



EXPANDING HORIZONS

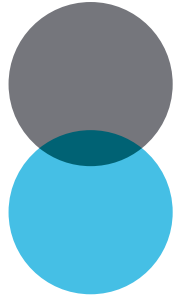
An Economic Development Strategy for a Global City



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



Lakeside Joondalup Shopping Centre – image courtesy of Greg Hocking



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INTRODUCTION

The City of Joondalup has come of age. It is at the cusp of an exciting new growth phase, one driven by unique competitive advantages in the growing knowledge and service sectors and underpinned by new technology and innovation.

This Economic Development Strategy is appropriately referred to as *Expanding Horizons* as it sets out a long term agenda to expand opportunities for business, investment, innovation, research and education.

The City has one of Western Australia's leading local governments setting a new standard in economic development and more focused on innovation and technology than ever before. The *Joondalup: Digital City Strategy* has already helped position the City as a leading centre for technology and innovation in metropolitan Perth.

Creating a framework for a more collaborative and regional approach while recognising the importance of a global outlook, maximises new economic and infrastructure development opportunities.

This Strategy supports such an approach working more proactively in partnership with key stakeholders from across government, industry, education and not-for-profit sectors.

The ultimate aim is to grow the local economy and provide employment opportunities for all with a particular focus on encouraging higher value add economic activity leveraging the City's key strengths and emerging global growth opportunities. This activity is poised to grow in the coming months and years as Joondalup emerges as a truly global city.



Joondalup City Centre

EXECUTIVE SUMMARY

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

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

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

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

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

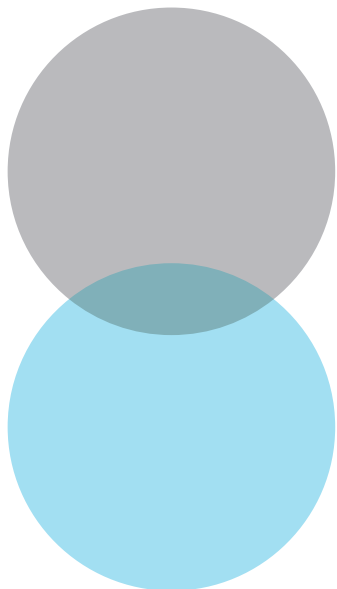
- Business Growth and Innovation
- Business Clusters and Investment
- Employment and Skills Development
- City and Regional Infrastructure.

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

- Global City
- Digital City
- Destination City.

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





Joondalup Resort

EXPANDING HORIZONS

At the time of developing this strategy, Western Australia had been experiencing the highest economic growth of any State in Australia. Although ongoing structural changes are expected for a number of business sectors and challenging times ahead in some areas, overall, continued economic growth is expected for the State.

This Economic Development Strategy, takes a long term perspective and presents a vision and plan for strategic economic growth through maximising business, investment and employment opportunities via a clear, measured approach to diversifying the economy, working in partnership with others.

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

Businesses create wealth and employment. However, universities and other education and training organisations are regularly viewed as drivers of economic and social agendas underpinning the growth of knowledge-based economies. Government also has an important role to play in facilitating and coordinating activity to support business and community needs.

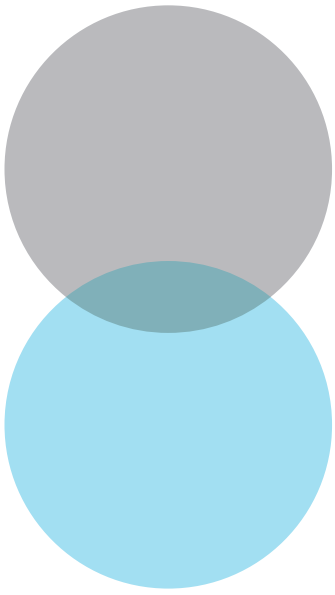
In order to fully realise the business and jobs growth that is required within the region to meet State and local targets, a more regional, collaborative and partnership led approach to economic development is required. Ultimately the success of the delivery of this strategy is the responsibility of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

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

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

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

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



Economic Development Explained

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

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

Joondalup 2022

The City of Joondalup Strategic Community Plan *Joondalup 2022* is the City's overarching guide for the future that outlines and drives a new vision for Joondalup. The long term strategic planning document highlights the City's commitment to achieving the vision and aspirations of its community as Joondalup continues its impressive growth and development.

Joondalup 2022 aims to be transformational and expand on the City's role as the commercial, civic and cultural hub of Perth's North-West Metropolitan Region. The six key themes of *Joondalup 2022* are as follows:

- Governance and Leadership
- Economic Prosperity, Vibrancy and Growth
- Financial Sustainability
- The Natural Environment
- Quality Urban Environment
- Community Wellbeing.

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

A VISION FOR ECONOMIC GROWTH

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

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

- Fosters economic growth and vitality
- Fosters local commercial activity and business prosperity
- Maximises local economic multiplier effects from major investment projects
- Enhances vibrancy and liveability of the area for local people

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

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

North West Metropolitan Perth – The Economic Challenge

It is estimated that by 2031 the population of the North-West Metropolitan Region* will have grown to 486,000. The regional level of Employment Self Sufficiency must increase from the current level of 45% to at least 60% if the negative impact of a relatively weak local employment base is to be moderated. Attracting the additional jobs required to achieve this level of Employment Self-Sufficiency presents a significant challenge for the Region in the coming decades. This equates to around 153,000 jobs in the Region by 2031, or approximately double the number of jobs currently available in the Cities of Wanneroo and Joondalup.

Expanding Horizons aligns with the State Government Planning framework document *Directions 2031 and Beyond* which sets a hierarchy of activity centres within Metropolitan Perth. Joondalup is currently recognised as a ‘Strategic Metropolitan Centre’ and a focus of *Expanding Horizons* is to support the case for Joondalup evolving to a higher order Primary Centre as well as encouraging stronger economic activity in other key centres such as Whitfords and Warwick.

*Cities of Joondalup and Wanneroo combined area

486,000 Population and household forecasts 2011 to 2036, prepared by id, September 2012.

Employment Self Sufficiency (ESS). This is the total number of jobs within the City of Joondalup divided by the total number of employed residents of the City of Joondalup, regardless of where those residents work (Western Australian State Government definition).

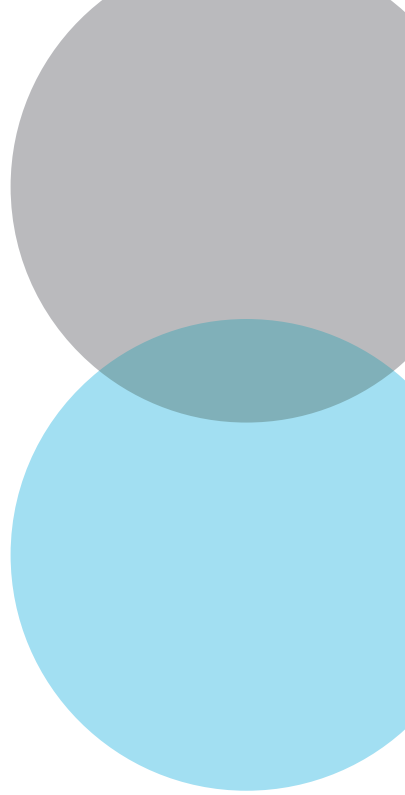


Image courtesy of Edith Cowan University

DRIVING A KNOWLEDGE ECONOMY

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

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

These strategic level jobs tend to be of higher skill level, with greater levels of remuneration and ultimately have greater economic value and impact. With continued investment in education, training and research and development in Joondalup, and the continued attraction of skilled migration, the area will continue to benefit from a growing educated and talented local population base.

