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REGIONAL ECONOMIC DEVELOPMENT STRATEGY 2010 – 2015



The Eastern Metropolitan Regional Council (EMRC) is a progressive and innovative regional local government working on behalf of six member Councils located in Perth's eastern suburbs - Town of Bassendean, City of Bayswater, City of Belmont, Shire of Kalamunda, Shire of Mundaring and City of Swan. The EMRC provides services in waste management, environmental management and regional development.

Executive Summary

The Eastern Metropolitan Regional Council's (EMRC) Strategic Plan for the Future 2010/11 to 2013/14 sets in place a vision for the organisation "to be a responsive and innovative leader in assisting Perth's Eastern Region to be a great place to live, work, play and do business."¹ This Regional Economic Development Strategy 2010 – 2015 (REDS) supports the achievement of this vision by providing a flexible framework for the EMRC to work with member Councils and other stakeholders to achieve a prosperous future for the Region and to build its position as a key economic powerhouse for WA.

The directions set by this Strategy align to the context set by the Western Australian Planning Commission's Directions 2031 and Beyond: Metropolitan Planning Beyond the Horizon and the Department of Planning's draft Industrial Land Strategy 2009: Perth and Peel, which together set in place a vision for Perth and Peel for the next 20 to 25 years that embraces continued growth with the preservation of local environments and a high quality of life. Within Directions 2031, a hierarchy and spatial distribution of activity centres has been defined that recognises Perth's Eastern Region as a significant transport and industry hub.

The REDS has been developed in close association with representatives from its six member Councils. The Strategy does not seek to replace individual economic development strategies of member Councils, but rather to complement and support them by outlining a regional framework for the delivery of economic outcomes across the whole of Perth's Eastern Region.

The Strategy is built upon a number of key themes that, when combined with

local economic factors, set a context for the Strategy. The most important theme for this Strategy is one of partnership and collaboration; recognising the EMRC's role to work closely together with member Councils and other regional stakeholders to achieve shared economic development outcomes. Another key theme for the strategy is the balance between 'nature' and 'nurture' for creating successful and resilient economic development. This recognises the need to balance market forces and the macro-economic context with supportive strategies that encourage the growth of the local economy. The themes blend with the economic context of Perth's Eastern Region leading to seven Key Focus Areas that will focus the activities for economic development over the next five years.

The economic context for Perth's Eastern Region is one of managed growth, building upon the Region's existing strengths (which include its strategic positioning, current transport infrastructure, resident workforce, and existing industry base in particular), maximising opportunities from several significant new investment and infrastructure projects in the Region, and capitalising upon new growth opportunities that emerge.

By careful consideration of the need for continual alignment between workforce, industry and infrastructure (whilst retaining liveability), the Region can ensure it maximises the opportunities from these investments as well as realising the potential value and opportunities from its existing resident industry and workforce. In addition to growing existing industry, the EMRC will look for opportunities to encourage and nurture higher output-value strategic industries, where increases in employment will result in

proportionately larger impacts on regional output and help to create a more resilient economy. These higher value industries will continually evolve in line with the growth of the Region.

This Strategy recognises that in an increasingly globalised economy, value and future prosperity of the Region will be driven by its unique points of difference and the greater personalisation of this 'product' to industry needs. In the context of Perth's Eastern Region, this requires creating combinations of land, infrastructure, workforce, services and existing industry strengths to more closely align to the needs of targeted industries. The Strategy also recognises that the identification and resolution of capacity constraints and barriers in economic 'enabling infrastructure' such as communications infrastructure, transport links and industrial land will help to maximise the economic potential of the Region and must match economic growth. Social and environmental challenges such as residential housing supply (and affordability) and environmental sustainability are also considered as they are inextricably linked to economic development and, if not considered, create significant risks to the Region's growth.

These factors are reflected in the seven Key Focus Areas of the Strategy as follows:

- (a) **Local Jobs for Local People** - Improve employment self-containment by working with partners to focus on initiatives that align the availability of local jobs to the local working resident population, and therefore reduce the social, environmental and infrastructure burdens that arise from commuting workers in Perth's Eastern Region;



- (b) **Buy Local, Supply Local** - Maximise local supply and demand opportunities through initiatives that reduce leakage of economic activity to other areas. The aim of this being to encourage the growth of existing businesses and attract new businesses to meet local industry needs and generate opportunities in Perth's Eastern Region;
- (c) **Think Smart, Work Smart** - Increase the output value of Perth's Eastern Region by developing and attracting knowledge intensive and creative industries, encouraging innovation in existing businesses, and generally creating higher value employment opportunities in the Region;
- (d) **Joining the Dots** - Create world-class enabling infrastructure that maximises economic productivity, creates competitive advantage for businesses in Perth's Eastern Region and resolves infrastructure bottlenecks that inhibit growth;
- (e) **Work Hard, Play Hard** - Protect, improve and promote the liveability of Perth's Eastern Region through the supply and diversity of housing, education, health, culture and vibrancy to attract workers to live and enjoy the Region in which they work;
- (f) **Natural Growth** - Ensure that economic growth complements rather than compromises the environmental future of Perth's Eastern Region by taking an environmentally responsible and sustainable approach; and
- (g) **Responsible Leadership** - Provide good governance that facilitates responsible economic growth, advocates for Perth's Eastern Region and encourages all stakeholders to work collaboratively together, equipped with the best knowledge to exercise sound leadership.

These Key Focus Areas are not mutually exclusive and will be continually reviewed to respond to evolving market conditions, regional issues, challenges and opportunities.

The Key Focus Areas also link the EMRC's other regional strategies which include;

- Regional Integrated Transport Strategy 2010 – 2013 (RITS);
- Regional Tourism Strategy 2010 – 2015 (RTS);
- Regional Advocacy Strategy 2010 – 2015 (RAS);
- Regional Climate Change Adaptation Action Plan 2009 – 2013 (RCCAAP); and
- EMRC's Strategic Plan for the Future 2010/11 to 2013/14.

This approach recognises that economic development is only one part of an interlinked and cross-dependant set of activities that achieve sustainability.

Each Key Focus Area has a number of objectives and actions that underpin the achievement of positive outcomes in each area. The EMRC's role in delivery of this collaborative strategy will build upon past achievements through a number of activities. These day-to-day activities illustrate the role of the EMRC in economic development within Perth's Eastern Region, and are broadly categorised into the following main activity areas:

- **Research, Measure and Review** - Identifying and collating data on an on-going basis to inform and support regional economic development decision making in association with member Councils.
- **Advocate, Educate and Align** - Working on behalf of member Councils, existing businesses and industry and business networks to advocate, educate and align thinking on regional issues and opportunities, particularly in areas such as infrastructure (e.g. transport, broadband, sewerage), skills shortages, and regulatory reform.
- **Project and Program Management** - Facilitating the delivery of projects and programs in association with member Councils and other regional stakeholders through a strong delivery framework, leadership, and close collaboration.

- **Attraction and Promotion** - Working with member Councils and other stakeholders to promote the opportunities offered within the Key Focus Areas of this Strategy. This will include, although is not limited to, promotion of the Region's existing infrastructure and industry base, new investment projects planned and underway, business support services, and the liveability of the Region (including health, leisure, education, tourism and transport). Target markets for these promotional activities are likely to include the existing workforce, residents and new and existing industry.
- **Funding Support** - Working with member Councils and other regional stakeholders to identify and facilitate opportunities for funding the Region's growth, including developing financial partnerships, sourcing government funding, and attracting private sector investment.
- **Governance** - The EMRC has a role to ensure that the Regional Economic Development Strategy achieves its objectives through good governance and positive stakeholder collaboration. The Strategy will be guided by the Economic Development Officers' Group that is made up of representatives from member Councils. The EMRC's Establishment Agreement specifies that two councillors from each member Council be appointed to the EMRC's Council, while a third councillor is appointed to deputise in their absence. The responsibility for economic development resides within Regional Services, which also takes responsibility for transport, tourism and environmental services.

Delivery of the Strategy has been underpinned by an implementation framework that defines roles, resources, governance and a review framework to ensure that the Strategy achieves its stated objectives.

¹ Eastern Metropolitan Regional Council 2010, Strategic Plan for the Future 2010/11 - 2013/14, report, Eastern Metropolitan Regional Council, Belmont, Western Australia, p.4



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1.0 Introduction

Perth's Eastern Region is emerging as a key economic powerhouse for WA. Strategically placed within the Perth metropolitan area, the Region contains Perth's international and domestic airports, as well as major arterial roads and rail infrastructure that link Perth to the rest of Western Australia and beyond.

Covering almost one-third of the Perth metropolitan area, Perth's Eastern Region is home to over 310,000 residents² with a diversity of cultural backgrounds.

Perth's Eastern Region is already a major contributor to the Western Australian economy, generating an estimated \$16,764 million³ or 10.7% of Gross State Product (\$156,603 million in 2008/2009)⁴.

Currently, the major industry sectors in the Region, based upon their output value, are manufacturing, transport and storage, construction, property and business services, wholesale trade, retail trade and mining.

Industry sectors that are experiencing high growth include mining, communication services, construction, agriculture, forestry, fishing and government administration and defence. In terms of the total number of employment opportunities in the Region, the key industry sectors that employ the highest numbers of workers are retail trade, and health and community services.

With population growth consistently above the WA average, and forecasts suggesting continued growth to reach almost 360,000 people by 2021 (an increase of approximately 15%)⁵, Perth's Eastern Region is set to remain

one of the fastest growing regions in Western Australia. The challenges for the Region over the next decade are to manage this growth strategically whilst creating a resilient economy that can withstand the uncertainties and impact of global economic and environmental factors. As the last few years have shown, in an increasingly globalised economy, global events can rapidly impact local economies. It is important for Perth's Eastern Region to identify and mitigate risks as well as to manage expected growth and create opportunities in order to maximise prosperity and to realise the economic potential of the Region for its residents and the State.

Diagram 1:

Location of Local Government Authorities in Perth's Eastern Region

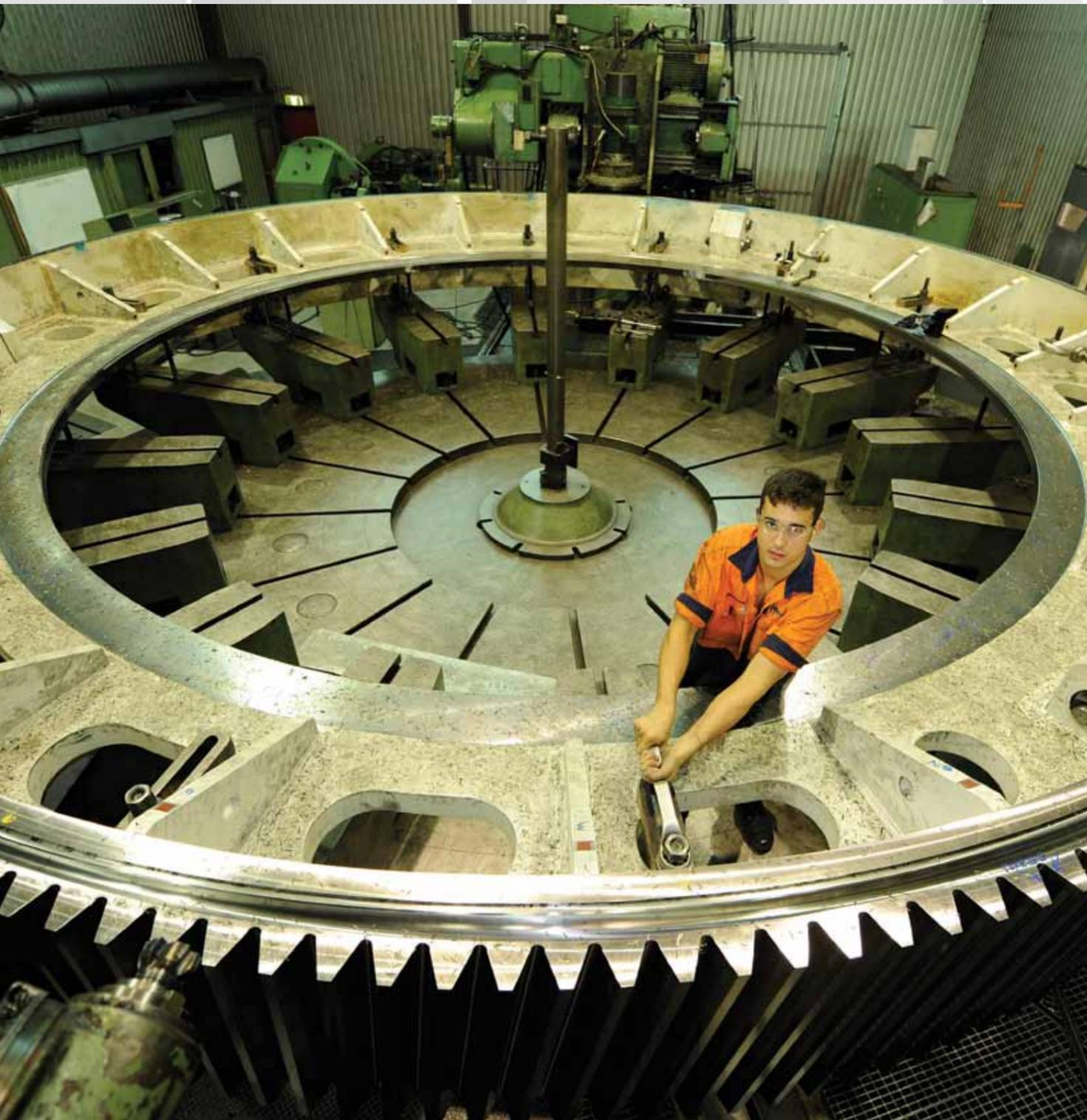


² profile.id 2010, .id Consulting, Collingwood, Victoria, viewed 21 July 2010, <<http://www.id.com.au/profile/emrc>>

³ REMPLAN May 2009, Compelling Economics, Bendigo, Victoria

⁴ Australian Bureau of Statistics 2009, Australian National Accounts: State Accounts (2008-09 re-issue), Cat. no. 5220.0, Australian Bureau of Statistics, Canberra, Australian Capital Territory, viewed 16 February 2010, <[http://www.ausstats.abs.gov.au/Ausstats/subscriber.nsf/0/705B32D194E15754CA2576930013F3B6/\\$File/52200_2008-09%20\(reissue\).pdf](http://www.ausstats.abs.gov.au/Ausstats/subscriber.nsf/0/705B32D194E15754CA2576930013F3B6/$File/52200_2008-09%20(reissue).pdf)>

⁵ Western Australian Planning Commission 2005, Western Australia Tomorrow: Population Report No. 6, report, Western Australian Planning Commission, Perth, Western Australia, p.31-87



the Region which in turn attract associated industries; leading to further investment. As the Region's existing industry base continues to mature and thrive, and new businesses flourish on commercial opportunities that growth brings, it will be important to ensure enabling infrastructure keeps up with this growth. Therefore with focused governance and sound economic development strategies, Perth's Eastern Region will continue to position itself as a major contributor to the State and national economies.

As a consequence of this predicted growth, a new era of employment opportunities are anticipated in the Region that will require careful consideration to ensure the alignment of a skilled resident workforce to the needs of industry. If the current high-level of employment self-sufficiency in the Region is to be maintained at or above 78%, it will be necessary to grow the population of resident workers in line with industry growth and to ensure the attraction of the necessary diversity of workers required to match the local

economy. The Western Australian Planning Commission's Directions 2031 predicts that this will require almost 48,000 additional jobs to be created in the Region by 2031⁶. Meanwhile, the current low levels of employment self-containment need to be resolved to reduce the impact on infrastructure by aligning local resident workers with local jobs. At the same time, proactive strategies are needed to attract a greater proportion of knowledge workers to the Region to support the growth of higher output-value knowledge-based industries.

2.0 The Role of the EMRC in Economic Development and Perth's Eastern Region

The Eastern Metropolitan Regional Council (EMRC) has supported member Councils and industry stakeholders to achieve economic development outcomes since 1998. The EMRC's mission is to partner with member Councils and other stakeholders to facilitate strategies and actions for the benefit and sustainability of Perth's Eastern Region.

Economic development is identified as a key result area in EMRC's Strategic Plan for the Future 2010/11 to 2013/14, which includes the objective "to facilitate regional economic development activities."⁷ Economic development is also progressed through related EMRC strategies including the Regional Advocacy Strategy (RAS), the Regional Integrated Transport Strategy (RITS), the Regional Tourism Strategy (RTS), and the Regional Climate Change Adaptation Action Plan (RCCAAP).

The EMRC's regional economic development activities and achievements in the past have included:

- The development of regional advocacy submissions, for example the State Government's Directions 2031 and Industrial Land Use Strategy.
- The purchase of regional demographic and economic impact tools including profile.id, atlas.id and REMPLAN to inform sound decision making with detailed demographic and economic data (2009);
- The coordination of regional industrial

tours for member Council and EMRC staff and stakeholders to cross-promote investment attraction opportunities (2009-2010);

- The facilitation of information exchanges with stakeholders on industry developments such as the Small Business Development Corporation (SBDC), Business Enterprise Centres (BECs), Small Business Centres (SBCs) and Midland Health Campus (2008-2010);
- An investigation into barriers to growth and investment attraction including broadband blackspots and industrial sewerage (2007-2010);
- The employment of a full-time Regional Development Coordinator to progress the implementation of regional development projects (2007);
- The development of the regional identity "Perth's Eastern Region" and taglines which are used to represent the six member Councils that comprise the Region (2007);
- The expansion of the previous Tourism Coordinator role and appointment of a

full-time Manager, Regional Development to oversee both the tourism and economic development functions (2006);

- The investigation of export opportunities through the sister city relationships between the City of Belmont and Adachi Ku, Japan (2006-2009);
- The formation of the Economic Development Officers' Group (EDOG) which supports EMRC to identify and progress regional economic development opportunities (2006);
- An investigation into the potential for industry cluster and commencement of support for the formation in 2008 of what is now known as the Engineering and Manufacturing Industry Cooperative Limited (EMICoL) (2005-2008);
- The provision of funding to support the development of the Regional Education Retention for Crime Prevention Project, which is a regional model designed to strengthen the education retention and engagement of young people aged 10-14 years who are at risk of involvement in antisocial and offending behaviour (2008);

⁶ Western Australian Planning Commission 2010, *Directions 2031 and Beyond – Metropolitan Planning Beyond the Horizon*, report, Western Australian Planning Commission, Perth, Western Australia
⁷ Eastern Metropolitan Regional Council 2010, *Strategic Plan for the Future 2010/11 – 2013/14*, report, Eastern Metropolitan Regional Council, Belmont, Western Australia, p.13



- The provision of support to the establishment of Swan Alliance, an organisation that enabled the dovetailing of youth employment into local industry (2005);
- The provision of support to the Midland Tertiary Education Working Party (MTEWP) to create a Midland Education precinct and subsequent support for the Raffles University Bid (2003-2010);
- The provision of funding to assist the North East Metropolitan Chamber of Commerce (NEMCC) with the development of its strategic plan and annual business plan during its initial establishment phase (2002-2003); and
- The development of an on-line Regional Opportunities Register to promote business, industrial, commercial and residential investment opportunities in Perth's Eastern Region (2003).

These activities illustrate the role of the EMRC in economic development within Perth's Eastern Region, and can be broadly categorised into the following main activity areas:

Research, Measure and Review

In its role in supporting member Councils and advocating on behalf of Perth's Eastern Region, the EMRC identifies and collates data on an on-going basis to inform and support regional economic development decision making. This activity helps to achieve the following outcomes:

- To support informed decision making within the Key Focus Areas;
- To identify existing and emerging industry strengths in the Region;
- To enable continual review of the Region's positioning and help to adjust future directions;
- To measure performance, success, and the competitive environment to help support risk management;
- To research regionally, nationally and globally to grow the Region's knowledge capital and help ensure the EMRC is at the leading edge of economic development practice; and
- To identify new projects that can help to deliver outcomes in the Key Focus Areas.

In supporting the delivery of this Strategy, particular areas of research are expected to include:

- Workforce analysis to quantify the availability, suitability, skills, training needs, and liveability requirements of our current and desired resident workers compared to local employment opportunities;
- Economic activity analysis to help identify current industry strengths, supply chain opportunities and potential targets;
- Business and stakeholder consultation to identify issues and opportunities relating to areas such as infrastructure, workforce, sustainability and regulation reduction;
- Opportunity assessment to identify and review economic development opportunities; and
- Economic impact assessments associated with significant developments.

Advocate, Educate and Align

The EMRC has a responsibility to work on behalf of member Councils, local businesses, as well as industry and business networks to:

- Advocate on regional issues and opportunities particularly areas such as infrastructure (e.g. transport, broadband, sewerage), skills shortages, and regulatory reform;
- Engage with and support local chambers of commerce, business and trade associations, and small business support centres;
- Engage community representatives, including local business leaders;
- Promote consistent messages between stakeholders; and
- Educate EMRC and member Council economic development and planning staff on best practice models for economic development.

This activity links closely to EMRC's Regional Advocacy Strategy (RAS) which is designed to facilitate consistent, professional and effective advocacy campaigns through a focussed and structured approach. The RAS is supported by member Councils participation on the Regional Advocacy Advisory Group (RAAG). Key regional issues are brought before RAAG who provide advice to technical officers on how advocacy is best approached for specific issues.

Project and Program Management

The achievement of this Strategy will ultimately depend on the successful implementation of the actions identified within the Key Focus Areas. This will require a strong delivery framework, political leadership, and close collaboration between the EMRC, its member Councils and other regional stakeholders. A key activity for the EMRC will be to facilitate the delivery of these projects and programs in partnership with member Councils.

Attraction and Promotion

The EMRC will work with member Councils and other stakeholders to promote the opportunities offered within the Key Focus Areas of this Strategy including, but not limited to, promotion of the Region's existing infrastructure and industry base, new investment projects planned and underway, business support services, and the liveability of the Region (including health, leisure, education, tourism and transport). Target markets for these promotional activities are likely to include the existing workforce, residents and new and existing industry.

Funding Support

The EMRC will work with member Councils and other regional stakeholders to identify and facilitate opportunities for funding the Region's growth, including developing financial partnerships, sourcing government funding, and attracting private sector investment.

Governance

The EMRC's role is to ensure that this Strategy achieves its objectives through good governance and positive stakeholder collaboration. The Strategy will be guided by the Economic Development Officers' Group that is comprised of representatives from the member Councils. The EMRC's Establishment Agreement specifies that two councillors from each member Council be appointed to the EMRC's Council, while a third councillor is appointed to deputise in their absence. The responsibility for economic development resides within Regional Services, which also takes responsibility for transport, tourism and environmental services.



3.0 The Role of the Regional Economic Development Strategy

The aim of the Regional Economic Development Strategy 2010-2015 is to guide the EMRC in its facilitation of regional economic development activities as agreed by member Councils for the period 2010 to 2015. The Strategy embraces the Council's key role to advocate and facilitate outcomes on behalf of member Councils, and in collaboration with regional stakeholders.

The Strategy does not seek to replace individual economic development strategies of member Councils, but rather to complement them by outlining a regional framework for the delivery of economic outcomes across the whole of Perth's Eastern Region. The individual economic development strategies of the member Councils, where available, have been reviewed as part of the development of this Strategy.

