical services	1,622	1,742	1,994
Total Employed	7,262	9,021	9,737
% of total employed	17.9%	18.8%	19.8%
OTHER			
Agriculture, Forestry and Fishing	108	73	56
Manufacturing	1,009	1,088	1,049
Total Employed	1,117	1,161	1,105
% of total employed	2.7%	2.4%	2.2%
TOTAL	40,675	47,863	49,265

Source: NIEIR

Note:

NIEIR data is regularly used at the national level for sector employment comparisons and forecasting and has been referenced within this strategy for the sections relating to Business Sectors. NIEIR are recognised as industry leaders in the development and provision of robust economic modeling at the smallest credible geographic unit (Local Government Area).

Please note Census data is generally used for measuring and tracking Employment Self Sufficiency and Self Containment indicators and is used by State Government for this purpose. Census data generally 'undercounts' sector employment at the local level and therefore for data that is closer to the actual figures, the NIEIR data source is generally used.

NATIONAL REGIONAL PROFILE: JOONDALUP (C) LOCAL GOVERNMENT AREA ECONOMY					
COUNTS OF BUSINESSES, INCLUDING ENTRIES AND EXITS					
NUMBER OF BUSINESSES - at 30 June	2007	2008	2009	2010	2011
Number of non-employing businesses	8665	8737	8656	9113	9063
Number of employing businesses: 1-4 employees	3053	3113	2976	3025	3087
Number of employing businesses: 5 or more employees	1433	1480	1521	1482	1483
Total number of businesses	13151	13330	13153	13620	13633
BUSINESS ENTRIES - year ended 30 June		2008	2009	2010	2011
Number of non employing business entries		1763	1599	1799	1463
Number of employing business entries: 1-4 employees		526	455	468	448
Number of employing business entries: 5 or more employees		111	101	96	108
Total number of business entries		2400	2155	2363	2019
BUSINESS EXITS - year ended 30 June		2008	2009	2010	2011
Number of non employing business exits		1791	1845	1500	1625
Number of employing business exits: 1-4 employees		315	378	279	278
Number of employing business exits: 5 or more employees		110	106	116	103
Total number of business exits		2216	2329	1895	2006

Source: Australian Bureau of Statistics

STRATEGY ALIGNMENT, BACKGROUND REFERENCES AND CREDITS

The following documents were utilised as background research for formulating this Economic Development Strategy.

DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
CORPORATE BUSINESS PLAN 2012 - 2017	CITY OF JOONDALUP	✓					
JOONDALUP 2022 STRATEGIC COMMUNITY PLAN 2012-2022	CITY OF JOONDALUP	✓					
JOONDALUP: DIGITAL CITY STRATEGY	CITY OF JOONDALUP	✓					
JOONDALUP-JINAN RELATIONSHIP PLAN 2006-2016	CITY OF JOONDALUP	✓					
BUILDING A FUTURE TOGETHER STRATEGIC COMMUNITY PLAN 2013/14 - 2023/24	CITY OF WANNEROO	✓					
SCOPING STUDY: IMPACT OF FLY-IN FLY-OUT/ DRIVE-IN DRIVE-OUT WORK PRACTICES ON LOCAL GOVERNMENT	MORRIS, R AUSTRALIAN CENTRE OF EXCELLENCE FOR LOCAL GOVERNMENT	✓					
INDUSTRY, SCIENCE AND INNOVATION DIVISION STRATEGIC PLAN 2011-2014	DEPARTMENT OF COMMERCE		✓				
EXCELLENCE AND EQUITY STRATEGIC PLAN FOR WA PUBLIC SCHOOLS 2012 - 2015	DEPARTMENT OF EDUCATION		✓				
TRAINING WA PLANNING FOR THE FUTURE 2009-2018	DEPARTMENT OF EDUCATION AND TRAINING		✓				
GOVERNMENT OFFICE ACCOMODATION MASTER PLANNING STRATEGY	DEPARTMENT OF FINANCE BUILDING MANAGEMENT AND WORKS		✓				
NORTH WEST SUB-REGION EMPLOYMENT ALLOCATION	DEPARTMENT OF PLANNING (PREPARED BY PRACSYS)		✓				
DIRECTIONS 2031 AND BEYOND	DEPARTMENT OF PLANNING/WAPC		✓				

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
ECONOMIC AND EMPLOYMENT LANDS STRATEGY: NON HEAVY INDUSTRIAL PERTH METROPOLITAN AND PEEL REGIONS	DEPARTMENT OF PLANNING/WAPC		✓				
STRATEGIC PLAN: LEADING RESPONSIBLE DEVELOPMENT 2011 - 2014	DEPARTMENT OF STATE DEVELOPMENT		✓				
SKILLING WA - A WORKFORCE DEVELOPMENT PLAN FOR WESTERN AUSTRALIA	DEPARTMENT OF TRAINING AND WORKFORCE DEVELOPMENT		✓				
WESTERN AUSTRALIAN SKILLED MIGRATION STRATEGY	DEPARTMENT OF TRAINING AND WORKFORCE DEVELOPMENT		✓				
PUBLIC TRANSPORT FOR PERTH IN 2031	DEPARTMENT OF TRANSPORT		✓				
TOURISM WESTERN AUSTRALIA EXPERIENCE PERTH TOURISM DEVELOPMENT PRIORITIES 2010 - 2015	TOURISM WESTERN AUSTRALIA		✓				
TOURISM WESTERN AUSTRALIA STRATEGIC PLAN 2008-2013 BUILDING FOR THE FUTURE	TOURISM WESTERN AUSTRALIA		✓				
DATA ALERT	AUSTRALIAN TRADE COMMISSION			✓			
INTERNATIONAL DATA COMPARISONS	AUSTRALIAN TRADE COMMISSION			✓			
WHY AUSTRALIA BENCHMARK REPORT UPDATE	AUSTRALIAN TRADE COMMISSION			✓			
ICT WORKFORCE ISSUES PAPER	AUSTRALIAN WORKFORCE AND PRODUCTIVITY AGENCY			✓			
ICT WORKFORCE STUDY	AUSTRALIAN WORKFORCE AND PRODUCTIVITY AGENCY			✓			
AUSTRALIA'S DIGITAL ECONOMY: FUTURE DIRECTIONS	DEPARTMENT OF BROADBAND, COMMUNICATIONS AND THE DIGITAL ECONOMY			✓			
THE NATIONAL CLOUD COMPUTING STRATEGY	DEPARTMENT OF BROADBAND, COMMUNICATIONS AND THE DIGITAL ECONOMY			✓			

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
IMPACT - AUSTRALIA INVESTMENT FOR SOCIAL AND ECONOMIC BENEFIT	DEPARTMENT OF EDUCATION, EMPLOYMENT AND WORKPLACE RELATIONS /JBWERE			✓			
2012 NATIONAL RESEARCH INVESTMENT PLAN	DEPARTMENT OF INDUSTRY, INNOVATION, SCIENCE, RESEARCH AND TERTIARY EDUCATION			✓			
A PLAN FOR AUSTRALIAN JOBS THE AUSTRALIAN GOVERNMENT'S INDUSTRY AND INNOVATION STATEMENT	DEPARTMENT OF INDUSTRY, INNOVATION, SCIENCE, RESEARCH AND TERTIARY EDUCATION			✓			
AUSTRALIAN INNOVATION SYSTEM REPORT - 2012	DEPARTMENT OF INDUSTRY, INNOVATION, SCIENCE, RESEARCH AND TERTIARY EDUCATION			✓			
KEY STATISTICS AUSTRALIAN SMALL BUSINESS	DEPARTMENT OF INDUSTRY, INNOVATION, SCIENCE, RESEARCH AND TERTIARY EDUCATION			✓			
NATIONAL WORKFORCE DEVELOPMENT FUND SKILLING YOUR BUSINESS	DEPARTMENT OF INDUSTRY, INNOVATION, SCIENCE, RESEARCH AND TERTIARY EDUCATION			✓			
STRATEGIC RESEARCH PRIORITIES	DEPARTMENT OF INDUSTRY, INNOVATION, - SCIENCE, RESEARCH AND TERTIARY EDUCATION			✓			
OUR CITIES, OUR FUTURE A NATIONAL URBAN POLICY FOR A PRODUCTIVE, SUSTAINABLE AND LIVEABLE FUTURE	DEPARTMENT OF INFRASTRUCTURE AND TRANSPORT			✓			
STATE OF AUSTRALIAN CITIES 2012	DEPARTMENT OF INFRASTRUCTURE AND TRANSPORT			✓			
STATE OF AUSTRALIAN CITIES 2013	DEPARTMENT OF INFRASTRUCTURE AND TRANSPORT			✓			
KEY STATISTICS AUSTRALIAN SMALL BUSINESS	DEPARTMENT OF INNOVATION, INDUSTRY, SCIENCE AND RESEARCH			✓			
POWERING IDEAS AN INNOVATION AGENDA FOR THE 21ST CENTURY	DEPARTMENT OF INNOVATION, INDUSTRY, SCIENCE AND RESEARCH			✓			
STRATEGIC PLAN 2011-2014	DEPARTMENT OF INNOVATION, INDUSTRY, SCIENCE AND RESEARCH			✓			

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
REGIONAL ECONOMIC DEVELOPMENT GUIDE	DEPARTMENT OF REGIONAL AUSTRALIA, LOCAL GOVERNMENT, ARTS AND SPORT			✓			
TOURISM OPERATORS ONLINE CAPABILITIES BENCHMARK SURVEY 2010 RESEARCH REPORT	DEPARTMENT OF RESOURCES ENERGY AND TOURISM			✓			
NATIONAL LONG-TERM TOURISM STRATEGY	DEPARTMENT OF RESOURCES ENERGY AND TOURISM TOURISM AUSTRALIA			✓			
TOURISM 2020	DEPARTMENT OF RESOURCES ENERGY AND TOURISM TOURISM AUSTRALIA			✓			
AUSTRALIA IN THE ASIAN CENTURY	DEPARTMENT OF THE PRIME MINISTER AND CABINET			✓			
NATIONAL COMPAC WORKING TOGETHER	DEPARTMENT OF THE PRIME MINISTER AND CABINET			✓			
TRENDS IN MANUFACTURING TO 2020	FUTURE MANUFACTURING INDUSTRY INNOVATION COUNCIL DEPARTMENT OF INNOVATION, INDUSTRY, SCIENCE AND RESEARCH			✓			
NATIONAL ONLINE STRATEGY FOR TOURISM	KEYSTONE CORPORATE POSITIONING DIGITAL DISTRIBUTION WORKING GROUP AUSTRALIAN TOURISM DATA WAREHOUSE			✓			
FRAMEWORK FOR REGIONAL ECONOMIC DEVELOPMENT	REGIONAL AUSTRALIA STANDING COUNCIL DEPARTMENT OF REGIONAL AUSTRALIA, LOCAL GOVERNMENT, ARTS AND SPORT			✓			
PERTH REGIONAL PLAN	REGIONAL DEVELOPMENT AUSTRALIA PERTH			✓			
CREATIVE INDUSTRIES, A STRATEGY FOR THE 21ST CENTURY	VARIOUS DEPARTMENTS			✓			

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
EMPLOY OUTSIDE THE BOX THE REWARDS OF A DIVERSE WORKFORCE	ACCI - AUSTRALIAN CHAMBER OF COMMERCE AND INDUSTRY				✓		
WORKING IN PARALLEL LARGE AND SMALL BUSINESSES SUCCEEDING SIDE BY SIDE	BUSINESS COUNCIL OF AUSTRALIA				✓		
BOOSTING AUSTRALIA'S PRODUCTIVITY 2012 PRODUCTIVITY PAPER	CHAMBER OF COMMERCE AND INDUSTRY OF WESTERN AUSTRALIA				✓		
WA STATE GROWTH OUTLOOK 2013	CME - THE CHAMBER OF MINERALS AND ENERGY OF WESTERN AUSTRALIA (PRODUCED BY PWC)				✓		
THE INNOVATION DRIVEN ECONOMIC DEVELOPMENT MODEL	COLLABORATIVE ECONOMICS				✓		
AUSTRALIA'S COMPETITIVENESS SURVEY	CPA AUSTRALIA				✓		
IT'S (ALMOST ALL ABOUT ME) WORKPLACE 2030: BUILT FOR US	DELOITTE AUSTRALIA (PREPARED FOR AMP CAPITAL)				✓		
CONNECTED SMALL BUSINESSES	DELOITTE ACCESS ECONOMICS (PREPARED FOR GOOGLE AUSTRALIA)				✓		
MOBILE NATION THE ECONOMIC AND SOCIAL IMPACTS OF MOBILE TECHNOLOGY	DELOITTE ACCESS ECONOMICS (PREPARED FOR GOOGLE AUSTRALIA)				✓		
NBN BUSINESS READINESS SURVEY IN 2013	DELOITTE ACCESS ECONOMICS (PREPARED FOR MACQUARIE TELECOM)				✓		
CONNECTING COMMUNITIES THE IMPACT OF BROADBAND ON COMMUNITIES IN THE UK AND ITS IMPLICATIONS FOR AUSTRALIA	DR TIM WILLIAMS HUAWEI				✓		
A SNAPSHOT OF AUSTRALIA'S DIGITAL FUTURE TO 2050	IBISWORLD (COMMISSIONED FOR IBM AUSTRALIA)				✓		
ECONOMIC DEVELOPMENT IN A RUBIK'S CUBE	IBM				✓		

