



ECONOMIC DEVELOPMENT STRATEGY

2022 – 2026

Acknowledgement of Country

Wyndham City Council recognises Aboriginal and Torres Strait Islander peoples as the First Custodians of the lands on which Australia was founded. Council pays respect to the wisdom and diversity of past and present Elders. We share commitment to nurturing future generations of Elders in Aboriginal and Torres Strait Islander communities. Wyndham has a rich Aboriginal history. For tens of thousands of years, the Werribee River has been a significant meeting place for Aboriginal people to build community, exchange resources, and share responsibility for its lands. The area that is now the City of Wyndham was inhabited by the tribes of the Kulin Nation, comprising five different language groups. Council acknowledges the Wathaurong, Woiwurrung and Boonwurrung peoples of the Kulin Nation as the Traditional Owners of the lands on which Wyndham is being built.

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Mayor's Message

The economic prosperity of our municipality is one of Wyndham City Council's highest priorities.

Council's Economic Development Strategy 2022 – 2026, provides a clear direction to help drive our economic growth and transformation over the next four years. It's designed to ensure sustainable economic development that enables local job creation and growth.

Our vision for the future is underpinned by the Economic Development Strategy 2022-2026 to support innovation, investment, commercial and industrial growth, business engagement and connection and at the same time supporting local employment opportunities that will benefit the whole community.

This Economic Development Strategy identifies priority sectors for growth, including industrial activity precincts, while addressing the opportunities and challenges of the pandemic.

Council's priority is to build on our economic strengths through encouraging investment, supporting small business and increasing employment opportunities locally to support our residents. Currently, just 37 per cent of workers reside in Wyndham and work within the municipality. We have set an ambitious goal, aiming for 51 per cent to work locally within our municipality by 2041.

Wyndham is in a unique economic position. With more than 24,000 businesses located here, we are continuing to emerge as a major commercial hub in the greater Melbourne area.

Our close proximity to the Melbourne CBD and Geelong by both road and rail, as well being positioned halfway between Melbourne Airport and Avalon Airport, combined with our large tracts of greenfield developable land, place us in an exclusive position to grow our business and employment footprint beyond that of any other centre.

The East Werribee Employment Precinct is Council's priority employment creation project which we are optimistic in the future will be a leader in providing local employment opportunities and industry development. When developed, the 775 hectares of greenfield, State Government-owned land could provide more than 58,000 local jobs.

Council has also invested in the Spark Hub to encourage innovation and to support start-up entrepreneurs.

Wyndham has a highly skilled and educated workforce with which we can leverage a range of opportunities for investment.

This Economic Development Strategy 2022-2026 is a positive way forward with a focus on ensuring our economic growth and prosperity and making Wyndham an even more liveable city.

Mayor Cr Susan McIntyre

1. Introduction

The Economic Development Strategy aligns with the Wyndham 2040 Community Vision and provides a clear direction for economic prosperity. It captures the vision, attitudes, and aspirations of a growing and diverse community.

The Strategy addresses the economic challenges and opportunities the COVID-19 global pandemic has created, recognising that the utilisation of technology and the capacity to enable flexible working arrangements in the way we work has accelerated.

The Strategy aims to set Wyndham on a transformation journey of reshaping the future economy to align with broader national and international trends.

1.1. Accelerating Economic Development and Growth in Wyndham City

Much of Wyndham's economic growth will be organic and in line with the growing demand for goods and services associated with high levels of population growth. The Economic Development Strategy seeks to accelerate growth in a timelier and focussed manner and:

- Grow Wyndham's reputation for working with industry to achieve efficient development and business growth
- Enhance Wyndham's reputation as a business and investment destination
- Build the entrepreneurial and innovation capacity of Wyndham's industries and businesses
- Invigorate activity centres to enhance customer experiences and attract new business, and very importantly
- Grow the number of local jobs for Wyndham residents and reshape the structure of Wyndham's economy to ensure the City is a major contributor to the emerging knowledge economy.

1.2. Overview of the Economic Development Strategy

The Strategy comprises the following key elements:

- A summary of the structure of the local economy and implications for economic development
- A summary of recently delivered major infrastructure investment and commercial development projects and the implications for economic development
- The impacts and opportunities created by the COVID-19 global pandemic
- The impacts and opportunities created by climate change
- The identification of critical community service gaps and the capacity to deliver significant economic and social development outcomes through the growth of these service sectors
- Confirmation of the East Werribee Employment Precinct and more broadly the East Werribee National Employment and Innovation Cluster as Wyndham's priority economic development project over the next twenty years
- Confirmation of Wyndham's priority sectors for investment attraction

1.3. Implementation

The Economic Development Strategy includes an action plan; with actions grouped under four broad themes with clearly articulated objectives, desired outcomes, and success measures.

While the action plan provides a clear direction, it allows for flexibility, acknowledging that local and global economic conditions are subject to rapid change.

Council's Economic Development Unit is responsible for leading the Strategy's implementation and reporting progress to Council and the community. The progression of the action plan will inform Council's annual budget and department business planning.

2. The Vision for Wyndham's Economy

Wyndham City will be a productive, liveable city that promotes sustainable economic development that enables local job growth.

3. A Snapshot

Located on the western urban fringe midway between Melbourne Central Business District and the Greater City of Geelong, Wyndham City has been experiencing rapid change.

Maintaining a position as one of Australia's fastest growing municipalities, Gross Regional Product has experienced 85% growth over the past ten years, more than double the rate of the State of Victoria.

Home to more than 140,000 resident workers and 87,000 local jobs, the labour force is forecast to grow to more than 232,000 by 2041 as the City's overall population swells to more than 500,000.

Wyndham's economic growth is characterised by the expansion of population driven industries such as construction, health services and retail and the exponential growth of the City's industrial footprint as a logistics hub.

3.1. Priority Industry Sectors

The Strategy confirms the priority industry sectors identified in Council's Investment Attraction Plan.¹ These industry sectors will benefit from leveraging a combination of:

- Wyndham City's continuing population growth
- Existing economic strengths and opportunities
- Recently delivered and planned improvements to local and regional infrastructure

With the potential to generate significant local jobs, attract capital from outside the region and close service delivery gaps, the designated priority sectors for investment attraction and accelerated business growth are:

- Health Services
- Higher Education, TAFE and Further Education
- Professional and Technical Services
- Manufacturing
- Logistics
- Construction
- Visitor Economy
- Agribusiness

3.2. Setting a Target: More Local Jobs for Resident Workers

Some 37% of workers residing in Wyndham work within the municipality. Long periods of travel to work time can be detrimental to the community's environmental, social, and economic wellbeing.

This Strategy sets a goal of increasing the status position of 37% of resident workers employed within the municipality to 51% by 2041. Meeting this target will shift the proportion of resident workers employed in Wyndham to a level greater than the percentage of resident workers employed outside the municipality.

¹ Wyndham City Council, Investment Attraction Plan 2019

3.3. Major Projects

Although investment in infrastructure continues to be a challenge for a rapidly growing city, there has been a wide range of significant projects delivered in recent times, or in the planning pipeline, that can enable further economic development and growth.

These projects include road and rail infrastructure funded by state and federal government and privately funded commercial and industrial investment in activity centres and industrial precincts.

The ongoing development of well-planned high amenity activity centres has enhanced Wyndham’s position as a business destination and provided an opportunity for local small businesses, including homebased operations seeking to transition to outside the home and grow their employment footprint. It is important that these activity centres grow as mix-use centres providing a range of employment opportunities, rather than as purely retail centres.

Road and rail infrastructure investment has enabled economic efficiencies delivering improved access and connectivity which has further enhanced Wyndham’s position as a logistics hub.

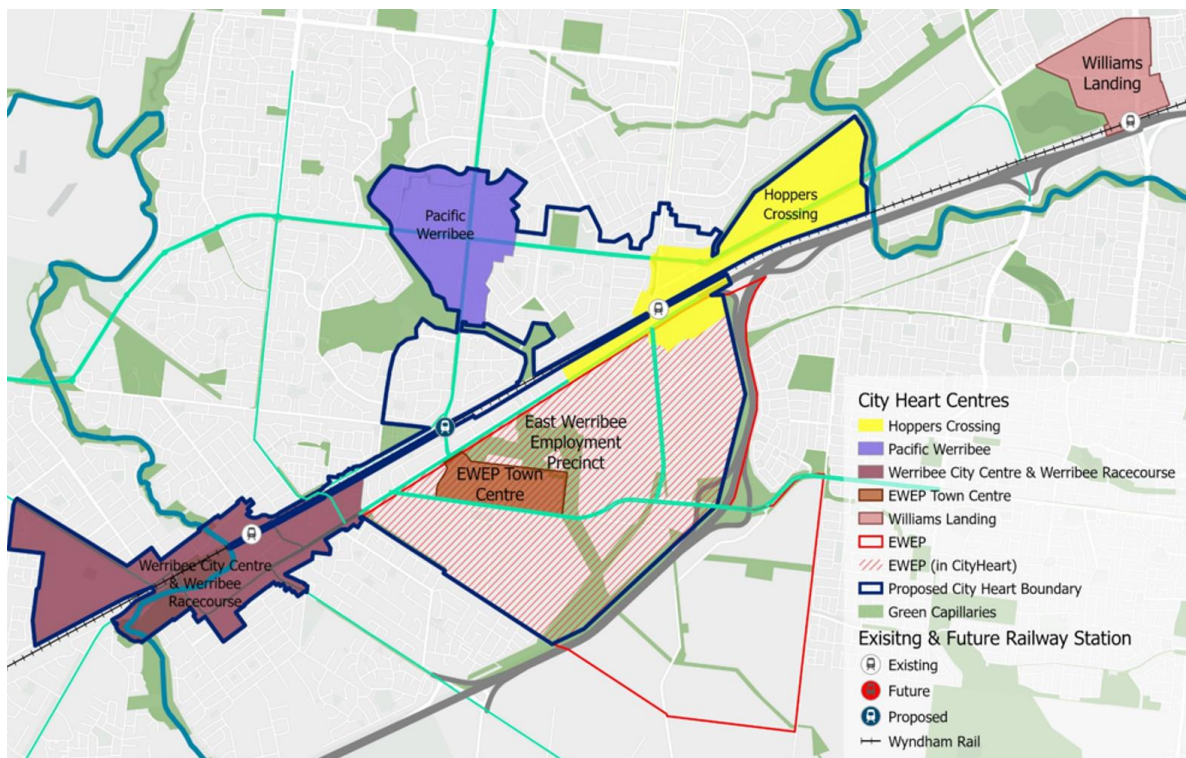
The Strategy recognises the opportunities these projects present in influencing economic development.

3.4. East Werribee Employment Precinct

The Employment Precinct comprises 775 hectares of state government owned land within the broader East Werribee National Employment and Innovation Cluster.

Wyndham requires a game-changing project to drive this change and deliver the necessary level of job growth. With an endorsed Precinct Structure Plan and a vision of more than 58,000 jobs, the Economic Development Strategy confirms the development East Werribee Employment Precinct as the priority employment creation project over the next twenty years.