The Strategy articulates the vision for the Region and includes a number of Key Focus Areas and activities, as well as an action plan for delivery. The Strategy forms a basis for the EMRC to work with member Councils to guide decision making and achieve regional outcomes. The Strategy is designed to be flexible and adaptable. It considers the needs of all stakeholders and the importance of a collaborative approach to achieving outcomes. The document forms only one part of a broader interlinked range of strategies including:

- Regional Tourism Strategy 2010-2015 (RTS);
- Regional Integrated Transport Strategy 2010-2013 (RITS);
- Regional Advocacy Strategy 2010-2015 2010-2013 (RAS);
- Regional Climate Change Adaptation Action Plan 2009-2013 (RCCAAP); and
- Eastern Metropolitan Regional Council's Strategic Plan for the Future 2010/11 - 2013/14.

All of these strategies have relevance to the Regional Economic Development Strategy as together they support the broader goal of sustainability for the Region.

3.1 Links to Member Council Economic Development Strategies

In developing this Strategy a comparative review was undertaken with the economic development strategies of the member Councils, where available. These included:

- Shire of Mundaring Economic Development Strategy 2009;
- City of Swan Economic Vision and Strategy (Draft) – September 2009;
- Shire of Kalamunda Economic Development Strategy Report (Draft) – June 2010;
- City of Bayswater Economic Development Action Plan 2010 – 2015;
- City of Belmont Strategic Plan 2008-2013; and
- Town of Bassendean Economic Development Plan 2005 – 2010.

This review identified that whilst the detailed actions for each member Council were specific to the individual region, there were many common themes that align to the Key Focus Areas of this Regional Economic Development Strategy. These themes include

business development, investment attraction, workforce skills development, infrastructure provision, commercial and industrial land supply, leadership, regulation support, tourism development and business networking.

3.2 Links to State and Federal Government Strategies

As well as a comparative review of member Council strategies, the development of this strategy also included a comparative review of State and Federal Government Strategies, where available. These included:

- The Western Australian Planning Commission's Directions 2031 and Beyond: Metropolitan Planning Beyond the Horizon;
- The Western Australian Planning Commission's Draft Industrial Land Strategy 2009 – Perth and Peel; and
- The Department of Training and Workforce Development's State Workforce Development Plan.



4.0 The Approach to Economic Development in Perth's Eastern Region

The future growth of economic activity in Perth's Eastern Region will depend on aligning industry, infrastructure and workforce to the broader macro-economic context.

This includes growing the Region's existing industry strengths as well as embracing new industry development opportunities as they arise. In consultation with member Councils, the EMRC's approach to economic development can be summarised by the following principles:

- Economic development outcomes will be best achieved by working in partnership and in collaboration with member Councils and other regional stakeholders to inform and deliver these outcomes (including local chambers, business associations, small business centres, business enterprise centres, and local industry leaders). This includes acknowledging individual economic development strategies of member Councils and working on shared priorities to achieve results.
- A focus of economic development activities for the EMRC will be to work with stakeholders to maximise the opportunities from the Region's existing economic base together with the planned investments in significant infrastructure projects. These include, but are not limited to, the Midland Health Campus, the Perth Airport Redevelopment, the proposed Raffles University, the Morley City Centre Master Plan and several other employment supportive projects. In particular the EMRC will work to leverage existing business support services that are already available such as those provided by member Councils, local business enterprise centres, small business centres and local associations and chambers of commerce.
- Population driven employment will develop primarily as a natural by-product to residential growth and strategic employment. The maximisation of employment opportunities within this context, whilst important, requires less intervention and will be achieved through key enablers such as simplifying and expediting regulatory processes, as well as ensuring the appropriate availability of serviced commercial and industrial land.
- In addition to growing existing industry, EMRC will look for opportunities to encourage and nurture higher output-value strategic industries, where increases in employment will result in proportionately larger impacts on regional output. These higher value industries will continually evolve in line with the growth of the Region, with current industries for potential targeting to include: mining, manufacturing, transport and storage, clean technologies, and creative industries.
- Taking guidance from member Councils, the EMRC will embrace a proactive approach to economic development - with continual review. This proactive approach will balance the momentum of market forces with a focused vision - a blend of 'nature' versus 'nurture' - to guide and facilitate the efficient development of the local economy. This approach is considered more efficient and effective than leaving development purely to market forces alone. The approach includes identifying and pursuing existing industry strengths, supporting organic growth and innovation, as well as actively targeting future opportunities that align to the vision outlined within this Strategy.
- In an increasingly globalised economy, it is recognised that value and future prosperity of the Region will be driven by the greater personalisation of 'product' to needs. In a regional context this requires creating combinations of land, infrastructure, workforce, services and existing industry strengths to reinforce local strengths and more closely align them to the needs of targeted industries previously outlined.
- Capacity constraints in economic enabling infrastructure such as communications infrastructure, transport links and industrial land, need to be identified and resolved to maximise the economic potential of the Region and match economic growth. Social and environmental challenges such as residential housing supply (and affordability) and environmental sustainability also need to be considered as they are inextricably linked to economic development and, if not considered, present significant risks to the Region's growth.
- The EMRC recognises that while comprehensive data analysis is a key component in the development of economic development strategies, successful economic development needs to embrace an entrepreneurial and forward looking attitude in line with the businesses it aims to encourage. This principle is reflected in the EMRC's strategic vision to be a responsive and innovative leader in assisting Perth's Eastern Region.
- Economic development is only one part of an interlinked and cross-dependant set of activities between environmental, social, governance and economic strategy. It is important that economic development is considered, understood and integrated into other aspects of regional growth. In particular there is a greater need for economic development to be embraced within planning and land use frameworks. Directions 2031⁸ has set in place a strategy at the State level for this to happen.

⁸ Western Australian Planning Commission 2010, *Directions 2031 and Beyond – Metropolitan Planning Beyond the Horizon*, report, Western Australian Planning Commission, Perth, Western Australia



5.0 Vision

The vision for economic development in Perth's Eastern Region builds upon the Western Australian Planning Commission's Directions 2031 and Beyond. Directions 2031 sets in place a vision for Perth and Peel for the next 20 to 25 years that embraces continued growth with the preservation of local environments and valued quality of life.

Within Directions 2031, a hierarchy and spatial distribution of activity centres has been defined that recognises the Region as a significant transport and industry hub. Perth's Eastern Region is geographically critical to the strategy with a number of key centres defined in the strategy including the Perth Airport (one of five Strategic Specialised Centres), Midland and Morley (as two of ten Strategic Metropolitan Centres) and Kewdale-Welshpool (as one of four Strategic Industrial Centres). In addition, Belmont and Ellenbrook have been identified as Secondary Town Centres and Bayswater/Bassendean, Hazelmere, Mundaring, Belmont, Malaga, Midvale and South Guildford have been acknowledged as Existing Industrial Centres in the Region.

The Department of Planning, in collaboration with other partners⁹, has also released the draft Industrial Land Strategy 2009: Perth and Peel which considers the areas, type and locations of general and light industrial land required for Perth and Peel

over the next 20 years. The strategy identifies both new sites and extensions to existing industrial areas for further consideration. The Perth Airport and surrounds feature prominently within this strategy due to its strategic location with easy access to key road transport corridors that link to air, port and rail terminals. Additional sites in Perth's Eastern Region that are referenced by the Strategy include Hazelmere South (likely industrial extension), Bullsbrook South, South Forrestdale and Whiteman (priority industrial sites), Bullsbrook townsite precinct, North Ellenbrook and Forrestfield (possible future industrial sites). Forrestfield is identified as a possible future industrial site as a result of the Kewdale-Hazelmere Integrated Master Plan and due to its close proximity to Perth Airport and the Kewdale-Welshpool industrial centre.

The EMRC's Strategic Plan for the Future 2010/11 to 2013/14 sets in place a vision for the organisation "to be a responsive and innovative leader in assisting Perth's Eastern Region to

be a great place to live, work, play and do business." The EMRC's vision for the Regional Economic Development Strategy for Perth's Eastern Region builds upon this context and is defined as:

"To create a prosperous region achieved through effective partnership and collaboration to facilitate the development of a rich diversity of local employment and industry opportunities."

To achieve this vision it will be necessary to embed world-class infrastructure, efficient regulative frameworks and effective governance.

6.0 Methodology

The development of the Regional Economic Development Strategy has resulted from a collaborative approach involving a broad range of stakeholders from the Region. In particular, economic development officers from the member Councils have provided direction and recommendations that have defined the key themes of this Strategy.

Specific steps in the evolution of this Strategy have included:

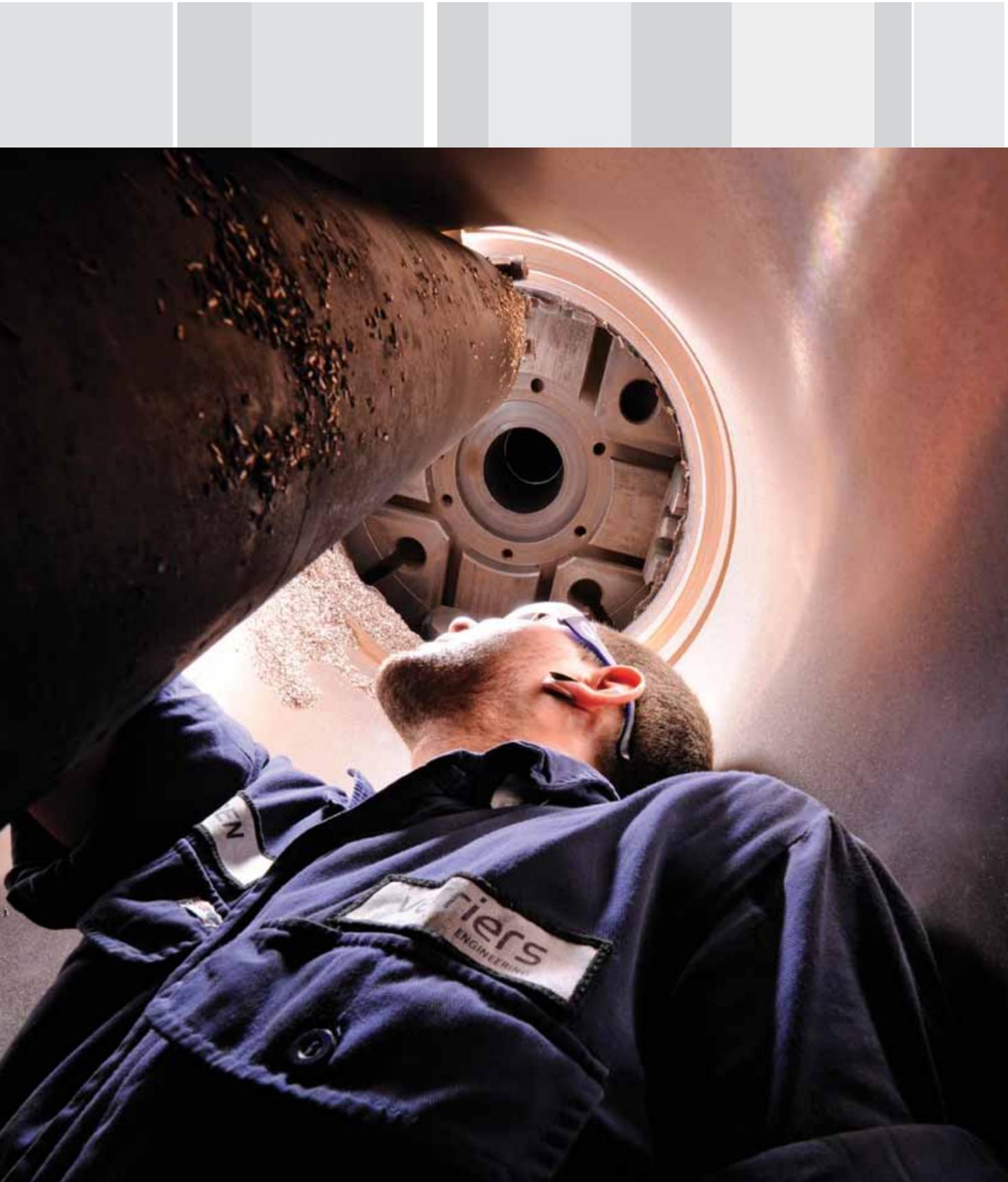
- Preliminary desktop research and analysis of demographic and economic data;
- A review of previous achievements;
- Consideration of current State and Federal Policies (particularly Directions 2031 and the Draft Industrial Land Strategy 2009: Perth and Peel);
- Assessment and prioritisation of regional issues, barriers and opportunities with the

Economic Development Officers' Group (EDOG) through a half day workshop held on 3 March 2010;

- Sourcing input from key state government, business and industry stakeholder groups through a workshop held on 16 March 2010;
- Revision of stakeholder input to identify Key Focus Areas with EDOG through a workshop held on 13 April 2010;

- A review of available member Council economic development strategies to ensure alignment with this Strategy; and
- Assessment and prioritisation of Key Focus Areas, Objectives and Actions by key state government, business and industry stakeholder groups through a workshop held on 12 August 2010.

⁹ In association with LandCorp, the Department of State Development and the Department of Environment and Conservation



7.0 Timeframes

A timeframe and level of priority has been identified for each action that forms part of the objectives and Key Focus Areas of this Strategy.

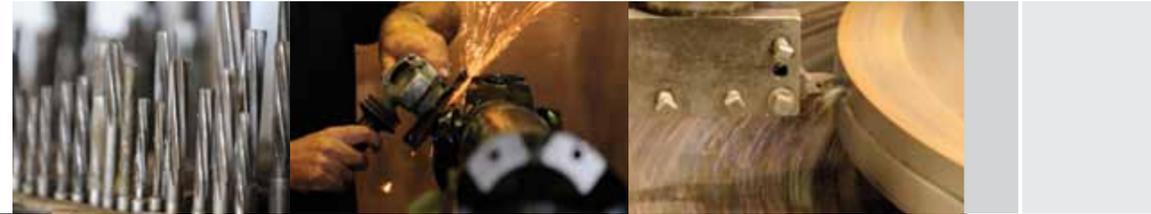
These identified timeframes and priority levels are indicative only and should not hinder an action of low priority or long-term timeframe being undertaken if an opportunity should arise.

Timeframe	Actions to be completed	Priority	Level of Importance
Immediate	2010 - 2011	High	Of high importance, needs a strong proactive approach, opportunities should be created.
Short term	2011 - 2012		
Medium term	2012 - 2013	Medium	Of medium importance, opportunities should be sought out.
Long term	2013 - 2015		
Ongoing	Throughout the implementation of the Strategy.	Low	Of low importance, opportunities should be undertaken as they arise.

8.0 Document Framework

The structure for this Regional Economic Development Strategy is described as follows:

- A future **Vision** has been defined to position, align and focus the direction of economic development efforts for the next five years;
- **Activities** have been identified which describe the day-to-day functions of the EMRC to support its role in facilitating economic development in the Region;
- Seven **Key Focus Areas** have been defined that outline high-level objectives based upon the current context of the Region. These Key Focus Areas combine to underpin the achievement of the vision;
- **Objectives** have been defined for each Key Focus Area that link each area to the vision;
- **Actions** have been defined that form a more detailed set of tasks to deliver the objectives. These actions will be delivered through collaboration and facilitation with member Councils and other stakeholders together with the activities of the EMRC; and
- **Key Performance Indicators** have been defined to provide a basis for measuring the extent to which the actions are achieved.



9.0 Key Focus Areas

The key economic development focus areas for Perth's Eastern Region aim to maximise the economic potential arising from the strengths of the Region. The areas are summarised as follows:

- (a) **Local Jobs for Local People** - Improve employment self-containment¹² by working with partners to focus on initiatives that align the availability of local jobs to the local working resident population, and therefore reduce the social, environmental and infrastructure burdens that arise from commuting workers in Perth's Eastern Region;
- (b) **Buy Local, Supply Local** - Maximise local supply and demand opportunities through initiatives that reduce leakage of economic activity to other areas. The aim of this being to encourage the growth of existing businesses and attract new businesses to meet local industry needs and generate opportunities in Perth's Eastern Region;
- (c) **Think Smart, Work Smart** - Increase the output value of Perth's Eastern Region by developing and attracting knowledge intensive and creative industries, encouraging innovation in existing businesses, and generally creating higher value employment opportunities in the Region;
- (d) **Joining the Dots** - Create world class enabling infrastructure that maximises economic productivity, creates competitive advantage for businesses in Perth's Eastern Region and resolves infrastructure bottlenecks that inhibit growth;
- (e) **Work Hard, Play Hard** - Protect, improve and promote the liveability of Perth's Eastern Region through the supply and diversity of housing, education, health, culture and vibrancy to attract workers to live and enjoy the Region in which they work;
- (f) **Natural Growth** - Ensure that economic growth complements rather than compromises the environmental future of Perth's Eastern Region by taking an environmentally responsible and sustainable approach; and
- (g) **Responsible Leadership** - Provide good governance that facilitates responsible economic growth, advocates for Perth's Eastern Region, and encourages all stakeholders to work collaboratively together, equipped with the best knowledge to exercise sound leadership

In responding to the directions set by these Key Focus Areas, the EMRC will partner and collaborate with member Councils and other stakeholders to support and grow existing businesses as well as to embrace and facilitate new business. These Key Focus Areas are not mutually exclusive and will be continually reviewed to respond to evolving market conditions, regional issues, challenges and opportunities.

9.1 KFA 1: Local Jobs for Local People

Improve employment self-containment by working with partners to focus on initiatives that align the availability of local jobs to the local working resident population, and therefore reduce the social, environmental and infrastructure burdens that arise from commuting workers in Perth's Eastern Region.

A healthy, prosperous and resilient local economy requires the close alignment of local resident workers to local employment opportunities. Not only does this help to maximise the economic output from a region, it also minimises the burden on transport infrastructure caused by commuting workers. In doing so, this also reduces environmental impacts. 'Dormitory' suburbs, where large proportions of workers commute each day, experience lower social capital and experience

greater social issues¹⁰. There are also greater risks in dormitory suburbs during time of economic uncertainty as fewer employment opportunities are available and generally those that exist are in population driven industries that are very susceptible to economic downturns, leading to unemployment growth.

The East Metropolitan Region* has seen strong employment growth over several years. At 13%, the East Metropolitan Region of Perth has been identified as having the strongest employment growth since November 2007, on par with lower Northern Sydney (13%) and South Eastern NSW (11%).¹¹ According to the Australian Bureau of Statistics (ABS), in 2006 the number of jobs in Perth's Eastern Region was approximately 105,611, which, when compared to the working population of the Region of 135,097, reflects an employment self-sufficiency of approximately 78%.¹² These figures position the Region in second place only to the Perth CBD as a major employment centre in the Perth Metropolitan Area. This trend has the potential to continue with several factors underpinning further jobs growth including:

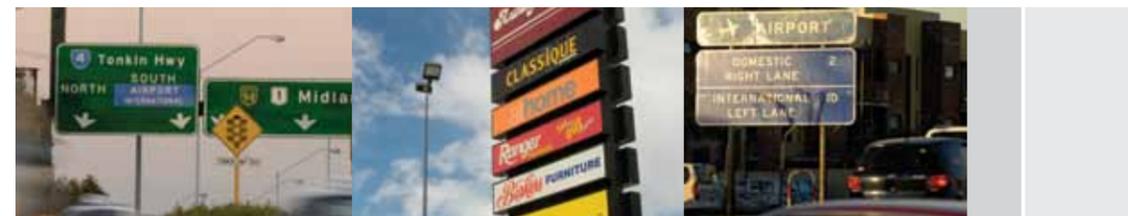
- Significant investment projects such as the Midland Health Campus, proposed Raffles University, Perth Airport, Kewdale Intermodal Freight Terminal, Midland Atelier and others;
- The likely start of a new phase of growth in the mining sector that will create significant opportunities for local industry both in the mining sector itself as well as other related industries; and
- The recognition of home-based businesses and small business as a key driver of local employment and the opportunities it presents for Perth's Eastern Region.

¹⁰ CSIRO 2005, Sustainability Network Update, newsletter, No. 49E, March 2005, CSIRO, Glen Osmond, South Australia

* Note: The East Metropolitan Region is defined by the Australian Bureau of Statistics to include the Town of Bassendean, City of Bayswater, Shire of Kalamunda, Shire of Mundaring and City of Swan. This region does not include the City of Belmont

¹¹ Bankwest 2009, Jobs Winners - Report Identifies WA Regions to Emerge from GFC, media release, 07 September, Bankwest, Perth, Western Australia, viewed 21 April 2010, <http://www.bankwest.com.au/library/scripts/objectifyMedia.aspx?file=pdf/54/05.pdf&str_title=Employment Growth WA.pdf>

¹² See glossary for definition of Employment Self-containment and Employment Self-sufficiency



However, as the population of Perth's Eastern Region is expected to grow by around 114,000 by 2031 (which is a growth of around 41%¹³) it is important for the Region to consider the need to maximise new employment opportunities in order to maintain its current employment self-sufficiency levels. In doing so it must develop and attract the necessary skills in its resident population to fulfil employment opportunities in these growing sectors. This will help the Region to meet the target set by Directions 2031 to create an additional 48,000 jobs in the Region by this time.

Whilst the employment self-sufficiency of the Region is high, the employment self-containment is low at only 43.3%, which translates into many workers commuting into and out of the Region every day. This low self-containment¹⁴ places an unnecessary burden on transport infrastructure and creates social and environmental impacts. A key priority for the Region is to identify the causes of this imbalance between local resident workforce and local employment opportunities and to redress this balance through appropriate strategies. Typically this may include skills

development, liveability promotion and better communication of local employment opportunities to local residents.

Further analysis shows the major industry contributors to employment by number of jobs in Perth's Eastern Region are manufacturing, retail trade, construction, wholesale trade and transport, postal and warehousing. However, when the alignment of local workers to local employment is considered, a number of sectors show significant mismatches. Table 1 illustrates a comparison between the local workforce and local jobs.

Whilst this data fails to show the actual number of local jobs that are filled by local people, it is an indicator of the 'best case' scenario and serves to highlight some significant shortfalls in local employment and also, for some sectors, a shortfall in the resident workforce available locally to meet industry needs. In reality, it is certain that many more local working residents are commuting to jobs outside the Region and many local industries are importing workers from other areas. Table 2 indicates this by showing how many residents are working in other areas. The table highlights that a significant proportion of resident workers are employed in the Perth, Stirling and Canning local government areas.

Whilst the ultimate decision on place of residence and place of work are highly individualistic, and depend on many factors, there are expected to be some factors that can be influenced by economic development strategies to help align the two. Table 1 highlights opportunities to focus on key sectors and develop strategies to increase

local employment opportunities in health care and social assistance, professional, scientific and technical services, construction, and public administration and safety. In relation to this, the new Midland Health Campus, the Midland GP Super Clinic and other health investments should provide a strong opportunity to increase the number of local jobs available locally in the health care sector. It will be important for Perth's Eastern Region to maximise the opportunities for local employment of local people that these investments will create by promoting job opportunities to local residents in a timely manner.