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
WORLD							
SMARTER CITIES FOR SMARTER GROWTH HOW CITIES CAN OPTIMIZE THEIR SYSTEMS FOR THE TALENT-BASED ECONOMY	IBM				✓		
SMARTER EDUCATION POINT OF VIEW BUILDING THE FOUNDATIONS OF ECONOMIC SUCCESS	IBM				✓		
SMARTER GOVERNMENT POINT OF VIEW THE FOUNDATIONS OF EFFICIENCY	IBM				✓		
SMARTER HEALTHCARE AND LIFE SCIENCES POINT OF VIEW REDEFINING VALUE AND SUCCESS IN HEALTHCARE	IBM				✓		
SMARTER RETAIL POINT OF VIEW THE QUEST FOR CUSTOMER CONNECTION	IBM				✓		
DIGITAL LITERACY AND E-SKILLS: PARTICIPATION IN THE DIGITAL ECONOMY	IBSA - INNOVATION & BUSINESS SKILLS AUSTRALIA				✓		
ENVIRONMENT SCAN - 2013 RESPONSIVE WORKFORCES - ADAPTABLE STRATEGIES	IBSA - INNOVATION & BUSINESS SKILLS AUSTRALIA				✓		
ANALYSIS OF THE LONG DISTANCE COMMUTER WORKFORCE ACROSS AUSTRALIA	MINERALS COUNCIL OF AUSTRALIA (PRODUCED BY KPMG)				✓		
WHERE IS YOUR NEXT WORKER? (BUILDING THE LUCKY COUNTRY 2011)	DELOITTE				✓		
DIGITAL DISRUPTION: SHORT FUSE, BIG BANG? (BUILDING THE LUCKY COUNTRY 2012)	DELOITTE				✓		
POSITIONING FOR PROSPERITY? CATCHING THE NEXT WAVE (BUILDING THE LUCKY COUNTRY 2014)	DELOITTE				✓		

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
ANNUAL REPORT 2012	EDITH COWAN UNIVERSITY					✓	
ENGAGING MINDS, ENGAGING COMMUNITIES: TOWARDS 2020	EDITH COWAN UNIVERSITY					✓	
THE SUSTAINABILITY OF CITIES: DETERMINING AN APPROPRIATE MODEL	INSTITUTE FOR SUSTAINABILITY AND TECHNOLOGY POLICY - MURDOCH UNIVERSITY (STEVE EGGER)					✓	
ENTERPRISING PLACES SUSTAINING COMPETITIVE LOCATIONS FOR TECHNOLOGY-BASED ACTIVITY	THE CAMBRIDGE-MIT INSTITUTE					✓	
EMBEDDING UNIVERSITIES IN KNOWLEDGE CITIES	THE WORK FOUNDATION					✓	
A MODEL OF SUSTAINABLE INNOVATION	WEST COAST INSTITUTE OF TRAINING					✓	
STRATEGIC PLAN 2013-2015	WEST COAST INSTITUTE OF TRAINING					✓	
THE WORLD IS NOT FLAT THE CASE FOR CITY REGIONS	DUBLIN CHAMBER OF COMMERCE						✓
A PRACTICAL GUIDE TO CLUSTER DEVELOPMENT	ECOTECH RESEARCH & CONSULTING (REPORT TO THE DEPARTMENT OF TRADE AND INDUSTRY AND THE ENGLISH RDAS)						✓
UNLOCKING GROWTH IN CITIES	HM GOVERNMENT						✓
CREATIVE CLUSTERS AND INNOVATION PUTTING CREATIVITY ON THE MAP	NESTA						✓
SEEING THE LIGHT? NEXT STEPS FOR CITY REGIONS	NLGN NEW LOCAL GOVERNMENT NETWORK						✓
BROADBAND AND THE ECONOMY	OECD - ORGANISATION FOR ECONOMIC CO- OPERATION AND DEVELOPMENT						✓
OECD INTERNET ECONOMY OUTLOOK 2012	OECD- ORGANISATION FOR ECONOMIC CO- OPERATION AND DEVELOPMENT						✓
TEN PRINCIPLES FOR DEVELOPING SUCCESSFUL TOWN CENTRES	ULI URBAN LAND INSTITUTE						✓

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DOCUMENT TITLE	SOURCE	LOCAL GOVERNMENT	STATE GOVERNMENT	FEDERAL GOVERNMENT	INDUSTRY	ACADEMIC	INTERNATIONAL
BREAKING THE BINARY: POLICY GUIDE TO SCALING SOCIAL INNOVATION	WORLD ECONOMIC FORUM						✓
THE GLOBAL COMPETITIVENESS REPORT 2012-2013	WORLD ECONOMIC FORUM						✓
THE GLOBAL INFORMATION TECHNOLOGY REPORT 2013	WORLD ECONOMIC FORUM						✓
TRAILBLAZERS, SHAPERS AND INNOVATORS	WORLD ECONOMIC FORUM						✓



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ANALYSIS OF DRAFT ECONOMIC DEVELOPMENT STRATEGY SURVEY

The following provides an analysis of the quantitative and qualitative data gathered from the *Economic Development Strategy* survey conducted with stakeholders between 14 March 2014 and 11 April 2014.

(N.b. unless otherwise stated, “%” refers to the proportion of total survey respondents.)

BACKGROUND

The City targeted its consultation with key external stakeholders that were categorised into five main groups:

- Local/Regional partner organisations and service delivery bodies e.g. ECU, City of Wanneroo
- Statutory partners including relevant State and Federal Government Agencies e.g. Department of Planning, AusIndustry, Small Business Development Corporation
- Local Business Community
- Key Business and Industry Associations e.g. CCI WA, JBA, AIIA
- General Community within the City of Joondalup

A generic and targeted approach to consultation is proposed to include the following activities;

- A personally addressed letter explaining the purpose and objectives of the Draft Economic Development Strategy and inviting higher level feedback (direct mail)
- A more targeted form (online) with a focus on key objectives and activities inviting specific feedback relevant to the stakeholder (direct email)
- Web link to an online form distributed via various networks including City of Joondalup e-bulletin distribution list (2000+) and Joondalup Learning Precinct
- Potential adverts and news items in specific business related publications including Business News WA
- General media releases and social media activity

A page dedicated to the Economic Development Strategy Consultation was set up on the City's website, with a link to the Online Survey Form available for key stakeholders to complete. In addition, there were copies of the draft Economic Development Strategy available as well as a summary version for stakeholders' perusal. Members of the public were also able to complete a survey form online via the City's website.

RESPONSE RATES

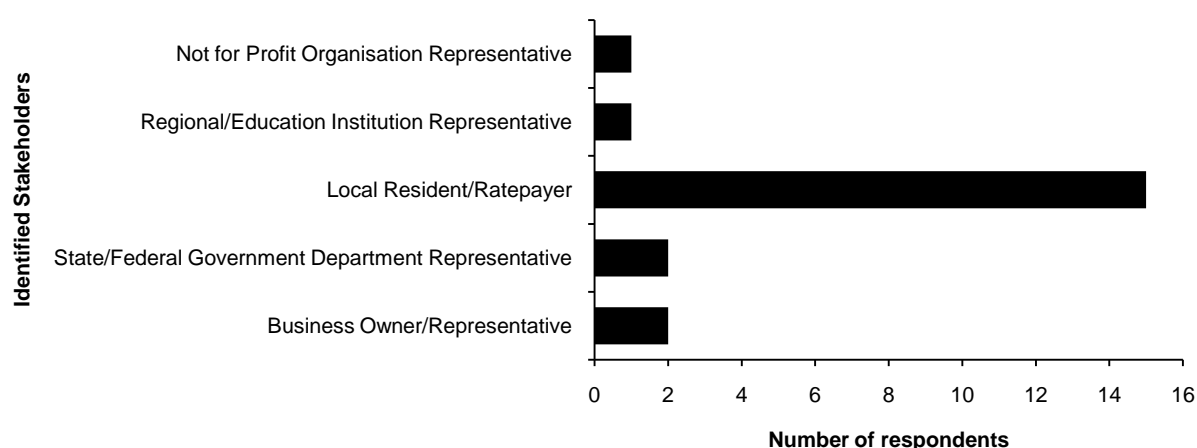
Online surveys were sent to key external stakeholders who conduct business within the City as well as other external stakeholders. The City collected a combined total of 21 responses, all of which were valid responses¹.

Of the 21 valid responses, the majority of respondents were local resident/ratepayers (N=15, 71.4%). This data is summarised in Table 1 and Chart 1 below.

Table 1: Identified Stakeholders

Identified User Groups	Responses	
	N	%
Business Owner/Representative	2	9.5%
State/Federal Government Department Representative	2	9.5%
Local Resident/Ratepayer	15	71.4%
Regional Education Institution Representative	1	4.8%
Not for Profit Organisation Representative	1	4.8%
Total (valid) responses	21	100.0%

Chart 1: Identified Stakeholders



¹ N.b. a "valid" response is one which includes the respondent's full contact details, they have responded within the advertised consultation period and for which multiple survey forms have not been submitted by the same person.

THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: GROWING BUSINESS****QUESTION – 1.1 (A) — “MONITOR AND REVIEW LOCAL AND REGIONAL BUSINESS ISSUES AND TRENDS ON A REGULAR BASIS”**

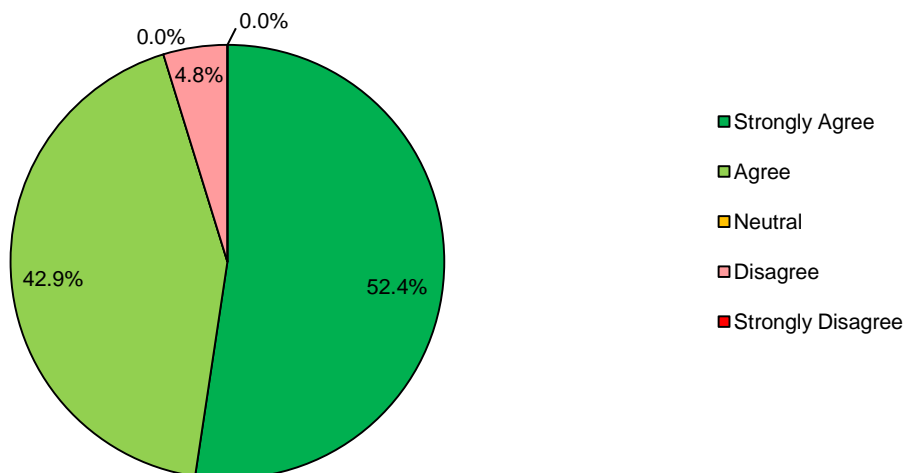
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 2 and Chart 2 below.

The majority of respondents (95.3%) indicated that they either agreed or strongly agreed with the statement, “Monitor and review local and regional business issues and trends on a regular basis”.

Table 2: Level of agreement support for statement – “Monitor and review local and regional business issues and trends on a regular basis”.

Level of Agreement	Responses	
	N	%
Strongly Agree	11	52.4%
Agree	9	42.9%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 2: Level of agreement support for statement – “Monitor and review local and regional business issues and trends on a regular basis”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: GROWING BUSINESS****QUESTION – 1.1 (B) — “PROMOTE BUSINESS GROWTH AND PRODUCTIVITY PROGRAMS WITH KEY PARTNERS”**

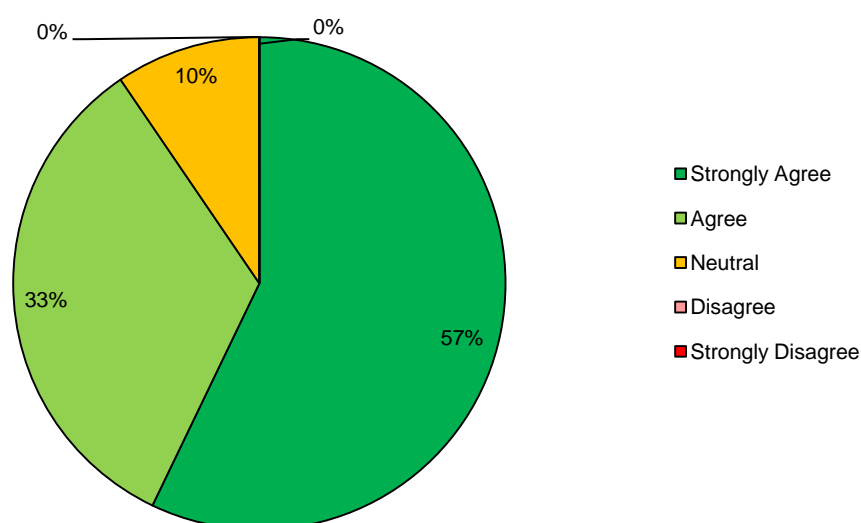
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 3 and Chart 3 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Promote business growth and productivity programs with key partners”.

Table 3: Level of agreement support for statement – “Promote business growth and productivity programs with key partners”.