Map 1
East Werribee National Employment and Innovation Cluster



3.5. COVID Impacts

COVID-19's impact on tourism and export markets, an unstable international political environment, increasing intensity and frequency of natural disasters and a growing focus on climate change has accelerated an urgent need for local economies to respond to disruptive local and global trends.

The response to COVID-19 has also generated growth opportunities for several industry sectors. To address these issues in detail, the Economic Development Strategy identifies a need for more detailed work to grow Wyndham's visitor, agribusiness, and circular economies.

3.6. Climate Change Impacts

Similar opportunities will be prevalent in response to climate change adaptation and mitigation. As pressure grows to act on climate change increased investment in sectors relating to Australia's energy transition, away from fossil fuels, is expected.

By 2050 Wyndham's climate is modelled to increase in average temperature by 2.4°C, resulting in a doubling of 'very hot' days (over 35°C) combined with a decrease in rainfall of 20%.

The ripple effect of impacts of this will be felt in all sectors however there will be direct implications for some industries including agriculture and blue-collar work typically subject to heat restrictions.

3.7. Strategic Themes

The Strategy articulates four strategic themes to guide the City's future economic prosperity:

- *Business Engagement and Connection*
 - Strengthen connections with government, industry and community to foster new opportunities for investment and growth
- *Entrepreneurship and Innovation*
 - Develop a diverse, robust, and resilient local economy underpinned by businesses responsive to local, national and global influences
- *Investment Attraction and Trade*
 - *Attract and facilitate new job creation investment and enable national and international trade*
- *Activity Centre Development and Enhancement*
 - Prepare and implement policies, strategies and plans to enhance, activate and grow activity centres and industrial precincts.

3.8. Alignment with Council Priorities and Policy

There is a range of strategies and plans across Council service areas which influence economic sustainability and growth. These strategies and plans are informed by the thoughts and aspirations of the community gathered through a robust process of consultation and community engagement.

3.8.1. Wyndham 2040 Community Vision

The Wyndham 2040 Community Vision and Council Plan provide guidance for achieving economic growth for a city experiencing dynamic change.

Developed in 2015 and subsequently refreshed in 2021 through the implementation of the Help Shape Wyndham's Future project, Wyndham 2040 Community Vision provides the foundation and overarching vision for economic prosperity. Residents shared that they would like to see increased local employment opportunities, mentioning that they were currently travelling to the Melbourne Central Business District to jobs not readily available in Wyndham. Residents also said they would like to see more jobs aligned to resident workforce skills and experiences.

3.8.2. Council Plan 2021-2025

The Council Plan is a shared vision and blueprint for the four-year term of the current elected Council. The plan outlines how Council, and the community will work towards achieving the Wyndham 2040 Community Vision to ensure Wyndham remains a welcoming and inclusive, liveable and economically prosperous city for all.

Through the Council Plan, Council works towards achieving the long-term success of our community, whilst remaining financially viable and sustainable, as articulated within the following eight strategic areas:

- A healthy, equitable and accessible city
- A welcoming and inclusive city
- A liveable city
- A green city
- An economically prosperous city
- A thriving city
- Community as an active partner
- Delivering public value and excellence

As an economically prosperous city, Wyndham will be an attractive place to visit and invest in with Council committing to:

- Enhancing the vibrancy and activation of the City.
- Taking an active role in attracting investment opportunities that grow the local economy.
- Continuing to support the resilience and recovery of those hardest hit by the impacts of the COVID-19 pandemic.
- Driving growth and activation of the tourism economy and activity centres.

Whilst the focus here is on economic prosperity, each of the other seven strategic areas provides further guidance for implementing this Strategy.

3.8.3. Complementary Council Strategies

Collaboration with internal departments responsible for delivering the strategies outlined below will ensure alignment and no duplication of service delivery.

Visitor Economy Strategy

- Aims to grow the value of the visitor economy.

Smart City Strategy

- Aims to enhance Wyndham's reputation as a city that enables innovation and technological advancement.

Wyndham Learning Community Strategy

- Addresses priority skills for development to meet new and emerging work trends.

Resilient Wyndham Strategy

- Aims to position Wyndham City to an optimum state of preparedness to repair, recover and offer new directions in the event of future shocks and stresses

Social and Economic Inclusion Framework

- Aims to enable career development, employment pathways and business ownership of the City's multi-cultural community.

Industrial Land Use Strategy

- Aims to support the unlocking of future industrial zoned land.

Werribee South Green Policy and Wedge Management Plan

- A plan which supports sustainable agricultural innovation and diversification and investment in tourism.

4. Structure of Wyndham City's Economy

Considering economic measures, including employment and contribution to Gross Regional Product, the top four industries driving Wyndham's economy are construction, logistics, manufacturing and wholesale trade. Both construction and manufacturing are also key drivers of the Victorian economy.

At the other end of the scale, financial and professional and technical services are low contributors to the local economy, whereas these sectors are critical drivers of the Victorian economy.

Leveraging existing industry strengths and prioritising the growth of sectors with the capacity to enable a knowledge economy of the future underpins the direction of the Economic Development Strategy.

4.1. Key Statistics

Table 4-1 - Key Statistics

Gross Regional Product 2022 \$12.83billion	Population 2022 316,000	Local jobs 2022 87,170
Businesses 2021 23,850	Population forecast 2041 512,590	Employed residents 2022 140,825

Source: forecast id

Although Wyndham's population growth is well documented, the change in the number of employed residents is rarely highlighted, despite what has been a significant increase from contributing 1.88% of Victoria's workforce in 2001 to 4.12% in 2021.

With the City's Gross Regional Product representing 25% of western metropolitan Melbourne's GRP, Wyndham is the region's most substantial contributor to economic output and job generation. Nevertheless, the challenge to provide more local jobs for residents is significant, noting that the current level falls 50,000 short of the number of employed residents.

4.2. Key Drivers

Table 4-2 Highest Employing Industry Sectors as a percentage of the local workforce

Logistics (13.5%) strategic advantage	Retail Trade (13.2%) population driven industry	Education & Training (10.4%) population driven industry
Health Care (10.3%) population driven industry	Construction (9.8%) population driven industry	Manufacturing (9.8%) strategic advantage

Source: REMPLAN

Beyond employment, manufacturing, construction, and transport & warehousing (logistics) generate high output levels and onflow economic activity. Manufacturing and logistics have established a strong footprint due to a strategic advantage underpinned by large tracts of available zoned land within the western industrial node and direct access to air and seaports. Growth in the construction industry has been driven by rapid residential growth and demand for industrial and commercial job creation development. Education and Training's growth can be attributed to a growing demand for primary and secondary schools to meet population growth. Similarly, health care and retail trade have expanded to meet the demand generated from population growth. However, in the case of health care, the City is significantly underrepresented when compared to the Melbourne metropolitan region.

4.3. Growth Trends

Table 4-2 - Growth Trends in the Wyndham Local Economy

	2012	2021	Change
Population	161,455	302,650	87.4.2%
Gross Regional Product	\$6.24billion	\$12.83billion	105.6%
Number of Businesses	10,146	23,852	135.1%
Number of local jobs	42, 953	87,170	102.9%

Source: id forecast

Wyndham City's local job growth has been relatively strong compared to many other regions, with the percentage growth in the number of local businesses and local jobs greater than the percentage growth in population.

One of the most visible drivers of this outcome has been the continuous development of the Laverton North/Truganina Industrial Precinct. However, with an accelerated level of industrial development over the past five years and the subsequent reduction in land supply, Wyndham can no longer rely on the Precinct to drive exponential job growth.

Further measurable growth is evident within the Old Geelong Road light industrial precinct, Werribee City Centre and Pacific Werribee retail complex.

As a relatively new activity centre, Williams Landing, underpinned by the multi-level office complexes accommodating Target Australia, the Emergency Services Telecommunication Authority, and several strata title office developments, has delivered significant job growth.

Although East Werribee Employment Precinct has experienced development levels well below community expectations, job creation has been initiated through the privately owned medical precinct land on the east side of Hoppers Lane, coupled with significant redevelopment investment within the existing health hub and justice precinct.

Table 4-4 Industry sector change by output from 2011 to 2021

Sector	2011	2021	Change
High growth sectors			
Real Estate Services	\$1.239billion	\$2.754billion	160.0%
Construction	\$1.250billion	\$3.107billion	148.5%
Agriculture	\$121million	\$288million	138%
Logistics	\$1.471billion	\$3.107billion	111.2%
Low growth sectors			
Manufacturing	\$5.185billion	\$6.140billion	18.4%
Wholesale Trade	\$1.059billion	\$1.397billion	31.0%
Arts & Recreation	\$86million	\$147million	70.9%

Source: REMPLAN

Table 4-5 - Industry sector change by employment from 2011 to 2016

Sector	2011 ABS Census	2016 ABS Census	Change
High growth sectors			
Construction	3,323	6,354	91.2%
Health Care	3,571	6,657	86.4%
Logistics	4,981	8,732	75.3%
Agriculture	475	835	75.0%
Professional Services	1,397	2,148	53.7%
Low growth sectors			
Manufacturing	6,196	6,309	1.8%
Information Media	370	388	4.8%
Wholesale Trade	3,199	3,426	7.1%

Source: REMPLAN

Construction has experienced high levels of employment and output growth. In contrast, despite generating a high increase in output, the Real Estate Service sector has experienced a relatively low level of employment growth.

Home to a unique offer at Werribee South, the agriculture sector has seen high growth rates in both output and employment.

The manufacturing sector has experienced the lowest growth rate of all industries; however, compared to the State of Victoria's negative employment growth of 16.0%, the industry remains stable in Wyndham. The sub-sectors with the highest contribution to manufacturing in Wyndham are food production and chemical, metal and transport parts manufacturing.

4.4. Local Jobs Target

Table 4-6 Jobs Target: Workforce v Local Jobs

Year	Work Force	Local Jobs	Gap
2011	80,500	42,953	37,547 (46.6%)
2016	107,200	64,600	42,600 (39.7%)
2022	140,825	87,170	53,655 (38.1%)
2041	232,000 (forecast)	204,000 (target)	28,000 (12.0%)

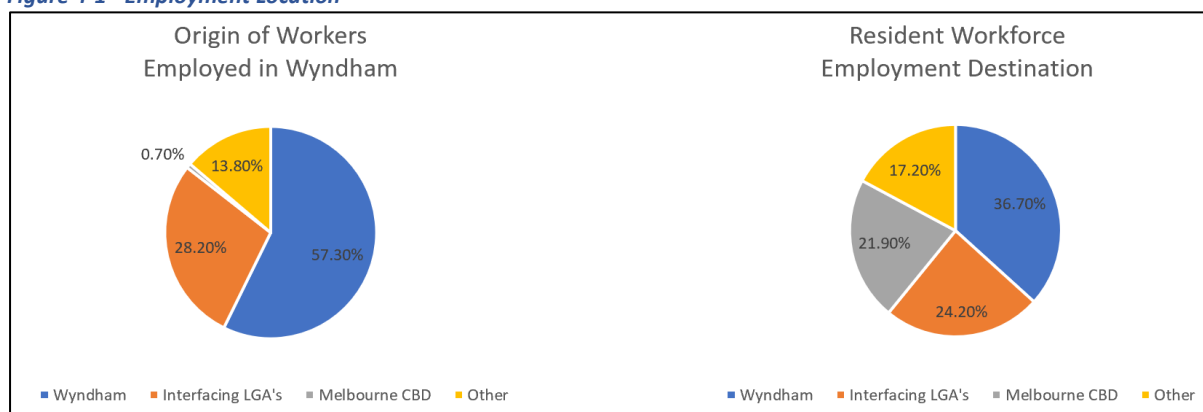
Source: REMPLAN / forecast id

Presently, if a Wyndham resident held every available job in Wyndham, there would still be a gap of 53,655 to satisfy the employment needs of the City's labour force.