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

Creating and developing sustainable competitive advantages around key economic assets, recognised industry strengths and global growth opportunities will maximise strategic employment opportunities for the local skilled, labour force.

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

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

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

CITY OF JOONDALUP DELIVERY MODEL

To develop the local economy to become more diverse, resilient and globally competitive, the City needs to transition from having primarily a population driven economy with high levels of out commuting to a more knowledge based higher value local economy with greater strategic employment opportunities.

In response, the City has developed an Economic Development Delivery Model with a sectoral, geographic and thematic approach including specialist cross cutting themes, all aligning with *Joondalup 2022*. The following graphic illustrates the overall economic development model for the City highlighting the key themes and areas of focus.

A number of key issues have been identified for the City requiring potential action and response. In addition a number of key drivers and mega trends at the national and global level need careful consideration at a strategic level. The key opportunities for the City however are highly significant and the *Expanding Horizons* Economic Development Delivery Model has been created in response to these background issues, drivers and trends.

Communication and Engagement

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

The communication and engagement activity underpins all of the core and specialist themes covered within *Expanding Horizons*. A key objective is the establishment of an external stakeholders group with senior representation from major employers, key organisations and the City of Joondalup.

Catalyst Projects

Under each of the Core and Geographic themes, 'Catalyst Projects' have been identified. These are defined as key strategic projects that will provide a significant positive impact and will enable a number of other activities and projects to occur.



Key Issues

Three quarters of resident workers commute out daily

Misalignment of local jobs with resident skills and qualifications

Lower levels of business growth (net business stock)

Lower presence of medium and large sized organisations

Higher proportion of population driven jobs

Lower proportion of strategic level jobs

Low Employment Self Sufficiency

Low Employment Self Containment

Key Drivers

Lower levels of business and worker productivity nationally

Rising energy consumption and costs

Water and food consumption

Global competition for investment and talent

Regional population growth impact e.g. transport congestion

Ageing population

Environmental sustainability

Social and community change

Technological change and connectivity

Global economic/ demographic shifts

Political change and influence

Key Opportunities

Attract new investment to create local employment

Encourage higher skilled/order jobs

Focus on global growth and specialist niche sectors

Support new business start-up and entrepreneurial activity

Promote business growth, productivity and innovation

Promote industry-research collaboration and innovation

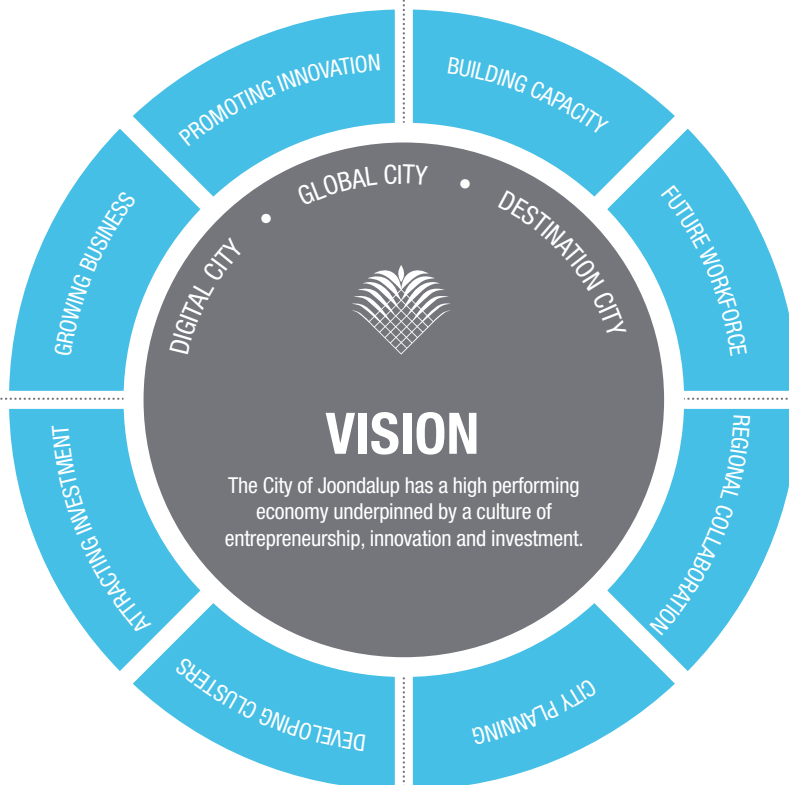
Attract larger corporate and government organisations

Support regional approach to economic development

Raise profile of region as a visitor destination



BUSINESS GROWTH AND INNOVATION



BUSINESS CLUSTERS AND INVESTMENT

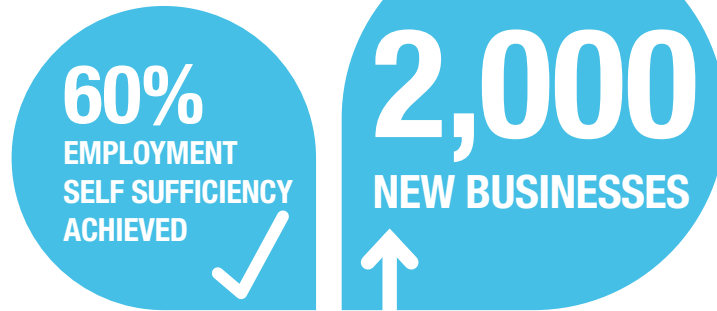


EMPLOYMENT AND SKILLS DEVELOPMENT



CITY AND REGIONAL INFRASTRUCTURE

LONG TERM OUTCOMES



Outcomes by 2031

↑	20,000 new jobs
↑	Increase in knowledge/service sector employment
↑	Increase in professional level occupations
✓	Larger corporate/government organisations located in the City
✓	Greater level of economic growth – GRP* five year trend exceeded
✓	Unemployment rate maintained under the State average
↑	Increase in new business start-ups
↑	Increase in medium and larger sized enterprises
↑	Increase in visitor numbers
✓	Increase in awareness of the City for research and technology
✓	Primary Centre Status achieved

*Gross Regional Product



JOONDALUP ECONOMIC SNAPSHOT

GROSS REGIONAL PRODUCT (GRP)

- GRP \$4.8 billion at 2012
- GRP up 47% in 10 year period from 2002 to 2012 (NIEIR)

BUSINESS COUNT

- 13,470 Local Business Count at 2012 (ABS)