Level of Agreement	Responses	
	N	%
Strongly Agree	12	57.1%
Agree	7	33.3%
Neutral	2	9.5%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 3: Level of agreement support for statement – “Promote business growth and productivity programs with key partners”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: GROWING BUSINESS****QUESTION – 1.1 (C) — “ENCOURAGE AND PROMOTE BUSINESS START-UP, INCUBATION AND COMMERCIALISATION ACTIVITY”**

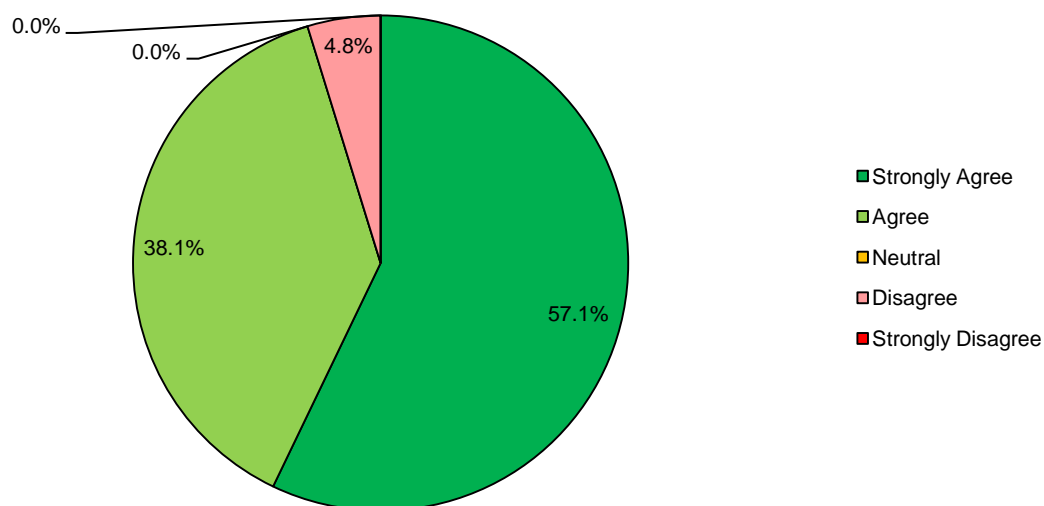
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 4 and Chart 4 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Encourage and promote business start-up, incubation and commercialisation activity”.

Table 4: Level of agreement support for statement – “Encourage and promote business start-up, incubation and commercialisation activity”.

Level of Agreement	Responses	
	N	%
Strongly Agree	12	57.1%
Agree	8	38.1%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 4: Level of agreement support for statement – “Encourage and promote business start-up, incubation and commercialisation activity”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: GROWING BUSINESS****QUESTION – 1.1 (D) — “PROMOTE BUSINESS SUSTAINABILITY AND ENVIRONMENTAL RESPONSIBILITY COMMERCIALISATION ACTIVITY”**

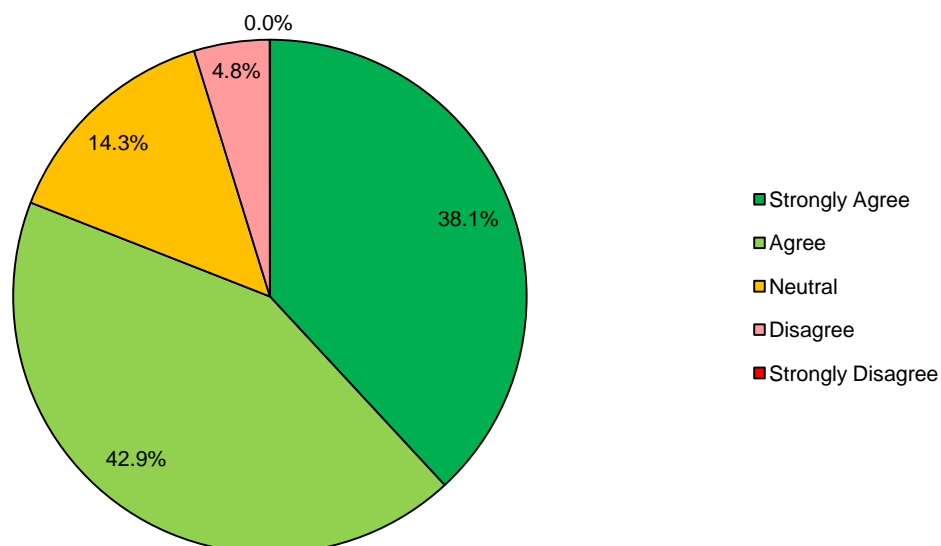
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 5 and Chart 5 below.

The majority of respondents (81.0%) indicated that they either agreed or strongly agreed with the statement, “Promote business sustainability and environmental responsibility commercialisation activity”.

Table 5: Level of agreement support for statement – “Promote business sustainability and environmental responsibility commercialisation activity”.

Level of Agreement	Responses	
	N	%
Strongly Agree	8	38.1%
Agree	9	42.9%
Neutral	3	14.3%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 5: Level of agreement support for statement – “Promote business sustainability and environmental responsibility commercialisation activity”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: PROMOTING INNOVATION****QUESTION – 1.2 (A) — “PROMOTE JOONDALUP AS A REGIONAL KNOWLEDGE AND INNOVATION HUB AND DIGITAL CITY”**

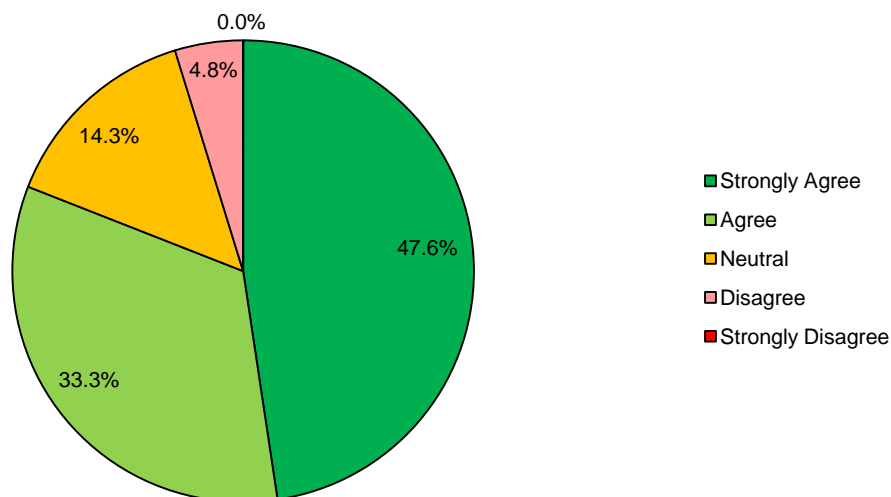
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 6 and Chart 6 below.

The majority of respondents (81.0%) indicated that they either agreed or strongly agreed with the statement, “Promote Joondalup as a regional knowledge and innovation hub and Digital City”

Table 6: Level of agreement support for statement – “Promote Joondalup as a regional knowledge and innovation hub and Digital City”.

Level of Agreement	Responses	
	N	%
Strongly Agree	10	47.6%
Agree	7	33.3%
Neutral	3	14.3%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 6: Level of agreement support for statement – “Promote Joondalup as a regional knowledge and innovation hub and Digital City”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: PROMOTING INNOVATION****QUESTION – 1.2 (B) — “STRENGTHEN COLLABORATION BETWEEN RESEARCH AND INDUSTRY IN KEY SECTORS/NICHE CLUSTERS”**

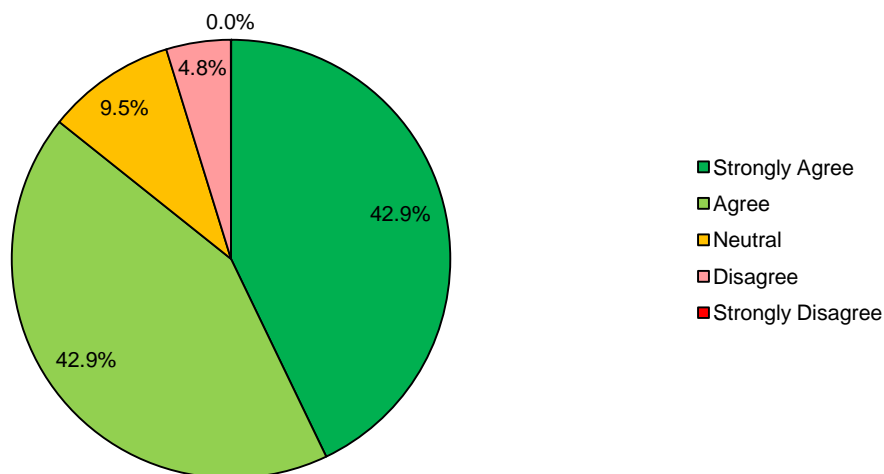
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 7 and Chart 7 below.

The majority of respondents (85.7%) indicated that they either agreed or strongly agreed with the statement, “Strengthen collaboration between research and industry in key sectors/niche clusters”.

Table 7: Level of agreement support for statement – “Strengthen collaboration between research and industry in key sectors/niche clusters”.

Level of Agreement	Responses	
	N	%
Strongly Agree	9	42.9%
Agree	9	42.9%
Neutral	2	9.5%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 7: Level of agreement support for statement – “Strengthen collaboration between research and industry in key sectors/niche clusters”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: PROMOTING INNOVATION****QUESTION – 1.2 (C) — “IDENTIFY, SUPPORT AND PROMOTE STRATEGIES AND PROGRAMS THAT ENHANCE LOCAL INNOVATION”**

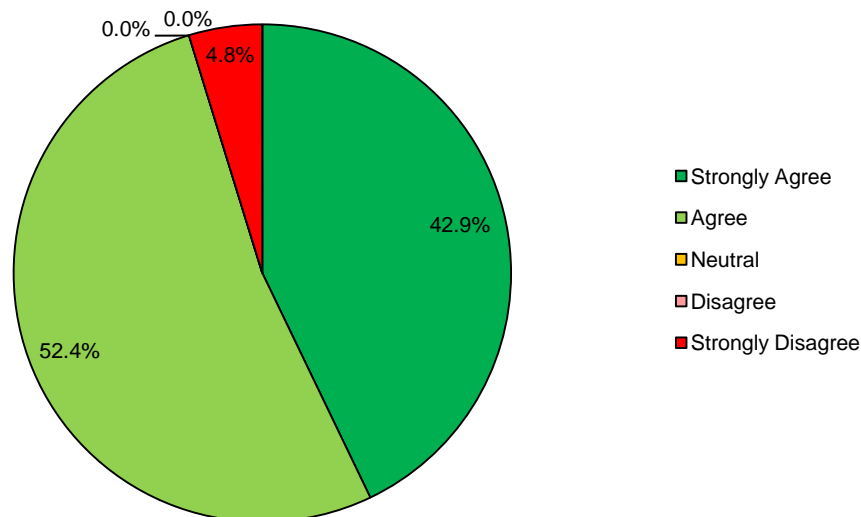
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 8 and Chart 8 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Identify, support and promote strategies and programs that enhance local innovation”.

Table 8: Level of agreement support for statement – “Identify, support and promote strategies and programs that enhance local innovation”.

Level of Agreement	Responses	
	N	%
Strongly Agree	9	42.9%
Agree	11	52.4%
Neutral	0	0.0%
Disagree	0	0.0%
Strongly Disagree	1	4.8%
Total responses received	21	100.0%

Chart 8: Level of agreement support for statement – “Identify, support and promote strategies and programs that enhance local innovation”.



THEME: BUSINESS GROWTH & INNOVATION**STRATEGY: PROMOTING INNOVATION****QUESTION – 1.2 (D) — “IDENTIFY AND DEVELOP LOCAL, NATIONAL AND GLOBAL CONNECTIONS WITH OTHER INNOVATION HUBS”**

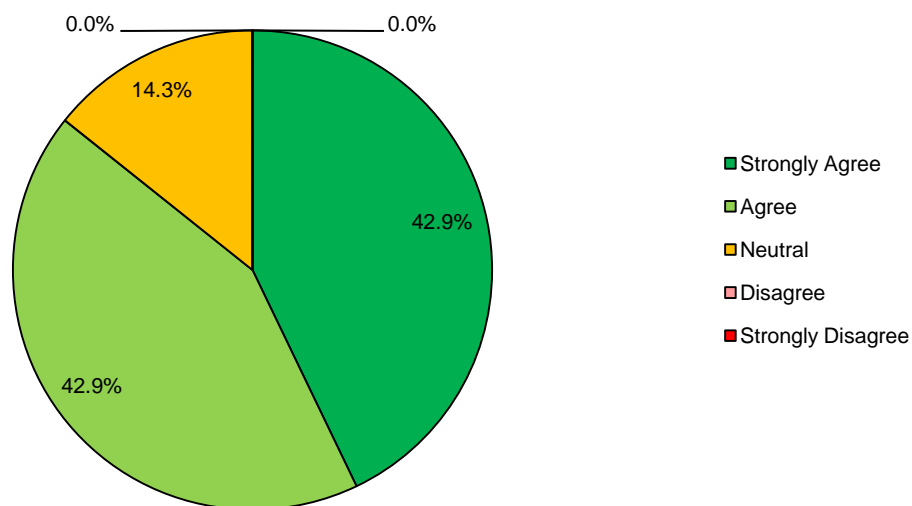
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 9 and Chart 9 below.

The majority of respondents (85.7%) indicated that they either agreed or strongly agreed with the statement, “Identify and develop local, national and global connections with other innovation hubs”.

Table 9: Level of agreement support for statement – “Identify and develop local, national and global connections with other innovation hubs”.

Level of Agreement	Responses	
	N	%
Strongly Agree	9	42.9%
Agree	9	42.9%
Neutral	3	14.3%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 9: Level of agreement support for statement – “Identify and develop local, national and global connections with other innovation hubs”.



THEME: BUSINESS GROWTH & INNOVATION
QUESTION 1.3 — “IF YOU DO NOT SUPPORT ANY OF THE STRATEGIES FOR BUSINESS GROWTH & INNOVATION, PLEASE TELL US WHY.”