In determining the target number of 204,000 local jobs to meet the 51% resident employment retention rate by 2041, the following considerations have been addressed:

- Forecast number of resident workers (232,000)
- Recognition that Wyndham will always attract workers from outside the municipality
- Capacity to grow jobs in sectors where there are significant service delivery gaps
- Capacity of East Werribee to deliver exponential employment growth over the next twenty years
- Capacity of East Werribee to deliver jobs growth in targeted, high density employment sectors
- Long term impacts of COVID-19 through the heightened awareness of the advantages and potential opportunities of working from or closer to home.

Figure 4-1 - Employment Location



41.4% of resident workers are either employed in the Melbourne CBD or regions which do not directly interface with Wyndham. These destinations are subject to long travel to work times. There is a significant capacity to attract these resident workers back to Wyndham when new jobs become available as an outcome of new investment.

Table 4-3 - Priority sectors: Workforce breakdown by employment location

Sector	Employed in Wyndham	Employed outside Wyndham
Health Services	4,908	6,682
Logistics	3,655	7,217
Manufacturing	2,433	6,358
Construction	3,305	4,726
Professional & Scientific	1,650	5,459
Financial and Insurance	543	4,576
Higher Educ, TAFE, Further Educ.	241	1,454
Agriculture	591	250

Source: REMPLAN

Wyndham is well placed to meet the employment needs of businesses and organisations seeking to invest in the priority sectors identified in the Economic Development Strategy.

A detailed scenario outlining how the 51% target can be achieved is included in the Appendices.

4.5. Key Implications for Economic Development

4.5.1. Workforce Capacity & Structural Change

Except for agriculture, each sector identified as priorities for investment attraction and growth has many residents employed in those sectors at locations outside Wyndham.

With access to skilled workers a primary influence on investment decisions, Wyndham is well placed to meet the needs of businesses seeking to relocate or expand. This position is particularly evident in knowledge economy jobs offered in professional services and financial & insurance services. Growing these sectors can restructure the local economy and build economic resilience in an expanding global knowledge economy.

Emphasising the capabilities of the resident workforce and promoting the City's economic assets will continue to be a focus for investment attraction initiatives.

4.5.2. Employment Destination

A municipal boundary alone does not determine a worker's preferred employment location.

24.2% of Wyndham's resident workforce is employed within the interfacing Local Government Areas of Brimbank, Hobsons Bay, Maribyrnong, Melton and Greater Geelong, with 28.2% of Wyndham based jobs held

by residents from those municipalities. These workers enjoy relatively comfortable travel to work times of approximately 40 minutes or less.

Before COVID-19, 21.9% of the resident workforce travelled to the Melbourne Central Business District for work, with 17.2% travelling beyond the immediate interfacing regions. Travel time to and from work for these people can extend beyond three hours per day.

Logically, the capacity to attract resident workers currently employed in the Melbourne CBD or beyond the interfacing LGA's back to employment locations within Wyndham is greater than the capacity of resident workers presently employed within the interfacing LGA's.

4.5.3. Demands of Population Growth

Population growth will continue to drive a level of job growth and new business including:

Homebased businesses

- through existing home business operations moving to the City

Primary, Secondary and Pre-school Education

- through the ongoing demand for school facilities

Retail Trade

- through the growing need for a wide range of goods

Arts and Recreation

- through more people participating in cultural and recreational activities

Health Services

- through the ongoing demand for medical and social assistance

4.5.4. Building on Industry Sector Strengths

Wyndham's position as a hub for logistics and manufacturing has continued to prosper due to the availability of affordable zoned land strategically positioned with direct connections to freeways and air and seaports. As these sectors continue to transition to greater levels of automation, there is the capacity to strengthen Wyndham's ability to meet the future industry employment, manufacturing and service needs generated by this change.

5. Leveraging Wyndham's Major Projects

Enabling trade, sustaining and growing local businesses, connecting workers to jobs and creating ongoing job opportunities makes non-residential construction and infrastructure investment key pillars in developing and maintaining a healthy economy.

Non-residential building approvals, which account for construction costs of buildings in the retail, commercial and industrial sectors, were valued at \$5.5billion from 2011 to 2020.

Infrastructure investment builds a city's economic assets. Attracting new investment to meet population demand has been a challenge for Wyndham. However, several significant projects have recently been delivered, or are currently being delivered, which can be leveraged to enable further economic growth.

The following is a brief description of these projects and the implications for economic development.

5.1. Transport Infrastructure

Transport is vital to providing access to jobs and community services, enabling cohesive economic activity, and maintaining social wellbeing.

5.1.1. Regional Rail Link

A \$3.6billion project delivered a new service from Geelong to Southern Cross Station with a new line constructed from west of the Werribee Station to Truganina and beyond. The project included the completion of two new train stations at Wyndham Vale and Tarneit. A commitment by the State Government to fund the construction of four more train stations on the regional rail link will accelerate commercial transit centres planned at those stations.

Implications:

- A direct connection between Werribee and Geelong and the delivery of a Melbourne to Geelong fast rail service and completion of the Melbourne Metro Loop Project will enhance the capacity to connect people to jobs, services, and visitor economy experiences.
- A significant effort is required in advocating for radial bus services to connect workers with major activity centres and industrial precincts across the municipality.

5.1.2. Western Arterial Upgrade

A \$1.8billion project that included the delivery of an improved road network to accommodate heavy freight movement within the Laverton North/Truganina industrial precinct and a full east/west interchange at Duncans Road/Princes Freeway, Werribee South.

Implications:

- Whilst east and westbound access to Werribee Park Tourism Precinct enhances the visitor experience, the challenge remains in dispersing precinct visitation across the City.
- Improved road networks in and around the industrial node will create economic efficiencies in freight movement to and from major ports.

5.1.3. Western Intermodal Freight Terminal

At an estimated \$2billion, planning is in the pipeline to deliver an intermodal freight precinct at Truganina on the north side of Boundary Road within the Melton City Local Government Area.

Implications:

- Providing an integrated road and rail freight network will enhance economic efficiencies and ensure the region's reputation as a logistics hub. Facilitating new investment within the industrial precinct must continue to be a priority.
- The terminal will provide construction and ongoing jobs for Wyndham residents. It will be important that the commitment of government to provide employment opportunities during project construction is met.

5.1.4. Level Crossing Removal Project

Part of a \$355million state-wide project, the removal of crossings has enabled efficient road connections across the physical barrier created by the Werribee to Melbourne rail line at Hoppers Crossing and Cherry and Werribee Streets in Werribee.

Implications:

- Completing these projects offers an opportunity to reshape the urban design, amenity, and connectivity of two major activity centres and deliver positive economic onflow. Achieving a positive outcome will require a collaborative approach with businesses within the immediate vicinity of the projects.

5.2. Employment Precincts

Ultimately growing the number of local jobs relies on the supply of zoned land and development ready sites for businesses to establish a presence in the City. With Wyndham home to many homebased businesses, opportunities must be available for transition to commercial spaces that enable growth and build the employment base.

5.2.1. East Werribee Employment Precinct

Wyndham City's Priority Project. The activation of the 775hectare site is critical to the City's economic future.

Implications:

- Maintaining the employment objectives of the existing Precinct Structure Plan will deliver more than 58,000 jobs.
- The advocacy challenge remains in accelerating the initiation of the project and maintaining a focus of job creation

5.2.2. Werribee City Centre

Council has initiated several strategic land acquisitions focused on delivering the vision for Werribee City Centre.

Implications:

- Werribee is well positioned to build a vibrant, active place for people and new business opportunities.
- Land ownership fragmentation and small lot size presently impede large scale investment by first and second-tier development companies. Consolidation of sites is challenging but facilitating such outcomes will benefit accelerated investment.

5.2.3. Williams Landing

Anchored by a \$24million train station and bus interchange, the activity centre includes the \$37million multi-level office complex accommodating Target Australia's head office and a multi-level complex servicing Wyndham's highest employing state government agency, the Emergency Services Telecommunications Authority.

Implications:

- Williams Landing offers an emerging high amenity commercial hub capable of attracting and growing economic activity and investment, including the professional services sector.
- Collaboration between Council and landowner, Cedar Woods Property Limited, will be critical in attracting and facilitating new investment.

5.2.4. Pacific Werribee

Expansion of the retail hub in 2015 places the centre in the top twenty-five ranked shopping complexes in Australia by floorspace. Offering a ten-screen cinema complex, food court, fresh food precinct and bus interchange, the centre attracts many shoppers outside the municipality.

Implications:

- There is potential for expansion of the complex's leasable floor space to include multi-level development that extends the current predominant retail offer to one that attracts professional service investment and jobs.
- Collaboration with the property owner, Queensland Investment Corporation, will be important in delivering future development outcomes and attracting new business.

5.2.5. Laverton North/Truganina Industrial Node

Home to major national and global brand mega-distribution centres, the precinct also maintains a strong presence in manufacturing and an increasing number of sophisticated materials recycling facilities. With rapid expansion over the past five years, the precinct presently provides 32.0% of Wyndham jobs and 45.5% of the City's economic output.

Implications:

- Potential to attract and support technology-based industries that can leverage the shift to industrial automation.
- Manufacturing remains a mainstay of the local economy. The economic impacts of COVID-19 have raised awareness of growing and supporting the nation's manufacturing capabilities. Council must play a role in increasing the capacity of these businesses. This can include assisting with funding applications to government.

- With a strong presence of recycling businesses combined with the Council owned and operated Refuse Disposal Facility, Wyndham can be a leader in driving the circular economy.
- Reducing the environmental impacts of production and consumption whilst enabling economic growth through more productive use of natural resources aligns with Council's Resilient Wyndham Strategy 2021-2025.
- It is timely that Council works toward developing a Circular Economy Strategy.

5.2.6. Point Cook Town Centre

The Point Cook Town Centre is under the ownership of private company, Stockland, and predominantly offers retail, hospitality and professional services over a leasable footprint of 44,000m² generating sales of approximately \$250M.

Implications:

- Council has been actively involved with the Point Cook Pop Up Park and there is opportunity for the Park to be a more permanent fixture in the centre. This outcome would further activate the centre as a community gathering place, dining hospitality experience and well visited retail centre.
- Whilst there may be capacity to develop the centre further this will be reliant in part on continued investment by the developer. The development of the adjacent Community Hospital may provide for expansion of medical and allied health services.

5.2.7. Emerging Activity Centres

With the vision of an integrated commercial heart of Wyndham within the cluster comprising East Werribee, Werribee City Centre, Hoppers Crossing, Williams Landing and Pacific Werribee, a focus must remain on growing non-retail jobs in emerging activity centres across the municipality.