LOCAL JOBS

- The City had almost 50,000 local jobs at 2013
- Over 10,000 new local jobs created between 2002 and 2012
- Job creation up 26% between 2002 and 2012 (NIEIR)

ESTIMATED RESIDENTIAL POPULATION

- 167,623 at 2013 (ABS)

UNEMPLOYMENT RATE

- 1.9% at December 2013 (ABS and DEEWR)

TOP 3 INDUSTRIES EMPLOYEE NUMBERS

1. Retail 9,410
2. Health Care and Social Assistance 7,960
3. Education and Training 7,224 (NIEIR 2011/12)

TOP 3 INDUSTRIES BUSINESS NUMBERS

1. Construction 3,687
2. Professional, Scientific and Technical Services 1,946
3. Rental, Hiring and Real Estate Services 1,071 (2012 ABS)

TOP 3 OCCUPATIONS LABOUR FORCE

1. Professionals 18,187
2. Clerical and Administrative Workers 13,946
3. Technicians and Trades Workers 13,835 (ABS – Census 2011)

TOP 3 QUALIFICATION FIELDS LABOUR FORCE

1. Engineering and Related Technologies 11,287
2. Management and Commerce 10,358
3. Health 5,625 (ABS – Census 2011)

TOP 3 OCCUPATIONS WORKFORCE

1. Professionals 8,666
2. Sales Workers 6,339
3. Community and Personal Services Workers 5,928 (ABS – Census 2011)

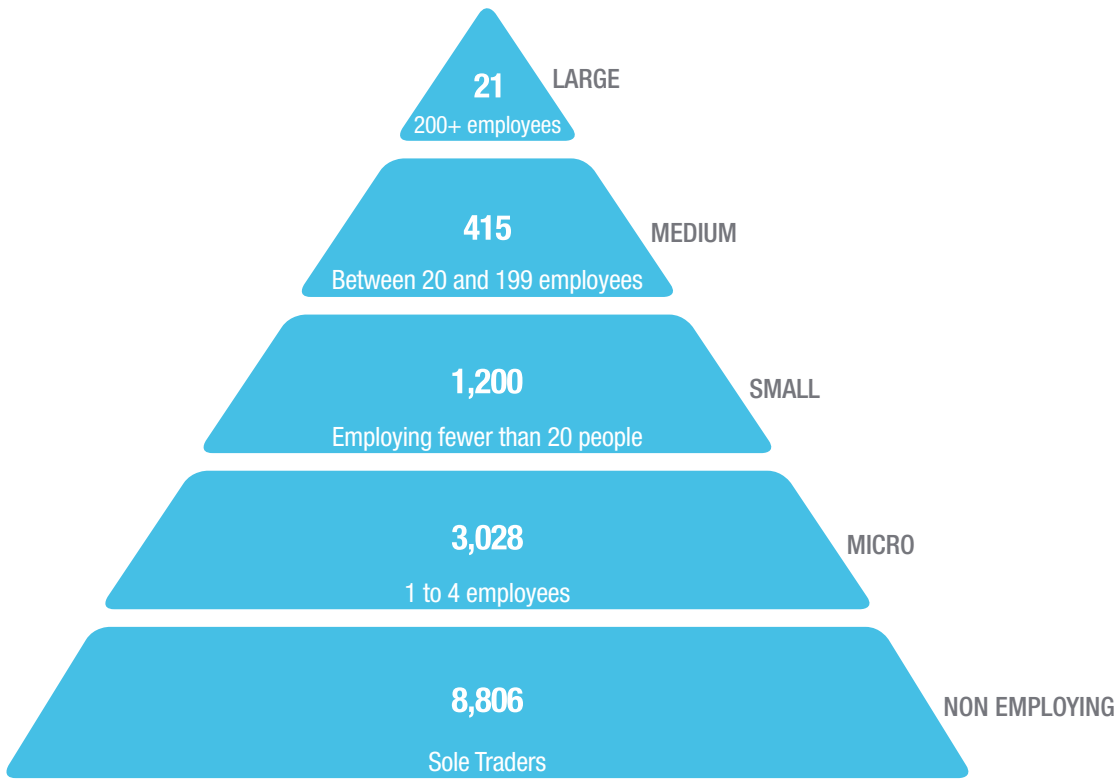
TOP 3 INDUSTRIES VALUE ADDED

1. Construction \$778.6 million
2. Health Care and Social Assistance \$561.7 million
3. Education and Training \$493.3 million (NIEIR 2011/12)

The local labour force refers to the people who reside in an area and are available to work. They may currently be either employed or unemployed. They may work either in the local area or elsewhere.

Workforce refers to the number of people who work in the area, regardless of where they live.

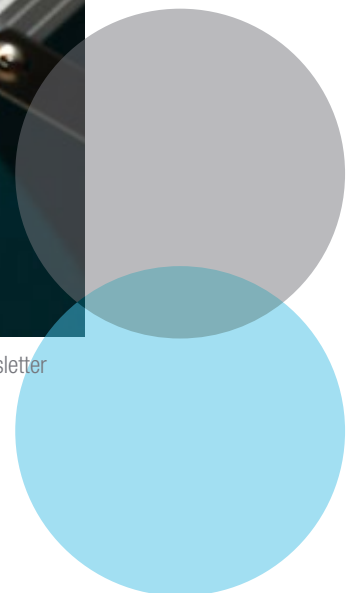
ABS – Australian Bureau of Statistics. NIEIR - National Institute of Economic and Industry Research. DEEWR - Department of Education, Employment and Workplace Relations.



CITY OF JOONDALUP BUSINESSES BY EMPLOYMENT SIZE *ABS Business Count June 2012*



Joondalup Business Edge newsletter



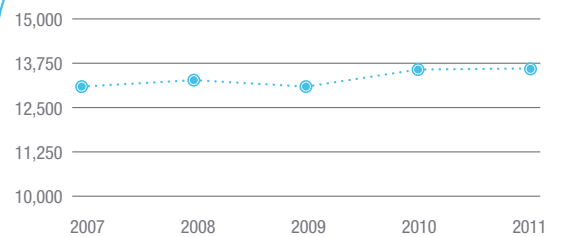
BUSINESS ANALYSIS

13,470
BUSINESSES

ABS 2012

**ABS DATA REFLECTS
MINIMAL GROWTH IN
BUSINESS NUMBERS
IN RECENT YEARS**

ANNUAL BUSINESS COUNT (ABS) ● Joondalup

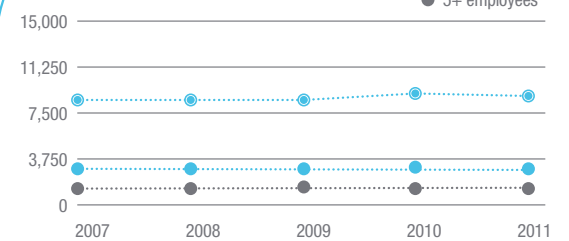


**THERE ARE FEW
BUSINESSES
EMPLOYING
5 OR MORE
PEOPLE**

5

ANNUAL BUSINESS COUNT (ABS)

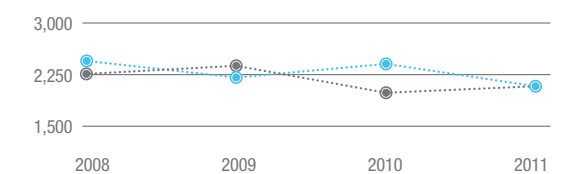
● Non employing businesses
● 1 to 4 employees
● 5+ employees



**BUSINESS
ENTRIES AND
EXITS RUN AT
SIMILAR LEVELS**

ANNUAL BUSINESS ENTRIES AND EXITS (ABS)

● Business Entries
● Business Exits



BUSINESS GROWTH AND INNOVATION

Core Theme Overview

Small and micro sized enterprises, with less than 20 employees, account for almost 97% of all businesses in the City of Joondalup. Their continued success is vital to providing local employment opportunities. Supporting start-up businesses and growing/sustaining existing businesses is essential to future job opportunities within the Region.