Respondents who indicated that they either disagreed or strongly disagreed with any of the strategies for Business Growth & Innovation were asked to describe why this was the case. A total of 2 respondents provided 6 comments for improvement and 1 comment that support the plan. The results have been summarised in Table 10 below.

Table 10: Summary of reasons for disagreement to one or more of the strategies for Business Growth & Innovation²

Comments for Improvement	Responses	
	N	%
Consider different leasing options	1	16.67%
Consider targeting particular industries for co-working	1	16.67%
Need for a major focus on large businesses instead of small/medium businesses	1	16.67%
Need to attract large businesses to Joondalup (i.e. Relocate head offices)	1	16.67%
Support the establishment of home-based businesses	1	16.67%
Support the plan (in general)	1	16.67%
Total comments received	6	100.0%

² N.b. some respondents provided more than one reason.

THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: DEVELOPING CLUSTERS****QUESTION – 2.1 (A) — “RESEARCH AND IDENTIFY KEY LOCAL AND REGIONAL BUSINESS CLUSTERS”**

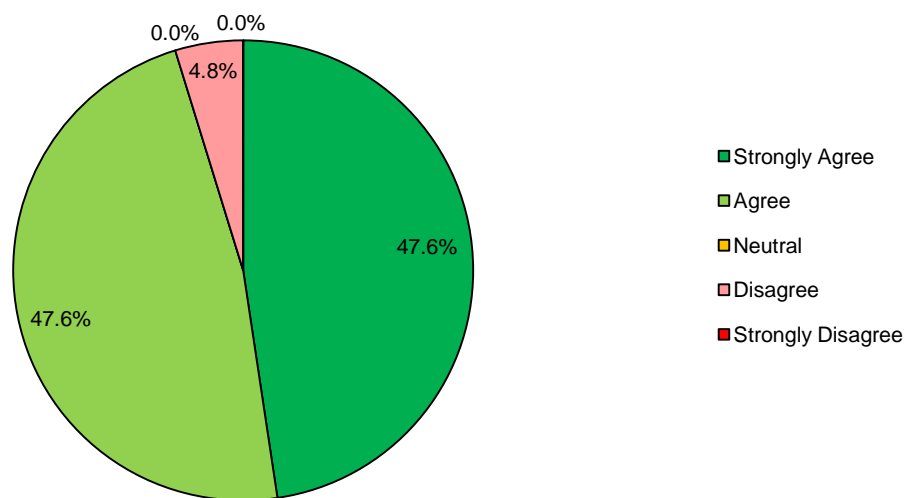
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 11 and Chart 10 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Research and identify key local and regional business clusters”.

Table 11: Level of agreement support for statement – “Research and identify key local and regional business clusters”.

Level of Agreement	Responses	
	N	%
Strongly Agree	10	47.6%
Agree	10	47.6%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 10: Level of agreement support for statement – “Research and identify key local and regional business clusters”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: DEVELOPING CLUSTERS****QUESTION – 2.1 (B) — “PROMOTE LOCAL VALUE CHAIN ACTIVITY TO ENHANCE GROWTH AND INVESTMENT IN KEY CLUSTERS”**

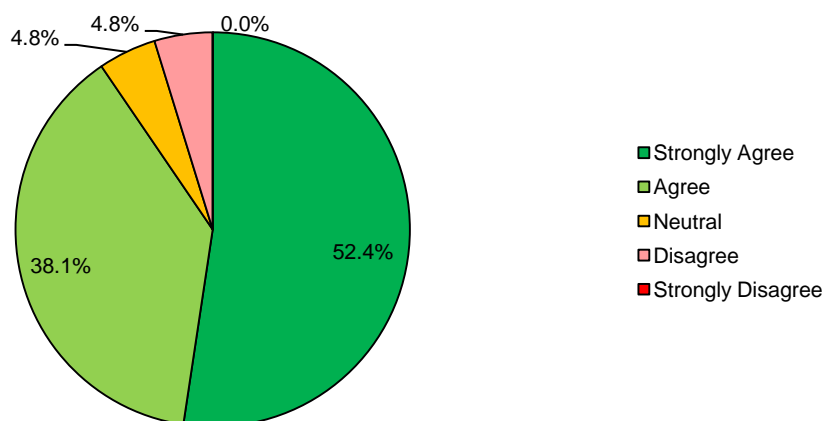
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 12 and Chart 11 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Promote local value chain activity to enhance growth and investment in key clusters”.

Table 12: Level of agreement support for statement – “Promote local value chain activity to enhance growth and investment in key clusters”.

Level of Agreement	Responses	
	N	%
Strongly Agree	11	52.4%
Agree	8	38.1%
Neutral	1	4.8%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 11: Level of agreement support for statement – “Promote local value chain activity to enhance growth and investment in key clusters”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: DEVELOPING CLUSTERS****QUESTION – 2.1 (C) — “IDENTIFY OPPORTUNITIES IN NICHE CLUSTERS TO ENHANCE INVESTMENT AND EMPLOYMENT”**

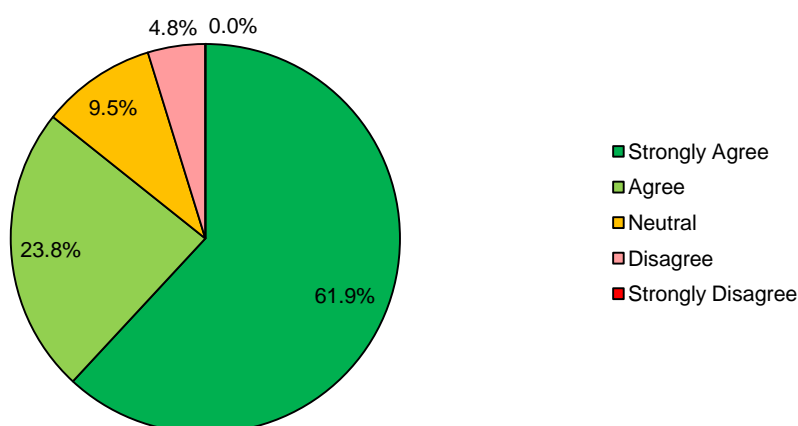
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 13 and Chart 12 below.

The majority of respondents (85.7%) indicated that they either agreed or strongly agreed with the statement, “Identify opportunities in niche clusters to enhance investment and employment”.

Table 13: Level of agreement support for statement – “Identify opportunities in niche clusters to enhance investment and employment”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	5	23.8%
Neutral	2	9.5%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 12: Level of agreement support for statement – “Identify opportunities in niche clusters to enhance investment and employment”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: DEVELOPING CLUSTERS****QUESTION – 2.1 (D) — “IDENTIFY EMERGING SECTORS AND FUTURE BUSINESS GROWTH OPPORTUNITIES”**

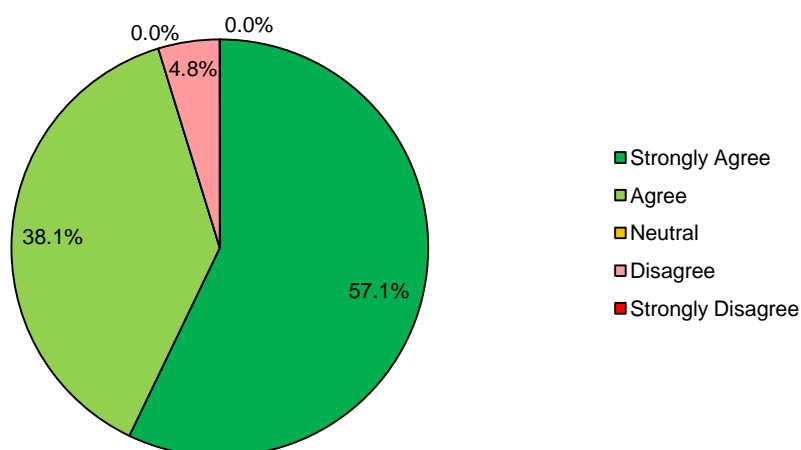
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 14 and Chart 13 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Identify emerging sectors and future business growth opportunities”.

Table 14: Level of agreement support for statement – “Identify emerging sectors and future business growth opportunities”.

Level of Agreement	Responses	
	N	%
Strongly Agree	12	57.1%
Agree	8	38.1%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 13: Level of agreement support for statement – “Identify emerging sectors and future business growth opportunities”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: ATTRACTING INVESTMENT****QUESTION – 2.2 (A) — “TRACK KEY METRICS RELATING TO BUSINESS AND INVESTMENT OPPORTUNITIES AND ENHANCE INTERNAL PROCESSES AND COMMUNICATION”**

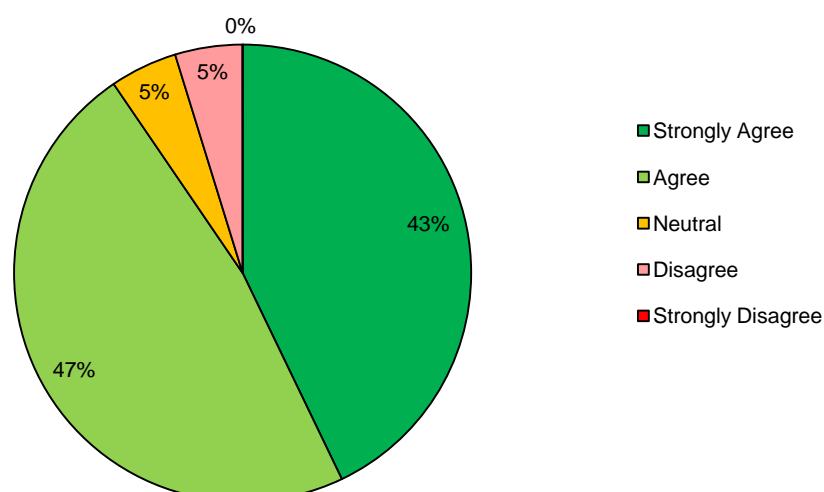
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 15 and Chart 14 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Track key metrics relating to business and investment opportunities and enhance internal processes and communication”.

Table 15: Level of agreement support for statement – “Track key metrics relating to business and investment opportunities and enhance internal processes and communication”.

Level of Agreement	Responses	
	N	%
Strongly Agree	9	42.9%
Agree	10	47.6%
Neutral	1	4.8%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 14: Level of agreement support for statement – “Track key metrics relating to business and investment opportunities and enhance internal processes and communication”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: ATTRACTING INVESTMENT****QUESTION – 2.2 (B) — “DEVELOP MARKETING COLLATERAL AND MANAGE TARGETED CAMPAIGNS TO ATTRACT INVESTMENT”**

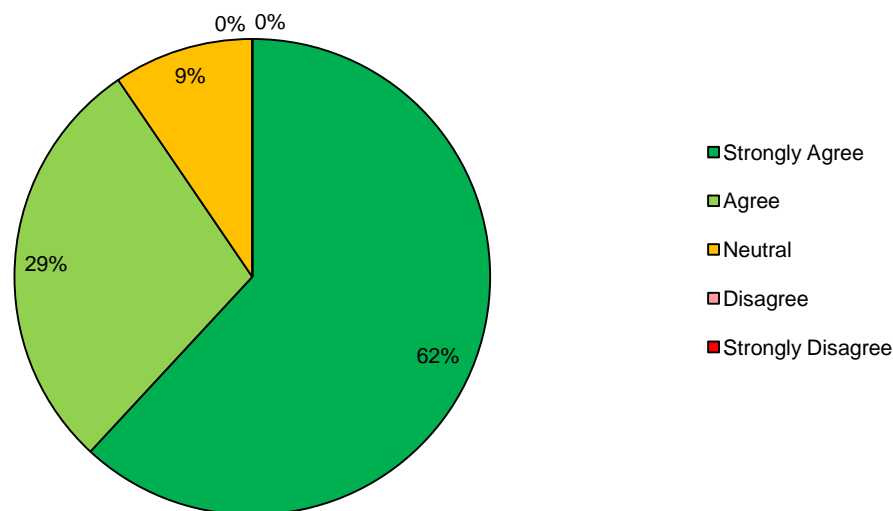
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 16 and Chart 15 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Develop marketing collateral and manage targeted campaigns to attract investment”.

Table 16: Level of agreement support for statement – “Develop marketing collateral and manage targeted campaigns to attract investment”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	6	28.6%
Neutral	2	9.5%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 15: Level of agreement support for statement – “Develop marketing collateral and manage targeted campaigns to attract investment”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: ATTRACTING INVESTMENT****QUESTION – 2.2 (C) — “DEVELOP PARTNERSHIPS WITH KEY AGENCIES AND ORGANISATIONS FOR LOCAL AND REGIONAL LEVEL ACTIVITY”**

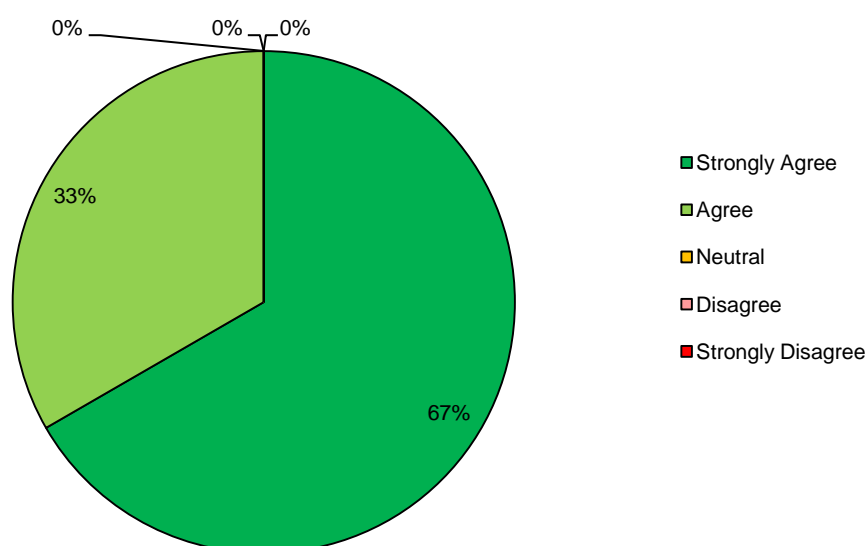
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 17 and Chart 16 below.