To give an idea of scale to the 'lost' opportunity that the shortfall of local jobs creates, it is estimated that the Region is losing \$20.7 billion in total Regional Output Value¹⁵, more than its current Gross Regional Product. Whilst this figure should be treated cautiously, it is useful as a guide to the lost opportunity from workers leaving the Region.

At a more detailed level, when considering the impact of the shortfall of local jobs, it is also useful to consider the loss of total output value for individual sectors. For example whilst the absolute figures for employment shortfalls indicate a shortfall of 5,153 jobs in health care and social assistance compared to, say mining, which has a much lower shortfall of 1,838 jobs, the impact on total output value is estimated to be \$1.06 billion for the health sector compared to \$4.4 billion for the mining sector¹⁶. This reflects the higher output value of mining jobs to the local economy.

In response to this, the Strategy recommends actions to redress the balance by growing existing businesses in these sectors and through business attraction initiatives to encourage businesses in these sectors to locate or relocate within the Region, particularly where these sectors have the potential to address supply chain gaps (see Key Focus Area 2). An example of a business attraction initiative may involve advocating the skills of the local workforce as an influencing factor in investment decisions.

Table 1: Alignment of Resident Workers to Local Jobs, Perth's Eastern Region, 2006

Industry	Employed Resident Workers ¹⁵	Local Jobs ¹⁶	Shortfall/ Surplus of Local Jobs
Health Care and Social Assistance	13,199	8,046	-5,153
Professional, Scientific and Technical Services	7,818	3,906	-3,912
Construction	11,468	8,244	-3,224
Public Administration and Safety	8,872	5,943	-2,929
Financial and Insurance Services	3,759	1,562	-2,197
Inadequately described or Not stated	3,665	1,558	-2,107
Retail Trade	15,502	13,403	-2,099
Education and Training	9,238	7,147	-2,091
Accommodation and Food Services	7,370	5,338	-2,032
Mining	3,331	1,493	-1,838
Administrative and Support Services	4,265	2,499	-1,766
Information Media and Telecommunications	1,974	1,163	-811
Other Services	6,033	5,315	-718
Arts and Recreation Services	1,904	1,287	-617
Electricity, Gas, Water and Waste Services	1,199	934	-265
Agriculture, Forestry & Fishing	1,328	1,081	-247
Rental, Hiring and Real Estate Services	2,565	2,456	-109
Wholesale Trade	6,562	8,066	1,504
Transport, Postal and Warehousing	7,798	10,074	2,276
Manufacturing	14,704	17,647	2,943
Total	132,554*	107,162	-25,392

¹³ Western Australian Planning Commission 2010, Directions 2031 and Beyond – Metropolitan Planning Beyond the Horizon, report, Western Australian Planning Commission, Perth, Western Australia

¹⁴ Employed local workforce working locally as a proportion of total employed residents

¹⁵ profile.id 2010, .id Consulting, Collingwood, Victoria, viewed 21 July 2010, <http://www.id.com.au/profile/emrc>

¹⁶ REMPLAN January 2010, Compelling Economics, Bendigo, Victoria

* Note: This does not include jobs that are inadequately described or not stated.

Table 2: Top 10 Local Government Areas of Employment for Residents in Perth's Eastern Region, 2006¹⁷

Rank	Local Government Area	Number	Percent (%)
	Perth's Eastern Region * (This area includes several of the areas listed below and is excluded from the total)	58,537	43.3
1	Swan (C)	21,332	15.8
2	Perth (C)	18,009	13.3
3	Belmont (C)	10,610	7.9
4	Bayswater (C)	9,830	7.3
5	Stirling (C)	8,616	6.4
6	Canning (C)	7,920	5.9
7	Kalamunda (S)	7,828	5.8
8	Mundaring (S)	5,947	4.4
9	Victoria Park (T)	3,942	2.9
10	Bassendean (T)	2,990	2.2
	Other areas	38,067	28.2
	Employed resident workers in Perth's Eastern Region	135,091	100

¹⁷ profile.id 2010, .id Consulting, Collingwood, Victoria, viewed 21 July 2010, <http://www.id.com.au/profile/emrc>

¹⁸ REMPLAN May 2009, Compelling Economics, Bendigo, Victoria

¹⁹ Note: based upon REMPLAN Data (REMPLAN May 2009, Compelling Economics, Bendigo, Victoria), where impacts are calculated based upon 2003 ANZSIC classifications and therefore these figures should be treated as an approximate indicator only



At the other end of the scale, there are three sectors where the Region has a net shortfall of resident workers, and therefore industries must 'import' workers to fill local jobs. In these instances, the Region should look for targeted strategies to increase the pool of qualified workers for these sectors through up-skilling, education partnerships, increased local job promotion and encouraging workers in these sectors to relocate to the Region (linked to Key Focus Area 5: Work Hard, Play Hard). Some of the proposed new investments in the Region are likely to further add to the shortfall of resident workers, such as the redevelopment of the Kewdale Intermodal Freight Terminal, so these present urgent opportunities to attract additional skilled residents to the Region. The Department of Training and Workforce Development is currently developing a

Workforce Development Plan which is expected to contain strategies that can help the Region match its workforce to employer needs. As part of its partnerships approach, the EMRC will maintain contact with the Department to capitalise on any opportunities that this Workforce Development Plan may offer to the Region.

Labour Force Participation

In July 2010, Western Australia had the highest participation rate²⁰ of the states in Australia (68.9%), the lowest under-employment²¹ rate (4.0%), the lowest labour force utilisation rate²² (7.7%) and the lowest number of people looking for full time work.²³ Analysis of the labour force participation rate of the population in Perth's Eastern Region in 2006 indicates that there is a slightly higher proportion in the

labour force (63.2%) compared with the Perth Statistical Division (62.8%). It also experiences a lower unemployment rate.²⁴

While these figures show that Perth's Eastern Region is in a strong position at the current time, it will be important to continually monitor the participation rate in line with macro economic factors to ensure that any changes to the participation rate are notified early for remedial action to be taken if necessary.

Objective 1.1	Maximise the employment of local residents with local businesses in Perth's Eastern Region. <i>KPI: Measure of employment self-containment. Measure of employment self-sufficiency. Measure of Workforce Participation, Local employment by industry sector (ABS Journey to Work Data).</i>
Objective 1.2	Develop a skilled local workforce that matches the staffing needs of local businesses in Perth's Eastern Region. <i>KPI: Measure of employment self-containment. Measure of employment self-sufficiency.</i>
Objective 1.3	Use the existing skills base of local resident workers to attract new business and to support the growth of existing business in Perth's Eastern Region. <i>KPI: Total number of businesses in the Region by industry sector. Measure of employment self-containment.</i>
Objective 1.4	Resolve shortfalls in availability of resident workers within particular industries by attracting new appropriately skilled residents to Perth's Eastern Region. <i>KPI: Measure of employment self-containment. Measure of employment self-sufficiency. Measure of local residential population growth.</i>
Objective 1.4	Resolve shortfalls in availability of resident workers within particular industries by attracting new appropriately skilled residents to Perth's Eastern Region. <i>KPI: Measure of employment self-containment. Measure of employment self-sufficiency. Measure of local residential population growth.</i>

	Action	Activity	Links	Timeframe	Priority
1.1	Conduct a workforce gap analysis and skills audit to identify skill needs of existing industry base.	Research	1.1, 1.2, 1.3, 1.4	Immediate	High
1.2	Identify skills required for new investment projects (e.g. Midland Health Campus, Raffles University) and review alignment with existing skills base of local workers.	Research	1.1, 1.3	Ongoing	High
1.3	Identify barriers to matching local residents to local jobs and develop further strategies as necessary.	Research	1.1, 1.2	Ongoing	Medium
1.4	Promote local workforce surplus to industry stakeholders, focusing initially on representatives from new investment projects (e.g. Midland Health Campus).	Promotion	1.1, 1.3	Ongoing	Medium
1.5	Develop promotional tools to communicate local employment opportunities in Perth's Eastern Region to new residents and to support local businesses to attract local workers.	Promotion	1.1, 1.4 (KFA 5)	Long	Low
1.6	Facilitate initiatives and partnerships with industry, education providers and agencies to promote skills development and learning opportunities to up-skill local residents to match local jobs.	Advocate	1.2, 1.1	Ongoing	Medium

9.2 KFA 2: Buy Local, Supply Local

Maximise local supply and demand opportunities through initiatives that reduce leakage of economic activity to other areas. The aim of this being to encourage the growth of existing businesses and the attraction of new businesses to meet local industry needs and generate opportunities in Perth's Eastern Region.

An opportunity exists to grow the contribution of Perth's Eastern Region to the Western Australian economy through greater horizontal and vertical supply chain integration within the Region. By encouraging businesses to work more closely together to fulfil product and service needs locally, existing businesses in the Region are likely to grow and opportunities for new business will be created. In addition, there is less 'economic leakage' to other regions as economic value is captured and retained locally. Data shows that regional imports account for over \$15 billion from the Region's top 10 industries suggesting significant opportunities to increase local supply and production²⁵. Supply chain integration also reduces burdens on transport infrastructure as supplies are sourced locally. To facilitate

greater local integration of supply chains within key local industries, it is necessary to:

1. Encourage local businesses to collaborate with other local businesses to fulfil their supply chain requirements and nurture a 'buy local' mentality;
2. Identify gaps in the supply chain and to promote these as opportunities for new businesses or for the growth of existing businesses;
3. Create a diverse self-sufficient industry that works across sectors to meet supply needs and ultimately create outputs for the Region; and
4. Capitalise on the new investments that are planned within the Region to promote these for the purpose of investment attraction as well as to ensure that local suppliers receive opportunities to bid for products and services supply.

'Buy local, supply local' can be achieved to some extent through closer collaboration with industry support organisations, networks and associations. By increasing the collaboration between existing businesses in the Region and highlighting opportunities for new businesses (or growth opportunities for existing businesses) to fulfil local needs that are currently unmet, the Region can create new

linkages that complete and integrate supply chains. Existing business networks and 'clusters' provide a great starting point to facilitate this including support from local Council economic development, planning and customer service staff. Small businesses are important to achieving this Strategy as they often have much to gain from better marketing and networking opportunities. In addition, other government programs such as Enterprise Connect are likely to be able to provide useful information as part of their reviews of local businesses. By sourcing supplies locally, not only will the local economy benefit from the increased business transactions that result, but it can be expected that local businesses will see productivity and efficiency gains as a result of more streamlined supply chains. This will also lead to economic growth and the associated employment growth.

The retention and expansion of existing businesses and local industry will be achieved through improved communication of opportunities, services, and business support as well as increased service delivery and networking opportunities. By aligning communication messages to the decision making factors of businesses (such as the location to customers, suppliers etc), businesses will be encouraged to invest locally.

²⁰ See glossary for definition of participation rate

²¹ See glossary for definition of under-employed workers

²² See glossary for definition of labour force underutilisation rate

²³ See glossary for definition of Unemployed looking for full time work

²⁴ See glossary for definition of unemployment rate

²⁵ REMPLAN January 2010, Compelling Economics, Bendigo, Victoria



Table 3: Comparison between Output Value, Number of Jobs and Regional Imports by Industry Sector

EMRC Industry Output Value and Employment - Industry Sector	Output Value \$M ²⁶	Jobs ²⁶	Regional Imports \$M ²⁸
Manufacturing	13,854.95	18,336	7,030
Transport and storage	4,432.86	8,925	1,281
Wholesale trade	3,940.25	9,115	735
Property and business services	4,040.94	8,335	695
Construction	4,172.69	8,143	711
Retail trade	2,305.41	17,377	424
Mining	2,271.71	1,473	650
Communication services	1,193.62	2,125	189
Health and community services	962.79	8,301	66
Education	950.56	6,910	85
Government administration and defence	1,024.92	3,935	172
Finance and insurance	838.58	1,559	130
Accommodation, cafes and restaurants	709.19	3,415	167
Electricity, gas and water supply	590.74	588	132
Personal and other services	597.90	4,202	78
Cultural and recreational services	439.90	1,711	103
Agriculture forestry fishing	307.71	1,161	49
Total	42,634.72	105,611	12,697

The current major industry sectors in the Region provide a good starting point to consider opportunities for this focus area. Based upon output value, the main sectors are manufacturing, transport and storage, wholesale trade, property and business services, construction, retail trade and mining. Industry sectors experiencing high growth include mining, communication services, construction, agriculture forestry fishing and government administration and defence.²⁶ In terms of the number of local employment opportunities that each industry provides the impact of higher-volume, lower output-value employment such as retail trade and health and community services becomes apparent. These high-employment sectors tend to be highly population dependent and are facilitated more

by appropriate land supply and favourable planning regulations than proactive economic development intervention. Consideration to the level of regional imports for each sector provides a further indicator when considering the opportunity for supply chain integration. Table 3 shows the comparison between output value, jobs, and regional imports.

Further to the analysis of the employment, output value and regional imports for industry sectors in Perth's Eastern Region, an analysis of the concentration of employment in the Region as compared to the broader Perth Metropolitan Area is also useful, not only to identify competitive strengths, but also to identify supply-chain opportunities²⁷. From this analysis several industry sectors can be

identified where Perth's Eastern Region has a higher concentration than the broader metropolitan average including freight related industries (transport), manufacturing, agriculture, and warehousing²⁸. Exploration is also worthy of note given the links of this industry to high-value mining. However, it should be noted that this analysis should not be considered in isolation but needs to be taken in the broader context of industry value and employment numbers.

This research underpins potential target markets for 'quick win' vertical and horizontal supply chain integration including manufacturing, transport and storage, wholesale trade, construction and mining. When considering the Region's focus on

increasing knowledge based employment, creative industries and information technology may also provide supply chain integration opportunities.

Industry Clusters

Clustering is related closely to the opportunities for supply chain integration. A recent industrial land development study²⁹ highlighted the growing importance of industrial clustering and the rise of global trading hubs. The main factors driving the formation and success of regional industry clusters are:

- Specialisation;
- Local networks;
- R&D and educational institutions;
- Qualified workforce;
- Access to competent financial institutions;
- Collaboration between firms and other institutions; and
- Contacts with centres of best practice.

Perth's Eastern Region has a number of opportunities to capitalise on the benefits of clustering particularly in sectors such as mining, manufacturing and transport. As noted previously, while the mining and resources industries are critical to the overall financial strength of the WA economy, they employ only a small proportion of the workforce and utilise relatively little of the industrial land. To illustrate this point, the mining and resource supply sector represents 5.3% of the Region's output and yet provides only 1.4%

of jobs. Significantly however, this sector grew at a rate of 16.3% between 2008/09 and 2009/10³⁰. It is the key linkage industries such as manufacturing, construction, transportation, storage and warehousing, that are the main users of industrial land and which employ more people.

Compared to the mining sector, the manufacturing sector represents 32.5% of the Region's output and 17.4% of jobs. This sector grew at a rate of 4.3% between 2008/09 and 2009/10. As shown in Table 3, the sector also experiences a high level of overseas and domestic imports which may provide import replacement opportunities.³¹

The transport and storage sector represents 10.4% of the Region's output and 8.5% of jobs. This sector grew at a rate of 9.5% between 2008/09 and 2009/10. The transport logistics sector plays an important role in the Region, particularly those businesses linked to Perth Airport and to the Kewdale Intermodal Freight Terminal. This importance has the potential to increase should planned upgrades to road links be undertaken and future links such as the Perth to Darwin Highway move forward. While there are national and international players involved, the majority of the businesses are small and medium enterprises.

The development of industry clusters has been identified as an important economic tool to help industry collaborate and to compete. However, it is acknowledged that building clusters takes time and resources and that clusters work most effectively when there is

strong private sector support and participation. Therefore, this area of the Strategy recognises the need to support existing clusters as well as 'seeding' potential new Clusters through the facilitation of initiatives that support industry networking and collaboration in consultation with member Councils.

Existing Industry Clusters

The Engineering and Manufacturing Industry Cooperative Limited (EMICoL), the result of EMRC's previous Industry Cluster Strategy, sought to increase the number of quality and sustainable jobs, training opportunities, market demand, production inputs technology and infrastructure within the engineering services, metal fabrication and equipment manufacturing industry sectors. The EMRC worked alongside industry stakeholders to facilitate establishment of the EMICoL, which became a separate legal entity in 2007/08. EMICoL is a good example of industry and education partners working successfully together. EMICoL's work with Polytechnic West included a review of the training offered by Polytechnic West to ensure the skills needs of industry were being met.

The Textile, Clothing and Footwear Resource Centre of Western Australia Inc (TCFWA) was established in 1998 by the Belmont Business Enterprise Centre and provides business skills and industry mentoring, a helpline service and development of specialised industry workshops to better equip those operating in the industry.³²

Objective 2.1	Identify and develop opportunities for supply chain integration for key industries in Perth's Eastern Region. <i>KPI: Total number of businesses in the Region. Total number of businesses in the Region by industry sector.</i>
Objective 2.2	Encourage business development to grow local capacity to fill gaps in supply chains. <i>KPI: Total number of businesses in the Region. Gross Regional Product value. Local employment by industry sector (ABS Journey to work data).</i>
Objective 2.3	Encourage a 'buy local, supply local' attitude with local businesses. <i>KPI: Feedback from business and Industry. Gross Regional Product value.</i>
Objective 2.4	Create closer relationships between industry support organisations, networks and associations as a method to build awareness within the business community of local capabilities and new opportunities. <i>KPI: Feedback from stakeholders. Gross Regional Product value.</i>
Objective 2.4	Create closer relationships between industry support organisations, networks and associations as a method to build awareness within the business community of local capabilities and new opportunities. <i>KPI: Feedback from stakeholders. Gross Regional Product value.</i>

²⁹ Painted Dog Research 2009, *Industrial Land Development in Western Australia: Stage 2 Report*, report, Landcorp and Department of Planning, Perth, Western Australia, p.3

³⁰ REMPLAN January 2009, *Compelling Economics*, Bendigo, Victoria. See also Appendix 1.

³¹ REMPLAN January 2009, *Compelling Economics*, Bendigo, Victoria. See also Appendix 1.

³² The Textile, Clothing and Footwear Resource Centre of Western Australia Inc 2010, *The Textile Clothing and Footwear Resource Centre of Western Australia*, Belmont, Western Australia, viewed 22 July 2010, <<http://www.tcfwa.com.au>>



Action	Activity	Links	Timeframe	Priority	
2.1	Identify and support current and potential industry clusters in consultation with member Councils.	Research	2.1, 2.2, 2.3, 2.4	Short	High
2.2	Undertake Supply Chain Gap Analysis including the Identification of barriers to supply chain integration within the Region (including infrastructure barriers).	Research	2.1, 2.4	Immediate	High
2.3	Promote industry capabilities in association with member Councils (e.g. the creation of an investment attraction portal and industrial tours).	Research	2.1, 2.3, 2.4	Long	Low
2.4	Target investment from industries that respond to supply chain needs.	Promotion	2.2	Medium	Medium
2.5	Facilitate development of relationships between existing business networks and associations (e.g. local chambers of commerce, small business support centres and business associations).	Promotion	2.3, 2.4	Ongoing	Medium

9.3 KFA 3: Think Smart, Work Smart

Increase the output value of Perth's Eastern Region by developing and attracting knowledge intensive and creative industries, encouraging innovation in existing businesses, and generally creating higher value employment opportunities in the Region.

The Organisation for Economic Cooperation and Development (OECD) states that a knowledge economy is one which is "directly based upon the production, distribution and use of knowledge and information"³³. Knowledge-intensive industries are defined as those where value creation is disproportionately based on specialised, non-repetitious activities (Malecki, 1984)³⁴. Whilst there is currently no formally recognised classification of knowledge intensive industries, and the application of knowledge is relevant to all industries, certain sectors such as high technology, scientific, manufacturing and creative industries are typically included.

Knowledge-based employment is important to a region as it generally creates higher value outputs per job than other employment types³⁵. Given the higher level of knowledge or

intellectual property inherent to this type of employment, these jobs also help to provide a more resilient local economy and bring greater prosperity to a region. Unlike other types of employment such as retail, which are less distinct and more 'standardised', knowledge-based employment tends to help a local region to differentiate itself. A subset of knowledge-based industries is the creative industries sector³⁶ which helps a region to nurture creative capital. A recent report for FORM by David Hetherington summarises it well: "Creativity is central to economic prosperity, with innovation as its mechanism"³⁷.

The current profile of employment in Perth's Eastern Region is biased towards lower value population driven employment rather than more valuable knowledge-based employment. Pracsys has developed a proprietary method for measuring knowledge based employment which shows Perth's Eastern Region has approximately 12% (i.e. 12,856) of its jobs in knowledge-based employment sectors which compares to 16% for the Perth and Peel metropolitan area^{38,39}. This bias creates a Gross Regional Product that is lower than it has the potential to be. The equivalent contribution to the Gross Regional Product is \$158,742 per local job in the Region, which is almost 14%

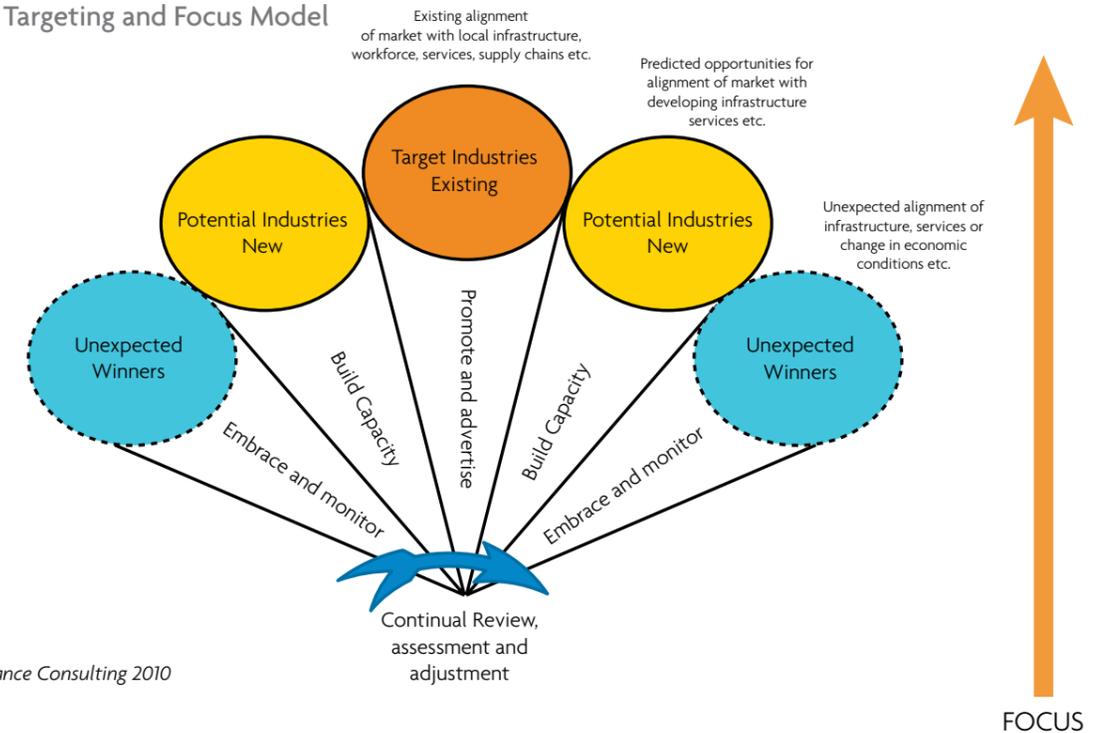
lower than the broader Perth metropolitan area, which has a much higher figure of \$184,122 per job⁴⁰.