Goal

To support and encourage the growth of more sustainable, innovative and productive businesses to enhance local strategic employment.

Detail

There are approximately 13,470 registered businesses in the City (ABS 2012) with the vast majority being Small and Medium Enterprises (SMEs) and home based businesses. Facilitating the growth of these local businesses and supporting new start-up activity is critical to the continued diversification of the local economy and the drive towards higher self sufficiency through the creation of local jobs.

Identifying and nurturing those businesses with higher growth potential and enhancing their levels of innovation and productivity is key to unlocking greater wealth creation locally and generating more employment.

There is significant opportunity to increase the level of business start-up and business growth activity in the City. The net stock of businesses has remained relatively static over the past five years, despite the continued growth of the regional population and thus enhanced potential for new business opportunities.

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

This involves establishing infrastructure and programs that encourage and enhance collaboration, networking and knowledge transfer between entrepreneurs, SMEs and researchers for example. The provision of relevant information, contacts and dedicated support at the appropriate stages is also vital.

It is important to have a holistic view on this area of activity to ensure that there is a much greater partnership approach. The aim is to ensure ongoing delivery of more generic business support activity but enhance this through the delivery of more specialist program activity. This may involve various organisations (public and private) or business associations, with a focus on promoting innovation and supporting companies with high growth potential.

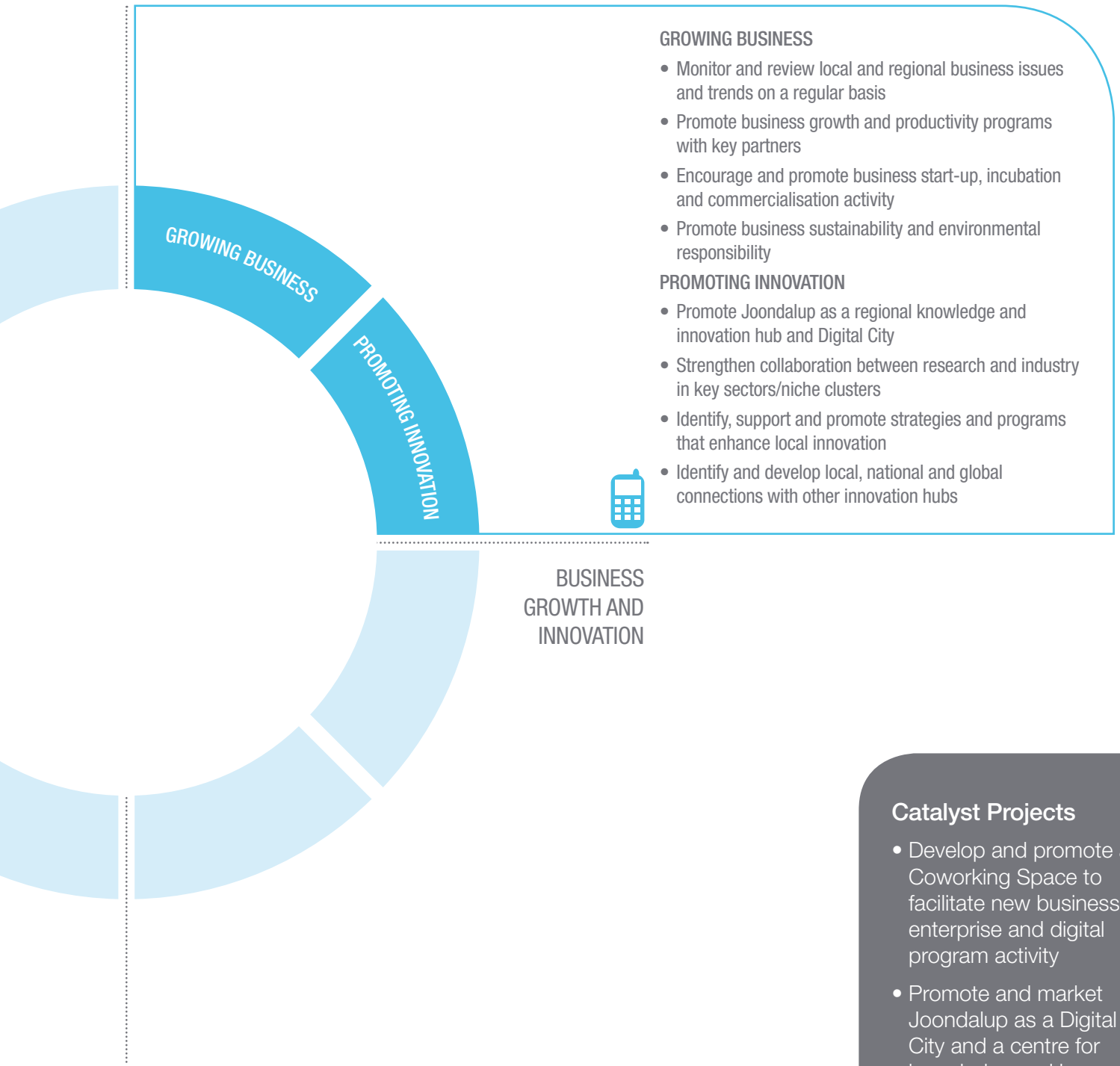
Innovation is a key focus. Research from across the world has shown that innovation is the most important driver of long term productivity and prosperity. Innovative businesses create more jobs, grow faster and ultimately contribute more to regional economic growth.

This Strategy recognises this fact and more broadly the important role of the various education/research organisations involved in the Joondalup Learning Precinct and other education/training organisations connected with the City. These organisations contribute to local innovation processes in a variety of ways.

To generate new wealth and support local job opportunities in the City, the key aims of this core theme include:

- to support and encourage new start-up activity
- encourage and leverage industry-research collaboration
- retain and nurture high growth companies
- promote innovative business activity
- enhance the innovation ecosystem.





BUSINESS CLUSTERS AND INVESTMENT

Core Theme Overview

Clusters* are important to the local economy and are underpinned by successful relationships and networks between businesses and organisations. To drive sustainable economic growth the City needs to understand, develop and support business clusters.