All respondents (100%) indicated that they either agreed or strongly agreed with the statement, “Develop partnerships with key agencies and organisations for local and regional level activity”.

Table 17: Level of agreement support for statement – “Develop partnerships with key agencies and organisations for local and regional level activity”.

Level of Agreement	Responses	
	N	%
Strongly Agree	14	66.7%
Agree	7	33.3%
Neutral	0	0.0%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 16: Level of agreement support for statement – “Develop partnerships with key agencies and organisations for local and regional level activity”.



THEME: BUSINESS CLUSTERS & INVESTMENT**STRATEGY: ATTRACTING INVESTMENT****QUESTION – 2.2 (D) — “PROMOTE KEY DEVELOPMENT SITES AND COMMERCIAL PREMISES TO ATTRACT STRATEGIC EMPLOYERS”**

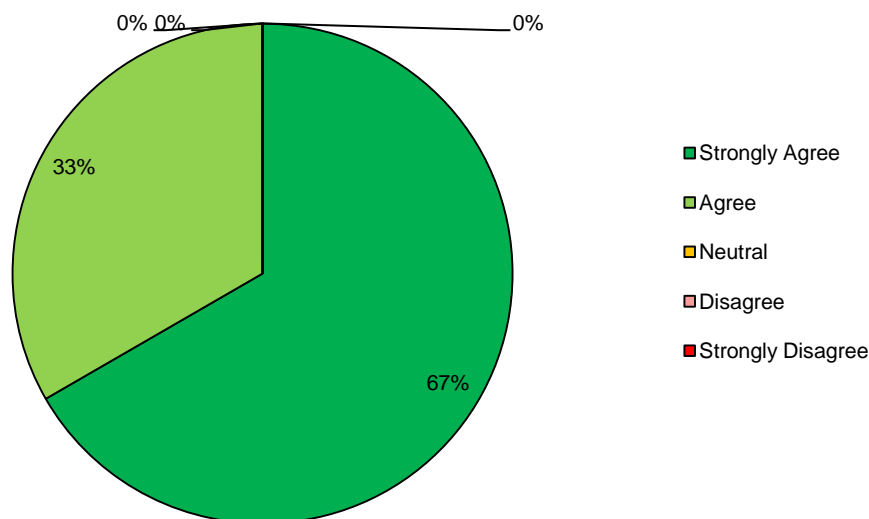
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 18 and Chart 17 below.

All respondents (100%) indicated that they either agreed or strongly agreed with the statement, “Promote key development sites and commercial premises to attract strategic employers”.

Table 18: Level of agreement support for statement – “Promote key development sites and commercial premises to attract strategic employers”.

Level of Agreement	Responses	
	N	%
Strongly Agree	14	66.7%
Agree	7	33.3%
Neutral	0	0.0%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 17: Level of agreement support for statement – “Promote key development sites and commercial premises to attract strategic employers”.



THEME: BUSINESS CLUSTERS & INVESTMENT
QUESTION 2.3 — “IF YOU DO NOT SUPPORT ANY OF THE STRATEGIES FOR BUSINESS CLUSTERS & INVESTMENT, PLEASE TELL US WHY.”

Respondents who indicated that they either disagreed or strongly disagreed with any of the strategies for Business Clusters & Investment were asked to describe why this was the case. A total of 4 respondents provided 5 comments for improvement and 1 comment that support the plan. The results have been summarised in Table 19 below.

Table 19: Summary of reasons for disagreement to one or more of the strategies for Business Clusters & Investment³

Reasons	Responses	
	N	%
Need for business for the City to track, identify and promote businesses in a cost effective way	1	20.00%
Need to promote in house talent rather than expensive outside contractors	1	20.00%
Promotion through local businesses rather than expensive media companies	1	20.00%
Shift the focus to large business within the City	1	20.00%
Support the plan (in general)	1	20.00%
Total comments received	5	100.0%

³ N.b. some respondents provided more than one reason.

THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: BUILDING CAPACITY****QUESTION – 3.1 (A) — “PROMOTION AND MATCHING OF LOCAL JOB OPPORTUNITIES FOR LOCAL PEOPLE”**

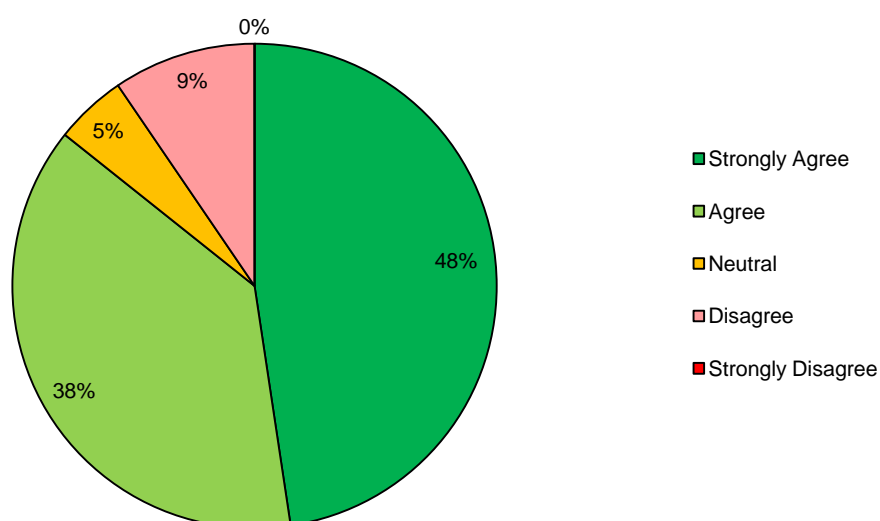
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 20 and Chart 18 below.

The majority of respondents (85.7%) indicated that they either agreed or strongly agreed with the statement, “Promotion and matching of local job opportunities for local people”.

Table 20: Level of agreement support for statement – “Promotion and matching of local job opportunities for local people”.

Level of Agreement	Responses	
	N	%
Strongly Agree	10	47.6%
Agree	8	38.1%
Neutral	1	4.8%
Disagree	2	9.5%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 18: Level of agreement support for statement – “Promotion and matching of local job opportunities for local people”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: BUILDING CAPACITY****QUESTION – 3.1 (B) — “ENHANCING LOCAL WORKFORCE PRODUCTIVITY”**

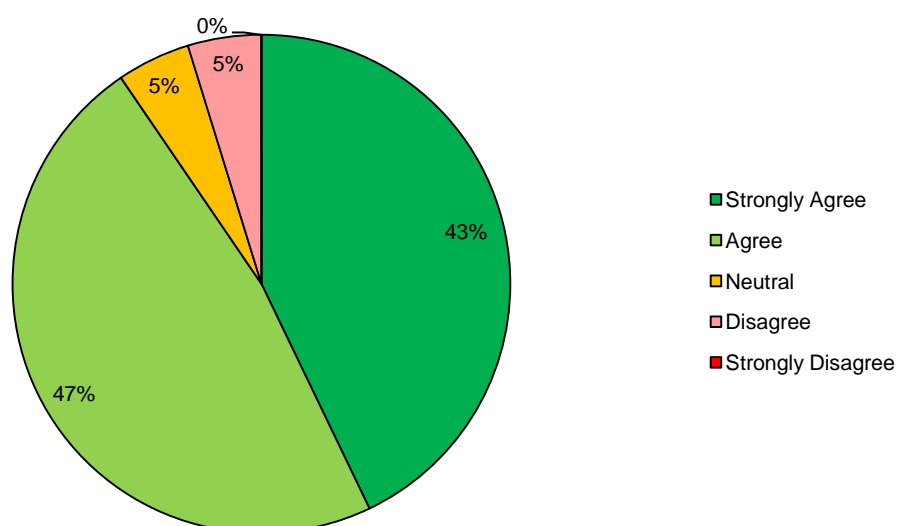
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 21 and Chart 19 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Enhancing local workforce productivity”.

Table 21: Level of agreement support for statement – “Enhancing local workforce productivity”.

Level of Agreement	Responses	
	N	%
Strongly Agree	9	42.9%
Agree	10	47.6%
Neutral	1	4.8%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 19: Level of agreement support for statement – “Enhancing local workforce productivity”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: BUILDING CAPACITY****QUESTION – 3.1 (C) — “ENHANCING LOCAL WORKFORCE PARTICIPATION AND REDUCING BARRIERS TO WORK”**

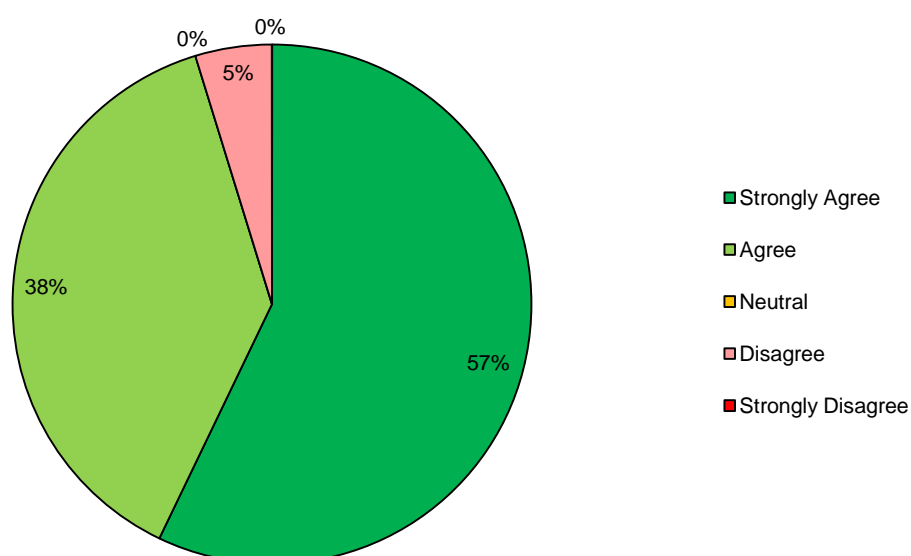
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 22 and Chart 20 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Enhancing local workforce participation and reducing barriers to work”.

Table 22: Level of agreement support for statement – “Enhancing local workforce participation and reducing barriers to work”.

Level of Agreement	Responses	
	N	%
Strongly Agree	12	57.1%
Agree	8	38.1%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 20: Level of agreement support for statement – “Enhancing local workforce participation and reducing barriers to work”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: BUILDING CAPACITY****QUESTION – 3.1 (D) — “ENHANCING EMPLOYABILITY SKILLS, IN PARTNERSHIP WITH KEY AGENCIES”**

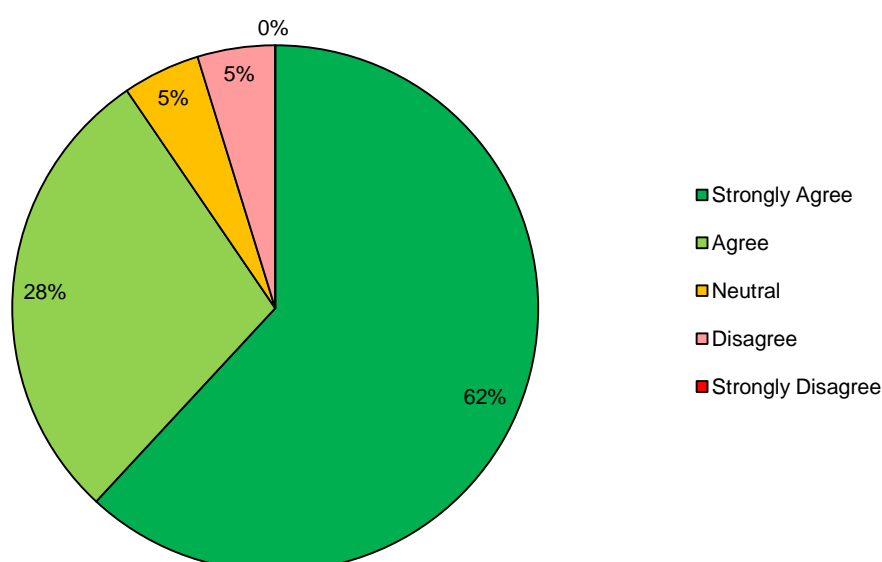
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 23 and Chart 21 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Enhancing employability skills, in partnership with key agencies”.