The key to increasing this output value in the Region is to:

- Maximise the growth potential from its existing industry strengths (in part through innovation and potentially the attraction of more 'head office' functions to the Region);
- Leverage opportunities for stronger links between education and industry;
- Capitalise upon the potential of new investment projects - particularly the opportunity to attract and develop knowledge based industries that nurture higher output value strategic industries, where a small increase in employment results in a relatively large impact on the regional output; and
- Embrace new and as yet unforeseen opportunities as they arise with particular focus on nurturing small business and entrepreneurs.

When aiming to attract or grow high-value knowledge based industries a cautious and blended approach is required to 'nurture' growth in target industries. This approach

Industry Targeting and Focus Model



Source: Reliance Consulting 2010

is not about 'picking winners' but considers analytical research, existing industry strengths, market growth trends and directions, regional advantages and resilience. Guidance for this Strategy will be informed and sought from the Economic Development Officers' Group (EDOG) and feedback from industry stakeholders. In addition, it should be remembered that the market continually 'moves' requiring constant review, monitoring and flexibility to change. The diagram above illustrates the approach.

Within this context, the EMRC will facilitate a proactive approach to economic development to balance the momentum of market forces with a focused vision - a blend of 'nature' versus 'nurture' - to guide and facilitate the efficient development of the local economy. In an increasingly globalised economy, many of the new paradigms of commercial business are becoming equally relevant to regional development. This includes the need to recognise the added value of greater personalisation of 'product' to industry 'needs'. In a regional context

this involves creating combinations of land, infrastructure, workforce, services and existing industry strengths that align more closely to the needs of targeted industries. These targets will need to be continually reviewed to blend trends and directions in the global economy with local strengths and innovation. By achieving this, Perth's Eastern Region can create a unique 'product' that is competitive and creates optimum prosperity as it evolves and develops.

Links to education providers such as Polytechnic West's Engineering Centre of Excellence and the proposed Raffles University in Midland provide the opportunity to innovate within existing and new industries by linking local industry with education. They also support the development of points of difference for the Region that will help to grow industry strengths. Polytechnic West's Specialist Metals and Engineering Centre has been built to ensure a focus on new technologies and the integration of new technologies across traditional trade and industry sectors. Students are exposed to

up-to-date computer controlled machining technology and gain skills in industrial robotics and component design using current industry standard computer-aided design. The proposed Raffles University has the potential to help the Region innovate through industry/education partnerships. FORM's redevelopment of the Midland Railway Workshops into a creative industries hub will also support the development of the creative industries sector and will support innovation in the Region.

For Perth's Eastern Region, the initial recommendations for target industries are outlined in the following table. It should be noted that this table outlines target industries for future strategic economic growth, rather than those industries with existing organic growth opportunities, although the two are not necessarily mutually exclusive. The target industries for improvements to employment self-containment are considered as part of Key Focus Area 1 - Local Jobs for Local People.

³³ Organisation for Economic Development and Co-ordination 1996, *The Knowledge-Based Economy, report, Organisation for Economic Development and Co-ordination, Paris, France, p.7*
³⁴ Malecki, EJ 1984, 'High technology and local economic development', *Journal of the American Planning Association*, vol. 50, no. 3, p.262-269
³⁵ REMPLAN January 2009, *Compelling Economics, Bendigo, Victoria. For example every mining job in Perth's Eastern Region creates an estimated 10 times the output value than a retail job (i.e. \$2.37m compared to \$0.24m for each retail job)*
³⁶ Note: Creative Industries include advertising, marketing, architecture, design, visual arts, film, TV, radio, music, performing arts, publishing, software and digital content
³⁷ Hetherington D 2008, *Credibility, Creativity and Innovation: Building the Feedback Loop, report, FORM, Perth, Western Australia*
³⁸ Where knowledge-based employment includes the Pracsys definition of Knowledge Intensive Producer Services and Knowledge Intensive Export Oriented
³⁹ Pracsys 2010, *Perth's Eastern Region Employment Characteristics, report, Pracsys, South Perth, Western Australia*
⁴⁰ REMPLAN January 2009, *Compelling Economics, Bendigo, Victoria.*



Table 4: Recommendations for Target Industries

Target Industry	Alignment of Industry ⁴¹	Alignment of Infrastructure ⁴²	Alignment of Workforce ⁴³	Future Opportunity of sector ⁴⁴	Competition ⁴⁵	Category	Risks/Constraints
Mining	Medium Strong links to manufacturing and transport sectors	High ⁴⁶ Good transport links	High Surplus of resident workers	High Predicted growth	Medium High barriers to entry	High Value	Risks with boom/bust cycle and social impact of FIFO workers
Manufacturing (incl. Support for mining sector and textile, clothing and footwear)	High Strong links to transport sector	High ³⁹ Good transport links	Medium Large base of resident workers (although shortfall)	Medium/high with continued innovation	Medium Both domestic & international	High Value	Requires continual innovation to maintain advantage
Transport and Storage	High Strong links to manufacturing sector	High ³⁹ Good transport links	Medium Large base of resident workers (although shortfall)	Medium/High	Medium	Medium Value	Leveraging Region's freight network. Bottlenecks in infrastructure need resolving with growth
Clean Tech (incl. Resource Recovery)	High Strong links to manufacturing Recognised skills in Resource Recovery	High ³⁹ Existing facilities Good transport links	Medium Large base of resident workers (although shortfall)	High	High – many areas looking at this sector	High Value	Particular opportunities to leverage strengths in Waste Recovery given EMRC experience
Creative industries	Medium	Medium ³⁹ Midland Atelier	Medium	High	High (e.g. City of Perth)	High Value	Require broadband infrastructure
Health and Well Being	Medium	High ³⁹ Health Campus	High Large surplus of resident workers	High – particularly via ageing population	High (e.g. Murdoch, Joondalup)	Quick win	Leverage new Health Campus and GP Superclinic
Vocational and Tertiary Education	High Strong opportunities for industry links	High ³⁹ Raffles University	Medium Large surplus of resident workers	High	High (UWA, Curtin, Murdoch, ECU, Notre Dame)	Long term value	Leverage new Raffles investment
Home Based Business	High	Medium – good liveability	Medium	High	High – all regions	High Value	Require improved broadband

⁴¹ Availability of current supply chains to meet end-to-end needs of the sector

⁴² Availability of required infrastructure to support industry needs

⁴³ Availability of local resident workforce to meet industry needs

⁴⁴ Perceived potential for growth of the sector

⁴⁵ Extent to which other areas or organisations within the Perth Metropolitan Area compete in this industry

⁴⁶ Note that future planned projects and investments are also likely to strengthen this area (See Appendix 2 for additional data)

Objective 3.1	Increase employment opportunities in existing knowledge based industries. <i>KPI: Contribution of knowledge-based employment to Gross Regional Product.</i>
Objective 3.2	Attract new knowledge intensive businesses and industries. <i>KPI: Total number of businesses in the Region by industry sector.</i>
Objective 3.3	Encourage creativity and innovation within existing businesses. <i>KPI: Number of registered patents in Perth's Eastern Region.</i>
Objective 3.4	Maximise opportunities for knowledge based employment arising from new investment projects. <i>KPI: Measure of employment by industry sector.</i>

	Action	Activity	Links	Timeframe	Priority
3.1	Identify and support the development of new industry clusters/hubs/collocation.	Research	3.1,3.2, 3.3 (KFA 2)	Short	High
3.2	Undertake pre-feasibility studies for strategic projects and developments.	Research	3.1, 3.2, 3.4	Ongoing	Medium
3.3	Facilitate increased knowledge sharing across existing business networks to encourage creativity and innovation (i.e. chambers of commerce, business associations, small business support services and EMICoL).	Advocate	3.3	Ongoing	Medium
3.4	Encourage creativity and innovation by showcasing examples of best practice and innovation in local industries to business networks (e.g. regional industry tours and forums).	Promote	3.3	Ongoing	Medium
3.5	Promote the support services that are available to businesses (e.g. Enterprise Connect and business enterprise centres).	Promote	3.3	Ongoing	Medium
3.6	Promote knowledge based industry and investment opportunities through promotional tools.	Promote	3.1, 3.2, 3.4	Ongoing	Low
3.7	Investigate and support opportunities to encourage 'head office' relocations to the Region (e.g. State government departments, mining).	Research	3.1, 3.2	Ongoing	Medium
3.8	Identify infrastructure requirements for knowledge based industry and feed into Key Focus Area 4 "Joining the Dots".	Research	3.1, 3.2, 3.3 (KFA 4)	Short	High



9.4 KFA 4: Joining the Dots

Create world class enabling infrastructure that maximises economic productivity, creates competitive advantage for businesses in Perth's Eastern Region and resolves infrastructure bottlenecks that inhibit growth.

To facilitate economic development, it is critical for a coordinated and interlinked range of strategies to be delivered that ensure the alignment of infrastructure, workforce, and industry. The current high employment self-sufficiency level in Perth's Eastern Region is undoubtedly supported by key infrastructure investments that have been made in the past - particularly transport linkages (road, rail, air, and port), the Kewdale Intermodal Freight Terminal, Metropolitan Grain Centre, and the supply of existing industrial land in areas such as Kewdale, Welshpool and Malaga. In addition, several key government and private investment projects are planned or underway including:

- The Midland Health Campus;
- The Midland Atelier (creative industries project);
- Perth Solar City;
- The EMRC Resource Recovery Facility;
- The Perth Airport Redevelopment;
- The Morley City Centre Master Plan and the Maylands Urban Design Framework;
- The Midland GP Super Clinic; and
- The proposed Raffles University Campus.

For additional information on these developments, please see Appendix 2.

Further to these projects, additional investment is expected for tourism initiatives within the Perth Hills, the Swan Valley and other areas. These are detailed within the Regional Tourism Strategy (RTS) as well as local economic development strategies for member Councils.

These investments are combining to build a unique environment that creates competitive advantages for the Region as they build a more supportive environment for businesses and

workers. The investments will have a significant positive effect on employment and the local economy directly as well as through their potential to attract further related industries to the Region. However, the capacity for the Region to maximise the value from these investments is dependent upon the need to pre-empt and resolve capacity constraints and deteriorating enabling infrastructure, particularly communications (i.e. broadband), transport and continued land supply. It is critical that the enabling infrastructure keeps up with economic growth. The redevelopment and consolidation of existing 'brown field'⁴⁷ industrial sites presents particular challenges to retrofit the necessary infrastructure that is required for modern industry and often increased density. The former Cresco site is an example of this where the site on Railway Parade in Bayswater has undergone extensive remediation works to convert the site from a Super Phosphate manufacturing site to an extension of the existing Bassendean industrial estate to the east of the site⁴⁸.

Enabling infrastructure needs to be upgraded to match the quality of the significant economic investments being made. There should be a greater apportionment of business rates to business related infrastructure rather than to community related services to support the funding of this infrastructure.

Strategic investment in enabling infrastructure will facilitate Perth's Eastern Region to leverage its advantages to create more strategic employment and will result in significant increases to the Gross Regional Product.

Transport

The strategic significance of Perth's Eastern Region as a transport and industry hub for the State is recognised by the significant transport infrastructure developments planned or underway, including the Perth Airport, upgrades to key roads such as the Great Eastern Highway, and the Kewdale Intermodal Freight Terminal. The Region already offers a number of strategic links to connect its activity centres, industrial

centres and employment centres with Perth, Fremantle Port, the rest of WA, Australia and even worldwide destinations. Traffic modelling by Main Roads WA has identified a number of road congestion and safety issues which will have an impact on transport efficiency in the Region unless addressed⁴⁹. Predictions of growth that include estimates of the growth in Perth Airport's passenger movements (expected to double to 18.9 million by 2029⁵⁰), the impact of Directions 2031 (and the associated activity centres defined in the Region), as well as existing evidence from business surveys⁵¹ show that transport is a major factor that needs to be considered. It is critical that the transport network is continually reviewed to ensure it meets the needs of a growing economy. The Regional Integrated Transport Strategy (RITS) provides a framework for this to be achieved and also considers integrated transport and land use planning, and public transport.

Broadband

One of the key infrastructure shortcomings of the Region relates to communications infrastructure. In Perth's Eastern Region in 2006, 54.6% of households had no internet connection or relied on a dial-up connection, and only 37.7% had broadband connectivity⁵². This compares with 50.8% and 41.1% respectively in the Perth Statistical Division. Access to the existing broadband backhaul fibre network and the range of developments both planned and underway occurring in the Region provide significant opportunities to bundle broadband infrastructure installations with other underground servicing projects. These include road, underground power, drainage and sewerage and can be achieved through a coordinated interagency approach. In particular, a significant opportunity exists to leverage the Geraldton Regional Backbone Blackspots Program⁵³ and the National Broadband Network (NBN). In particular, the Geraldton Regional Backbone Blackspots Program offers an immediate opportunity to upgrade high speed broadband services to Perth's Eastern Region as the infrastructure is expected to be routed through the Region.

Services

Services such as energy, water and waste are important to a growing economy and therefore it is necessary to ensure that commercial and industrial land has adequate services to meet the evolving needs of industry. There are some indications that Perth's Eastern Region may have constraints in some of these areas - for example in a survey of industrial land occupiers in WA, a small number of manufacturing firms indicated that an insufficient supply of electricity was a major problem in Bayswater⁵⁴.

Land Supply

The availability of appropriately serviced commercial and industrial land is key to facilitating economic growth. This is recognised in the Department of Planning's Draft Industrial Land Strategy 2009: Perth and Peel, which outlines a framework for industrial land in Perth and Peel. 'Value-add' infrastructure that provides specific advantages to key industry sectors is also increasingly important in a globalised economy. In order to maximise the opportunities of several major

investment projects that are already underway in Perth's Eastern Region, and to encourage additional industry attraction, it is critical to ensure that there is appropriate land and other infrastructure surrounding these investments to support the associated supply chain. Land use planning is critical to this process and requires flexible, efficient and well-thought out planning schemes that accommodate the needs of economic development.

Objective 4.1	Increase investment for enabling infrastructure in the Region. <i>KPI: Amount of investment in the Region.</i>
Objective 4.2	Identify key capacity constraints in enabling infrastructure in the Region. <i>KPI: Feedback from Business and industry. Local employment by industry sector, ABS Journey to work data, Main Roads Traffic Data.</i>
Objective 4.3	Create consistent and aligned regional infrastructure priorities between member Councils. <i>KPI: Feedback from member Councils.</i>
Objective 4.4	Coordinate a consistent and aligned regional response to address capacity constraints in enabling infrastructure. <i>KPI: Amount of investment in the Region.</i>
Objective 4.5	Increase awareness at all levels of government of the need for enabling infrastructure renewal and development. <i>KPI: Amount of investment in the Region.</i>

	Action	Activity	Links	Timeframe	Priority
4.1	Consider results of supply chain analysis to identify infrastructure dependencies and workshop infrastructure needs and priorities with member Councils, industry and other stakeholders.	Research	4.2, 4.3, 4.4, 4.5 (KFA 2)	Medium	Medium
4.2	Conduct pre-feasibility studies for key infrastructure (including transport and communications as a priority) that meet the needs of initiatives such as Infrastructure Australia.	Research	4.2, 4.4, 4.5	Ongoing	Medium
4.3	Investigate potential frameworks and case studies for successful public private partnerships and coordinate/progress as opportunities arise.	Research	4.1, 4.4	Ongoing	Low
4.4	Coordinate the development of regional submissions and funding applications for infrastructure as opportunities arise.	Funding	4.1, 4.4, 4.5	Ongoing	High
4.5	Facilitate information sharing between member Councils and other stakeholders regarding grant funding opportunities.	Advocate	4.1, 4.4	Ongoing	High
4.6	Support the development of funding applications by member Councils and stakeholders by providing regional research tools and relevant training (ie REMPLAN, profile.id and atlas.id).	Educate	4.3, 4.5	Ongoing	High

⁴⁷ i.e. Urban renewal of former developments and areas

⁴⁸ CSBP 2007, CSBP, Kwinana, Western Australia, viewed 15 July 2010, <http://www.csbp.com.au/Media/Environment/ENV_CIB_0207.aspx>

⁴⁹ Eastern Metropolitan Regional Council 2010, Regional Integrated Transport Strategy Action Plan 2010 - 2013, report, Eastern Metropolitan Regional Council, Belmont, Western Australia, p.24

⁵⁰ Westralia Airports Corporation 2009, Perth Airport Master Plan, report, Westralia Airports Corporation, Cloverdale, Western Australia, p.4

⁵¹ In a survey of Malaga Businesses in 2008 by SMERC, almost 20% of respondents rated traffic issues as the aspect they liked least about Malaga.

⁵² profile.id 2010, .id Consulting, Collingwood, Victoria, viewed 22 July 2010, <http://www.id.com.au/profile/emrc>

⁵³ Geraldton is one of six national priority regional blackspot locations in which the Australian Government is investing \$250 million through the national broadband network.

⁵⁴ JMG Marketing 2009, Industrial Land Development in Western Australia: Stage 3 Report, report, Landcorp and Department for Planning and Infrastructure, Perth, Western Australia, p.28



9.5 KFA 5: Work Hard, Play Hard

Protect, improve and promote the liveability of Perth's Eastern Region through the supply and diversity of housing, education, health, culture and vibrancy to attract workers to live and enjoy the region in which they work.

Achieving sustainable economic growth requires the attraction and availability of a working population that meets the needs of local industry and also provides the capacity for growth of higher-value industries. Part of the challenge of attracting residents to Perth's Eastern Region in the past has been the lack (or a perceived lack) of some of the key attractors, which include:

- Appropriate residential housing;
- Efficient and well-connected transport networks;
- The availability of working opportunities in a range of industries;
- The availability of community infrastructure such as sporting arenas;

- The proximity of quality health and education facilities;
- The development of a vibrant culture;
- The perception of safety and security;
- An engaged and socially inclusive community;
- The availability of tourism and leisure activities, including natural attractions; and
- The availability of high speed broadband at home to support home-working and home-based businesses.

To some extent, this perception is misinformed and requires a focus on promoting the current strengths of the Region to encourage people to 'take another look' at Perth's Eastern Region. Several of the exciting new investments such as the Midland Health Campus, the proposed Raffles University and the redevelopment of Governor Stirling Senior High School provide a great opportunity to change misconceptions and raise the attractiveness of the Region for new residents. As these developments occur it will be important to promote the Region as a great place to live and work and to ensure an adequate supply of appropriate housing to meet the demands.

Meanwhile, it will also be important not to compromise the liveability of the Region as economic growth occurs.

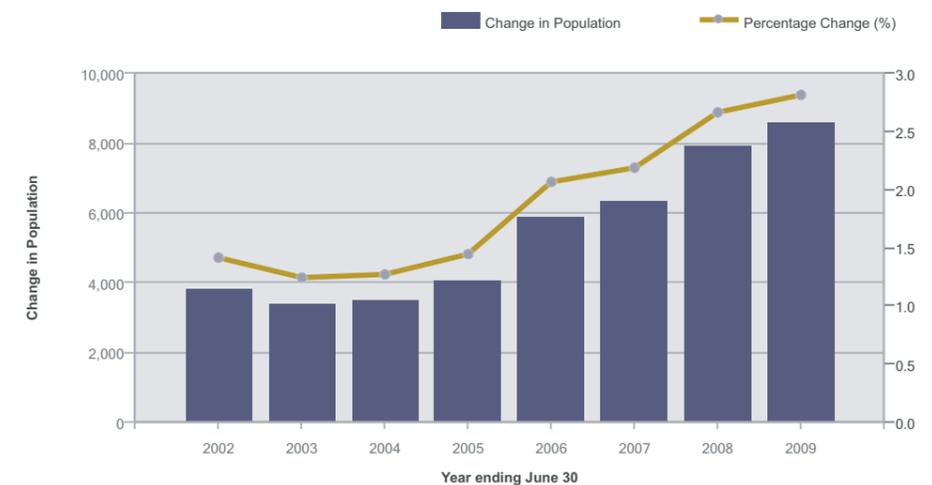
The promotion of Perth's Eastern Region is a shared responsibility between several stakeholders including member Councils and land developers. However there are expected to be opportunities for greater cooperation and collaboration to promote a positive image of the Region that encourages buy-in as a way of realising good capital growth on property decisions, local employment options and good education opportunities for families. Some of these priorities require a regional approach that surpasses purely commercial or local interests. The Regional Tourism Strategy 2010 - 2015⁵⁵ also provides links to this objective through its Key Focus Areas and associated actions.

Regional Growth

The estimated population of Perth's Eastern Region grew by 2.4% during the 12 months ended 30 June 2008⁵⁶, as shown in Graph 1. This is above population growth for the State (2.1%) and Nation (1.5%) in the same period.⁵⁷

Graph 1: Change in Estimated Resident Population, Perth's Eastern Region, 2002 to 2009⁵⁸

Change in Estimated Resident Population, Eastern Metropolitan Regional Council



Source: Australian Bureau of Statistics, 3235.0 - Population by Age and Sex, Regions of Australia, 2007

⁵⁵ Eastern Metropolitan Regional Council 2010, *Regional Tourism Strategy 2010 - 2015, report*, Eastern Metropolitan Regional Council, Belmont, Western Australia
⁵⁶ Australian Bureau of Statistics 2008, *Population by Age and Sex, Regions of Australia, 2007*, Cat. no. 3235.0, Australia Bureau of Statistics, Canberra, Australian Capital Territory, viewed 17 February 2010, <<http://www.abs.gov.au>>
⁵⁷ Australian Bureau of Statistics 2009, *Population by Age and Sex, Regions of Australia, 2008*, Cat. No. 3235.0, Australian Bureau of Statistics, Canberra, Australian Capital Territory, viewed 17 February 2010, <<http://www.abs.gov.au>>
⁵⁸ profile.id 2010, *id Consulting, Collingwood, Victoria*, viewed 22 July 2010, <<http://www.id.com.au/profile/emrc>>



The population of Perth's Eastern Region is predicted to reach 391,700 by 2031⁵⁹, an increase of 41% from 2006.⁶⁰ Residential building approval statistics are used in both the public and private sectors as a leading indicator of the general level of economic

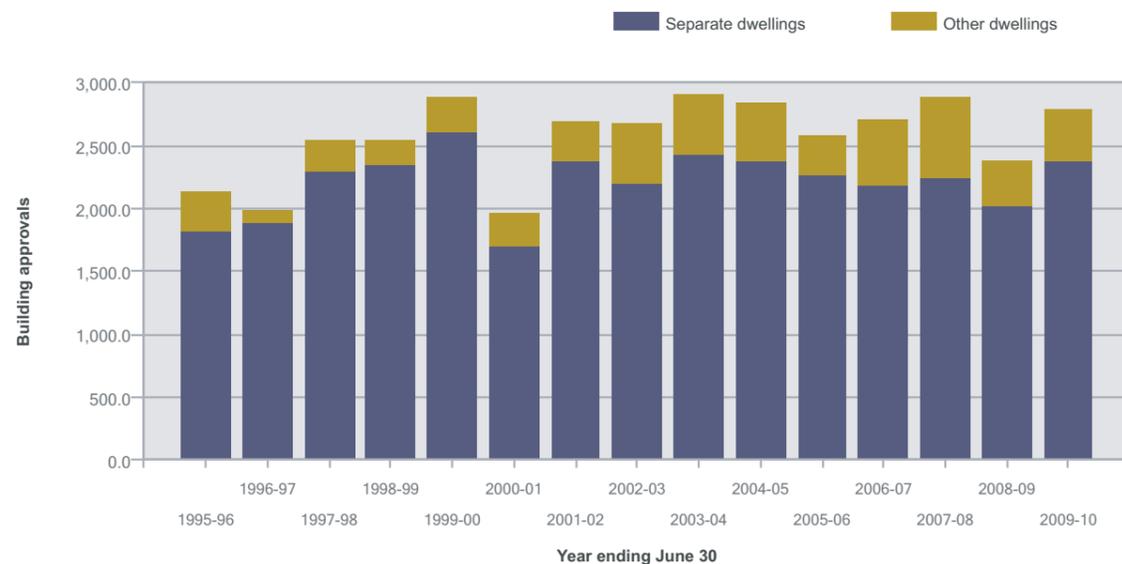
activity, employment and investment. Perth's Eastern Region has generally experienced steady residential building approvals as shown in Graph 2, although this masks significant variances between member Councils over time as key development projects have occurred.