Implications:

- Transit-oriented developments such as Tarneit are critical in ensuring the dispersal of jobs across Wyndham and providing access to resident workers living within the City's fringe.
- Working collaboratively with landowners and all developers, will be important in delivering future development and attracting new business.

5.3. Visitor Economy Projects

Although the negative impacts of COVID-19 on Wyndham's visitor economy have been severe, there is an opportunity to rebuild the sector. A vital component of the rebuild will be dispersing visitation beyond the City's key tourism experiences.

5.3.1. Werribee Open Range Zoo

The leading player in driving Wyndham's visitor economy, State Government funding of \$90million has been committed to a staged expansion over three years. The project includes relocating elephants from Royal Park to a 22hectare sanctuary, treetop sky safari gondola and a new waterhole precinct to accommodate rhinoceros and bison. Visitor numbers to the Zoo are forecast to exceed one million per annum by project completion.

Implications:

- The expansion will position the City as a significant domestic and international tourist destination and provide an opportunity to build on a unique marketing brand.
- Further investment in infrastructure, including road access, public transport access and public parking is required to ensure positive customer experiences.
- Industry must work collaboratively to leverage the increased visitor numbers to the Zoo. The challenge remains in dispersing visitors to the Zoo across the City's activity centres and other tourist experiences.
- The scale of the Open Range Zoo expansion will provide a high-profile anchor to attract investment in complementary major tourism experiences.

5.3.2. Avalon Airport

Notwithstanding COVID-19's impact on domestic and international travel disruption, pre-pandemic progress at the airport was strong. Growth in domestic flights servicing Sydney, Adelaide, and the Gold Coast was complemented by the opening of an international terminal accommodating flights to Kuala Lumpur and Bali.

Implications:

- As Melbourne's second airport, Avalon maintains plans for growth that will add value and onflow growth opportunities to Wyndham's visitor economy.
- The expected growth of the airport can deliver airport-based employment opportunities for Wyndham's resident workforce. Collaborating with the airport and Wyndham tourism operators can recapture and then grow national and international visitor markets.

5.3.3. Wyndham Harbour

A \$500million residential and marina development that includes a long-term plan of growing marina capacity to 1,000 berths, the largest of its kind on Port Phillip Bay.

Implications:

- The potential for a tourism focussed ferry servicing Port Phillip Bay, including Wyndham Harbour and a connecting bus service to the interfacing tourism precinct is a realistic project for future consideration.
- There is also potential for further commercial visitor economy development within the harbour front precinct, including major events delivery.

5.3.4. Wyndham Stadium Precinct

Final design and onsite construction commenced in March 2022. As the future home of the Western United A-League Soccer Club, the project will deliver a 15,000-seat capacity stadium and elite sports training facility, including a main grass training pitch.

Implications:

- The stadium precinct will offer the potential for new investment in health, sports medicine and recreation jobs.
- Maximising the development's advantages will require extensive audience participation experiences beyond those delivered by the core soccer offer.

5.4. Other Projects

5.4.1. Werribee South Pipeline Project

Stages 1, 2 and 3 are now complete and operational, making two-thirds of the pipeline project complete. Water efficiency has increased from 53% in 2014/15 to 74% in 2020/21. In February 2021, Southern Rural Water submitted an updated business case proposal to modernise Stages 4 and 5 to Australia's National Water Grid Authority. In May 2021, a 50% (\$11million) funding contribution was announced.

Implications:

- This project confirms the district's future as an agricultural food bowl of state significance.
- The economic impacts of COVID-19 disrupted import supply chains. This supply disruption raised awareness of Australia's need to increase food production capacity to provide safe food to local markets.
- Constantly challenged by urban encroachment and land speculation purchases, it is timely that a detailed Agribusiness Strategy is developed to guide the commercial future of Werribee South.

5.4.2. SPARK Innovation Hub

- Completed in March 2022, the SPARK Hub, an initiative of Council, has been established to support the accelerated objective of the Economic Development Strategy to restructure the local economy and grow jobs in knowledge economy sectors.

- A range of support programs will be offered at the SPARK hub ranging from building basic business skills and knowledge to enhancing innovation and entrepreneurial capacity and growth in start-ups and early-stage companies.

The hub's focus is to support innovative individuals with enhanced digital technology skills and experiences that demonstrate a desire and commitment to growing their existing enterprises and creating future employment growth.

Implications:

- The aims of the SPARK Innovation Hub must maintain alignment with the overarching objective of building Wyndham's knowledge economy.

6. COVID-19: Impacts and Opportunities

The COVID-19 pandemic has swept the world, creating the most significant economic crisis of the current generation. Primarily a global health crisis, the reach of the pandemic has severely affected the global economy and financial markets.

Significant economic impacts have included:

- reduced productivity and workplace absenteeism
- business closures
- disruption and realignment in the way we work and communicate
- supply chain disruption
- international trade disruption
- the decimation of the tourism industry
- changes in consumer expenditure behaviour

Although these impacts have created significant economic disruption, the Strategy action plan addresses the challenges and opportunities which have been created through heightened awareness associated with the social, environmental and economic benefits of:

- working closer to home
- developing Australia's manufacturing capacity and lessening the reliance on international suppliers of goods and services
- maintaining a robust agricultural sector to ensure a continuous supply of safe, fresh produce
- developing a diverse and resilient local economy
- reinvigorating local activity centres, entertainment complexes and tourism experiences
- accelerating growth in technologies, including those associated with public health and retail trade
- buying local and building local business to business supply chains

6.1. Future of Work

The necessity for many jobs to be anchored to a Central Business District location will no longer apply as tightly as it did in the past.

This trend has significant implications for an outer metropolitan region like Wyndham.

Large city-based corporations are exploring satellite office options for their employees to work closer to home, full-time or part-time. The Strategy recognises this opportunity and the need to work with the development industry in attracting new businesses and corporate satellite operations.

More importantly, these corporate jobs will be predominantly in the professional services sector, a key target for investment attraction and more particularly, a priority sector for initiating the East Werribee Employment Precinct.

6.1.1. Productivity Commission Report

Before the pandemic, the technology allowing many people to work from home existed, but few took it up. A 2021 research paper prepared by the Productivity Commission² confirmed that the COVID-19 pandemic forced many workers and firms, up to 40% of workers, to experiment with working from home.

The research paper noted that:

"The ability for people to do their job from home is strongly tied to their occupation and the tasks they are required to perform. Working from home is particularly suited to office-based workers such as managers, professionals, clerical and administrative workers. These workers use computers, interact less with the public, do not perform outdoor work or physical activity and do not work with immovable structures or equipment."

The paper contends that employers and their staff have some common ground on the benefits of working from home, but they also have different priorities. Staff tend to want to work from home more than employers. We can expect ongoing experimentation and testing of working from home models and negotiation between employees and employers for years to come.

Many firms will experiment with hybrid or work from anywhere models but will maintain their Melbourne CBD offices because of their accessibility.

Using estimates of the jobs performed from home, the research paper found an evident loss of people from the Melbourne CBD, with the most significant gains occurring in the inner suburbs and Melbourne's east and south-east.

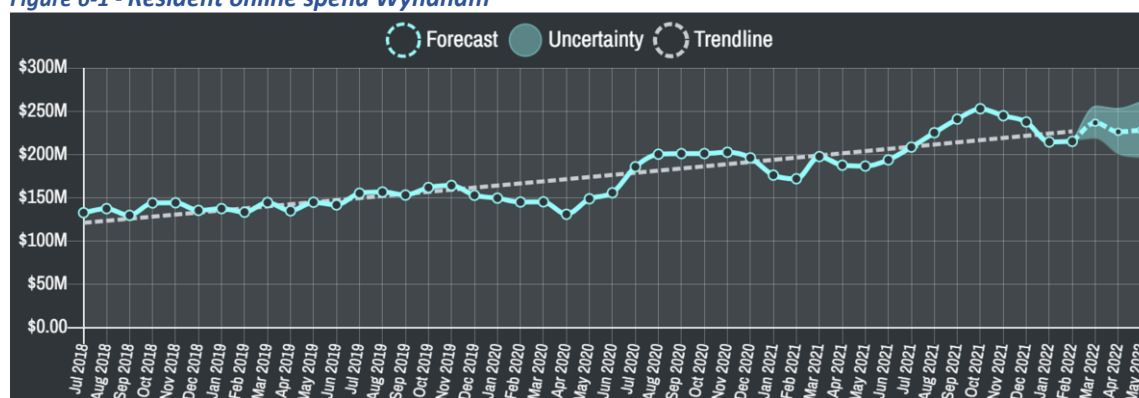
Wyndham's capacity to benefit from this shift is measured as a potential for minor to moderate gains.

6.2. Consumer Trends

6.2.1. Resident Online Spend

COVID-19 impacts have empowered more consumers to utilise e-commerce platforms to purchase goods and services. The level of goods and services purchased online by Wyndham residents grew substantially during the pandemic's peak. A \$145million online resident spend in February 2020 was followed by steady growth. Peaking in October 2021 at \$253million, expenditure for February 2022 was \$215million, representing a change of 48.2% over two years.

Figure 6-1 - Resident online spend Wyndham



Source: Spendmapp

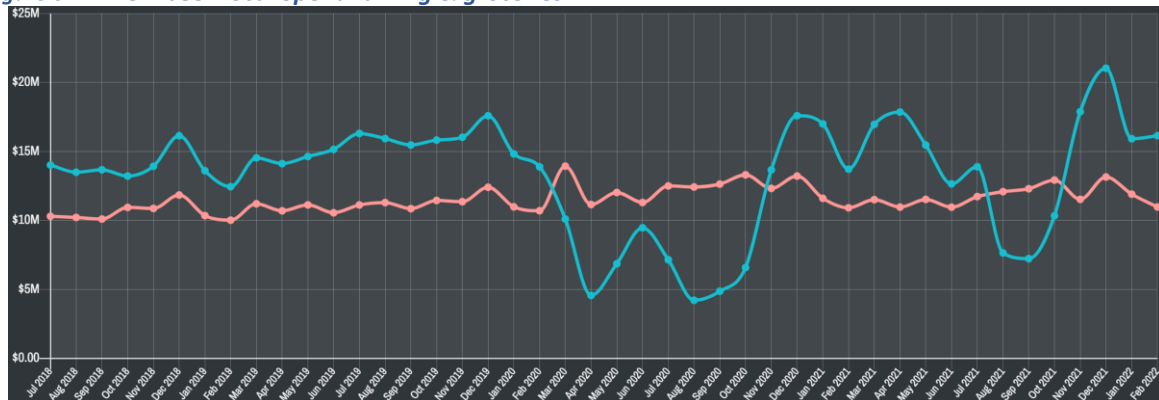
6.2.2. Total Local Spend

Long periods of lockdown closures have positioned many retailers in a precarious position, not only through lack of sales and revenue but the requirement to maintain ongoing payment of operational costs, including

² Productivity Commission, Working from Home Research Paper 2021, Australian Government

rent. Many of those that have been able to trade have experienced supply chain issues, most notably in the sale of imported goods.