Table 23: Level of agreement support for statement – “Enhancing employability skills, in partnership with key agencies”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	6	28.6%
Neutral	1	4.8%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 23: Level of agreement support for statement – “Enhancing employability skills, in partnership with key agencies”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT

STRATEGY: FUTURE WORKFORCE

QUESTION – 3.2 (A) — “ATTRACTION, RETENTION, RECOGNITION AND PROMOTION OF CREATIVE TALENT”

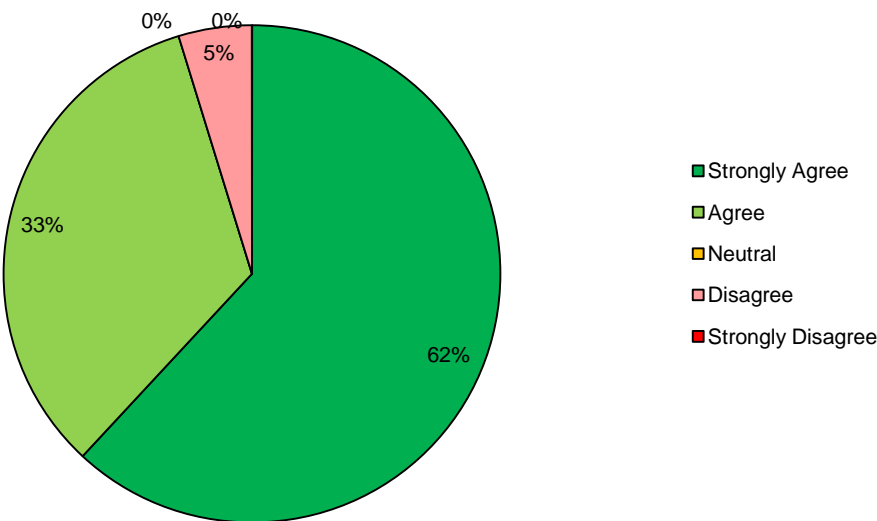
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 24 and Chart 22 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Attraction, retention, recognition and promotion of creative talent”.

Table 24: Level of agreement support for statement – “Attraction, retention, recognition and promotion of creative talent”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	7	33.3%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 22: Level of agreement support for statement – “Attraction, retention, recognition and promotion of creative talent”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: FUTURE WORKFORCE****QUESTION – 3.2 (B) — “ALIGNMENT OF FUTURE SKILLS DEVELOPMENT ACTIVITY WITH STATE AND FEDERAL POLICIES AND PROGRAMS”**

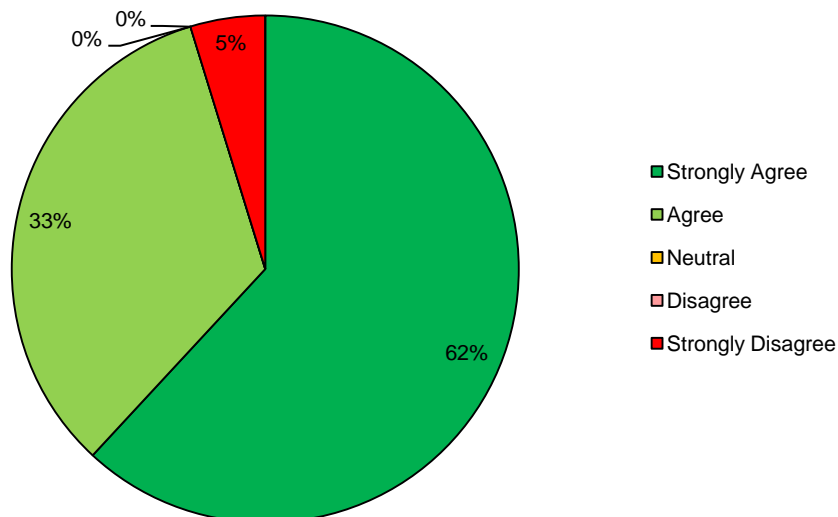
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 25 and Chart 23 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Alignment of future skills development activity with State and Federal policies and programs”.

Table 25: Level of agreement support for statement – “Alignment of future skills development activity with State and Federal policies and programs”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	7	33.3%
Neutral	0	0.0%
Disagree	0	0.0%
Strongly Disagree	1	4.8%
Total responses received	21	100.0%

Chart 23: Level of agreement support for statement – “Alignment of future skills development activity with State and Federal policies and programs”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: FUTURE WORKFORCE****QUESTION – 3.2 (C) — “PROMOTION AND DEVELOPMENT OF LOCAL SKILLS TO ATTRACT NEW BUSINESS GROWTH AND INVESTMENT IN KEY SECTORS”**

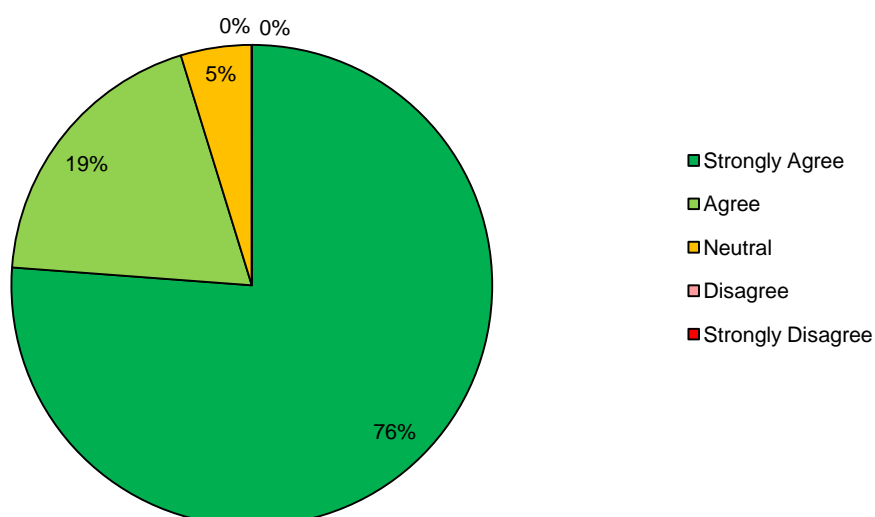
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 26 and Chart 24 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Promotion and development of local skills to attract new business growth and investment in key sectors”.

Table 26: Level of agreement support for statement – “Promotion and development of local skills to attract new business growth and investment in key sectors”.

Level of Agreement	Responses	
	N	%
Strongly Agree	16	76.2%
Agree	4	19.0%
Neutral	1	4.8%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 24: Level of agreement support for statement – “Promotion and development of local skills to attract new business growth and investment in key sectors”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT**STRATEGY: FUTURE WORKFORCE****QUESTION – 3.2 (D) — “PROMOTION OF SCIENCE AND TECHNOLOGY IN EDUCATION SYSTEM AND FUTURE EMPLOYMENT OPPORTUNITIES”**

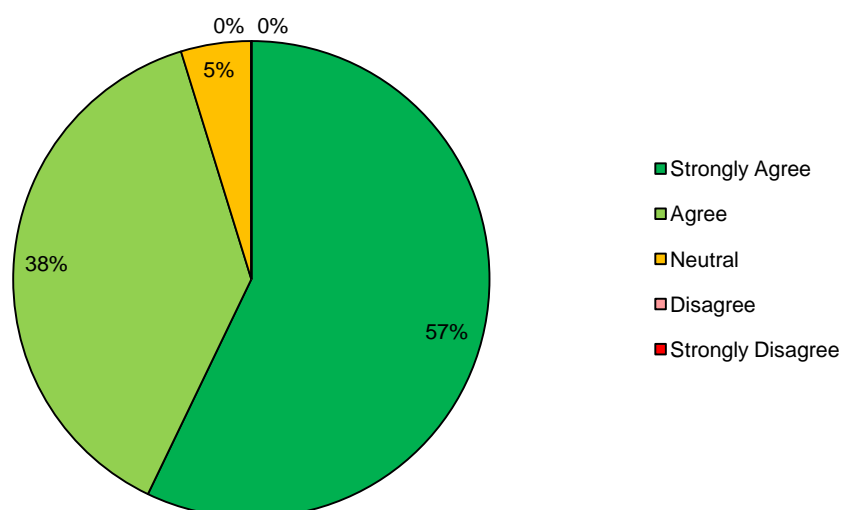
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 27 and Chart 25 below.

The majority of respondents (93.4%) indicated that they either agreed or strongly agreed with the statement, “Promotion of science and technology in education system and future employment opportunities”.

Table 27: Level of agreement support for statement – “Promotion of science and technology in education system and future employment opportunities”.

Level of Agreement	Responses	
	N	%
Strongly Agree	12	57.1%
Agree	8	38.1%
Neutral	1	4.8%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 25: Level of agreement support for statement – “Promotion of science and technology in education system and future employment opportunities”.



THEME: EMPLOYMENT AND SKILLS DEVELOPMENT
QUESTION 3.3 — “IF YOU DO NOT SUPPORT ANY OF THE STRATEGIES FOR EMPLOYMENT AND SKILLS DEVELOPMENT, PLEASE TELL US WHY.”

Respondents who indicated that they either disagreed or strongly disagreed with any of the strategies for Employment and Skills Development were asked to describe why this was the case. A total of 3 respondents provided 6 comments for improvement and 1 comment that support the plan. The results have been summarised in Table 28 below.

Table 28: Summary of reasons for disagreement to one or more of the strategies for Employment and Skills Development⁴

Reasons	Responses	
	N	%
Attract workers living outside the City as well as ones that live locally	1	16.67%
Encourage big businesses to run their own workforce development	1	16.67%
Need to work together with big businesses	1	16.67%
Need to work together with State and Federal Governments	1	16.67%
Utilise talent with the City	1	16.67%
Support the plan (in general)	1	16.67%
Total comments received	6	100.0%

⁴ N.b. some respondents provided more than one reason.

THEME: CITY AND REGIONAL INFRASTRUCTURE**STRATEGY: CITY PLANNING****QUESTION – 4.1 (A) — “SUPPORT PLANNING AND DEVELOPMENT THAT LEVERAGES AND STIMULATES ECONOMIC DEVELOPMENT”**

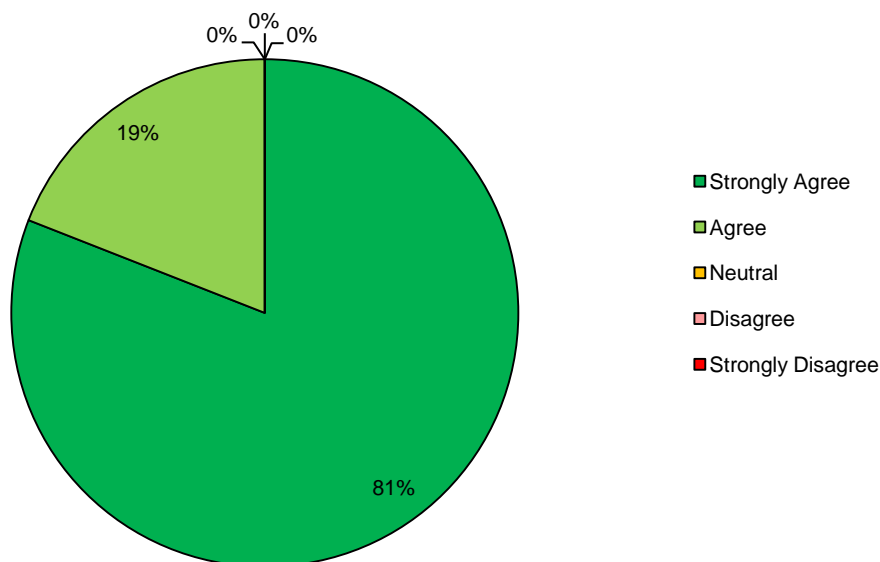
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 29 and Chart 26 below.

All respondents (100%) indicated that they either agreed or strongly agreed with the statement, “Support planning and development that leverages and stimulates economic development”.

Table 29: Level of agreement support for statement – “Support planning and development that leverages and stimulates economic development”.

Level of Agreement	Responses	
	N	%
Strongly Agree	17	81.0%
Agree	4	19.0%
Neutral	0	0.0%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 26: Level of agreement support for statement – “Support planning and development that leverages and stimulates economic development”.



THEME: CITY AND REGIONAL INFRASTRUCTURE**STRATEGY: CITY PLANNING****QUESTION – 4.1 (B) — “IDENTIFY AND RESPOND TO ANY BUSINESS BARRIERS TO GROWTH (IN TERMS OF LAND AND REAL ESTATE)”**

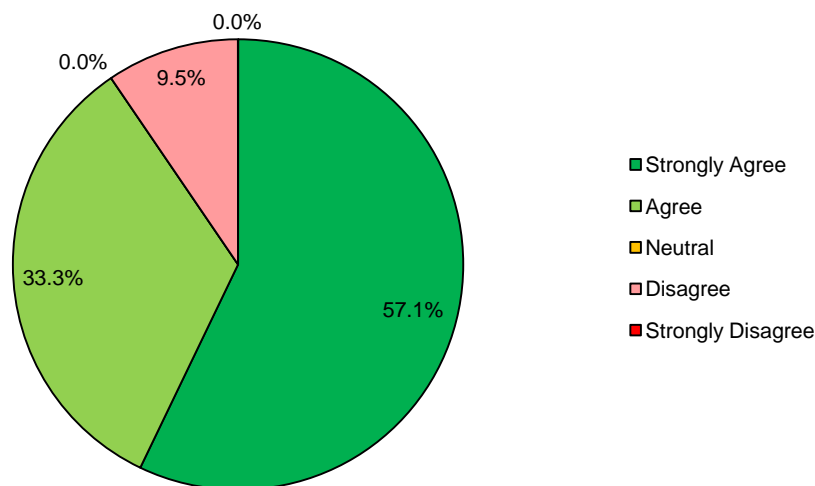
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 30 and Chart 27 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Identify and respond to any business barriers to growth (in terms of land and real estate)”.