If population growth continues at its current levels, there is likely to be housing shortages as building approvals do not keep track with the increasing demand for residential housing.

Objective 5.1	Match the availability of local housing with the growing economy and local workforce needs. <i>KPI: Number of building approvals.</i>
Objective 5.2	Reposition Perth's Eastern Region as a desirable place to live and work. <i>KPI: Measure of local residential population growth. Feedback from stakeholders.</i>
Objective 5.3	Balance economic growth with the need to protect the liveability of the Region. <i>KPI: Feedback from stakeholders (including community).</i>

Graph 2: Residential Building Approvals, Perth's Eastern Region, 1995 to 2010⁶¹

Residential Building approvals, Eastern Metropolitan Regional Council



Source: Australian Bureau of Statistics, Building Activity, Australia, (catalogue number: 8752.0 to 8752.7)

Social and environmental challenges such as residential housing supply and environmental sustainability need to be considered as they are inextricably linked to economic development. As other strategies to promote economic growth succeed, it will be important to align residential growth with employment growth. These factors will undoubtedly lead to

significant challenges for the Region but they will also lead to new and exciting economic opportunities for new industries.

The EMRC recognises the management of town planning schemes and land development is the responsibility of local council authorities. However the EMRC sees opportunities to consider local developments within a

broader regional context. With increased communication of local developments between stakeholders, the EMRC will be able to help to identify and understand potential synergies and opportunities for stakeholders to work together to promote the Region, manage growth, and thereby support both local and regional outcomes.

Action	Activity	Links	Timeframe	Priority	
5.1	Facilitate the two-way exchange of information with member Councils regarding land development opportunities.	Advocate	5.1	Ongoing	Medium
5.2	Undertake perception research to determine how Perth's Eastern Region is viewed as a place to work, live and play.	Research	5.2	Medium	Medium
5.3	Develop promotional tools to promote the Region to potential workers as a great place to live and work.	Promote	5.2 (KFA 1, KFA 2)	Long	Low
5.4	Promote the public transport and other alternative transport options within the Region. (eg involvement in TravelSmart Initiatives, RITS).	Promote	5.2, 5.3	Ongoing	Medium
5.5	Support sustainable development by providing input to planning processes (e.g. through environmental impact assessments).	Educate	5.3 (KFA 6)	Short	High
5.6	Facilitate a regional approach to ensure the local planning scheme, strategy and policies appropriately address the future supply and demand and needs and expectations of the community.	Governance	5.1, 5.3	Medium	Medium
5.7	Leverage existing stakeholders to help promote the Region.	Promote	5.2	Long	Low

⁵⁹ Pracsys 2010, Perth's Eastern Region Employment Characteristics, report, Pracsys, South Perth, Western Australia

⁶⁰ Western Australian Planning Commission 2010, Directions 2031 and Beyond – Metropolitan Planning Beyond the Horizon, report, Western Australian Planning Commission, Perth, Western Australia

⁶¹ profile.id 2010, id.Consulting, Collingwood, Victoria, viewed 22 July 2010, <http://www.id.com.au/profile/emrc>



9.6 KFA 6: Natural Growth

Ensure that economic growth complements rather than compromises the environmental future of Perth's Eastern Region by taking an environmentally responsible and sustainable approach.

The reality that climate change will create both challenges and opportunities to Perth's Eastern Region is clearly articulated in the Regional Climate Change Adaption Action Plan 2009 - 2013 (RCCAAP). The Plan suggests the potential impacts on infrastructure, land use planning as well as the potential for changing economic viability of local industry and social dislocation. The Plan identifies "economic challenges and opportunities" as one of the top ten Priority Risk Areas for the Region. Therefore it is critical to create a formal link between the RCCAAP and this Regional Economic Development Strategy through this Key Focus Area. The vision for the RCCAAP is

that: "Perth's Eastern Region will be a leader in climate change adaptation taking advantage of the opportunities created in a carbon constrained economy and evoking a sense of security, awareness and empowerment for residents living in the Region."

As one of the key factors often linked to climate change, sustainability is an integral part of the response. Perth was rated by the Australian Conservation Foundation (ACF) as the least sustainable city when compared to Australia's 20 largest cities in 2010⁶². The ACF suggests that all Australian cities would benefit immediately from increased and better targeted investment to provide efficient, affordable and healthy transport choices (reducing our oil dependence and vulnerability) and improved energy and water efficiency for both households and workplaces.

Perth's Eastern Region's leadership in climate change adaptation and sustainability must include the local economy and the associated businesses and industry. The environmental

impact of economic growth must be managed in a sustainable way. Already there are examples of leadership in the Region such as the recent commission of a 60kW solar power project for the Midland Atelier as part of the Australian Government's \$94 million Solar Cities program⁶³. Regional stakeholders such as the Perth Region Natural Resource Management (NRM) provide industry support and guidance including Perth NRM's Guidelines for Industrial Development⁶⁴ that must be integrated with planning strategies. Recently, Perth NRM partnered with Jane Brook Winery to support a range of energy reducing and sustainability initiatives including the installation of a solar tracker aimed at improving winery energy management⁶⁵. Sustainable growth is likely to also bring its own economic opportunities for the Region to develop and attract new businesses providing clean technologies.

Objective 6.1	Support industry with taking action to be environmentally conscious in their day-to-day activities. <i>KPI: Savings in energy costs. Savings in emissions.</i>
Objective 6.2	Encourage innovation in environmental management, clean tech industries and sustainable business practices. <i>KPI: Total number of businesses in the Region by industry sector. Savings in emissions.</i>
Objective 6.3	Support with the delivery of EMRC's Regional Climate Change Adaptation Action Plan 2009 -2013. <i>KPI: Review of RCCAAP KPI's relating to economic development.</i>
Objective 6.4	Leverage the Perth Solar City program to assist in raising awareness of energy management in Small to Medium Enterprises. <i>KPI: Number of projects undertaken as part of the Perth Solar City program. Savings in energy costs.</i>

⁶² Australian Conservation Foundation 2010, Sustainable Cities Index: Ranking Australia's 20 largest cities in 2010, report, Australian Conservation Fund, Carlton, Victoria
Measures 15 different indicators across three broad areas of Environmental Performance, Quality of Life and Resilience

⁶³ The project is an initiative of Perth Solar City, one of seven Solar Cities across Australia funded by the Federal Government. The Federal Government's \$94 million Solar Cities initiative encourages households, industry and the community to work together to find ways to better use and conserve energy.

⁶⁴ Blue Sands Environmental and Essential Environmental Services 2010, Guidelines for Industrial Development, report, Perth Region Natural Resource Management, Middle Swan, Western Australia

⁶⁵ Jane Brook Wines 2010, Raising a Glass to Lower Energy Use, media release, 25 May, Jane Brook Wines, Jane Brook, Western Australia, viewed 22 July 2010, <http://www.janebrook.com.au/media.asp?NID=181>



Action	Activity	Links	Timeframe	Priority	
6.1	Support the delivery of the Regional Climate Change Adaptation Action Plan 2009 - 2013.	All	6.1, 6.2, 6.3, 6.4 (KFA 7)	Ongoing	High
6.2	Monitor the implementation of other Key Focus Areas within the Regional Economic Development Strategy to identify opportunities to raise environmental awareness.	All	6.1, 6.2, 6.3, 6.4 (KFA1-7)	Ongoing	Medium
6.3	Review the Supply Chain Analysis from Key Focus Area 2 to identify feasibility of new industries in clean tech sector.	Research	6.2	Medium	Medium
6.4	Facilitate information sharing about existing awards, grant funding and good business practice in industrial ecology and promote best practice examples.	Promote	6.1, 6.2	Ongoing	Low
6.5	Partner with the Perth NRM Light Industry Reference Group and other stakeholders to raise environmental awareness and leverage environmentally friendly programs to SME's in Perth's Eastern Region.	Advocate	6.1, 6.2	Ongoing	Medium
6.6	Offer fee for service energy and water auditing services to SME's in Perth's Eastern Region.	All	6.1, 6.2, 6.3, 6.4	Medium	Medium
6.7	Support the delivery of the Regional Environmental Strategy 2010 – 2015 (currently under development).	All	6.1, 6.2, 6.3, 6.4, 6.5	Ongoing	High

9.7 KFA 7: Responsible Leadership

Provide good governance that facilitates responsible economic growth, advocates for Perth's Eastern Region, and encourages all stakeholders to work collaboratively together, equipped with the best knowledge to exercise sound leadership.

The facilitation of economic development requires an environment of responsible leadership and governance that supports, nurtures and manages growth. All too often, government can be seen as an inhibitor to growth rather than a champion of it, typically due to excessive regulation, red-tape and political influences. Particular elements of responsible leadership include:

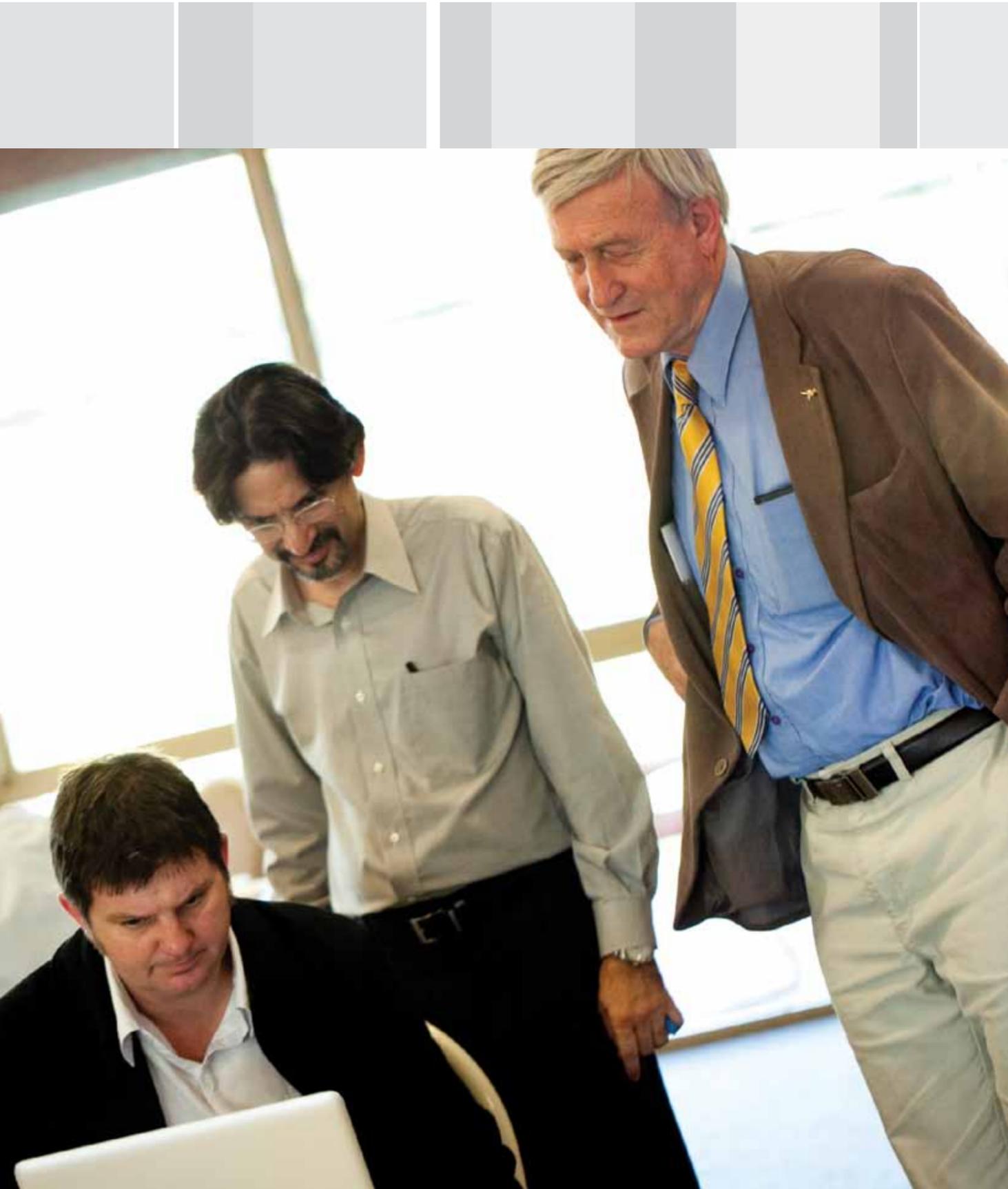
- A clear strategy that creates a vision and framework for delivery of agreed outcomes, but which is also flexible and continually reviewed to adapt to the changes in the economy;
- An efficient and effective regulatory environment that encourages innovation and entrepreneurship;

- Clear and sensible land use planning that aligns the availability and use of land to business needs and requirements;
- A 'can do' culture;
- Advocacy to promote the needs of the Region and its businesses with government and other key stakeholders;
- The provision of a range of services that support investment attraction and business development;
- The facilitation of networking to provide business connections and collaboration;
- The identification of funding opportunities to fund investment projects that benefit the Region as a whole; and
- Education and research to ensure informed decisions, manage risks and an alignment of understanding between all stakeholders.

Whilst these elements require a whole of government approach to succeed, there is an opportunity for the EMRC to work together with member Councils to achieve positive outcomes. Even for matters that are specific to a local area, such as local planning regulations, there are expected to be opportunities to advocate, share knowledge and provide opportunities for improvement that can be explored through

collaboration and cooperation. In Perth's Eastern Region, there is already strong leadership in economic development founded upon the commitment of member Councils and their economic development officers. The Chief Executive Officers Advisory Committee (CEOAC) and the Economic Development Officers' Group (EDOG) are frameworks for collaboration between member Councils that allows positive outcomes to be achieved in this Key Focus Area. Some specific opportunities that have been identified for further progress include:

- The facilitation of information sharing between member Council's Grants' Officers. This will enable cross-Council funding opportunities to be identified and coordinated funding submissions to be delivered; in particular to explore opportunities for public private partnerships;
- The provision of consultancy services by the EMRC in its areas of expertise, particularly environmental management to support bringing commercial and industrial land to market; and
- Greater links to State and Federal government, industry and business groups.



Objective 7.1	Increase the understanding of the importance and role of economic development in the Region with key stakeholders. <i>KPI: Monitor references to economic development in regional strategies and regulatory processes (including planning schemes). Increased funding of economic development.</i>
Objective 7.2	Support opportunities to create a regulatory environment that is business friendly. <i>KPI: Feedback from business and industry.</i>
Objective 7.3	Encourage collaboration between all stakeholders. <i>KPI: Feedback from stakeholders.</i>

	Action	Activity	Links	Timeframe	Priority
7.1	Support member Council staff with best practice service, planning processes and economic development tools.	Educate	7.1, 7.2, 7.3	Medium	Medium
7.2	Investigate processes for the EMRC to act as a service delivery agent in planning assessments (i.e. Environmental Impact Studies, Economic Analysis Studies).	Educate	7.2, 7.3	Short	Medium
7.3	Provide regional profiling tools (e.g. REMPLAN) and train EMRC and member Council staff to use these tools.	Research	7.1	Ongoing	High
7.4	Facilitate regional forums to bring together key stakeholders from member Councils and industry to discuss, understand and prioritise regional issues, barriers and opportunities.	Research	7.1, 7.2, 7.3	Ongoing	High
7.5	Maintain awareness of local, national and global economic trends to identify, understand and pre-empt risks and opportunities.	Research	7.1	Ongoing	Low
7.6	Facilitate shared understanding of regional advocacy priorities and the collation of key data and information to underpin a regional response to State and Federal government.	Advocate	7.1, 7.2, 7.3	Ongoing	Medium
7.7	Represent Perth's Eastern Region on key boards/ groups for developments of regional significance.	Promote	7.1, 7.2, 7.3	Ongoing	High
7.8	Facilitate business development by providing support to business with regulatory compliance (i.e. through education and communication tools).	Educate	7.2	Ongoing	Low
7.9	Investigate regional funding opportunities and models to support economic development.	Funding	7.1, 7.3	Ongoing	Medium



10.0 Implementation, Review And Evaluation

The EMRC will facilitate the delivery of the objectives in this Regional Economic Development Strategy through a structured implementation plan as well as effective and ongoing evaluation and monitoring.

10.1 Implementation Roles

The EMRC will take a central role for the delivery of this Strategy and will coordinate collaboration amongst member Councils to achieve the objectives of the Strategy. In addition to this, EMRC will undertake day-to-day activities to support the actions within the Strategy. These have been defined previously and include activities such as research, analysis, review, advocating, educating, project and service management, attraction and promotion, funding support and governance.

As with all economic development teams in the Region, the EMRC is resource constrained, having only one dedicated full-time officer focused upon economic development at the time of writing. This is without doubt an ambitious strategy and therefore it is imperative that a collaborative approach is adopted between all member Councils and stakeholders to maximise the outcomes that can be achieved. In particular, the role of member Council officers over the next five years is to actively engage in implementation of regional actions that have relevance at the local level. This will involve:

- Participating in the EMRC advisory and project groups;
- Provision of economic data available at local government level
- Leveraging regional advocacy activities;
- Consulting and engaging with local industry;
- Liaising with other business units within their Council; and
- Keeping the EMRC informed of local activities and other project delivery responsibilities.

10.2 Governance

The implementation of the Strategy will be governed according to the following structure:

- The Strategy will focus the day-to-day activities of the EMRC within economic development;
- The Strategy will be used as a basis to seek funding allocations from the EMRC operating budget on an annual budget;
- The Economic Development Officers' Group (EDOG) will provide on-going feedback and review of the Strategy as part of its regular meetings and will refer actions and achievements back to the Strategy; and
- Progress against the actions and objectives of the Strategy will be reported to EMRC management and Council

10.3 Resources

To facilitate regional economic development, the EMRC employs a dedicated team of staff supported by specialist consultants (as required). Some actions and outcomes of the Regional Economic Development Strategy integrate to other Regional Development strategies including the Regional Integrated Transport Strategy (RITS) and the Regional Tourism Strategy (RTS). Actions relating to these areas will be progressed by other project officers within Regional Development accordingly. Other officers of the EMRC will contribute technical assistance for advocacy, environmental management, and marketing as required.

Implementation of the Regional Economic Development Strategy is expected to be resourced through a blend of EMRC contributions, member Council contributions, and supplemented by grants for projects. Member Council are asked to contribute to the maintenance of REMPLAN data. Detailed

budgets for the delivery of actions within the Regional Economic Development Strategy will be developed as part of the next stage of implementation planning. At this stage, available budgets and resources will be balanced against outcome priorities.

10.4 Monitoring, Review and Evaluation

The implementation of the Regional Economic Development Strategy (REDS) will be monitored, reviewed and evaluated on an on-going basis through:

- Regular meetings of the Economic Development Officers' Group (EDOG);
- The monitoring of Key Performance Indicators (KPI's);
- The quarterly Regional Development Services Activity Report which is presented to the CEO Advisory Committee and EMRC Council;
- A minor review of the Strategy undertaken annually, which will focus on the updating of actions. Given the expected finalisation and release of several important government strategies over the next 12 months, it will be important to review the directions of this Strategy in accordance with them (including the Directions 2031 and Industrial Land Strategies);
- A workshop with regional stakeholders (including EDOG) to review progress. This will allow the REDS to be a living document, evolving as market conditions, issues, challenges and opportunities change and actions are completed. A complete review of the Strategy will be undertaken in 2015; and
- Where appropriate, the community will be informed of significant developments through the EMRC website, media releases and newsletter.



10.5 Key Performance Indicators

Key Performance Indicators (KPI's) have been included throughout the Strategy in association with the specific actions and objectives to which they relate. A summary of these KPI's have been repeated below to show how the EMRC will measure the extent to which its activities are meeting the objectives of this Strategy.

It should be recognised that some of these indicators are influenced by macro economic factors and as a result changes may occur irrespective of the activities of the EMRC and member Councils.

Key Performance Indicator	Objective
Completion of Objections and Actions outlined in REDS.	All
Measure of employment self-containment.	1.1, 1.2, 1.4
Measure of employment self-sufficiency.	1.1, 1.2, 1.4
Measure of employment by industry sector.	3.4
Local employment by industry sector (ABS Journey to work data) .	1.1, 2.2, 4.2
Total number of businesses in the Region.	2.1, 2.2,
Total number of businesses in the Region by industry sector.	1.3, 2.1, 3.2, 6.2
Measure of local residential population growth.	1.4, 5.2
Gross Regional Product value.	2.2, 2.3, 2.4
Feedback from stakeholders.	2.4, 5.2, 5.3, 7.3
Feedback from business and industry.	2.3, 4.2, 7.2
Feedback from member Councils.	4.3
Contribution of knowledge-based employment to Gross Regional Product.	3.1
Number of registered patents in Perth's Eastern Region.	3.3
Amount of investment in the Region.	4.1, 4.4, 4.5
Main Roads Traffic Data.	4.2
Number of building approvals.	5.1
Savings in energy costs.	6.1, 6.4
Savings in emissions.	6.1, 6.2
Review of RCCAAP KPI's relating to economic development.	6.3
Number of projects undertaken as part of the Perth Solar City program.	6.4
Reference to economic development activities in regional strategies and regulatory processes (including planning schemes).	7.1
Increased funding of economic development.	7.1



11.0 Acknowledgements

The EMRC would like to acknowledge the valuable contributions of the following people:

The Economic Development Officers' Group (EDOG)

William Barry, Town of Bassendean, Economic Development Officer
 Piero Fazio, City of Bayswater, (former) Economic Development Officer
 Jay Hardison, City of Belmont, Manager - Property & Economic Development
 Ling Geh, City of Belmont, Property and Economic Development Officer
 Kevin O'Connor, Shire of Kalamunda, Executive Manager - Community Services
 Andrew Fowler-Tutt, Shire of Kalamunda, Manager of Strategic Planning
 Damien Martin, Shire of Mundaring, Economic Development Adviser
 Stuart Thiele, Shire of Mundaring, Senior Planning Officer (Strategic)
 Mike Brewis, City of Swan, (former) Research and Information Officer, Strategic Planning
 Carol Catherwood, City of Swan, (former) Strategic Planning Coordinator
 Anthony Kelly, City of Swan, Business Development Officer
 Tat Beng Khaw, City of Swan, Coordinator, Business and Tourism

The EMRC also acknowledges the contribution of State Government and business and industry stakeholders to the development of the Regional Economic Development Strategy. These include:

Belmont BEC	Polytechnic West (formerly Swan TAFE)
Bullsbrook & Chittering Chamber of Commerce Inc	Pracsys
Central Eastern Business Association	SBC East Metro
Department for Mines and Petroleum	SBC Stirling
Department of Commerce	Small Business Development Corporation
Department of Planning	Swan Chamber of Commerce
Eastern Hills Business Association	Swan Valley Tourism Council
Enterprise Connect Manufacturing Centre	Westralia Airports Corporation Pty Ltd
Engineering and Manufacturing Industry Cooperative Limited (EMICoL)	Property Council of Australia (WA)
FORM	Swan Kalamunda Health Service
Kalamunda Chamber of Commerce	Jobs Australia - Midland
Malaga & Districts Business Association	Verriers Engineering
Maylands Business Association	
Metro BEC Welshpool	
Midland Redevelopment Authority	
Midland Job Link	
North East Metropolitan Health Service	

12.0 Contact Information

Correspondence on the Regional Economic Development Strategy 2010-2015 should be directed to the EMRC Regional Development Team on phone: 9424 2222 or email mail@emrc.org.au.