Economic development also requires identification of key opportunities and targeted investment attraction. Future employment generated through this activity should be diverse and aligned to local workforce skills.

Goal

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

Detail

Joondalup 2022 recognises the importance of clusters and promoting industry niches and this Economic Development Strategy places a high priority on identifying and creating competitive advantage around key industry strengths and clusters of economic activity to help drive future economic growth and investment within the City.

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

It is important to recognise that industry clusters are more than just a group of firms within the same industry sector. There are a range of potential stakeholders such as government,

education and other supporting organisations. It is the synergy and dynamic relationships and networks that underpin a successful approach to developing clusters within a local economy. There may be multiple operating scales, with regional, national and even international dimensions to some clusters.

Over the past decade, a global shift toward a knowledge-based economy has accelerated dramatically. Attracting investment and diversifying a local economy is no longer simply about providing adequate physical infrastructure and land to attract new business. The attraction and retention of creative talent and knowledge is critical. A location with a higher quality of life will attract skilled, creative and diverse groups of workers which in turn will improve the attraction and retention of innovative businesses and the sustainability of clusters.

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

In terms of strategic marketing and brand development, leveraging the national and international profile of Perth and Western Australia State branding as well as strengthening the local and regional identity is important to consider in any strategic marketing activity to attract investment, particularly from overseas.

Catalyst Projects

- Identify, support and promote the development of specialist business and research centres in key business sectors
- Develop targeted information and communication formats to attract potential investors.

*A cluster is defined as an inter-connected group of businesses and organisations that operate in a geographical location.

The City has capacity to grow its medium to large employer base with opportunity for attracting larger scale corporate and government organisations to the City. The decentralisation of corporate and government activity from the central Perth metropolitan region offers new investment attraction opportunities for the City in the medium to longer term.

Significant potential also exists with identifying commercial land for high value added based activity. Positioning the City as a primary hub for knowledge and technology based activity will enhance strategic investment and employment in the future. The concept of an innovation or technology precinct is a priority consideration and correlates strongly with the Digital City theme.



DEVELOPING CLUSTERS

ATTRACTING INVESTMENT

DEVELOPING CLUSTERS

- Research and identify key local and regional business clusters
- Promote local value chain activity to enhance growth and investment in key clusters
- Identify opportunities in niche clusters to enhance investment and employment
- Identify emerging sectors and future business growth opportunities

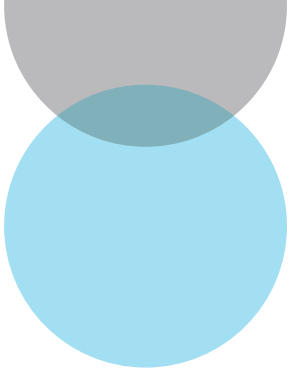
ATTRACTING INVESTMENT

- Track key metrics relating to business investment and enhance internal processes and communication
- Promote key development sites and commercial premises to attract strategic employers
- Develop marketing collateral and manage targeted campaigns to attract investment
- Develop partnerships with key agencies and organisations for local and regional level activity



BUSINESS
CLUSTERS AND
INVESTMENT





Mullaloo Beach



Academy of Digital Technologies – image courtesy of West Coast Institute



HBF Arena, Joondalup – image courtesy of VenuesWest



Joondalup Private Hospital – image courtesy of Ramsay Health Care



Perth International Airport – image courtesy of Edith Cowan University

EMPLOYMENT AND SKILLS DEVELOPMENT

Core Theme Overview

Matching local jobs to local skills and developing the City's future workforce to meet the anticipated needs of the business community is a priority. Critical success factors in the local job market include:

- The attraction and retention of creative and talented workers
- Leveraging job opportunities for those currently disengaged from the labour market
- Enhancing the skills and productivity of the existing workforce

Goal

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

Detail

The City has an estimated population of 167,623 (June 2013 ABS). According to the latest census the City had 83,033 total employed residents. Of these employed residents, only 22,191 (26.7%) actually worked in the City with a significant proportion therefore leaving each day for employment elsewhere. This measurement of local residents working within the Local Government Area is typically referred to as 'self containment' and is an important measure of how closely local jobs match the local available labour force.

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

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

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

The creation of any new jobs in an area is important however creating jobs to meet local requirements and matching skills provision is critical. A range of important influencing factors are taken into consideration to fully understand the dynamics of the local labour market. These include local demographic data, ageing workforce, participation rates, worker productivity, employability skills, local education/training community and levels of skilled migration.

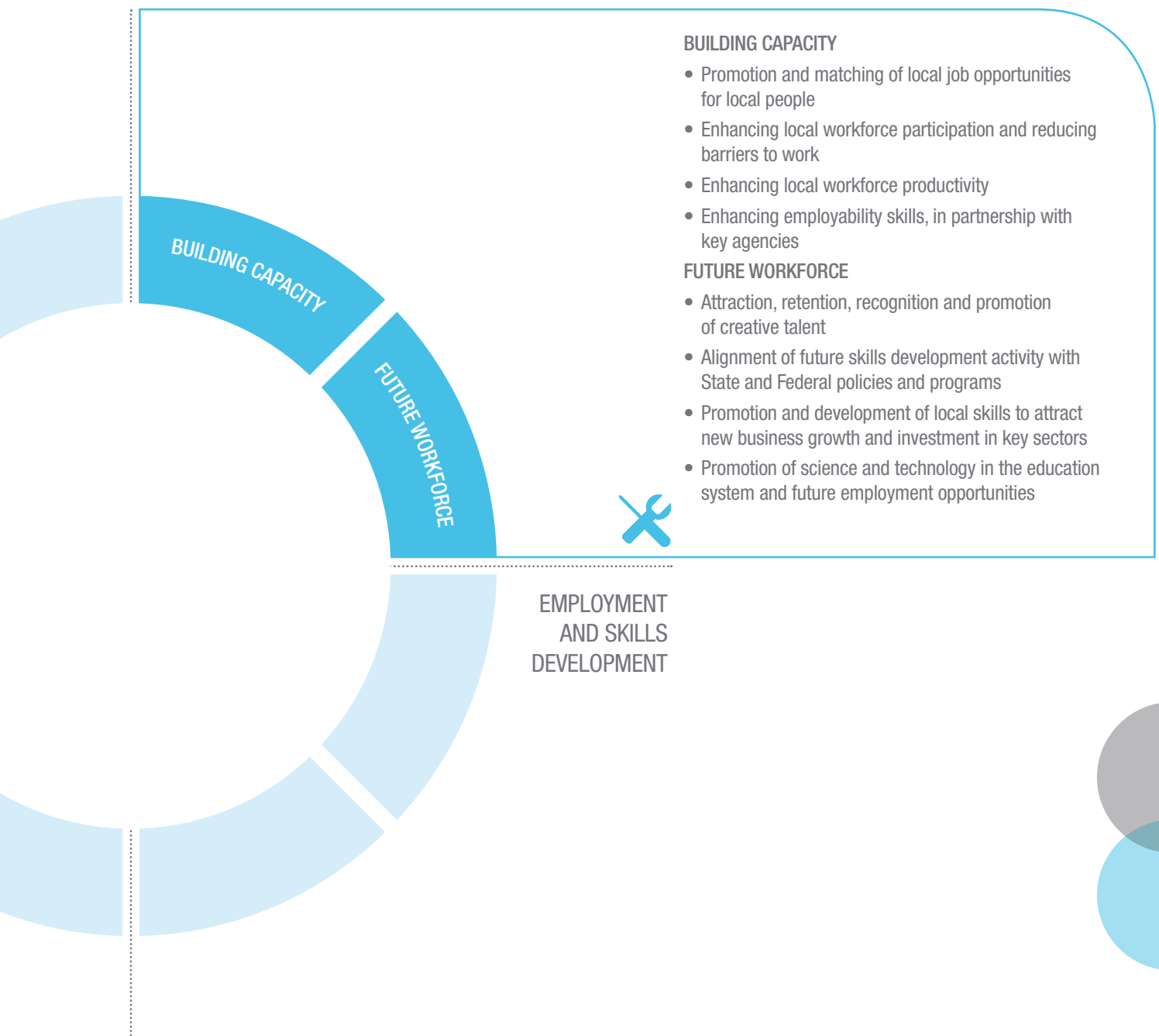
Understanding the future skills requirements of the City's key business sectors and matching this with the evolving, local labour force is challenging. Ensuring that the local labour force is productive, resilient to change and fully engaged with the opportunities that arise within the local business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