Table 30: Level of agreement support for statement – “Identify and respond to any business barriers to growth (in terms of land and real estate)”.

Level of Agreement	Responses	
	N	%
Strongly Agree	12	57.1%
Agree	7	33.3%
Neutral	0	0.0%
Disagree	2	9.5%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 27: Level of agreement support for statement – “Monitor and review local and regional business issues and trends on a regular basis”.



THEME: CITY AND REGIONAL INFRASTRUCTURE

STRATEGY: CITY PLANNING

QUESTION – 4.1 (C) — “SUPPORT DEVELOPMENT THAT ENHANCES VISUALLY ATTRACTIVE ACTIVITY CENTRES AND BUILT FORM”

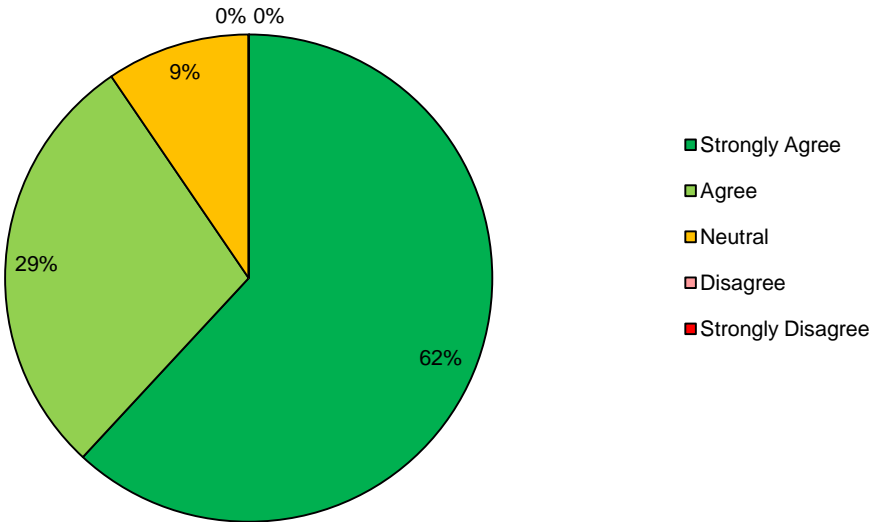
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 31 and Chart 28 below.

The majority of respondents (90.5%) indicated that they either agreed or strongly agreed with the statement, “Support development that enhances visually attractive activity centres and built form”.

Table 31: Level of agreement support for statement – “Support development that enhances visually attractive activity centres and built form”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	6	28.6%
Neutral	2	9.5%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 28: Level of agreement support for statement – “Support development that enhances visually attractive activity centres and built form”.



THEME: CITY AND REGIONAL INFRASTRUCTURE

STRATEGY: CITY PLANNING

QUESTION – 4.1 (D) — “LOBBY FOR AND SUPPORT PHYSICAL AND TELECOMMUNICATIONS INFRASTRUCTURE ENHANCEMENTS”

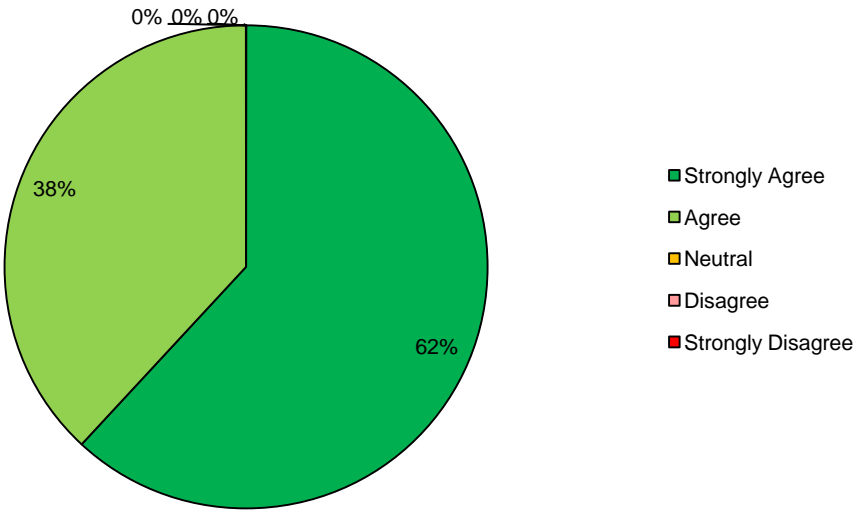
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 32 and Chart 29 below.

The majority of respondents (93.4%) indicated that they either agreed or strongly agreed with the statement, “Lobby for and support physical and telecommunications infrastructure enhancements”.

Table 32: Level of agreement support for statement – “Lobby for and support physical and telecommunications infrastructure enhancements”.

Level of Agreement	Responses	
	N	%
Strongly Agree	13	61.9%
Agree	8	38.1%
Neutral	0	0.0%
Disagree	0	0.0%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 29: Level of agreement support for statement – “Lobby for and support physical and telecommunications infrastructure enhancements”.



THEME: CITY AND REGIONAL INFRASTRUCTURE

STRATEGY: REGIONAL COLLABORATION:

QUESTION – 4.2 (A) — “ENHANCE A REGIONAL APPROACH TO ECONOMIC DEVELOPMENT AND STRATEGIC PLANNING”

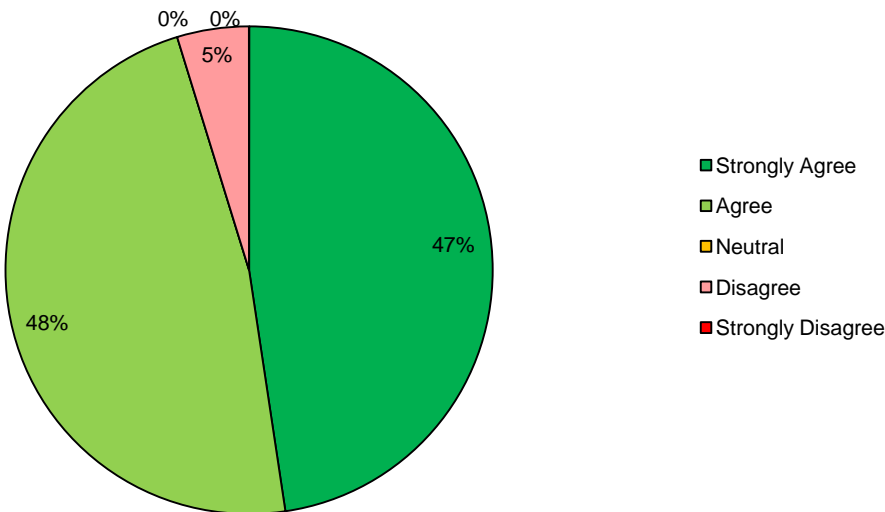
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 33 and Chart 30 below.

The majority of respondents (95.2%) indicated that they either agreed or strongly agreed with the statement, “Enhance a regional approach to economic development and strategic planning”.

Table 33: Level of agreement support for statement – “Enhance a regional approach to economic development and strategic planning”.

Level of Agreement	Responses	
	N	%
Strongly Agree	10	47.6%
Agree	10	47.6%
Neutral	0	0.0%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 30: Level of agreement support for statement – “Enhance a regional approach to economic development and strategic planning”.



THEME: CITY AND REGIONAL INFRASTRUCTURE**STRATEGY: REGIONAL COLLABORATION:****QUESTION – 4.2 (B) — “IDENTIFY AND SUPPORT JOINT REGIONAL PROJECTS TO LEVERAGE GREATER ECONOMIC VALUE”**

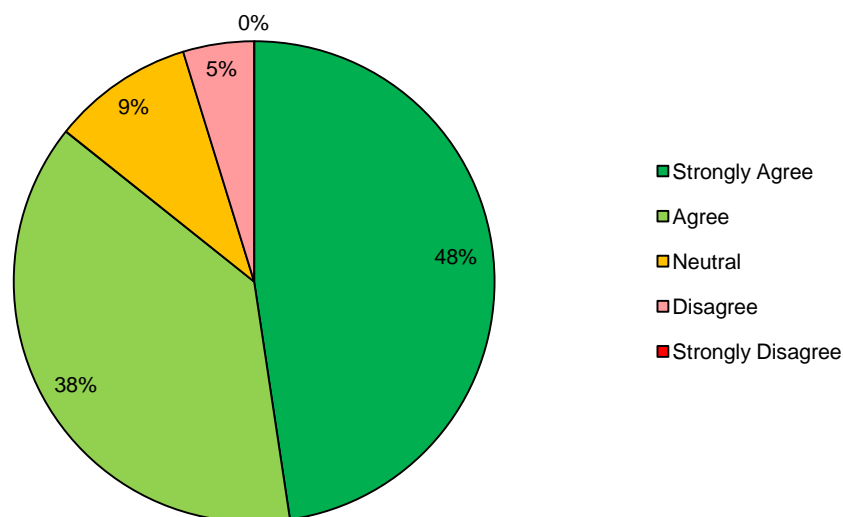
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 34 and Chart 31 below.

The majority of respondents (85.7%) indicated that they either agreed or strongly agreed with the statement, “Identify and support joint regional projects to leverage greater economic value”.

Table 34: Level of agreement support for statement – “Identify and support joint regional projects to leverage greater economic value”.

Level of Agreement	Responses	
	N	%
Strongly Agree	10	47.6%
Agree	8	38.1%
Neutral	2	9.5%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 31: Level of agreement support for statement – “Identify and support joint regional projects to leverage greater economic value”.



THEME: CITY AND REGIONAL INFRASTRUCTURE**STRATEGY: REGIONAL COLLABORATION:****QUESTION – 4.2 (C) — “ENHANCE PARTNERSHIP COLLABORATION ACTIVITY WITH STATE AND FEDERAL GOVERNMENT AGENCIES”**

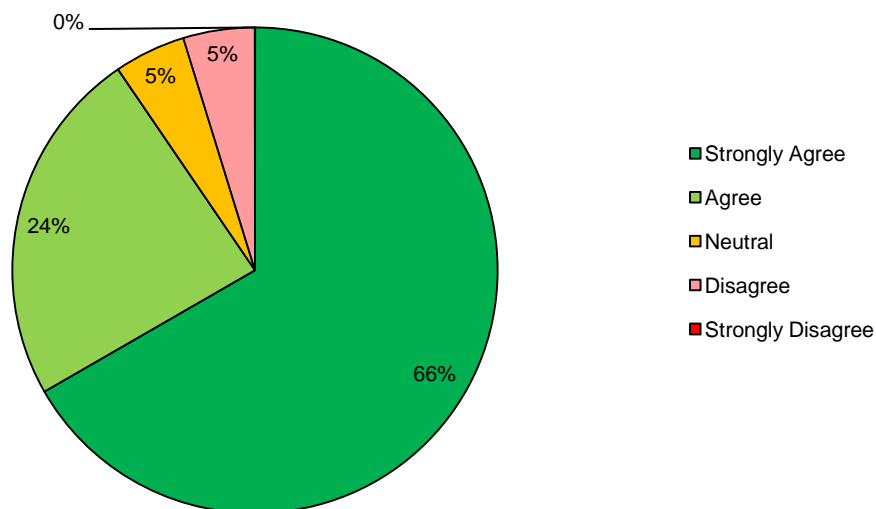
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 35 and Chart 32 below.

The majority of respondents (93.4%) indicated that they either agreed or strongly agreed with the statement, “Enhance partnership collaboration activity with State and Federal Government agencies”.

Table 35: Level of agreement support for statement – “Enhance partnership collaboration activity with State and Federal Government agencies”.

Level of Agreement	Responses	
	N	%
Strongly Agree	14	66.7%
Agree	5	23.8%
Neutral	1	4.8%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 32: Level of agreement support for statement – “Enhance partnership collaboration activity with State and Federal Government agencies”.



THEME: CITY AND REGIONAL INFRASTRUCTURE**STRATEGY: REGIONAL COLLABORATION:****QUESTION – 4.2 (D) — “MONITOR AND REVIEW REGIONAL GOVERNANCE FRAMEWORK AND KEY REGIONAL PRIORITIES”**

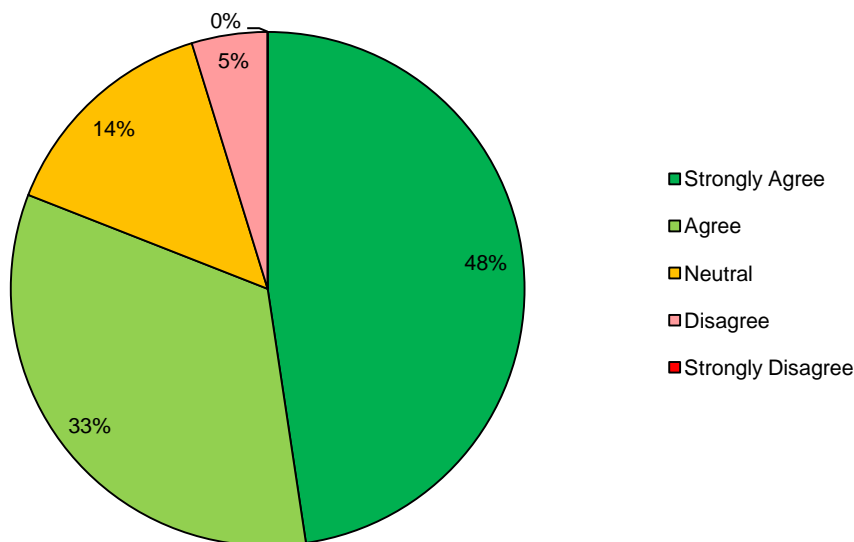
Respondents were asked to indicate their level of agreement for the above statement on a 5–point scale (“strongly agree” to “strongly disagree”). The results have been summarised in Table 36 and Chart 33 below.