13.0 Glossary And Definitions

CEOAC	Chief Executive Officers' Advisory Council.	Perth's Eastern Region	The geographic area covered by the six member Councils of the EMRC: Town of Bassendean, City of Bayswater, City of Belmont, Shire of Kalamunda, Shire of Mundaring and City of Swan. Also referred to as 'the Region'.
ECF	Employment Concentration Factors.	Perth Metropolitan Area/Region	As defined by the WA Planning Commission and the associated Metropolitan Regional Scheme.
EDOG	Economic Development Officers' Group.	Perth Statistical Division	As defined by the ABS and includes the Central, East, North, South West and South East Metropolitan Areas.
East Metropolitan Region	Region of the Perth metropolitan area defined by the Australian Bureau of Statistics to include five of the six EMRC member Councils including: Town of Bassendean, City of Bayswater, Shire of Kalamunda, Shire of Mundaring and City of Swan (excludes the City of Belmont).	Profile.id	A research tool from .id (short for informed decisions) a company specialising in the provision of demographic data for local governments.
Employment Self-Containment	The total number of working residents who work locally as a proportion of the total number of working residents (e.g. an ESC of 43% means that for every 100 working residents, 43 of them work locally).	RAS	EMRC Regional Advocacy Strategy.
Employment Self-Sufficiency	The total number of local jobs in the Region as a proportion of the total number of employed residents in the Region (e.g. an ESS of 78% means there are 78 local jobs in the Region for every 100 local working residents).	RCCAAP	EMRC Regional Climate Change Adaptation Action Plan 2009 - 2013.
EMRC	Eastern Metropolitan Regional Council.	REDS	EMRC Regional Economic Development Strategy.
Enabling Infrastructure	Defined as hard infrastructure that includes services (power, water, gas, waste, communications), transport and land supply.	REMPAN	Regional Economic Modelling and Planning System. A product of Compelling Economics Pty Ltd, the commercial spin-off from the Economic Research Unit (ERU) at La Trobe University.
KFA	Key Focus Area.	RITS	EMRC Regional Integrated Transport Strategy.
Knowledge Capital	Knowledge resources, expertise and experience	RTS	EMRC Regional Tourism Strategy 2010 - 2015.
Knowledge Worker	An individual who works primarily with information or one who develops and uses knowledge in the workplace.	The Region	Refers to Perth's Eastern Region (see above).
KPI	Key Performance Indicator.	Supply Chain Integration	Methods of coordination and integration of processes within a traditional supply chain.
Labour force underutilisation rate	The sum of the number of persons unemployed and the number of persons in underemployment, expressed as a proportion of the labour force.	Unemployed looking for full time work	Unemployed persons who: - actively looked for full time work; or - were waiting to start a new full time job.
Member Councils	The six member Councils of the Eastern Metropolitan Regional Council- Town of Bassendean, City of Bayswater, City of Belmont, Shire of Kalamunda, Shire of Mundaring and City of Swan.	Unemployment rate	For any group, the number of unemployed persons expressed as a percentage of the labour force in the same group.
Participation rate	For any group, the labour force expressed as a percentage of the civilian population aged 15 years and over in the same group.	Underemployed workers	Employed persons aged 15 years and over who want, and are available for, more hours of work than they currently have. They comprise: - persons employed part time who want to work more hours and are available to start work with more hours, either in the reference week or in the four weeks subsequent to the survey; or - persons employed full time who worked part time hours in the reference week for economic reasons (such as being stood down or insufficient work being available). It is assumed that these people wanted to work full time in the reference week and would have been available to do so.
Population Driven Employment	Employment that derives primarily as a result of local population growth to service the convenience needs of those residents. Typically includes retail.	WAPC	Western Australian Planning Commission.
Perth and Peel	As defined by the WA Planning Commission and includes the North West, North East, Central, South West, South East and Peel sub-regional areas.		

14.0 Appendices

14.1 Appendix 1: Economic Profile

Introduction

Perth's Eastern Region covers 2,100 square kilometres or about one-third of the Perth

metropolitan area. The Region extends from the edge of the Perth CBD, along the Swan River through urban residential, commercial and industrial areas, to the scenic Swan Valley and up into the forest and prime agricultural land of the Darling Range. The EMRC and its member Councils serve approximately 310,000 residents.

Perth's Eastern Region is a major contributor to the Western Australian economy, generating an estimated \$16,764 million⁶⁶ or 10.7% of Gross State Product (\$156,603 million in 2008/2009)⁶⁷.

The breakdown of the Gross Regional Product for the Region is shown in Table A1.1⁶⁸.

Table A1.1: Gross Regional Product, Perth's Eastern Region ⁶⁹

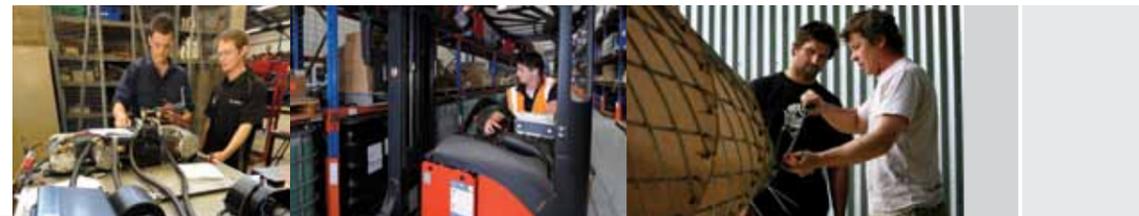
GRP Expenditure Method	Perth's Eastern Region		
	08/09 \$M	09/10 \$M	Change %
Household Consumption	13,070.04	13,169.18	0.76
Government Consumption	4,076.30	4,034.60	-1.03
Private Gross Fixed Capital Expenditure	5,073.23	5,077.78	0.09
Public Gross Fixed Capital Expenditure	861.83	930.755	7.41
Gross Regional Expenses	23,081.40	23,212.32	0.56
plus Exports	15,091.96	15,937.91	5.31
minus Domestic Imports	-15,681.08	-15,432.58	-1.61
minus Overseas Imports	-5,727.34	-6,147.19	6.83
Gross Regional Product	16,764.94	17,570.46	4.58
Population (number) ⁶⁹	277,505		
Per Capita GRP (\$'000)	60.41	63.32	4.60

⁶⁶ REMPLAN May 2009, *Compelling Economics, Bendigo, Victoria*

⁶⁷ Australian Bureau of Statistics 2009, *Australian National Accounts: State Accounts (2008-09 re-issue)*, Cat. no. 5220.0, Australian Bureau of Statistics, Canberra, Australian Capital Territory, viewed 16 February 2010, <[http://www.ausstats.abs.gov.au/Ausstats/subscriber.nsf/0/705B32D194E15754CA2576930013F3B6/\\$File/52200_2008-09%20\(reissue\).pdf](http://www.ausstats.abs.gov.au/Ausstats/subscriber.nsf/0/705B32D194E15754CA2576930013F3B6/$File/52200_2008-09%20(reissue).pdf)>

⁶⁸ Gross Regional Product (GRP) is the net measure of wealth generated by the Region and can be measured by using the incomes approach, where all incomes earned by individuals (wages and salaries), firms (gross operating surplus) and governments (taxes on products or services) are added.

⁶⁹ REMPLAN May 2009, *Compelling Economics, Bendigo, Victoria*



Key Industries

The major industry contributors to output in Perth's Eastern Region are manufacturing, transport and storage, construction, property and business services and wholesale trade. Manufacturing is by far the largest sector in

terms of output representing over three times the output of the next largest sector (transport and storage). Industry sectors experiencing high growth include mining, communication services, construction, agriculture forestry fishing and government administration and defence. The financial contribution of these

and other industry sectors together with their growth is shown in Table A1.2. Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in the Perth's Eastern Region. Gross revenue is also referred to as total sales or total income.

Table A1.2: Industry Sectors Ranked by Output, Perth's Eastern Region⁷¹

Industry sector	Perth's Eastern Region				
	08/09	09/10	Change	Share of Region	
	\$M	\$M	%	08/09	09/10
Manufacturing	13,285.61	13,854.95	4.29	33.51	32.50
Transport and storage	4,046.03	4,432.86	9.56	10.20	10.40
Wholesale trade	3,739.34	3,940.25	5.37	9.43	9.24
Property and business services	3,686.15	4,040.94	9.62	9.30	9.48
Construction	3,602.37	4,172.69	15.83	9.09	9.79
Retail trade	2,283.46	2,305.41	0.96	5.76	5.41
Mining	1,953.74	2,271.71	16.27	4.93	5.33
Communication services	1,026.87	1,193.62	16.24	2.59	2.80
Health and community services	940.13	962.79	2.41	2.37	2.26
Education	936.17	950.56	1.54	2.36	2.23
Government administration and defence	902.71	1,024.92	13.54	2.28	2.40
Finance and insurance	802.73	838.58	4.47	2.02	1.97
Accommodation, cafes and restaurants	641.00	709.19	10.64	1.62	1.66
Electricity, gas and water supply	587.64	590.74	0.53	1.48	1.39
Personal and other services	542.07	597.90	10.30	1.37	1.40
Cultural and recreational services	403.21	439.90	9.10	1.02	1.03
Agriculture forestry fishing	269.80	307.71	14.05	0.68	0.72
Total	39,649.05	42,634.72	7.53		

⁷¹ All references to 08/09 data is based upon modelling using 2008 June GSP WA (ABS), 2004/05 I/O Tables (ABS) and 2006 JTW Census data. Reference to 09/10 data is based upon modelling using June 2009 GSP WA (ABS), 2006/07 I/O Tables (ABS) and 2006 JTW Census data. REMPLAN May 2009, January 2010, Compelling Economics, Bendigo, Victoria. REMPLAN January 2010, January 2010, Compelling Economics, Bendigo, Victoria



Key Industries by Value Add

Value-Added data represents the marginal economic value that is added by each industry sector in the Region. Value-Add is calculated by subtracting local expenditure and expenditure on regional imports from

the output generated by an industry sector, or alternatively, by adding the wages & salaries paid to local employees, the gross operating surplus and taxes on products and production. Value-Added by industry sector is the major element in the calculation of Gross Regional Product. Table A1.3 shows that the

key sectors in the Region by Value-Added are manufacturing, property and business services, wholesale trade and transport and storage. It is worth noting however that the key growth sectors between 2008/09 and 2009/10 are construction, mining, and health and community services.

Table A1.3 Industry Sectors by Value Add ⁷³

Industry Sector	Value Add		Change	Share of Region	
	08/09	09/10		08/09	09/10
	\$M	\$M	%	%	%
Manufacturing	3.045	3.008	-1.20	20.0	18.7
Property & Business Services	1.679	1.825	8.70	11.0	11.4
Wholesale Trade	1.652	1.676	1.50	10.9	10.5
Transport & Storage	1.534	1.658	8.10	10.1	10.3
Retail Trade	1.157	1.181	2.10	7.6	7.4
Construction	1.079	1.229	13.90	7.1	7.7
Mining	0.965	1.085	12.40	6.3	6.8
Education	0.707	0.719	1.70	4.7	4.5
Health & Community Services	0.704	0.779	10.70	4.6	4.9
Communication Services	0.512	0.539	5.30	3.4	3.4
Sub-Total	13.037	\$13.699		85.64	85.35

Key Industries by Regional Imports

Regional Imports data represents the value of goods and services imported into the Region by businesses / organisations in each of the industry sectors. Another way of defining imports is as an outflow of money from the Region, i.e. a local business outsourcing accountancy services to a firm in another region which results in an outflow of money

and an importation of services. This data highlights potential opportunities to attract new businesses into the Region to prevent this leakage. No distinction is made between domestic and international imports, and no indication is given as to the type of imports (to determine the types of imports by industry sector requires a process of "Gap Analysis" whereby the defined Region is contrasted with state or national averages).

The table highlights the key sectors for regional imports are currently manufacturing, transport and storage, wholesale trade and mining. Manufacturing is by far the greatest sector for regional imports. Key sectors that are experiencing growth in regional imports include government administration and defence, construction and accommodation, cafes and restaurants although compared to the manufacturing sector, these are still very small.

Table A1.4 Industry Sectors by Regional Imports ⁷⁵

Industry Sector	Regional Imports		Change	Share of Region	
	08/09	09/10		08/09	09/10
	\$M	\$M	%	%	%
Manufacturing	6,806	7,030	3.29	56.77	55.37
Transport & storage	1,388	1,281	-7.71	11.58	10.09
Wholesale trade	760	735	-3.29	6.34	5.79
Mining	727	650	-10.59	6.06	5.12
Property & business services	529	695	31.38	4.41	5.47
Construction	505	711	40.79	4.22	5.60
Communication services	155	189	21.94	1.29	1.49
Retail trade	418	424	1.44	3.49	3.34
Accommodation, cafes and Restaurants	125	167	33.6	1.04	1.31
Government administration and defence	106	172	62.26	0.88	1.35
Sub-Total	11,519	12,054		96.08	94.93

Key Industries by Local Expenditure

Local Expenditure data represents the value of intermediate goods and services purchased by local industry sectors within the Region.

A high level of local expenditure on intermediate goods and services proportionate to total output is indicative of well developed local supply chains and also that any expansion in this sector would typically deliver broad based benefits for the Region's economy.

The key sectors in Perth's Eastern Region for local expenditure include manufacturing, construction, property and business services and wholesale trade, although there is major growth within the mining, communication and transport and storage sectors.

⁷³ All references to 08/09 data is based upon modelling using 2008 June GSP WA (ABS), 2004/05 I/O Tables (ABS) and 2006 JTW Census data. Reference to 09/10 data is based upon modelling using June 2009 GSP WA (ABS), 2006/07 I/O Tables (ABS) and 2006 JTW Census data. REMPLAN May 2009, January 2010, Compelling Economics, Bendigo, Victoria. REMPLAN January 2010, January 2010, Compelling Economics, Bendigo, Victoria

⁷⁵ All references to 08/09 data is based upon modelling using 2008 June GSP WA (ABS), 2004/05 I/O Tables (ABS) and 2006 JTW Census data. Reference to 09/10 data is based upon modelling using June 2009 GSP WA (ABS), 2006/07 I/O Tables (ABS) and 2006 JTW Census data. REMPLAN May 2009, January 2010, Compelling Economics, Bendigo, Victoria. REMPLAN January 2010, January 2010, Compelling Economics, Bendigo, Victoria

Table A1.5 Industry Sectors by Local Expenditure ^{77,78}

Industry Sector	Local Expenditure		Change	Share of Region	
	08/09	09/10		08/09	09/10
	\$M	\$M	%	%	%
Manufacturing	3,434.29	3,816.94	11.14	27.61	27.49
Construction	2,017.39	2,232.97	10.69	16.22	16.08
Property & business services	1,477.35	1,520.57	2.93	11.88	10.95
Wholesale trade	1,326.72	1,528.51	15.21	10.67	11.01
Transport & storage	1,123.95	1,493.74	32.90	9.04	10.76
Retail trade	708.59	700.86	-1.09	5.70	5.05
Communication services	359.52	466.22	29.68	2.89	3.36
Government administration & defence	325.24	317.94	-2.24	2.62	2.29
Mining	261.23	536.86	105.51	2.10	3.87
Accommodation, cafes & restaurants	258.49	265.43	2.68	2.08	1.91
Sub-Total	11,292.75	12,880.04		90.80	92.75

Major Propulsive Sectors

The industry sectors which are the key drivers of the Perth's Eastern Region's economy in terms of regional exports, employment, value-added and local expenditure on goods and services (backward linkages) are detailed below. The industry sectors highlighted by a ✓ in the table below are amongst the top five (of 17 sectors) contributors to economic activity in Perth's Eastern Region in relation to backward linkages, exports, employment, and value-added. Where:

- Value-Added represents the marginal economic value that is added by each industry sector in a defined region. Value-Added is calculated by subtracting local expenditure and expenditure on regional

imports from the output generated by an industry sector. Value-Added by industry sector is the major element in the calculation of Gross Regional Product.

- Employment is the key social outcome of economy development; employment data represents the number of people employed by businesses / organisations in each of the industry sectors in Perth's Eastern Region.
- Regional Exports represents the value of goods and services exported outside of Perth's Eastern Region that have been generated by local businesses / organisations. Another way of defining exports is as an inflow of money into the Region, i.e. Motels have an inflow of money from people who live outside the

Region's boundaries thus they are earning export equivalent dollars.

- Backward Linkages details the industry sectors which spend the most on locally sourced intermediate goods and services per dollar of output. These industry sectors may not necessarily make the largest contributions to the Region's economy at present however due to well developed local supply chains these sectors have a significant capacity to deliver broad based economic benefits for the Region.

From the table it can be seen that the key sectors include wholesale trade, manufacturing, construction, transport and storage, and property and business services.

Table A1.6 Major Propulsive Sectors ^{79,80}

Industry Sector	Backward Linkages	Exports	Employment	Value-Added	Total
Agriculture Forestry Fishing					0
Mining		✓			1
Manufacturing		✓	✓	✓	3
Electricity, gas & water supply					0
Construction	✓	✓		✓	3
Wholesale trade	✓	✓	✓	✓	4
Retail trade			✓		1
Accommodation, cafes & restaurants					0
Transport & storage		✓	✓	✓	3
Communication services	✓				1
Finance & insurance					0
Property & business services	✓		✓	✓	3
Government administration & defence					0
Education					0
Health & community services					0
Cultural & recreational services	✓				1
Personal & other services					0

Industry Concentration

Employment concentration factors (ECF) show the comparative concentration of industries within Perth's Eastern Region comparative to the Perth and Peel Metropolitan area average. If an industry's ECF is greater than 1.0, it can be assumed that Perth's Eastern Region contains a comparatively large concentration of a particular industry. A score of two represents double the metropolitan average concentration.

Table A1.7 shows the employment concentrations for Perth's Eastern Region based upon Census 2006 data. The concentration

figures should be interpreted carefully as they do not take into account absolute employment figures, hence some sectors with large concentrations may not be particularly significant for the Region however at a broad level, this analysis shows a predominance of logistics and freight-related industries that align with the logistics infrastructure located in the area (Perth Airport International Terminal and Kewdale Intermodal Freight Terminal). Heavier industrial activity including fabrication and manufacturing also is shown to be highly concentrated within the area. Both of these areas are primarily classified as producer services.

Finally, exploration-related resources activity is strongly represented as a number of junior resource-sector firms have chosen to locate their offices within Perth's Eastern Region.

A high ECF provides an indication of industries that are potentially realising a comparative advantage by locating within Perth's Eastern Region. It therefore offers direction to planners as to areas of focus that may be leveraged through horizontal and vertical integration of supply chains to achieve economic development objectives.

⁷⁷ All references to 08/09 data is based upon modelling using 2008 June GSP WA (ABS), 2004/05 I/O Tables (ABS) and 2006 JTW Census data. Reference to 09/10 data is based upon modelling using June 2009 GSP WA (ABS), 2006/07 I/O Tables (ABS) and 2006 JTW Census data. REMPLAN May 2009, January 2010, Compelling Economics, Bendigo, Victoria. REMPLAN January 2010, January 2010, Compelling Economics, Bendigo, Victoria

⁷⁹ All references to 08/09 data is based upon modelling using 2008 June GSP WA (ABS), 2004/05 I/O Tables (ABS) and 2006 JTW Census data. Reference to 09/10 data is based upon modelling using June 2009 GSP WA (ABS), 2006/07 I/O Tables (ABS) and 2006 JTW Census data. REMPLAN May 2009, January 2010, Compelling Economics, Bendigo, Victoria. REMPLAN January 2010, January 2010, Compelling Economics, Bendigo, Victoria

Table A1.7: Industry Concentration ⁸¹

#	ANZSIC Industry 2006- 3 digit	Perth's Eastern Region ECF	South West Sub-Region ECF	North West Sub-Region ECF
1	Museum Operation	5.98	18.42	8.50
2	Other Transport Support Services	5.09	0.99	1.14
3	Other Transport, nfd	5.06	-	-
4	Structural Metal Product Manufacturing	4.79	142.46	63.85
5	Cement, Lime, Plaster and Concrete Product Manufacturing	3.95	4.35	1.63
6	Rail Passenger Transport	3.52	0.26	0.31
7	Other Transport Equipment Manufacturing	3.06	13.33	0.48
8	Grain Mill and Cereal Product Manufacturing	3.04	4.58	3.05
9	Agriculture, Forestry and Fishing Support Services, nfd	2.99	-	-
10	Amusement and Other Recreation Activities	2.93	0.95	0.58
11	Warehousing and Storage Services	2.93	2.01	0.16
12	Grocery Liquor and Tobacco Product Wholesaling	2.83	1.84	1.28
13	Sheep, Beef Cattle and Grain Farming	2.78	0.88	0.50
14	Other Machinery and Equipment Manufacturing	2.75	0.67	0.08
15	Pipeline and Other Transport	2.74	0.12	0.11
16	Exploration	2.66	69.59	59.19
17	Furniture and Other Manufacturing, nfd	2.65	0.05	0.04
18	Non-Metallic mineral product Manufacturing, nfd	2.64	1.90	2.43
19	Agricultural Product Wholesaling	2.59	88.29	117.64
20	Aquaculture	2.52	0.69	0.14

Key to shading

Consumer Services
Knowledge Intensive / Export Oriented
Producer Services

⁸¹ Pracsys 2010, Perth's Eastern Region Employment Characteristics, report, Pracsys, South Perth, Western Australia

EMPLOYMENT

Employment Growth

The East Metropolitan Region is identified as one of twenty regions across Australia emerging from the economic downturn

that "could lead Australia out of the Global Financial Crisis"⁸². At 13%; the East Metropolitan Region of Perth, was identified as having the strongest employment growth since November 2007, on par with lower Northern Sydney (13%) and South Eastern NSW (11%).⁸³

Employment Self Sufficiency

Perth's Eastern Region experiences a high Employment Self Sufficiency (number of local jobs/employed residents) of 78.17% as shown in Table A1.8.