Catalyst Projects

- Develop strategic partnerships and marketing activity to promote local employment, research, education and training opportunities
- Develop strategic partnerships with education and industry to connect local and global talent with future job opportunities.

A collaborative approach engaging local schools and educational and training institutions such as Edith Cowan University, West Coast Institute, NECA College of Electrical Training, MTA WA Automotive Institute of Technology and the WA Police Academy is fundamental to achieving this aim.

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



CITY AND REGIONAL INFRASTRUCTURE

Geographic (Place Based) Theme Overview

Sustainable economic development is enabled by appropriate transport, telecommunications and urban infrastructure. This allows businesses and organisations to be connected and for the workforce to effectively travel between these places. This requires effective planning and collaboration at a regional level.

Furthermore, land must be available for the development and construction of new commercial spaces that will add to the vibrancy of activity centres and generate local jobs.

Goal

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

Detail

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

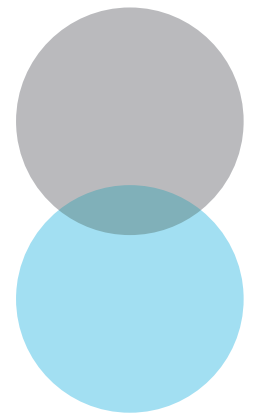
For the City to meet its Employment Self Sufficiency target it must attract economic activity that is beyond local population driven and have a greater focus on regional and strategic employment driven activity. Effective spatial planning in key centres will ensure greater diversity and density of economic activity.

Some flexibility in the planning controls in key centres is important, particularly for the ongoing sustainable growth and vibrancy of the Joondalup City Centre which provides the only environment within the Local Government Area that can develop to the scale to attract the significant and diverse economic activity that is required.

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

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

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



Catalyst Projects

- Develop an Activity Centre Structure Plan for Joondalup City Centre to enhance commercial activity in key economic precincts
- Progress a regional economic development framework identifying key collaborative projects.

Regional Governance has an important strategic focus. Working closely with the City of Wanneroo, a more regional approach to economic and infrastructure development is being progressed with a number of areas of potential activity and deliverables identified including investment attraction, transport infrastructure, digital telecommunications, lobbying and advocacy.

Working in collaboration with other Local Government Areas, State and Federal Government Departments and other key stakeholders in a more cohesive, integrated way will ensure greater synergy and will maximise opportunities for future economic growth of the North West Metropolitan Perth Region.

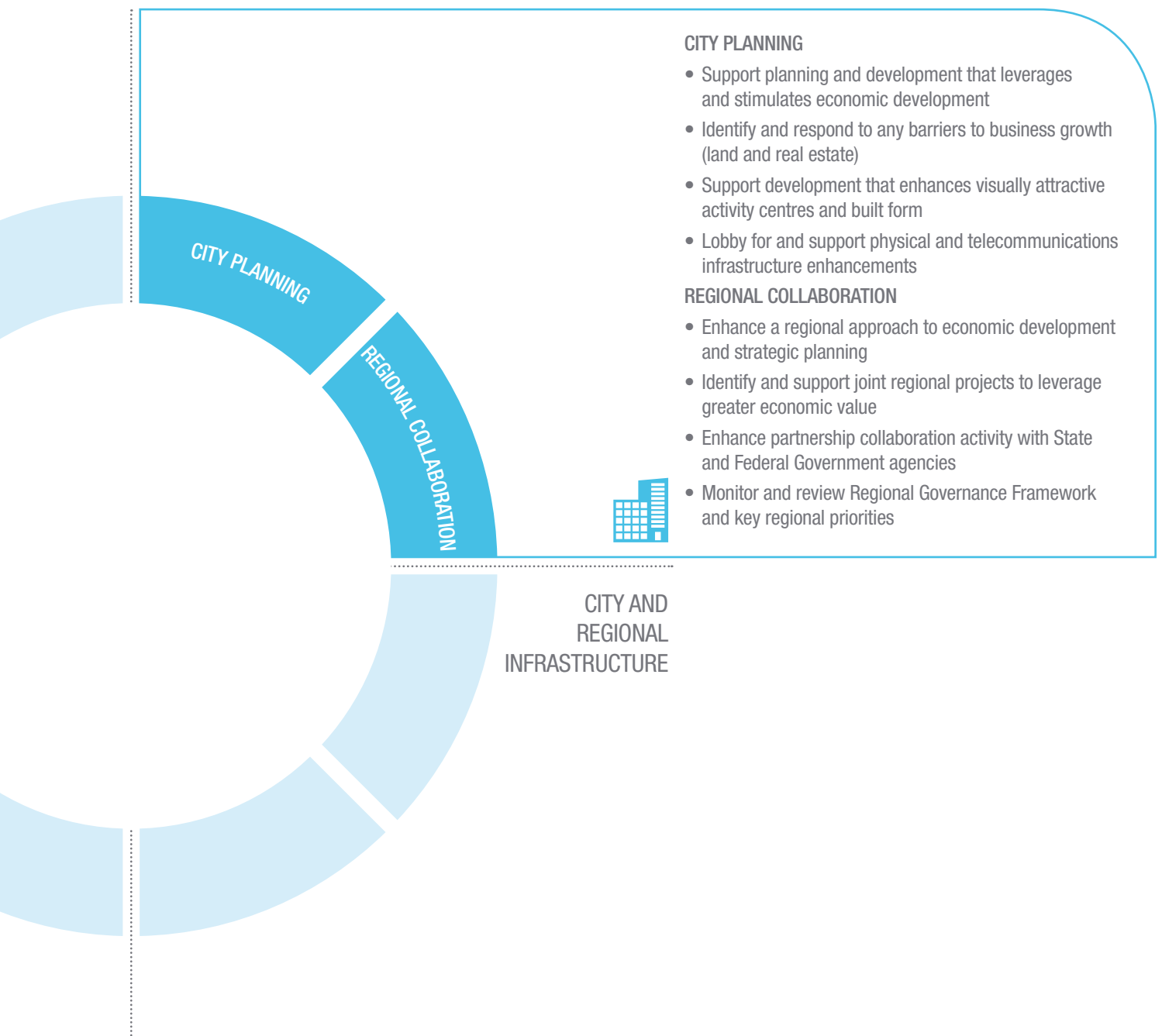
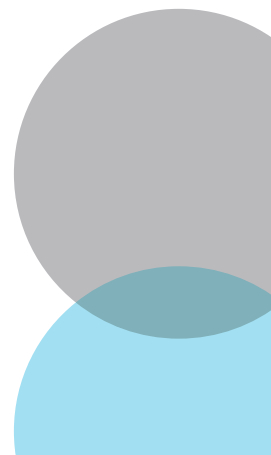