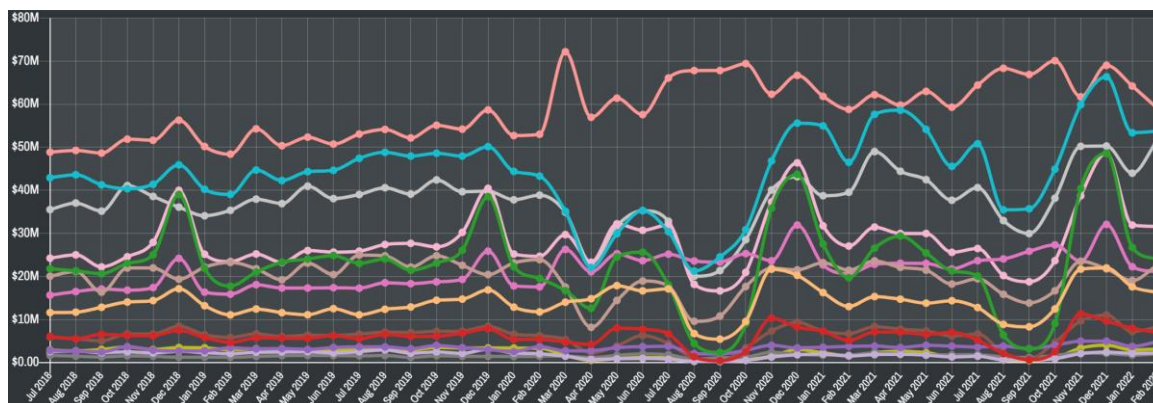
Figure 6-2 - Werribee: Local Spend: dining & groceries



Source: Spendmapp

Figure 4-2 shows differences in trends for dining & entertainment and groceries and supermarkets in Werribee. Whilst the blue line (dining & entertainment) is volatile to lockdown measures, the pink line (groceries and supermarkets) remained relatively stable.

Figure 6-3 - Wyndham City: Total Local Spend: all categories



Source: Spendmapp

Diagram 3 captures a month-to-month trend of total expenditure in the City across 14 defined categories. There was a varying range of sales volatility as Victoria moved in and out of lockdown.

6.3. Implications for Economic Development:

- Council can play a role in facilitating professional development support to build knowledge that enables small businesses to make informed decisions when considering an investment in e-commerce tools and digital platforms.
- Whilst data provides a broad picture Council must maintain a strong industry engagement program to capture a greater understanding of the longer-term impacts of COVID-19.
- The pandemic has raised awareness by consumers and businesses of the benefits of buying local. Broadening the understanding of the advantages of supporting local businesses and building business to business supply chains in all sectors will enhance economic growth.
- Implementing a robust activation program and attracting infrastructure investment in activity centres will enhance customer experiences, drive increased foot traffic and build business revenues.

6.4. Post COVID-19: Opportunities and Challenges for Key Industry Sectors

Notwithstanding the significant challenges created by the impacts of COVID-19, Council, in collaboration with industry stakeholders, can play a leading role in leveraging the opportunities the pandemic has created.

6.4.1. Hospitality and Entertainment

The sector experienced significant impacts, including lockdown limits on patrons, cancellation of major events, disruption to hotel accommodation, and reliance on a predominantly casual labour force unable to access Federal Government support payments. After the peak pandemic, the loss of overseas students and young tourists has created significant staff shortages. These shortages impact service delivery, sometimes forcing businesses to reduce their trading hours. This situation is anticipated to continue until regular international travel and study return.

Implications:

- In responding to the immediate challenges associated with compromised trading during COVID-19, future actions, and investments to support activity centres must focus on delivering permanent solutions that aim to maintain customer experiences and minimise negative impacts during periods of economic downturn.
- Staff shortages impact bottom-line revenues, and Council can play a role in facilitating programs that assist the industry in identifying and retaining casual employees.

6.4.2. Visitor Economy

Historically the growth of the City's visitor economy has been driven by several influencing factors, including a robust international visiting friends and relatives' market (VFR) and single-day domestic traveller market. These markets will take some time to recover and then grow.

Implications:

- The visitor economy was decimated at local, state and national levels. While Wyndham's visitor economy is relatively small, contributing 1.2% of output and 2.3% of employment, the sector has significant growth capacity to capture state, national and international tourists.
- The planned development at the Werribee Open Range Zoo will take that venue to a level that will confirm it as a premier visitor destination. The opportunity the Zoo will deliver, combined with the reactivation of Avalon Airport, can be leveraged to enhance tourism yield and dispersal.
- In responding to the challenges and opportunities of a post COVID-19 tourism market, it is timely to refresh Wyndham's Visitor Economy Strategy.
- The emergence of a night-time economy is apparent in some key activity centres. The further growth and impact of a night-time economy will be supported by the Werribee Open Range Zoo masterplan completion whereby this significant visitor attractor will be 'more than just a day'. Accommodation, retail, entertainment, and hospitality sectors are likely to experience positive economic impacts.

6.4.3. Logistics

Although the industry experienced high infection levels at the pandemic's peak, the capacity to continue operations was relatively strong compared to many other sectors. As the home of national and global distribution and fulfilment centres, logistics will continue to be a priority sector and driver of the local economy. Industry stakeholders confirm that the two most significant challenges facing the sector post COVID-19 are access to suitably trained truck drivers and increasing fuel costs.

Implications:

- Increasing consumer demand for online purchasing is transforming the logistics industry, with the impacts of COVID-19 accelerating the trend.
- There is potential to initiate investment and business development programs to build innovative business capacity and leverage the technology change. Local businesses must be positioned to contribute to operating system design, maintenance and manufacturing.

6.4.4. Health

The challenges faced by Wyndham's large and culturally diverse community during the pandemic reinforced the need for greater access to local services, including mental health support.

Implications:

- The community's health and well-being level and access to available services influence lifestyle and capacity to maintain a healthy work-life balance. Levels of absentee employment negatively impact the economy.
- Advocating and subsequently facilitating sector investment in this sector has been identified as a priority.

6.4.5. Higher Education, TAFE and Further Education

International students is a cohort severely impacted with reduced numbers because of the pandemic. This change has reduced economic onflow associated with student expenditure. A further negative onflow has been staff shortages in sectors that traditionally rely on casual student labour.

Implications:

- The dramatically reduced presence of international students has impacted the economic benefits derived from student expenditure. A further negative onflow has been staff shortages in sectors that traditionally rely on casual student labour.
- Advocating and subsequently facilitating investment in this sector has been identified as a priority.
- The challenge ahead will require all relevant stakeholders to work collaboratively in reactivating the international student market.

6.4.6. Manufacturing

In Australia, consumers witnessed supply shortages, in part, due to the country's reliance on China. In response, the Federal Government launched a \$1.4billion Modern Manufacturing Strategy. Aligning with the Federal Government's focus, Council implemented a \$200,000 grant program for local manufacturers.

Implications:

- Manufacturing is a key driver of economic prosperity in Wyndham, accounting for 20.4% of economic output and 8.2% of employment,
- Council is committed to aligning with Federal Government policy in supporting existing manufacturers to invest in research and development and grow market share at a national and international level.
- The East Werribee Employment Precinct provides the opportunity to attract and grow innovative advanced manufacturing at a time of heightened community expectation to support the sector.

6.4.7. Construction

Although major construction sites were able to continue operation during most lockdown phases, small trade businesses, including plumbers, electricians and builders that service the residential maintenance and repair market, were detrimentally affected by the pandemic.

Implications:

- The construction sector will continue to benefit from population growth, and the industry can recover quickly.
- Shortage of building materials due to the impact of COVID-19 on import supply chains is driving a rise in construction costs, further supporting a need to build the capacity of national manufacturing.
- Wyndham's continuing population growth places the City well in attracting new investment in sectors that support the industry.

6.4.8. Professional Services

The professional and technical services sector provides services to consumers; however, a substantial market share is a product of business-to-business activity. With many businesses under financial pressure due to COVID-19 impacts, payment for business associated discretionary expenditures negatively impacted several industry sub-sectors.

Implications:

- The Productivity Commission Research Report findings confirm that Wyndham can be attractive for the utilisation of satellite workspaces by Melbourne CBD based organisations.
- Working closer to home will benefit the City's capacity to retain small businesses within the municipality's boundary.

6.4.9. Agribusiness

COVID-19's impact on global markets has made the short-term outlook for many sectors within the Australian agriculture industry increasingly uncertain. Werribee South has not been as exposed, as the region is not reliant on international markets. Unpredictable seasonal conditions and urban encroachment will continue to dominate industry fortunes over the long term.

Implications:

- More detailed action planning must be initiated to ensure Werribee South's long-term future as a food bowl of state significance.
- It is recommended that an Agribusiness Strategy is developed within the next 24 months.

7. Improving Access to Services

For Wyndham, there remain significant gaps in service delivery to meet the social and wellbeing needs of a growing city.

Improving access to these service industries has significant economic and social development implications, including the capacity to grow local employment opportunities. With a large proportion of Wyndham's workforce in these sectors travelling outside the municipality to their workplace, the City is well placed to meet the employment needs generated by new investment in these industries.

Table 7-1 - Sector access & workforce capacity - Wyndham v Greater Metropolitan Melbourne

	Higher Education, TAFE, Further Education	Health Services	Arts and Recreation
Number of sector jobs in Wyndham	527	6,657	738
Ratio of jobs to population in Wyndham	1:412	1:33	1:311
Ratio of jobs to population in Greater Metropolitan Melbourne	1:83	1:17	1:97
Number of Wyndham's workforce in sector	1,695	11,590	1,879
Number of Wyndham's workforce employed outside Wyndham	1,448 (85.4%)	6,682 (57.5%)	1,324 (70.4%)

Source: REMPLAN

0.8% of jobs (527) in Wyndham are in the tertiary education sector, including TAFE & vocational training. However, of the 1,695 Wyndham residents working in this industry, only 247 (14%) hold a job in Wyndham.

With one local job in TAFE and vocational training for every 412 Wyndham residents, compared to the Greater Metropolitan Melbourne ratio of one job for every 83 residents, Wyndham is grossly under-represented in this critical economic and community development space.

A similar scenario holds for the health services industry, with one local job for every 32.6 Wyndham residents compared to Greater Metropolitan Melbourne's one job for every 16.9 residents.

When comparing access to jobs in the Arts & Recreation sector, the employment to population ratio difference between Wyndham and Greater Metropolitan Melbourne is vast at 1:311 for Wyndham and 1:97 for Melbourne.

7.1. Implications for Economic Development

7.1.1. Higher Education, TAFE and Further Education

Access to higher education is essential in building skills and knowledge and retaining and transitioning qualified students into Wyndham's resident workforce.

In the first instance, students travelling long distances outside the City to participate in university based higher education compromise their study/lifestyle balance. These students may be less inclined to remain living in Wyndham once qualified and more prone to follow employment opportunities outside the City closer to the places where they were educated.

The under-representation of service delivery in Wyndham further highlights the need to deliver new investment in higher education and develop strong industry partnerships with innovative knowledge economy businesses within the East Werribee Employment Precinct and other principal activity centres.

7.1.2. Childcare

Access to quality childcare is increasingly critical to Australian children, families and the economy.

Notably, with the continuing growth of Wyndham's resident workforce, there will be increased demand to support children and their employed parents.