Table A1.8: Employment Self Sufficiency, Perth's Eastern Region ^{84,85}

Local Government Authority	Local Jobs Number	Employed Residents Number	Net Employment Number	Employment Self Sufficiency %
Town of Bassendean	5,161	6,584	-1,423	78.39
City of Bayswater	17,608	28,020	-10,412	62.84
City of Belmont	27,525	14,072	13,453	195.60
Shire of Kalamunda	11,051	25,379	-14,328	43.54
Shire of Mundaring	7,026	16,857	-9,831	41.68
City of Swan	37,242	44,185	-6,943	84.29
Perth's Eastern Region	105,611	135,097	-29,486	78.17

Employment Self Containment

Perth's Eastern Region experiences a low Employment Self Containment (employed local workforce working locally/employed residents) of 43.33% as shown in Table A1.9.

Table A1.9: Employment Self Containment, Perth's Eastern Region, 2006 ⁸⁶

Local Government Authority	Employed Residents Working Locally Number	Employed Residents Number	Employment Self Containment %
Perth's Eastern Region	58,537	135,091	43.33

⁸² Bankwest 2009, Jobs Winners - Report Identifies WA regions to Emerge from GFC, media release, 07 September, Bankwest, Perth, Western Australia, viewed 21 April 2010, <http://www.bankwest.com.au/library/scripts/objectifyMedia.aspx?file=pdf/54/05.pdf&str_title=Employment Growth WA.pdf>⁸³ Bankwest 2009, Jobs Winners - Report Identifies WA regions to Emerge from GFC, media release, 07 September, Bankwest, Perth, Western Australia, viewed 21 April 2010, <http://www.bankwest.com.au/library/scripts/objectifyMedia.aspx?file=pdf/54/05.pdf&str_title=Employment Growth WA.pdf>⁸⁴ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>⁸⁵ REMPLAN January 2010, Compelling Economics, Bendigo, Victoria⁸⁶ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>



Employment by Industry

The major industry contributors to employment in Perth's Eastern Region are manufacturing, retail trade, wholesale trade, and transport and storage. The number of jobs in these and other industry sectors is shown in Table A1.10.

Table A1.10: Industry Sectors ranked by Employment, Perth's Eastern Region ⁸⁷

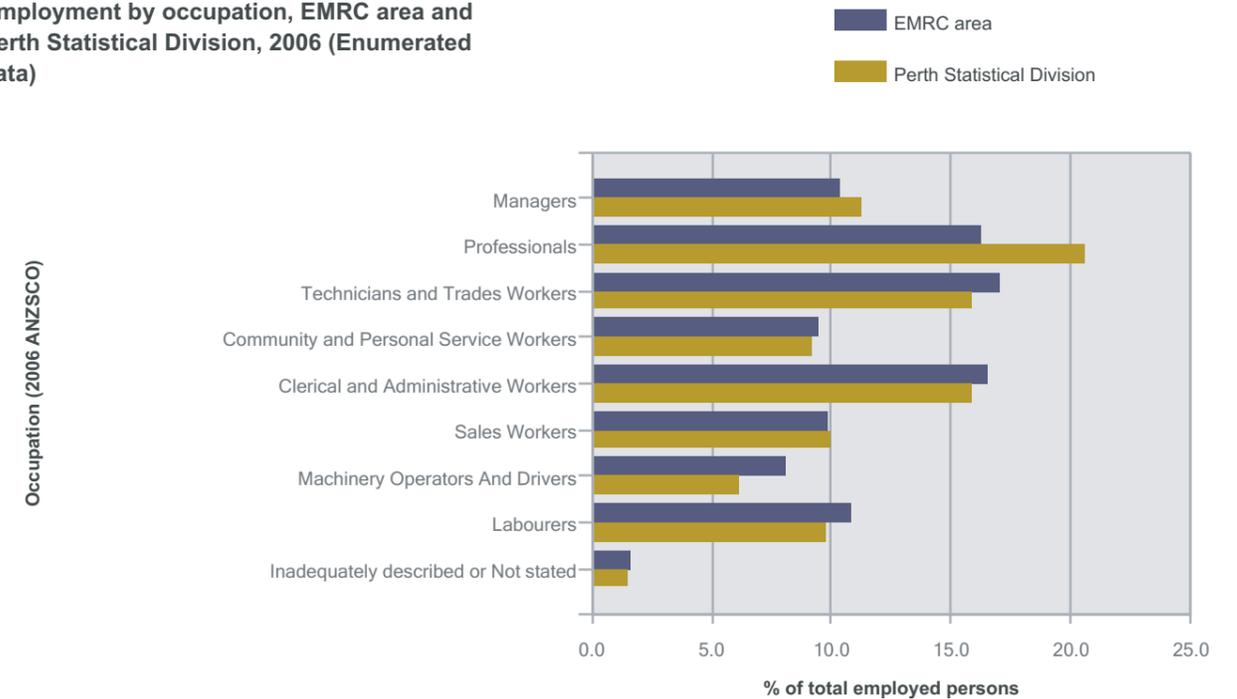
Industry Sector	Perth's Eastern Region Jan 2010	
	Jobs Number	%
Manufacturing	18,336	17.36
Retail trade	17,377	16.45
Wholesale trade	9,115	8.63
Transport and storage	8,925	8.45
Property and business services	8,335	7.89
Health and community services	8,301	7.86
Construction	8,143	7.71
Education	6,910	6.54
Personal and other services	4,202	3.98
Government administration and defence	3,935	3.73
Accommodation, cafes and restaurants	3,415	3.23
Communication services	2,125	2.01
Cultural and recreational services	1,711	1.62
Finance and insurance	1,559	1.48
Mining	1,473	1.39
Agriculture Forestry Fishing	1,161	1.10
Electricity, gas and water supply	588	0.56
Total	105,611	

Occupations

Analysis of the occupations held by the resident population in the Perth's Eastern Region in 2006 shows the three most common occupations as: Technicians and Trades Workers (22,573 persons or 17.0%); Clerical and Administrative Workers (21,872 persons or 16.5%) and Professionals (21,520 persons or 16.2%). These three occupations accounted for 65,965 people in total or 49.8% of the employed resident population. Comparison of the Region with the Perth Statistical Division is shown in Graph A1.1.

Graph A1.1: Employment by Occupation, Perth's Eastern Region and Perth Statistical Division⁸⁸

Employment by occupation, EMRC area and Perth Statistical Division, 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)

Employment Vulnerability

The Employment Vulnerability Index⁸⁹ identifies suburbs that have higher proportions of the types of jobs considered to be most at risk during periods of economic uncertainty.

Perth's Eastern Region is clearly an at risk area with 60.3% of suburbs rated as Red Alert (high risk) or Amber Alert (medium risk); compared to the study area which has only 42.5% of suburbs rated high or medium risk.

The study area includes all capital cities and over 75% of the total Australian population.

The spatial distribution of these areas in Perth is shown in Diagram A1.1.

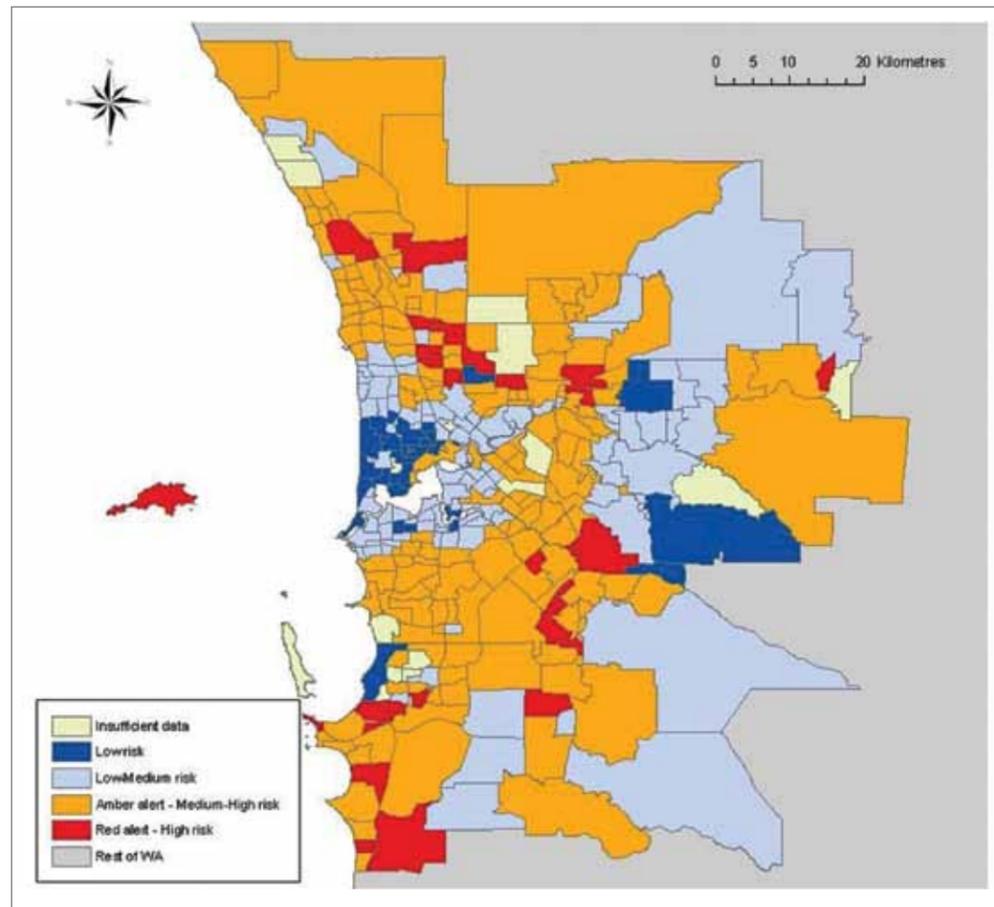
⁸⁷ REMPLAN May 2009, Compelling Economics, Bendigo, Victoria

⁸⁸ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

⁸⁹ Centre of Full Employment and Equity 2010, The University of Newcastle Australia, Callaghan, Melbourne, viewed 16 February 2010, <http://e1.newcastle.edu.au/coffee/indicators/job_loss_index/index.cfm>



Diagram A1.1: Spatial Distribution and Rated Employment Vulnerability, Perth, March 2009 ⁹⁰



Workforce Participation

Analysis of the labour force participation rate⁹¹ of the population in Perth's Eastern Region in 2006 (table A1.11) indicates that there is a slightly higher proportion in the labour force (63.2%) compared with the Perth Statistical Division (62.8%). It also experiences a lower unemployment rate.⁹²

⁹⁰ Centre of Full Employment and Equity 2010, The University of Newcastle Australia, Callaghan, Melbourne, viewed 16 February 2010, <http://e1.newcastle.edu.au/cofee/indicators/job_loss_index/index.cfm>
⁹¹ See glossary for definition of participation rate
⁹² See glossary for definition of unemployment rate

Table A1.11 Employment Status (Persons Aged 15 Years and Over) ⁹³

Enumerated Data	Perth's Eastern Region		Perth Statistical Division		Perth Statistical Division		Change 2001 to 2006
	2006	2001	2006	2001	2006	2001	
	Number	%	Number	%	Number	%	
Employed full time	85,047	61.9	74,483	59	74,483	57.8	10,564
Employed part time	43,461	31.6	39,003	32.9	39,003	32.1	4,458
Employed not stated	4,041	2.9	3,243	2.7	3,243	2.5	798
Total employed	132,549	96.4	116,729	96.3	116,729	92.3	15,820
Total unemployed	4,889	3.6	9,586	3.7	9,586	7.7	-4,697
Total labour force	137,438	100	126,315	100	126,315	100	11,123
Total in labour force	137,438	63.2	126,315	62.8	126,315	62.5	11,123
Total not in labour force	66,789	30.7	68,876	30.7	68,876	33.9	-2,087
Not stated	13,160	6.1	6,751	6.5	6,751	3.6	6,409
Total	217,387	100	201,942	100	201,942	100	15,445

Analysis of Western Australia labour force in July 2010 (table A1.12) shows that it experiences the highest participation rate of the states (68.9%), the lowest under-employment⁹⁴ rate (4.0%), the lowest labour force utilisation rate⁹⁵ (7.7%) and the lowest looking for full time work⁹⁶.

Table A1.12 Labour Force Status (Aged 15 Years and Over) States and Territories, July 2010 ⁹⁷

	Unemployment Rate			Labour Utilisation	
	Looking for f/t Work %	Total %	Participation Rate %	Under-employment Rate %	Labour Force Under-utilisation Rate %
New South Wales	5.2	5.1	63.2	5.6	11.0
Victoria	5.2	5.2	65.2	5.4	11.1
Queensland	5.4	5.1	67.5	5.1	10.5
South Australia	5.0	4.6	62.9	6.0	11.5
Western Australia	4.1	4.3	68.9	4.0	7.7
Tasmania	6.9	6.1	61.3	6.6	12.6
Northern Territory	2.1	2.4	73.6	2.5	5.2
ACT	2.9	3.2	72.6	4.4	8.3
Australia	5.1	5.0	65.3	5.3	10.5

⁹³ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <<http://www.id.com.au/profile/emrc>>
⁹⁴ See glossary for definition of under-employed workers
⁹⁵ See glossary for definition of labour force underutilisation rate
⁹⁶ See glossary for definition of Unemployed looking for full time work
⁹⁷ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <<http://www.id.com.au/profile/emrc>>



POPULATION GROWTH

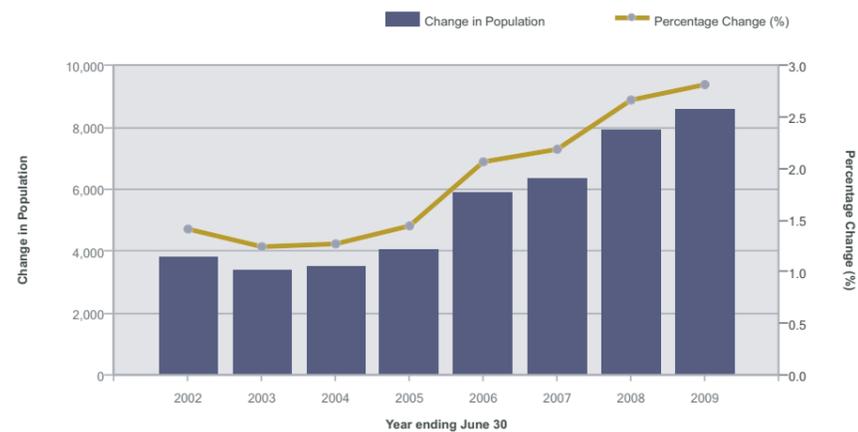
The population of Perth's Eastern Region grew by 2.4% during the 12 months ended 30 June 2008⁹⁸. This is above population growth for the State (2.1%) and Nation (1.5%) in the same period.⁹⁹ The change in estimated resident population in Perth's Eastern Region is shown in Graph A1.2.

RESIDENTIAL BUILDING APPROVALS

Residential building approval statistics are used in both the public and private sectors as a leading indicator of the general level of economic activity, employment and investment. Perth's Eastern Region is experiencing a steady growth in residential building approvals as shown in Graph A1.3.

Graph A1.2: Change in Estimated Resident Population, Perth's Eastern Region¹⁰⁰

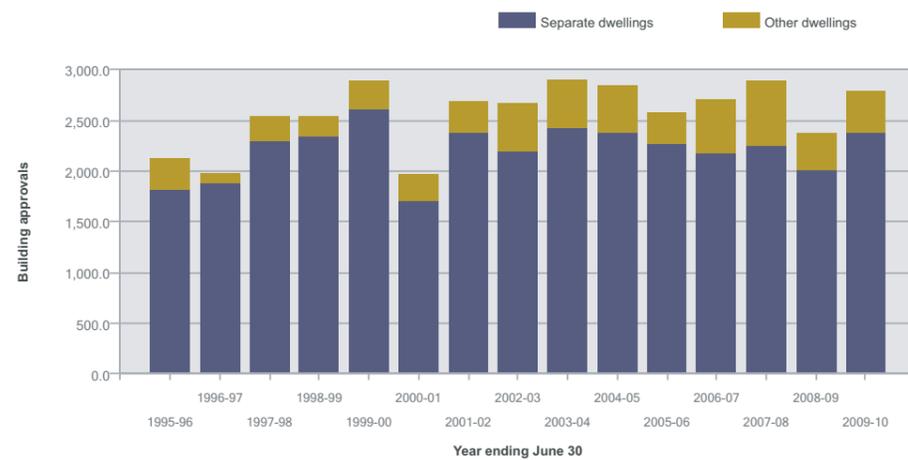
Change in Estimated Resident Population, Eastern Metropolitan Regional Council



Source: Australian Bureau of Statistics, 3235.0 - Population by Age and Sex, Regions of Australia, 2007

Graph A1.3: Residential Building Approvals, Perth's Eastern Region¹⁰¹

Residential Building Approvals, Eastern Metropolitan Regional Council



Source: Australian Bureau of Statistics, Building Activity, Australia, (catalogue number: 8752.0 to 8752.7)

⁹⁸ Australian Bureau of Statistics 2008, Population by Age and Sex, Regions of Australia, 2007, Cat. no. 3235.0, Australian Bureau of Statistics, Canberra, Australian Capital Territory, viewed 17 February 2010, <http://www.abs.gov.au>

⁹⁹ Australian Bureau of Statistics 2009, Population by Age and Sex, Regions of Australia, 2008, Cat. No. 3235.0, Australian Bureau of Statistics, Canberra, Australian Capital Territory, viewed 17 February 2010, <http://www.abs.gov.au>

¹⁰⁰ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

¹⁰¹ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

LEVEL OF DISADVANTAGE

SEIFA Index of Disadvantage

Four of the six Councils in Perth's Eastern Region are amongst the ten most disadvantaged Local Government Areas in

the Perth Statistical Division as identified by the 2006 Index of Relative Socio-Economic Disadvantage (SEIFA).¹⁰²

SEIFA is derived from attributes such as low income, low educational attainment, high unemployment, jobs in relatively unskilled

occupations and variables that reflect disadvantage rather than measure specific aspects of disadvantage, such as Indigenous people. The SEIFA Index for the Region and member Councils are shown in Table A1.13.

Table A1.13: SEIFA Index, Local Government Areas, Perth Statistical Division¹⁰³

Local Government Areas in the Perth Statistical Division Ranked from Greatest to Least Disadvantaged	2006 SEIFA Index of Disadvantage
Kwinana (T)	958.1
Belmont (C)	964.7
Armadale (C)	985.8
Bassendean (T)	987.1
Fremantle (C)	997.6
Victoria Park (T)	1002.4
Gosnells (C)	1003.5
Swan (C)	1004.4
Bayswater (C)	1010.2
EMRC Region	1014.1
Rockingham (C)	1014.2
Cockburn (C)	1019.0
Wanneroo (C)	1019.4
Stirling (C)	1020.4
Canning (C)	1037.6
Perth (C)	1045.9
Kalamunda (S)	1047.9
Serpentine-Jarrahdale (S)	1048.2
Vincent (T)	1049.7
Mundaring (S)	1051.8
Mosman Park (T)	1059.5
South Perth (C)	1065.5
Subiaco (C)	1074.6
Melville (C)	1080.0
East Fremantle (T)	1081.2
Joondalup (C)	1085.6
Claremont (T)	1090.4
Nedlands (C)	1118.5
Cambridge (T)	1119.0
Cottesloe (T)	1125.5
Peppermint Grove (S)	1139.3

¹⁰² profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

¹⁰³ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>



EDUCATION LEVELS

Highest Qualification Achieved

Analysis of the qualifications of the population in the Perth's Eastern Region in 2006 compared to the Perth Statistical Division shows that there was a smaller proportion of people holding formal qualifications of all types as shown in Graph A1.4.

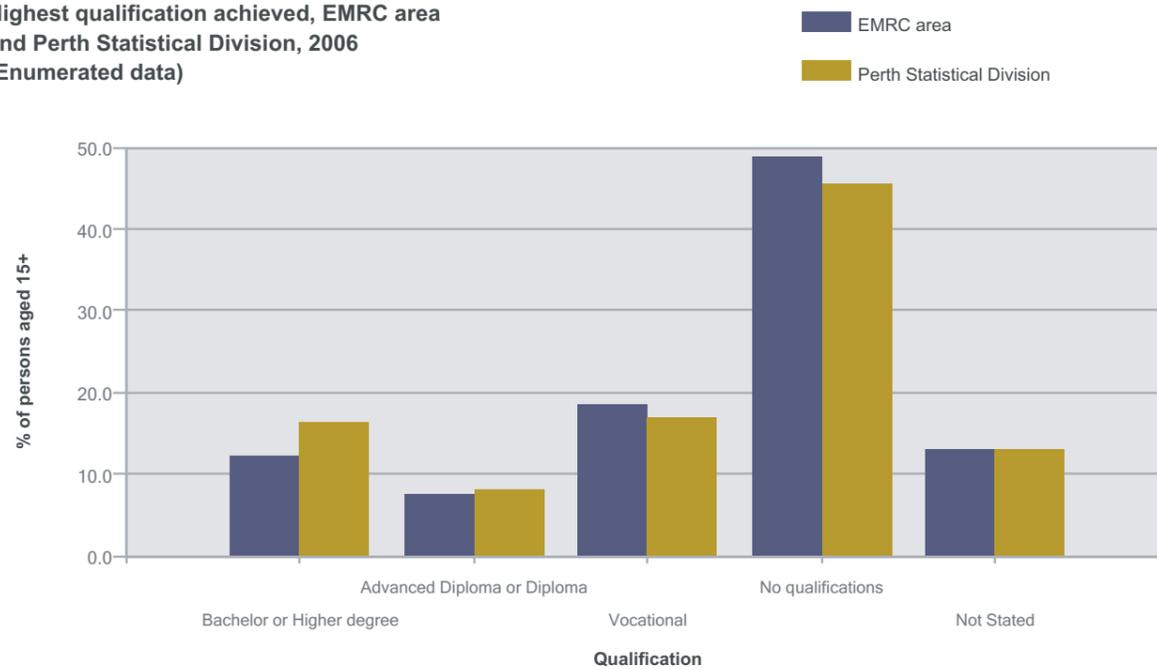
Overall, 38.2% of the Region's population held educational qualifications, and 48.9% had no qualifications. This compares with 41.2% and 45.5% respectively for the Perth Statistical Division.

The major and significant difference between the qualifications held by the population in Perth's Eastern Region and the Perth Statistical Division was:

- A smaller percentage of people with Bachelor or Higher degrees (12.2% compared to 16.4%).

Graph A1.4: Highest Qualification Achieved, Perth's Eastern Region and Perth Statistical Division, 2006¹⁰⁴

Highest qualification achieved, EMRC area and Perth Statistical Division, 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)

Level of Schooling

Analysis of the highest level of schooling attained by the population in Perth's Eastern Region in 2006 compared to the Perth Statistical Division shows that there was a larger proportion of people who had left school at an early level (Year 10 or less) and a smaller proportion of people who completed Year 12 or equivalent, as shown in Graph A1.5.