Image courtesy of Edith Cowan University



SPECIALIST THEMES

To support the Core and Geographic themes of *Expanding Horizons*, three Specialist Themes have also been identified as a high priority for the City and relate back to *Joondalup 2022*. These are 'cross cutting' themes and therefore essentially underpin all activities.



GLOBAL CITY

Fundamental shifts in the structure and influence of the global economy present many challenges but also many opportunities for Australia.

The 'BRIC' economies (Brazil, Russia, India and China) in particular will generate new sources of competition and also potentially provide significant trade and investment opportunities for Western Australia.

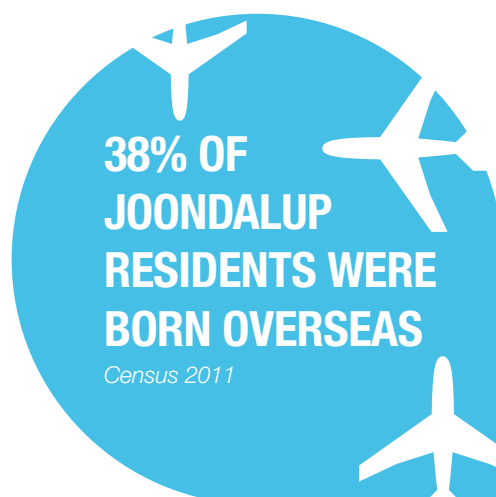
Due to its geographical position (distance and time zone) Western Australia has a competitive advantage over other States and countries to capitalise upon potential opportunities presented by the growth of the Asian economies.

The global positioning and focus of Western Australia and Cities such as Joondalup is vital. Sharing the same time zone as a highly significant and growing proportion of the world's population presents a very strong and compelling business case and an exciting opportunity to promote investment and trade flows, attraction of highly skilled workers and development of key research and industry links relating to recognised strengths.

Since 2004 the City has maintained a formal Sister City relationship with the City of Jinan of Shandong Province of the People's Republic of China. The relationship with Jinan is expected to bring about economic, socio-cultural and environmental benefits between the two cities and has resulted in a positive and proactive relationship built up between the two cities, particularly in the area of socio-cultural exchange and educational related activity.

Each of the core strategic themes of this Strategy has a 'Global City' dimension with examples including the following:

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



DIGITAL CITY

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

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

The digital economy presents exciting opportunities – how we engage with technology to connect with each other, improve our health, access learning and educational opportunities, transact business and grow small businesses from 'start-ups' to global businesses.

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

The *Joondalup: Digital City Strategy* identifies seven broad strategies, aligned with *Joondalup 2022*, to help lead, enable and empower the Joondalup communities in advancing a digital future.

Digital City Strategies

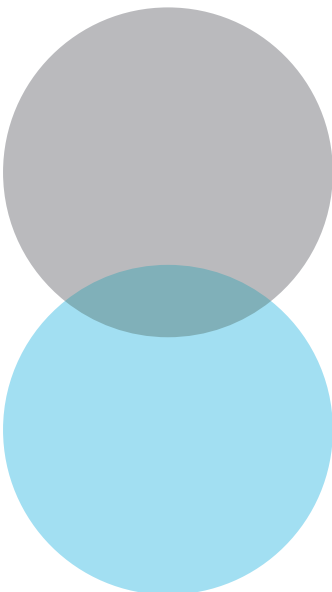
1. Lead and position Joondalup as a digital city.
2. Build infrastructure, platforms and content.
3. Actively grow the City's internal digital capacity.
4. Realise Joondalup's potential as an education city.
5. Build small business capacity and confidence.
6. Grow and attract new business in innovative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

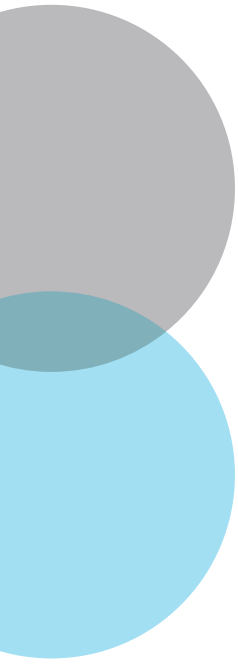
These strategies underpin and support the core themes outlined in *Expanding Horizons* resulting in a greater technology focus in key areas and projects.

As a result important initiatives are considered including:

- Teleworking and coworking hubs
- Broadband infrastructure

- Programs to enhance the digital capacity of small businesses
- Promotion of science and technology in the education sector
- Innovative projects to promote and enhance business and tourism.





Hillarys Boat Harbour

DESTINATION CITY

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

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

This overall approach also recognises:

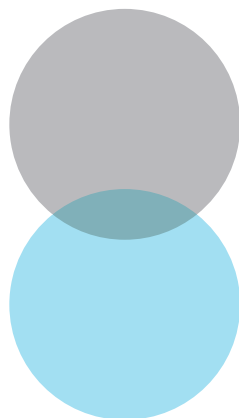
- Arts and cultural activity (festivals, events and the Joondalup Performing Arts and Cultural Facility)
- Major infrastructure developments (such as Ocean Reef Marina)
- Growing retail and hospitality offer
- Regional attractors including Yellagonga Regional Park and coastal destinations such as Hillarys Boat Harbour.

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

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

Main Strategic Focus Areas include:

- Promoting Regional Attractors e.g. Hillarys Boat Harbour
- Building capacity and enhancing service delivery of tourism businesses
- Identifying global tourism trends and targeting of key markets and groups
- Enhancing the day/evening economy and destination experience in key visitor precincts
- Enhancing the diversity of accommodation provision
- Supporting the development of new infrastructure to enhance the destination product
- Recognising and promoting key themes – nature, heritage and culture
- Enhancing the retail and leisure offer
- Application and promotion of new technologies.