A recent study by Victoria University's Mitchell Institute³ showed that, on average, Wyndham has .442 places per child. The lowest ratio of .316 places per child was recorded in Point Cook East and the highest ratio of .546 in Point Cook North. Presently, Wyndham is defined as an area of "greater relative supply", however with ongoing population growth, meeting the demand for childcare will be challenging.

7.1.3. Health Services

The impact of COVID-19 has highlighted the need for improving access to a range of medical services ranging from general practice to specialist medical, including mental health support.

The under-representation in Wyndham City's health workforce suggests a need to focus on growing employment in this sector to enable more local jobs for residents (including those with the immediate capability to fill those jobs).

With more than 57% of the 11,500 people working in health services employed at locations outside the City, Wyndham is positioned to meet the needs of employers seeking to expand operations or deliver new business into the City.

7.1.4. Arts and Recreation

Access to recreation services is particularly relevant to this Strategy's aim to reduce travel to work times and free up time to engage in personal and leisure pursuits, as demand for these services is a consequence of population growth.

Recreation services play an essential role in developing healthy living standards, connecting people, and maintaining communal harmony and connection.

Whilst the views of American urban theorist, Richard Florida⁴ have sparked much debate and discussion; his argument that the creative class is socially relevant because of its members' ability to spur regional economic growth through innovation warrants consideration.

With access to services in the Melbourne Metropolitan Area three times greater than Wyndham, any capacity to close this gap will deliver needed services and new jobs. Identifying creative people and building entrepreneurship and innovation capacity will be included in Council's business development programs.

³ Mitchell Institute, Childcare Centre Desserts and Oases: How Accessible is Childcare in Australia, Victoria University, 2022

⁴ Richard Florida, The Rise of the Creative Class, Pluto Press Australia, 2003

8. Changing Our Future: East Werribee

The State Government owned site, now known as East Werribee Employment Precinct, operated as an important state research and technology park for over 100 years.

Located at the City's eastern end with direct connections to the Princes Freeway, the site comprises 775 hectares of predominantly greenfield land. Development that has occurred thus far is concentrated at the eastern gateway.

In the past ten years, a small parcel of privately owned land on Hoppers Lane has seen the delivery of medical services, including St Vincent's Private Hospital and Wyndham Private Medical Clinic. Expansion projects have included the Werribee Mercy Hospital, University of Melbourne U-Vet Clinic, University of Notre Dame Medical Clinic and Suzanne Corey Select Entry Secondary College. A State Government funded school, Wyndham Tech School, opened three years ago on the Victoria University campus.

Within the identified justice precinct adjacent to Derrimut Road, a new \$45million police complex was completed in 2022.

Following a public tender process commenced in 2015 by the Victorian State Government to develop a 400hectare site within the precinct, a Chinese backed consortium, Australian Education City, was nominated as the preferred tender. However, in 2019, government determined to suspend the bid process.

In the Victorian State Budget 2022/2023 the following reference to East Werribee is included:

“Funding is provided to facilitate development in the Werribee National Employment and Innovation Cluster (NEIC) including the development of the East Werribee Roadmap and a fast-track review of the Precinct Structure Plan. This initiative will facilitate economic, social, and environmental benefits within the Western suburbs of Melbourne.

This initiative contributes to the Department of Jobs, Precincts and Regions’ Business Precincts output.”⁵

Maintaining a vision of a minimum of 58,000 jobs for the precinct and with a focus on the priority knowledge sectors identified in the Economic Development Strategy will be critical to achieving long term sustainable economic growth and prosperity for Wyndham City.

8.1. Employment Objectives: Precinct Structure Plan

The East Werribee PSP vision and employment objectives align with Wyndham 2040 Community Vision and the objectives of this Economic Development Strategy.

Adopted in October 2013, the East Werribee Employment Precinct Structure Plan (PSP)⁶ documentation outlines that it:

- Is a strategic plan which guides the delivery of a quality urban environment over the next 20 or 30 years
- Sets the vision for how land should be developed, illustrates the future urban structure and describes the outcomes to be achieved by the future development.
- Outlines projects required to ensure that future workers, residents and visitors within and to the area are provided with timely access to services and transport infrastructure necessary to support a quality, affordable business environment and lifestyle
- Details the form and conditions that must be met by future land use and development.

The PSP outlines the Vision for East Werribee, which includes:

⁵ Victorian State Budget, Department of Treasury and Finance, 2022

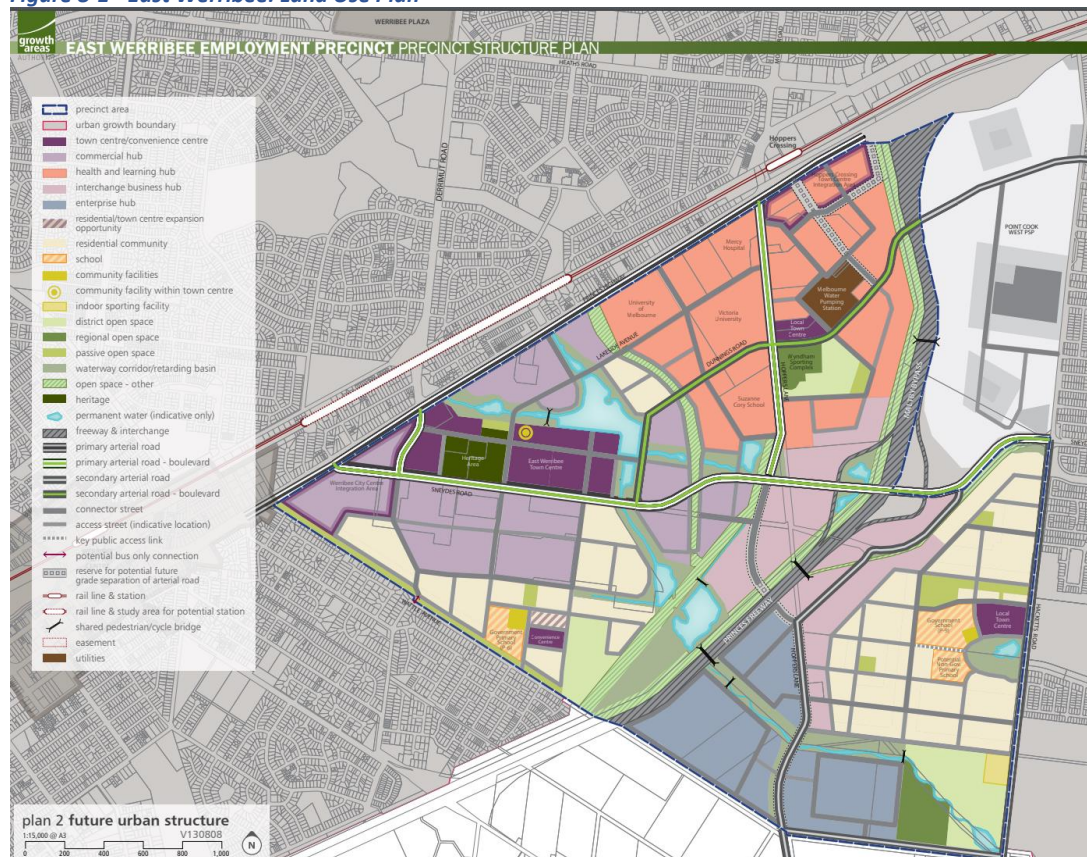
⁶ Victorian Planning Authority: East Werribee Employment Precinct Structure Plan; September 2013, amended July 2017

“East Werribee will combine with Werribee City Centre and develop to form the Capital of Melbourne's New West. East Werribee will be where people live, learn, work and play. It will be a vibrant, mixed-use community precinct focal point of economic, social, cultural and environmental excellence. It will be a regional centre for high skilled employment and services, emphasising research, technology, education, health, business services, and advanced clean manufacturing.”

Comprising a Town Centre, Commercial Hub, Health and Learning Hub, Enterprise Hub and three residential communities, the employment objectives for East Werribee include:

- To increase opportunities for white-collar employment in the region.
- To ultimately provide at least 58,000 new jobs.
- To facilitate the development of office-based businesses, high tech research and development, including food research and development based light industries and regional health and education uses.
- To ensure that employment hubs remain vibrant outside business hours through the provision of entertainment, and in some hubs, residential development and other facilities, as appropriate.
- To foster modern and innovative businesses and business areas.
- To encourage a diverse range of employment types and employers.

Figure 8-1 - East Werribee: Land Use Plan



Source: Victorian Planning Authority

8.2. East Werribee: Job Creation

In delivering on East Werribee's vision and noting that the precinct currently employs approximately 3,200 people, REMPLAN impact modelling measures the on-flow job creation generated by 55,100 jobs of an additional 32,839 jobs within the City.

The table below articulates the critical importance of East Werribee to achieving this Strategy's local job target of 204,000 by 2041.

Table 8-1 - East Werribee Employment Contribution

Wyndham Jobs 2020		86,640
Strategy Jobs Target 2041	204,000	
Gap	117,360	
East Werribee: new jobs		55,100
East Werribee: On-flow		32,839
Other Precinct Job Creation		25,461
Job Target 2041		204,000

Source: REMPLAN

A detailed impact modelling table based on estimated job creation per industry sector is included in the Appendices.

8.3. East Werribee: Reshaping Wyndham

Aligning with this Strategy, delivering the objectives of the East Werribee Precinct Structure Plan is critical for the future economic health of Wyndham City because:

- It can provide a quantum number of local jobs that will significantly contain employment destinations within the City.
- It can offer a real opportunity to deliver knowledge economy jobs that match the skills of the resident workforce.
- It can deliver critical medical services, which will close the gap in the current service undersupply.
- It can deliver greater access to higher education, TAFE and further education, which will close the gap in the current service undersupply.
- It can position itself as a centre of innovation excellence, which in turn will attract new investment and more new jobs.
- It can build on the City's manufacturing base and deliver an innovative hub of advanced manufacturing.
- It can deliver regional and State public entertainment and cultural offerings within the designated city centre lake precinct.
- It can deliver economic outcomes that will enhance the environmental and social fabric of the City.

8.4. East Werribee: Addressing the Challenge

Investing in East Werribee will support existing community needs across Melbourne's west, absorb future population growth, and build a more prosperous, productive and sustainable Wyndham.

Following the cancellation of the public tender process government has yet to advise any planned release of land.

In designating East Werribee as a priority project Council has sort the following:

- Formal identification of East Werribee by the Victorian State Government as a new 'Priority Precinct'.
- Establishment of a new East Werribee Precinct Board that provides a partnership approach between the Victorian Government, Wyndham City, and other key stakeholders to guide and coordinate reactivation efforts.
- Investment to kick start the design, development, and construction of an iconic catalyst project.

- Creation of a new East Werribee Investment Attraction, Innovation and Enabling Infrastructure Fund.
- Supporting the construction of community facilities that respond to the immediate needs of surrounding local communities for new schools, health, sporting and recreation infrastructure, and future requirements.
- Commitment to the delivery of a region leading environmentally friendly, low emissions and sustainable precinct.
- Development of an Integrated Transport Strategy that captures the collective benefits of the Geelong Fast Rail, Western Rail Plan and Airport Rail connecting the National Employment and Innovation Clusters of Sunshine and Werribee.
- Adoption of a Federal and State partnership with Wyndham City to leverage opportunities presented through the North and West Melbourne City Deal.