The majority of respondents (81.0%) indicated that they either agreed or strongly agreed with the statement, “Monitor and review Regional Governance Framework and key regional priorities”.

Table 36: Level of agreement support for statement – “Monitor and review Regional Governance Framework and key regional priorities”.

Level of Agreement	Responses	
	N	%
Strongly Agree	10	47.6%
Agree	7	33.3%
Neutral	3	14.3%
Disagree	1	4.8%
Strongly Disagree	0	0.0%
Total responses received	21	100.0%

Chart 33: Level of agreement support for statement – “Monitor and review Regional Governance Framework and key regional priorities”.



THEME: CITY AND REGIONAL INFRASTRUCTURE
QUESTION 4.3 — “IF YOU DO NOT SUPPORT ANY OF THE STRATEGIES FOR CITY AND REGIONAL INFRASTRUCTURE, PLEASE TELL US WHY.”

Respondents who indicated that they either disagreed or strongly disagreed with any of the strategies for City and Regional Infrastructure were asked to describe why this was the case. A total of 5 respondents provided 6 comments for improvement and 1 comment that support the plan. The results have been summarised in Table 37 below.

Table 37: Summary of reasons for disagreement to one or more of the strategies for City and Regional Infrastructure⁵

Reasons	Responses	
	N	%
Concern for loss of park and natural areas	1	16.67%
Consider rewording of statements	1	16.67%
Need for business for the City to track, identify and promote businesses in a cost effective way	1	16.67%
Need to facilitate planning of major office developments in City Centre	1	16.67%
Reduce amount of government "red tape"	1	16.67%
Support the plan (in general)	1	16.67%
Total comments received	6	100.0%

⁵ N.b. some respondents provided more than one reason.

QUESTION 5 — “DO YOU HAVE ANY ADDITIONAL COMMENTS ABOUT THE DRAFT ECONOMIC DEVELOPMENT STRATEGY?”

Respondents were asked if they had any further comments on the draft Economic Development Strategy. A total of 13 respondents provided 23 comments. The results have been summarised in Table 38.

Table 38: Summary of further comments provided by respondents⁶

Comments	Responses	
	N	%
Support the plan (in general)	3	13.0%
Want the City to invest in a Visitors Centre	1	4.3%
Want the City to encourage not-for-profit organisations to relocate to Joondalup	1	4.3%
Want the City to encourage large government head offices to relocate to Joondalup	3	13.0%
Need to keep the cost of living affordable	1	4.3%
Need to encourage short stay rentals over the construction of hotels	1	4.3%
Need for the reduction of "red tape"	1	4.3%
Need for Joondalup to embrace the digital age	1	4.3%
Need for Joondalup to become a centre of excellence for all services	1	4.3%
Need for focus on attracting volunteers to Joondalup	1	4.3%
Need for a focus on the expansion of the activities centres outside Joondalup CBD	1	4.3%
Concern for whether the infrastructure can support business growth	1	4.3%
Concern for the tourism around the Joondalup CBD	1	4.3%
Concern for the slow rollout of NBN	1	4.3%
Concern for the level of pollution and impact on suburban living by growing the Joondalup CBD	1	4.3%
Believe that there is no need for the construction of the Performing Arts and Cultural Centre	1	4.3%
Believe that the City should facilitate but not be involved in development projects	1	4.3%
Other comments (not related to Economic Development Strategy)	2	8.7%
Total comments received	23	100.0%

⁶ N.b. some respondents provided more than one comment.

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Organisation	Comments Received	Comment	City Response
Urbis (on behalf of Westfield Limited)	General Comments	Inadequate level of emphasis, rigour and analysis on the rest of the City of Joondalup. It is in these 'out-of' Joondalup City Centre areas where opportunities for strategic employment and new industries appear to be given little consideration.	Additional paragraph included on page.15 emphasises the alignment with State Planning Document Directions 2031 and Beyond and confirms that the Economic Development Strategy themes and catalyst projects aim to enhance, where appropriate, economic development in key activity centres including the Strategic Metropolitan Centre (Joondalup) and Secondary Centres (Warwick and Whitfords).
		Seeks to promote Joondalup City Centre up the established hierarchy of activity centres into Primary Centre status. In striving to achieve this status we consider that opportunities in other centres and employment areas (i.e. Whitford and Warwick) will be unnecessarily missed.	Additional paragraph included on page.15 emphasises the alignment with State Planning Document Directions 2031 and Beyond and confirms that the Economic Development Strategy themes and catalyst projects aim to enhance, where appropriate, economic development in key activity centres including the Strategic Metropolitan Centre (Joondalup) and Secondary Centres (Warwick and Whitfords).
		Should seek to address 'closer to home' opportunities that are also more likely to be realistically achieved within the lifespan of the Strategy given the current characteristics of the City's economic base.	Comment noted.
	Strategic Employment vs. Population Driven Employment	The lack of importance and emphasis placed on 'population driven' employment is considered to be short-sighted.	Comment noted. Specialist theme 'Destination City' and focus on the Visitor Economy provides an emphasis on some population driven employment activities including retail.
		Need to consider alternative or additional economic initiatives.	Comment noted.
		Need for planning and targeting students and baby boomers to reduce the amount of employment leakage to other centres outside of the City.	Comment noted.

Organisation	Comments Received	Comment	City Response
		A key competitive advantage for Joondalup by comparison should be considered to be the availability of affordable land.	Comment noted. Future investment attraction information will include reference to relative affordability of land.
	Other Activity Centres	The Draft Strategy places little to no emphasis on the importance of planning for other Activity Centres aside from Joondalup City Centre (for which an Activity Centre Structure Plan is suggested).	Additional paragraph included on page.15 emphasises the alignment with State Planning Document Directions 2031 and Beyond and confirms that the Economic Development Strategy themes and catalyst projects aim to enhance, where appropriate, economic development in key activity centres including the Strategic Metropolitan Centre (Joondalup) and Secondary Centres (Warwick and Whitfords).
		Little interest to engage with other parties on the preparation of Activity Centre Structure Plans for other Secondary and District Centres within the City.	The City engaged closely with the consultants for Westfield during preparation of the Activity Centre Structure Plan for Whitford and is currently liaising with consultants on the preparation for plans for both Warwick and Currambine.
		This perceived lack of interest in planning for these other smaller centres is also considered to be short-sighted.	Comment noted. Additional paragraph included on page.15 emphasises the alignment with State Planning Document Directions 2031 and Beyond and confirms that the Economic Development Strategy themes and catalyst projects aim to enhance, where appropriate, economic development in key activity centres including the Strategic Metropolitan Centre (Joondalup) and Secondary Centres (Warwick and Whitfords).
		Need for proper planning for centres which will ensure the provision of land within well-established areas for not only retail development but strategic forms of employment also.	Comment noted. The geographic theme 'City and Regional Infrastructure' included in the Economic Development Strategy references and links to the formal planning framework for all activity centres.
		Consider other activities centres and how best to unlock existing zoned land in these well-established areas for both strategic and population driven employment.	Comment noted. The geographic theme 'City and Regional Infrastructure' included in the Economic Development Strategy references and links to the formal planning framework for all activity centres.
		Planning for small business is often overlooked in planning for larger strategic employment areas or major retail projects.	Comment noted. Action area 4.1.2 'Identify and respond to any business barriers to growth (in terms of land and real estate)' is intended to consider the needs for small business in planning

Organisation	Comments Received	Comment	City Response
			terms.
	Expenditure Leakage	Not planning for other Activity Centres other than the Joondalup City Centre is also likely to see local retail expenditure leak from the City of Joondalup to other centres.	Comment noted. Additional paragraph included on page.15 emphasises the alignment with State Planning Document Directions 2031 and Beyond and confirms that the Economic Development Strategy themes and catalyst projects aim to enhance, where appropriate, economic development in key activity centres including the Strategic Metropolitan Centre (Joondalup) and Secondary Centres (Warwick and Whitfords).
City of Wanneroo	Full Version	Specify the timeframe of the Economic Development Strategy	The Economic Development Strategy timeframe is aligned with Joondalup 2022.
		The report could be updated to reflect this latest ERP figure	Noted and data will be reviewed.
		Suggests the use of the ID Forecasts when referring to projected population growth.	Noted and data will be reviewed.
		Suggests the use of the ID Economy data when referring to employment and jobs growth.	Noted and data will be reviewed.

Organisation	Comments Received	Comment	City Response
		The development of an implementation framework should be considered, including timeframes and required resources.	Comment noted. Implementation framework will be addressed as part of annual business planning and budgetary processes.
	Summary Version	The summary version excludes the actions. It may be useful to include goals, strategies and actions in the summary version to provide a complete framework	Final summary version will also have a separate appendix which includes the goals, strategies and actions.
		The inclusion of a long term outcomes summary reads like a set of targets. These targets provide a set of measureable indicators and should be included in the main document as well.	Long term outcomes summary (targets) have been included in the main document as part of the Economic Development Strategy Overview (p.9)
ECU	General Comments	State Government agencies might be a better option than corporate business, for relocation to Joondalup. Satellite offices of Federal Government departments might also be considered.	Comment noted and reference added to targeting of both larger corporate organisations and Government agencies for potential relocation to the City of Joondalup (p.42 section 'Attracting Investment')
		Need to be building partnerships rather than competing with other educational institutions (or technology/research precincts) – build on the competitive edge	Comment noted.
		Need to look for synergies with other organisations/projects rather than duplicating work already being undertaken.	Comment noted.
		Consider an approach to IBM re Digital City investment (Geraldton example cited – where IBM have invested in Geraldton as a Digital City). Also the potential to link in with the Square Kilometre	Comment noted.

Organisation	Comments Received	Comment	City Response
		Array (SKA) is important.	
		Opportunities to grow the ECU Business Innovation Centre and to invest in innovation for the future – issues around ‘where to next’ for businesses beyond ECUBIC – scarcity of land in COJ – need to look regionally to City of Wanneroo – Wangara/Neerabup;	Comment noted. A more regional approach to economic development outlined under section ‘Regional Collaboration’.
		Opportunities to grow an Innovation Cluster – encourage further investment/promotion of research centres and opportunities/commercialisation prospects – e.g. Cambridge model;	Comment noted. Reference to innovation based clusters with global examples already provided on p.38-39, sections entitled ‘A Cluster Approach to Economic Development – The Added Value’ and ‘Developing Knowledge and Innovation Clusters’
		Blonde Gorilla noted as a global business operating out of Joondalup – opportunity to use as an ambassador for Joondalup – there may be other similar businesses operating in Joondalup that may be worth exploring/nurturing.	Comment noted. Further case studies of global and innovative businesses planned as part of future economic development activity.
		Needs greater emphasis on big business	Comment noted and reference added to targeting of both larger corporate organisations and Government agencies for potential relocation to the City of Joondalup (p.42 section ‘Attracting Investment’)
		ECU tenders for maintenance and procurement – interested in major players/big business – procurement restrictions/State Government requirements – strategies need to support this approach.	Comment noted.
		Need to sell the Joondalup Business Case to big business	Comment noted and reference added to targeting of both larger corporate organisations and Government agencies for potential relocation to the City of Joondalup (p.42 section ‘Attracting Investment’)

Organisation	Comments Received	Comment	City Response
		Opportunity to use JLP Board to progress potential projects as a united body – strong corporate voice;	Comment noted.
		Opportunity to utilise and leverage opportunities from the high number of senior executives from private organisations living in the City of Joondalup to promote Joondalup, utilise expertise and skills, leverage – encourage them to move parts of their organisation to Joondalup	Comment noted.
		Need to build and promote the eco system around the Joondalup CBD – part of the attraction for big business	Comment noted.
		Talk to big business about moving some of their operations to Joondalup – don't need to move all operations – visibility can still be retained in CBD but opportunities to move back end operations. Use the RAC (with their permission) as an exemplar	Comment noted and reference added to targeting of both larger corporate organisations and Government agencies for potential relocation to the City of Joondalup (p.42 section 'Attracting Investment')
		Regional opportunities and partnerships to be explored – City of Joondalup and City of Wanneroo – opportunities to use regional clout and business case to lobby and leverage off State and Federal opportunities;	Comment noted. A more regional approach to economic development outlined under section 'Regional Collaboration'.
		Need to build capacity of workforce – current and future – opportunity to forge greater links between graduates, researchers and business – greater emphasis on attracting young people to science and technology degrees;	Comment noted. Main Core Theme 'Employment and Skills Development' has a primary focus on building the capacity of the current workforce <i>and</i> enhancing a future workforce including an emphasis on promoting science and technology to young people.

Organisation	Comments Received	Comment	City Response
		Need to build global profile – have world class research facilities – need to promote on the global stage;	Comment noted. Cross cutting 'Global City' specialist theme provides a greater focus on building a global profile (including research facilities).
		Opportunity to use a Stakeholder Group bringing together key stakeholders across the region to progress the Economic Development Strategy.	Comment noted. A key stakeholder group is referenced within the Economic Development Strategy (p.94 under section 'Communications and Engagement').