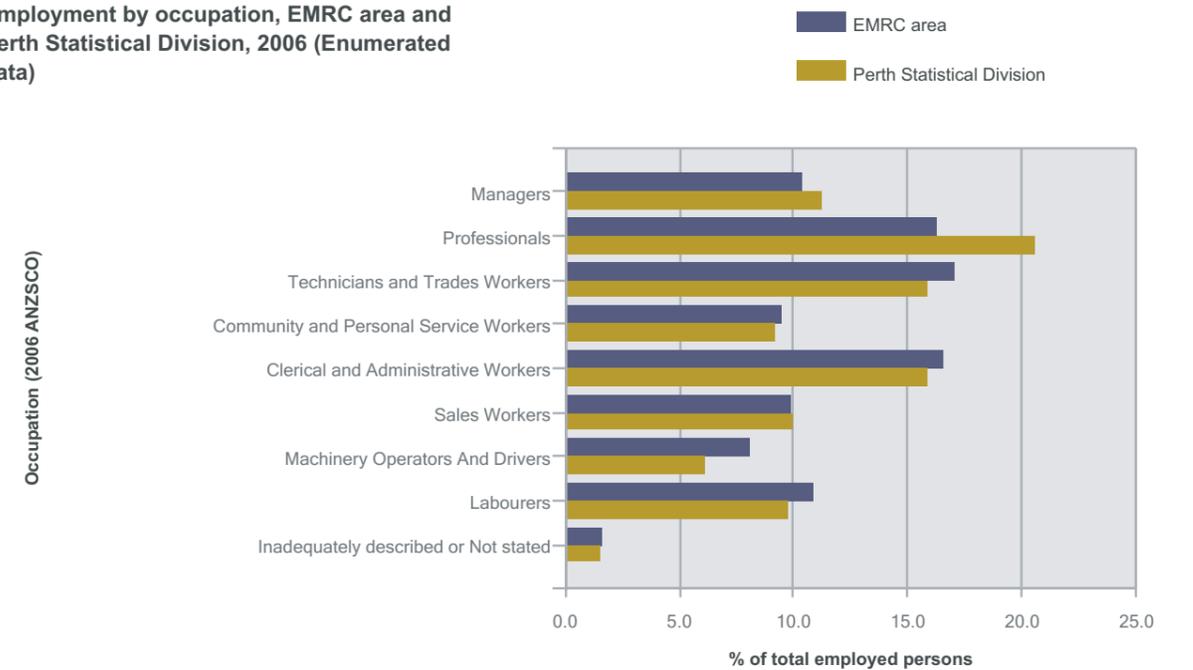
Overall, 36.9% of the population left school at Year 10 or below, and 41.1% went on to complete Year 12 or equivalent. This compares with 32.5% and 46.3% respectively for the Perth Statistical Division.

The major differences between the level of schooling attained by the population in Perth's Eastern Region and the Perth Statistical Division were:

- A larger percentage of people who left school at Year 10 or equivalent (25.9% compared to 23.1%), and;
- A smaller percentage of people who left school at Year 12 or equivalent (41.1% compared to 46.3%).

Graph A1.5: Highest Level of Schooling Completed, Perth's Eastern Region and Perth Statistical Division, 2006¹⁰⁵

Employment by occupation, EMRC area and Perth Statistical Division, 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)

¹⁰⁴ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

¹⁰⁵ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>



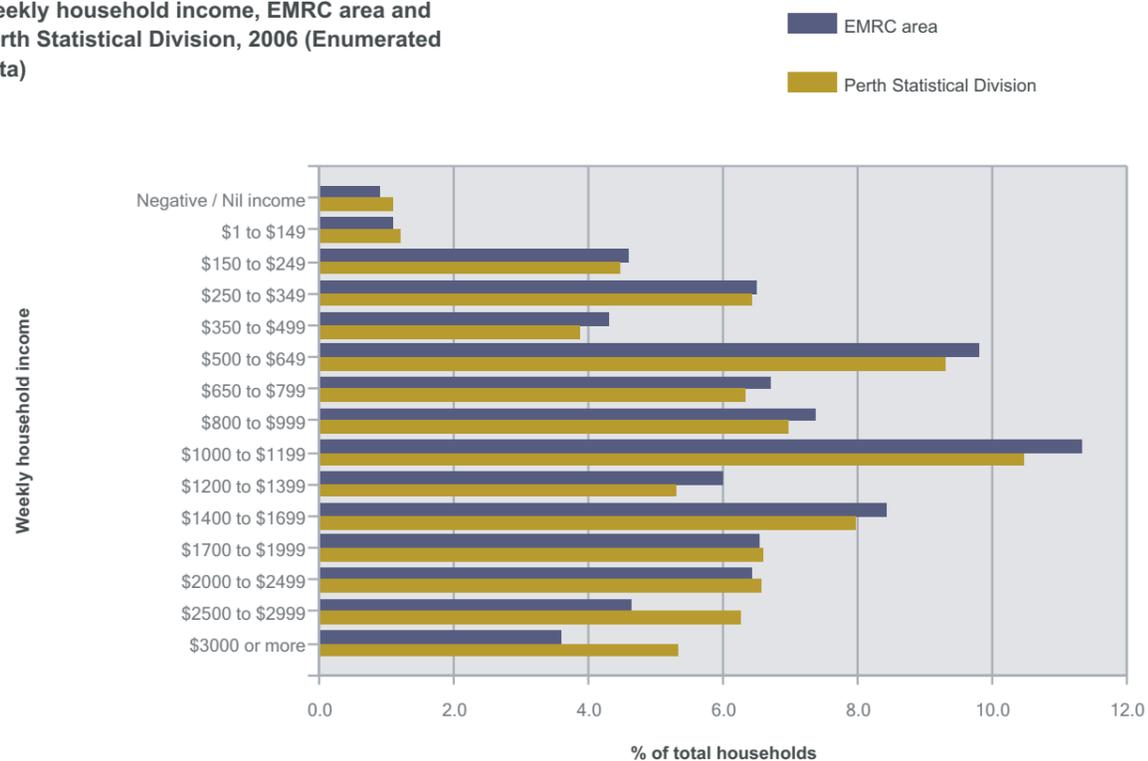
INCOME LEVELS

Analysis of weekly household income levels in Perth's Eastern Region in 2006 compared to the Perth Statistical Division shows that there was a smaller proportion of high income households (those earning \$1,700 per week or more) but a similar proportion of low income households (those earning less than \$500 per week) as shown in Graph A1.6.

Overall, 21.1% of households in the Region earned a high income, and 17.4% were low income households, compared with 24.8% and 17.0% respectively for the Perth Statistical Division.

Graph A1.6: Weekly Household Income, Perth's Eastern Region and Perth Statistical Division, 2006¹⁰⁶

Weekly household income, EMRC area and Perth Statistical Division, 2006 (Enumerated data)



Source: Australian Bureau of Statistics, 2006 Census of Population and Housing (Enumerated)

INDIGENOUS POPULATION

Analysis of the population characteristics for the population in Perth's Eastern Region in 2006 when compared to the Perth Statistical Division shows that there is a significantly larger proportion of Indigenous Australians residing in the Region.

Overall, 2.3% of residents in the Region are Indigenous Australians compared with 1.5% for the Perth Statistical Division as shown in Table A1.14.

Table A1.14: Population Characteristics, Perth's Eastern Region and Perth Statistical Division, 2001 to 2006¹⁰⁷

Population Characteristics	2006		Perth Statistical Division %	2001		Change 2001 to 2006 number
	Perth's Eastern Region Number	Perth's Eastern Region %		Perth's Eastern Region Number	Perth's Eastern Region %	
Indigenous population	6,203	2.3	1.5	5,709	2.2	494
Australian born	177,208	64.8	61.7	169,580	65.8	7,628
Overseas born	78,085	28.6	31.4	75,963	29.5	2,122
Australian citizens	233,066	85.2	82.8	224,933	87.3	8,133

The Indigenous population living in Perth's Eastern Region represents 29.1% of the indigenous population living in the Perth Statistical Division or 10.5% of Western Australia's total indigenous population, as shown in Table A1.15.

Table A1.15: Indigenous Population, Perth's Eastern Region, Perth Statistical Division, Western Australia and Australia, 2006¹⁰⁸

Indigenous Population	2006		
	Number	% of Total Population	% of Perth's Eastern Region's Indigenous Population
Perth's Eastern Region	6,203	2.3	100.0
Perth Statistical Division	21,325	1.5	29.1
Western Australia	58,711	3.0	10.5
Australia	455,031	2.3	1.3

¹⁰⁶ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

¹⁰⁷ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

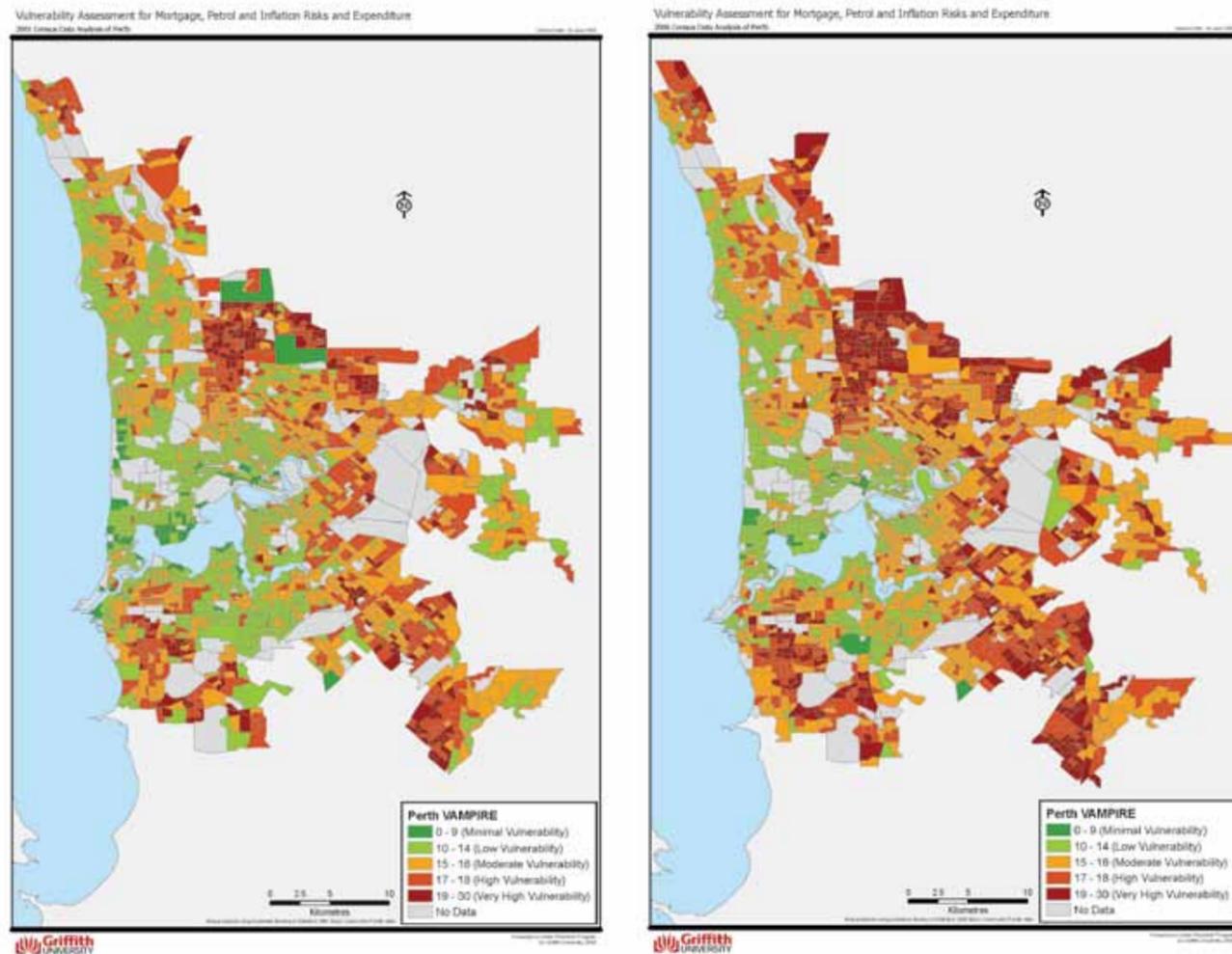
¹⁰⁸ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>



TRANSPORT VULNERABILITY

Perth became more oil and mortgage vulnerable between 2001 and 2006 according to the Vulnerability Assessment for Mortgage, Petrol and Inflation Risks and Expenditure (VAMPIRE) study¹⁰⁹. This index calculates the level of household vulnerability at the local level by combining Australian Census data on car dependence, mortgages and incomes at the collection district level. Diagram A1.2 rates Ballajura, Beechboro, Morley and Gooseberry Hill as 'Very High' vulnerability and Bassendean as 'High' vulnerability in 2001 and 2006.

Diagram A1.2: Vulnerability Assessment for Mortgage, Petrol and Inflation Risks and Expenditure, Perth, 2001 and 2006¹¹⁰



Reliance on private car to travel to work exacerbates vulnerability for residents in outer suburbs of the Region as shown in Table A1.16.

Table A1.16: Dependence of Residents on Private Car, Shire of Kalamunda, Shire of Mundaring, City of Swan and Perth Statistical Division, 2006¹¹¹

Local Government Authority	2006	
	Public Transport %	Private Car %
Shire of Kalamunda	5.4	71.6
Shire of Mundaring	5.7	69.8
City of Swan	5.9	72.1
Perth Statistical Division	8.5	68.8

Analysis of the method of travel to work by residents in the Local Government Areas of Kalamunda, Mundaring and Swan in 2006 when compared to the Perth Statistical Division shows that;

Shire of Kalamunda:¹¹²

- A larger percentage of car - as driver commuters (66.3% compared to 63.0%);
- An increase of 2,080 persons driving to work since 2001;

- A smaller percentage of train commuters (1.4% compared to 4.3%); and
- An increase of only 235 persons in 6 years travelling to work via bus.

Shire of Mundaring¹¹³

- A larger percentage of car - as driver commuters (64.8% compared to 63.0%);
- An increase of 767 persons driving to work by car since 2001;
- A smaller percentage of bus commuters (1.3% compared to 4.2%); and

- An increase of only 41 persons travelling to work via bus since 2001.

City of Swan¹¹⁴

- A larger percentage of car - as driver commuters (65.6% compared to 63.0%); and
- An increase of 5,072 persons driving to work since 2001.

Note that data on other member Council areas is not available.

¹⁰⁹ Dodson, J & Sipe, N 2008, *Unsettling Suburbia: The New Landscape of Oil and Mortgage Vulnerability in Australian Cities*, report, Urban Research Program, Griffith University, Nathan, Queensland, p. 34 - 35

¹¹⁰ Dodson, J & Sipe, N 2008, *Unsettling Suburbia: The New Landscape of Oil and Mortgage Vulnerability in Australian Cities*, report, Urban Research Program, Griffith University, Nathan, Queensland, p. 34 - 35

¹¹¹ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/emrc>

¹¹² profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/kalamunda>

¹¹³ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/mundaring>

¹¹⁴ profile.id 2010, .id consulting pty ltd, Collingwood, Victoria, viewed 16 February 2010, <http://www.id.com.au/profile/swan>



14.2 Appendix 2: Significant Developments

The State of Western Australia is predicted to enter another economic boom underpinned by major resource sector projects such as the Gorgon Gas project and Oakajee mid west port and rail development.

The resource sector of Western Australia also produces royalties that the Federal Government relies on to support the social needs of all Australians. In the macro context it should be noted that Perth's Eastern Region is the industrial hub that provides the logistical support and the supply chain required by the resource sector to effectively function. Large multinational companies such as WesTrac and Schenker Australia have their headquarters located in this Region. Other notable developments occurring in this Region are outlined as follows:

Transport and Logistics

- Perth Airport - \$2.4 billion is being invested in the airport site by Westralia Airports Corporation to consolidate domestic and international terminals and associated roads and facilities. The intrastate terminal will be operational by 2011.¹¹⁵
- Kewdale Intermodal Freight Terminal - \$17.9 million is being invested by the State government and private sector to redevelop the site including power, water, sewerage, drainage and roads.¹¹⁶
- Forrestfield Container Depot - \$14 million is being invested by Australia Western Railway Pty Ltd (AWR) to developing a

container depot in Forrestfield for the transfer of freight containers between rail and road transport. It will include rail connections to the adjoining main rail lines for access for trains to and from the Eastern States.¹¹⁷

Education

- Governor Stirling Senior High School - \$63 million is being invested by the State government to redevelop Governor Stirling Senior High School in Guildford, creating specialist centres in engineering and arts/media programmes.¹¹⁸
- Tertiary Education Campus - Approximately \$100 million is proposed to be invested by Raffles Education Corporation to establish the Region's first university campus which will commence operation in 2011 servicing an estimated 5,000 students by 2021 through learning programmes linked to industry opportunities in design, commerce, nursing and education.¹¹⁹

Health

- Midland Health Campus - \$360.2 million has been committed by the Federal and State governments to establish a state-of-

the-art facility in Midland replacing the Swan Districts Hospital Campus.¹²⁰

- Midland GP Super Clinic - \$10 million has been committed by the Federal and State governments to establish a clinic for practicing GPs, practice nurses, nurse practitioners and a range of allied health professionals.¹²¹
- Private Health Precinct - Planning is underway to develop a seven centre health research precinct located near the future Midland Health Campus.¹²²
- Midland Satellite Dialysis Unit - \$2.5 million has been invested by Baxter Healthcare and WA Health to provide critical health services locally to almost 100 patients. An additional \$21 million is being committed by the State Government to support services for five years.¹²³
- Kalamunda Hospital Campus - \$3.2 million has been committed to the redevelopment of Kalamunda Hospital surgical theatres. In addition \$482,000 is being invested to re-open Kalamunda's maternity service. It is planned to continue Kalamunda Hospital in a supportive role to the new Midland Health Campus.¹²⁴

Creative Industries

- Midland Atelier - \$10.5 million is currently being sought to extend the existing Midland Atelier creative design facility.¹²⁵

Energy Management

- Perth Solar Cities - \$73.5 million has been committed by industry, State and Federal governments to develop and monitor solar generation, energy efficiency and energy demand management initiatives delivered to approximately 106,000 residential households in Perth's Eastern Region from 2009 to 2013.¹²⁶

Waste Management

- Resource Recovery Facility - between \$50 and \$100 million is expected to be invested by the EMRC on behalf of its member Councils to develop a state-of-the-art Resource Recovery Facility and a Resource Recovery Park in Perth's Eastern Region.¹²⁷

Defence

- RAAF Base Pearce Redevelopment Stage One - \$154 million will be invested by

the Department of Defence to increase training output functions by replacing aging infrastructure and facilities to ensure the Base can support pilot training, as well as operational deployments and exercises.¹²⁸

Industrial and Commercial Land Developments

- The proposed industrial area in Forrestfield and High Wycombe represents a key development for the Shire of Kalamunda and its Economic Development Strategy. The location of the site adjacent to Perth Airport and Forrestfield Marshalling Yards and key road freight routes makes the site of strategic importance to both the Local and State Government in providing suitably located land for transport and logistic related industries. Stage 1 and 2 are expected to be ready for subdivision in early 2012 and Stage 3 in 2015-17;¹²⁹
- Other important areas for development that have been included in the Draft Industrial Land Strategy 2009 are Bullsbrook Townsite, Whiteman and South Forrestdale (as Priority Industrial

Sites), Hazelmere South (as an extension industrial site), and Bullsbrook townsite precinct, North Ellenbrook and Forrestfield (as possible future industrial sites);¹³⁰

- The Morley City Centre Master Plan and the Maylands Urban Design Framework will facilitate the development of a vibrant and sustainable city centre that responds to the needs of families, local businesses and the community to create a central hub of activity. In particular, it will generate ideas for improving landscaping, traffic-flow on city streets and access to public spaces to help build a community-friendly city centre.^{131, 132}

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¹¹⁸ Governor Stirling Senior High School 2009, Govo News, newsletter, Volume 34: Issue 4, December 2009, Governor Stirling Senior High School, Woodbridge, Western Australia, viewed 16 February 2010, <http://www.govo.wa.edu.au/newsevents/Govo%20News%20Flyer%20Dec%202009.pdf>

¹¹⁹ Weigall, F 2010, phone call, 19 January

¹²⁰ Constable, E (Minister for Education; Tourism) State Budget 2009-10: Record asset investment program for schools, media release, Government of Western Australia: Ministerial Media Statements, Perth, Western Australia, viewed 16 February 2010, <http://www.mediastatements.wa.gov.au/Pages/WACabinetMinistersSearch.aspx?Itemid=131838&minister=Constable&admin=Barnett>

¹²¹ Roxon, N (Minister for Health and Aging) & Jackson, S (Member for Hasluck) 2009, GP Super Clinic for Midland, media release, 08 September, Government of Western Australia: Department of Health, East Perth, Western Australia, viewed 17 February 2010, <http://www.health.gov.au/internet/ministers/publishing.nsf/Content/mr-yr09-nr-nr147.htm>

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¹²⁴ McGinty, J (Minister for Health) 2008, Eastern suburbs dialysis centre doubles patient capacity, media release, 17 July, Government of Western Australia: Ministerial Media Statements, Perth, Western Australia, viewed 07 April 2010, <http://www.mediastatements.wa.gov.au/ArchivedStatements/Pages/CarpenterLaborGovernmentSearch.aspx?Itemid=130530&minister=McGinty&admin=Carpenter>

¹²⁵ Barnett, C (Premier, Treasurer) 2010, Budget 2010-11: Strong foundations. Working together (East Metropolitan), media release, 20 May, Government of Western Australia: Ministerial Media Statements, Perth, Western Australia, viewed 22 July 2010, <http://www.mediastatements.wa.gov.au/Pages/RecentStatements.aspx?Itemid=133545>

¹²⁶ Karnovsky, C 2010, email, 14 January, Carolyn@form.net.au

¹²⁷ Western Power 2009, Western Power joins the Government to launch Perth's Solar City, media release, 05 November, Western Power, Perth, Western Australia, viewed 20 April 2010, <http://www.westernpower.com.au/subContent/aboutUs/mediaCentre/mediaReleases/Western_Power_joins_the_Australian_Government_to_launch_Perth.html>

¹²⁸ Eastern Metropolitan regional Council 2009, Start on the Biggest Investment Decision in the EMRC's History, media release, 16 March, Eastern Metropolitan regional Council, Belmont, Western Australia

¹²⁹ John Holland 2008, John Holland, Abbotsford, Melbourne, viewed 21 April 2010, <http://www.johnholland.com.au/Documents.asp?ID=6037&Title=John+Holland+Contracted+to+Deliver+%24154M+in+Works+at+RAAF+Base+Pearce>

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¹³¹ Western Australian Planning Commission 2009, Industrial Land Strategy 2009: Perth and Peel, draft, report, Western Australian Planning Commission, Perth, Western Australia, p. 15

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