9. Investment Attraction

Investment attraction facilitates growth in the local economy by encouraging the expansion of the existing businesses and generating the flow of new capital into the local economy from external sources.

Confirming the approach of Wyndham City's Investment Attraction Plan, the focus will be to:

- support the growth of local industry and businesses with a particular emphasis on priority industry sectors that can increase the number of local jobs
- Build and develop the sources of new capital through:
 - Direct new investment
 - Growing export revenues
 - Fostering trade and commerce relations with a range of national and international destinations.

With this Strategy's objective of delivering 204,000 local jobs by 2041, Council's Investment Attraction Plan will continue to guide intervention.

Initiatives will target those industry sectors that demonstrate the greatest capacity to generate high employment levels, meet the skills, knowledge and aspirations of resident workers and address gaps in access to community and business services.

The global economy is changing rapidly with the pace of change increasing. The disruption to business models through increasing digital capability and connectivity means the nature of the workplace is changing and many future jobs do not exist today.

In line with global trends, there is a need to reshape the local economy structure by strengthening the presence and contribution of those sectors that enable the growth of a globally competitive knowledge economy city.

9.1. Implications for Economic Development: Priority Sectors

9.1.1. Health and Social Services

The under-representation in Wyndham City's health employment suggests a need to focus on growing employment in this sector to enable more local jobs for residents (including those with the immediate capability to fill those jobs).

9.1.2. Higher Education, TAFE and Further Education

The under-representation in post-secondary education employment in Wyndham City suggests a need to focus on growing employment in this sector to enable more local jobs for residents (including those with the immediate capability to fill those jobs).

9.1.3. Professional and Technical Services

Wyndham has more than 6,500 resident workers employed in this industry, but less than 30% hold a job in Wyndham. With only 14% of resident workers employed in Computer Design holding a position in Wyndham, the City is resourced to meet the employment needs of businesses in this sector.

9.1.4. Manufacturing

COVID-19's impact on global supply chains has highlighted the need for Australia to be less reliant on products manufactured overseas. Climate change will continue to drive much needed investment in sustainable manufacturing processes and innovation to enhance the circular economy.

9.1.5. Construction

The industry has benefited from accelerated population growth and subsequent residential, commercial and industrial development. With 3D printing, drones, augmented reality, and robotics emerging as new industry technologies, there are opportunities to develop sectors that support this trend.

9.1.6. Logistics

COVID-19's impact on retail e-commerce has resulted in a growth in resident online expenditure of 75.2% over a 12month period driving further growth in the sector. The move to automated warehousing and distribution can be leveraged to grow and attract local knowledge industries which support technology advancement, manufacturing and maintenance.

9.1.7. Agribusiness

A large area of the municipality is utilised for agricultural production. There has been sizeable growth in the local food manufacturing and related transport sectors, with the industry experiencing considerable increases in output and regional exports.

9.1.8. Visitor Economy

Wyndham has a substantial visitor economy which has been impacted by COVID-19. Leveraging the City's culturally diverse community can re-establish the VFR market. The \$90million expansion of the Werribee Open Range Zoo will provide an important focal point in rebuilding the visitor economy.

10. Summary of key strengths, challenges & opportunities

The following table summarises the key strengths, challenges, and opportunities that have informed the Strategy's development.

Table 10.1

Key Strengths	Key Challenges & Opportunities
Large scale city experiencing continued population growth	Capacity to match the required level of community infrastructure with population growth Increasing local demand for goods and services
Large and diverse resident workforce	Increasing local jobs to a level closer to the number of resident workers
Multiculturally diverse community	Improving the communication of economic development opportunities to a broad range of stakeholders Strong links to international friends' and relatives' visitor market
Access to a growing knowledge economy workforce	Increasing access to local jobs that meet the skills and aspirations of the resident workforce
Industrial and commercial land affordability	Adapting to a diminishing supply of industrial land

Strategic location – midway between Melbourne CBD and the City of Geelong	Matching public transport services and infrastructure to community demand and access to employment nodes
Access to export infrastructure and 24/7 b-double capacity road network	Addressing traffic congestion, including significant conflict between heavy transport and commuter vehicles
Home to high profile tourism precinct (Werribee Park)	Dispersing visitors beyond the tourism precinct and recovery of the visiting friends’ and relatives’ market
Home to East Werribee, the largest tract of State Government-owned land identified for employment use	Committing State Government to collaborate with Council in delivering the vision of 58,300 jobs at East Werribee
Major commercial centres with capacity for growth	Enhancing local jobs growth beyond the retail and hospitality sectors in major centres
Increase in resident local spend in response to COVID-19	Enhancing of activity centre streetscapes and delivery of activation programs to retain and grow local expenditure
Increased desire for residents to work from or closer to home post COVID-19	Capacity to rebuild business confidence and resilience post COVID-19
Capability to leverage the challenge of COVID-19 to an enhanced culture of supporting local business	Capacity for businesses to adapt to effective e-commerce platforms in response to a post COVID-19 economy
Agricultural precinct of state significance at Werribee South	Implementing agreed actions that ensure the long-term sustainability of the Werribee Irrigation District Leveraging increased domestic and international demand for food and facilitating food processing investment
Established recycling industry and emerging green energy industry	Implementing agreed actions that grow Wyndham’s circular economy and reduce the City’s carbon footprint
Home to a manufacturing industry which accounts for more than \$6billion of the City’s economic output	Building on the City’s existing manufacturing base to enable investment in advanced manufacturing
Newly established small business innovation hub (SPARK)	Identifying local talent and enabling accelerated growth in innovative early-stage companies
Emerging young business owners with a demonstrated passion for supporting community and economic development	Opportunity for relevant stakeholders to deliver formal business and community leadership training
Continuing growth in residential and non-residential construction	Ongoing employment growth in the construction sector Opportunity to work collaboratively with industry and training organisations to identify trade training skills gaps

11. Strategy Implementation

The strategic framework for the Economic Development Strategy responds to Wyndham’s 2040 Community Vision and Council Plan, issues identified by stakeholders and the analysis of available economic data.

Leveraging opportunities derived from rapid population growth, the rise of resident workforce skills, major government infrastructure projects and private developer employment precinct investment; the Strategy’s objectives are articulated under four broad themes to guide the City’s economic development efforts:

The Strategy focuses on four themes:

- Business Engagement and Connection
- Entrepreneurship and Innovation
- Investment and Trade
- Activity Centre Enhancement and Development

Each of the themes has actions to deliver tangible outcomes that will benefit the local economy and community. This Strategy provides a pathway to restructure Wyndham’s economy and intensify investment and job creation opportunities for a City seeking to be a major contributor to the global knowledge economy.

Theme 1: Business Engagement and Connection

Objective: Strengthen connections with government, industry, and community to foster new opportunities for investment and growth

This objective seeks to:

- Build local supply chains and a culture of supporting local
- Celebrate, promote and share business success and best practice
- Collaborate with industry in advocating for government and private investment in projects, programs and infrastructure, which enable accelerated economic growth
- Collaborate with relevant partners in building business and community leadership skills and industry skills gaps

Desired Outcomes:

- A thriving business community proudly supporting local business to business trade and exchange of information
- An informed and competitive local business community embracing new opportunities for growth
- A diverse and robust local economy positioned to respond to emerging local, national and global trends
- A dynamic calendar of events that enhance the City's reputation as a business and investment destination

Economic Impact Indicators:

- Percentage of resident workforce employed within the City (id economy / REMPLAN)
- Annual percentage change in Gross Regional Product; benchmarked against percentage change of the western metropolitan region of Melbourne and State of Victoria (REMPAN)

11.1.1. Action Plan: Business Engagement and Connection

	Targets	Program	Policy/Process	Advocacy	Infrastructure
Delivery target industry sector roundtables	2 annually				
Celebrate business excellence and promote Wyndham as a business and investment destination	33 actions				
Deliver events that enhance knowledge and local supply chains	16 events 1,100 registrants				
Capture, analyse and report on economic data including resident workforce retention and jobs growth	Quarterly and Annual reports				
Conduct annual business confidence survey	Annual survey				
Deliver Industry Engagement Program	100 minimum site visits				
Develop and Deliver ongoing Buy Local Program	1 program				
Establish Wyndham Women's Business Network	10 initiatives 50 attendees External funding				

11.2. Theme 2: Entrepreneurship and Innovation

Objective: *Develop a diverse, robust and resilient local economy underpinned by businesses responsive to local, national and global influences*

This objective seeks to:

- Support business retention and expansion
- Build a culture of innovation and entrepreneurship to position the City as a destination for attracting high growth, high employing knowledge economy businesses and institutions
- Enhance the local business innovation eco-system by supporting business start-ups and facilitating accelerated early-stage business growth

Desired Outcomes:

- Progression of Wyndham Innovation Hub to a sustainable and effective model
- Evolution of entrepreneurship and innovation capacity of local business
- A robust local economy that offers increased opportunities in knowledge economy jobs
- Sustained participation in Council led entrepreneurship programs

Economic Impact Indicators:

- Level of participation and satisfaction levels by survey of Council-led business development programs
- Longitudinal revenue growth and employment generation of SPARK Innovation Hub tenant businesses (by Council survey)

Action Plan: Entrepreneurship and Innovation

11.2.1. Action Plan: Entrepreneurship and Innovation

	Targets	Program	Policy/Process	Advocacy	Infrastructure
Annual Business Training Calendar	12 sessions 360 registrants min				
SPARK Innovation Hub	20 member businesses				
SPARK Innovation Hub Business and Development Program	24 initiatives delivered				
WYNNovation Festival	5 events 500 registrants min				
Small Business Entrepreneurship & Innovation Fund	20 funded business \$200,000 distributed				

11.3. Theme 3: Investment and Trade

Objective: *Attract and facilitate job creation investment and enable national and international trade*

This objective seeks to:

- Actively position Wyndham City as a preferred destination for local, national and international investment

- Unlock the East Werribee Employment Precinct to deliver on the vision to create 58,300 jobs
- Leverage the impact of the COVID-19 global pandemic, including the national refocus on local manufacturing, buying local and working closer to home
- Support local companies to explore and build national and international markets
- Facilitate investment attraction opportunities in priority sectors

Desired Outcomes:

- Improved position of Wyndham City as a desirable business and investment destination
- Progression of the East Werribee Employment Precinct to a stage of “development ready” by 30 June 2024
- Well-developed relationships with industry stakeholders that stimulate investment attraction
- A robust local economy that offers increased employment opportunities, including those in priority sectors
- Delivery of large scale commercial and industrial job generation investment
- Enhancement of the City's circular economy, agribusiness sector and visitor economy sector

Economic Impact Indicators:

- Advancement of design and approval of industrial precincts within proposed PSPs
- Level of annual investment in non-residential building approvals (REMPPLAN)
- Change in revenue output and local employment levels of priority sector industries (REMPPLAN)
- Change in level of regional exports (REMPPLAN)

11.3.1. Action Plan: Investment and Trade

	Targets	Program	Policy/Process	Advocacy	Infrastructure
Maintain a proactive approach in facilitating investment in priority industry sectors	500 jobs min \$200M min				
Launch and Grow the Business and Investment Website	2,000 views first month 10% growth per annum				
Participate in an Export readiness program	1 VECCI program				
Support progression of the East Werribee Employment Precinct					

11.4. Theme 4: Activity Centre Development and Enhancement

Objective: Prepare and implement policies, strategies and plans to develop, enhance, activate, and grow activity centres and industrial precincts

This objective seeks to:

- Deliver place activation programs, placemaking, marketing and streetscape works that support the sustainability of retail and commercial activity centres
- Facilitate the delivery of Council lead catalyst projects
- Build capacity of retail and hospitality sectors and other shopfront traders

Desired Outcomes:

- Increase in consumer expenditure with local businesses

- Sustained low vacancy rates in retail activity centres
- Sustained high occupancy in completed catalyst development sites
- Level of jobs growth and economic output in activity centres and industrial precincts

Economic Impact Indicators:

- Value of consumer expenditure with local business in key activity centres (Spendmapp)
- Level of retail vacancy rates in activity centres (annual audit)
- Level of occupancy rates in Council led catalyst developments within key activity centres (yearly audit)
- Value of new investment in activity centres and industrial precincts

11.4.1. Action Plan: Activity Centre Enhancement and Development

	Targets	Program	Policy/Process	Advocacy	Infrastructure
Deliver annual place activation programs in Activity Centres	8 Activity Centres				
Deliver and attract Major Events focused on activity centres	4 Major Events 2 Activity Centres				
Deliver marketing and promotion support for targeted centres in partnership with business associations	4 Activity Centres				
Deliver Placemaking enhancement works to targeted activity centres to support infrastructure	4 Activity Centres				
Deliver streetscape enhancement works in targeted activity centres to support enhanced customer experiences.	Works commenced in Werribee City Centre				
Facilitate the delivery of catalyst developments by leveraging the value of Council-owned land.	Continue Council's role in delivering the Endeavour catalyst development and investigate new catalyst development opportunities.				
Develop and implement activity centre visions, plans and policies	Commencement of WCC strategic planning framework				

11.5. Further Strategy Development

In addition to the actions identified, there is a need for further strategy development in some key sectors.

The impacts of COVID-19 combined with unstable international relations with several key trading partners and the consequences of climate change are delivering significant economic challenges.

There is an enhanced understanding of a need to build a more independent nation that is less vulnerable to natural disasters and can sustain greater self-sufficiency through local manufacturing and primary production. After two years of international border closures, Wyndham can re-emerge as an invigorated tourist and international student destination.

Although the Economic Development Strategy addresses these issues, a deeper exploration of the challenges and opportunities is required. Therefore, three pieces of strategic planning are recommended for development:

11.5.1 Agribusiness Strategy

As supply chains faltered during the COVID-19 pandemic, there emerged a greater awareness of the need for Australia to be less reliant on imported food and more supportive of homegrown safe and accessible produce. Supplying 10% of Victoria's vegetables, the Werribee South Irrigation District is a primary production region of State and national significance. Uncertain weather patterns, the cost of farming, supply and cost of water, urban conflict and speculative purchasing are combining to challenge the future of Werribee South.

Whilst the Werribee South Green Wedge Policy and Management Plan⁷ guides land use; an Agribusiness Strategy should be developed within the next 24 months to support the long-term commercial sustainability of the region.

11.5.2 Circular Economy Strategy

The increasing intensity and frequency of natural disasters, including floods and fires, are accelerating awareness of the urgent need to address climate change and a shift to a carbon-positive economy. With Wyndham the home of numerous world-class recycling operations and Council owning and operating one of Melbourne's most extensive Refuse Disposal Facilities, there is an opportunity to take a leadership role in enhancing the nation's circular economy. Adopting this approach aligns with Council's Resilient Wyndham Strategy.

This Strategy's recommendation is to develop a circular economy strategy within the next 24 months.

11.5.3. Visitor Economy Strategy

The economic impacts of COVID-19 have decimated the sector. For Wyndham, the international visiting friends and relatives' market was suspended, and it may be some years before the market returns to post COVID-19 levels. Nevertheless, Wyndham has strong foundations to grow tourism yield and dispersal by leveraging the City's tourism assets, including:

- The \$90million Werribee Open Range Zoo expansion
- Wyndham Harbour as a future tourist ferry port
- The re-establishment of Avalon as a national and international airport
- The development of the Wyndham Soccer Stadium
- The potential of East Werribee to be home to a national arts and entertainment precinct

This Strategy supports a refresh of Council's Visitor Economy Strategy over the next twelve months.

⁷ Wyndham City Council, Werribee South Green Wedge Policy and Management Plan, Amendment C202, 2017

12 APPENDICES

12.1 Local Employment Target – Rationale

The Economic Development Strategy sets a resident employment location retention rate of 51.0% by 2041.

Table 12.1.1 - East Werribee Employment Contribution

Post COVID-19 Target 2041:

The percentage of resident workers employed in Wyndham is greater than the percentage of resident workers employed outside the City

Employment Location	Status Quo Forecast 2041		Post COVID-19 Target 2041	
	Percentage	Number	Percentage	Number
Wyndham City	36.6%	85,030	+51.0%	118,600
Interfacing municipalities	24.2%	56,225	20.0%	46,466
Melbourne CBD	21.9%	50,881	15.5%	36,011
Other locations	17.3%	40,194	13.5%	31,365
Total Resident Workforce	100%	232,330	100%	232,442

Assumption: The capacity to drive down dependency on CBD employment and beyond is greater than the capacity to influence change in employment locations within the interfacing LGAs.

12.1.2 How many local jobs are required by 2041?

Delivering the Post COVID-19 Target would see 118,600 employed Wyndham residents holding a job in Wyndham. However, as Wyndham will continue to be a location for workers living outside the City, there will be a requirement for a significant level of local job opportunities beyond the number which would serve only Wyndham residents.

If the current ratio of Wyndham's workforce was retained at 58.1% local workers and 41.9% outside workers, then servicing 118,600 resident employees would require a total city jobs number of 204,000 by 2041.

12.1.3 What needs to happen to get there?

Creation of local employment generation, including jobs in targeted sectors in which Wyndham has low representation and which the Melbourne CBD has high representation, offers an opportunity for measurable change, with the East Werribee National Employment and Innovation Cluster the key to that change, Three critical outcomes are required to drive the change:

- Attraction and growth of businesses that will provide local jobs in emerging knowledge sectors
- The capacity of Wyndham's workforce to supply jobs to those industry sectors
- Delivery of the East Werribee Employment Precinct's vision for 58,300 jobs predominantly in medical, education, health, professional services and manufacturing.

12.1.4 Knowledge Economy and Workforce Capacity

The City's local employment aspirations will not be defined by numbers alone.

Wyndham's capacity to meet the employment needs of knowledge economy enterprises and underrepresented critical service sectors such as health will be attractive to business and investment decision-makers.

A comparison of employment in Wyndham City to all of Victoria highlights that Wyndham City houses Victoria's most significant logistics sector. The retail, construction and manufacturing sectors are also highly represented. Wyndham also has many resident workers working in these sectors outside the City.

Access to local jobs is significantly under-represented for the priority knowledge sectors of health, higher education/TAFE/Further Education, and professional and financial services. Yet, the capacity of Wyndham's resident workforce to meet the employment needs of these priority sectors is very competitive.

Table 12.2- Percentage of local jobs and resident workers by industry sector

	Health and Social Services	Higher Education, TAFE & Further Educ.	Professional & Technical Services	Financial Services
% of Local Jobs by sector				
Wyndham	10.3%	1.2%	3.3%	1.1%
Victoria	13.1%	2.3%	8.3%	4.1%
% of resident workforce by sector				
Wyndham	11.5%	1.7%	7.0%	5.1%
Victoria	13.1%	2.3%	8.3%	7.5%
Resident workforce escape employment by sector.				
Number employed in sector	11,590	1,695	7,109	5,119

13 The Importance of East Werribee

In delivering on the vision for East Werribee and noting the precinct currently employs approximately 3,200 people, impact modelling measures the on-flow job creation generated by 58,300 jobs of an additional 32,500 jobs within the City of Wyndham.

Table 12.1 presents a scenario of estimated direct job creation in those sectors which are the focus of the existing East Werribee Precinct Structure Plan as described in each of the major employment hubs:

Commercial Hub

- Offices
- Office/warehouses
- Clean research and technology-based industry¹⁴
- Civic
- Conference and hotel facilities
- 17,500 jobs estimated

East Werribee Town Centre

- Offices
- Retail
- Entertainment
- Food and Beverages
- Civic
- 13,900 jobs estimate

Health & Learning Hub

- Intensification of existing and new health and education uses
- New private hospital and allied health uses
- Other offices and clean research and technology-based use
- University village centre
- 17,600 jobs estimated

Interchange Business Hubs

- Office and office/warehouse
- Research and development
- Clean manufacturing
- 6,300 jobs estimated

Enterprise Hub

- Research and development (including food R&D)
- Clean manufacturing (including food manufacturing)
- 2,500 jobs estimated

Community Centres

- Predominantly residential
- Local town centres
- Schools
- 500 plus jobs estimated

Table 13.1 - East Werribee Employment Impact Scenario

IMPACT SCENARIO: EAST WERRIBEE EMPLOYMENT PRECINCT (Source: Remplan)

Change: 55,100 Direct Jobs

Industry Sector	Direct Change	Direct Effect	Supply-Chain Effect	Consumption Effect	TOTAL JOBS
Agriculture			307	187	494
Mining			36	4	41
Manufacturing	5,000	5,000	1,280	951	7,231
Electricity, Gas & Water			333	97	429
Construction	600	600	1,664	412	2,676
Wholesale Trade	1,000	1,000	936	786	2,722
Retail Trade	3,800	3,800	1,272	4,202	9,274
Accommodation & Food	2,500	2,500	925	1,776	5,201
Transport & Warehousing	1,800	1,800	1,726	719	4,245
Telecommunications	300	300	293	97	690
Financial & Insurance	2,500	2,500	471	240	3,211
Real Estate Services	500	500	943	192	1,635
Professional & Technical	14,000	14,000	3,052	336	17,388
Administrative Services	3,900	3,900	2,361	418	6,678
Public Admin & Safety	4,000	4,000	658	98	4,756
Education & Training	5,300	5,300	125	1,930	7,355
Health & Social Care	8,200	8,200	226	1,593	10,019
Arts & Recreation Services	1,200	1,200	386	262	1,848
Other Services	500	500	682	865	2,046
TOTAL	55,100	55,100	17,673	15,166	87,939

From a direct increase in output of \$17,252.407 million, the corresponding creation of direct jobs is estimated at 55,100 jobs. Flow-on supply-chain effects in terms of local purchases of goods and services are anticipated from this direct expansion in the economy. It is estimated that these indirect impacts would result in the gain of 17,303 jobs.

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to increase the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption, and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario are estimated to boost employment by 15,287 jobs.

Total employment, including all direct, supply-chain and consumption effects, is estimated to increase by 87,690.

14 References

REMPAN: www.rempln.com.au

forecast .id: www.forecast.id.com.au

Spendmapp by Geografia: www.spendmapp.com.au