BUSINESS SECTOR FOCUS

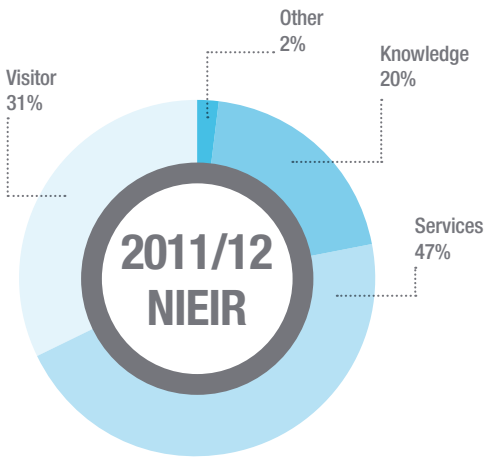
Expanding Horizons presents a much greater opportunity to leverage additional employment creation in key sectors as a result of the various activities outlined and to exceed national trends where possible. In particular the focus on leveraging research strengths, clustering activity and an enhanced approach to investment attraction and promotion will ensure that the City maximises local jobs growth in the key areas identified.

The Strategy presents not only a greater focus on creating strategic employment

in knowledge based and service sectors, it also places a stronger emphasis on diversifying the local economy and therefore enhancing future resilience by reducing an over reliance on one or two industry sectors.

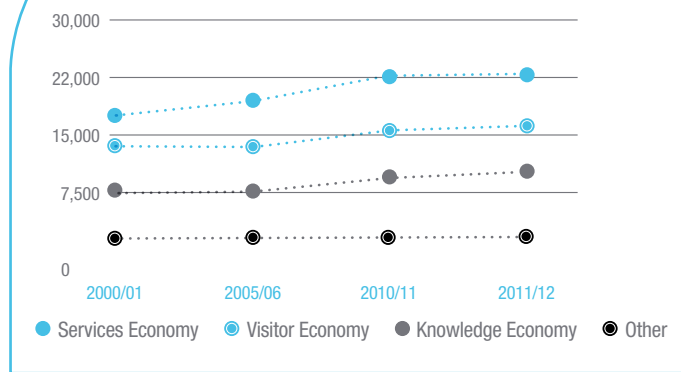
The framework behind this strategy provides a methodology of grouping sectors under broad headings for ease of presentation, reporting and measurement. The main groupings are denoted as Visitor Economy, Services Economy and Knowledge Economy.

SECTORAL JOBS ANALYSIS



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

SECTORAL JOB GROWTH



VISITOR ECONOMY

The Visitor Economy represents economic activity that relates to attracting and servicing visitors in the City either on a regular basis e.g. daily shopping trips, or unique visitations e.g. for an event.

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

For the purposes of this strategy the term applies to the following key sectors (although it is acknowledged that other

activities within the services sectors attract visitors to the City):

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

The specialist cross cutting theme 'Destination City' is outlined earlier within this Strategy and provides a specific focus on activities related to the visitor economy.

SERVICES ECONOMY

The service sectors form the greatest share of employment for the City with 22,823 jobs (mid-2012 NIEIR) representing almost 47% of all local employment. Much of this employment is focused around key activity centres and primarily the Joondalup City Centre in terms of commercial office based activity such as financial services, real estate and administration.

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

- Administrative and Support Services
- Construction
- Electricity, Gas, Water and Waste Services
- Financial and Insurance Services
- Health Care and Social Assistance

- Mining Services
- Other Services
- Public Administration and Safety
- Rental, Hiring and Real Estate Services
- Transport, Postal and Warehousing
- Wholesale Trade.

The most significant service sectors (by employment) for the City are:

1. Healthcare and Social Assistance (7,960 jobs)
 2. Construction (4,828 jobs)
 3. Public Administration and Safety (2,343 jobs).
- (NIEIR 2011/12)

KNOWLEDGE ECONOMY

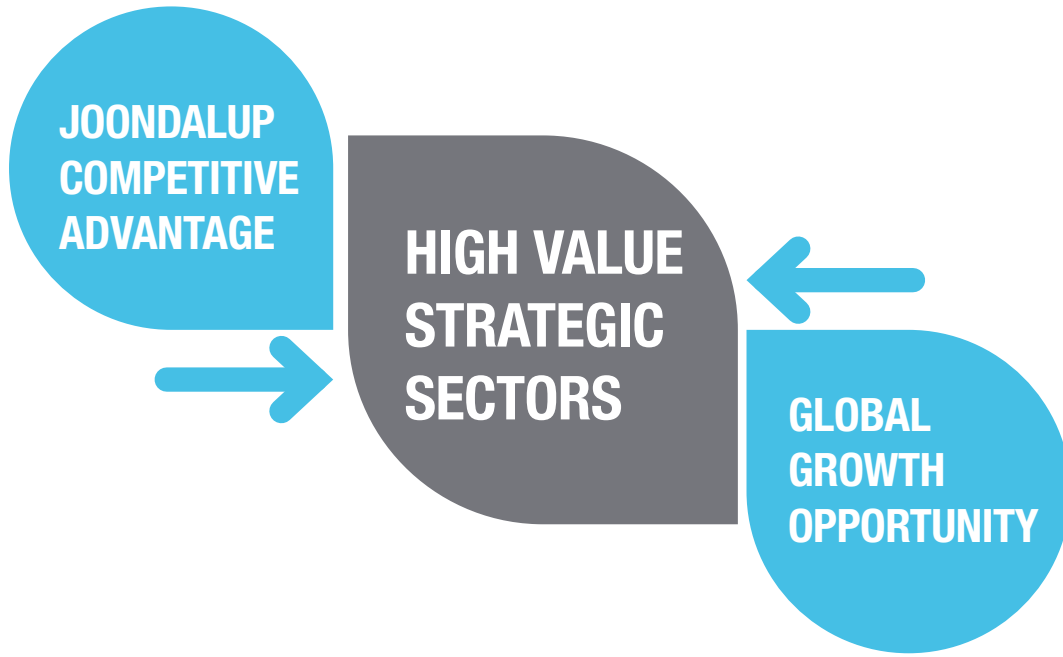
The Knowledge Economy is harder to define and cannot be fully described in the industrial classification system. Knowledge often forms part of the activities of a business or organisation yet is not its main activity. However for the purposes of this Strategy and for ease of measurement and reporting,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

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

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

The City has a significant local labour force working in these key knowledge sectors, not only education but in particular areas such as professional and scientific services and information media and telecommunications where there is a particularly high level of daily out commuting. This competitive advantage enhances any business case for the attraction of new investment to Joondalup.

Creative industries also requires a specific mention as this collective, although difficult to define, provides a significant contribution to the nation's economy and culture and is vital to Australia's prosperity. The City has a growing awareness and interest in this area from community based cultural events to specialist areas of creative activity such as 3D animation at West Coast Institute's Academy of Digital Technologies.



Shenton House and Joondalup Health Campus

HIGH VALUE STRATEGIC SECTORS

A number of industries, including specialist niche activity, have been identified as high value strategic sectors for the City. These include sectors where Joondalup offers a particular competitive advantage or recognised strength e.g. specialist research or existing activity, as well as presenting a national or global growth opportunity.

These high value strategic sectors present the strongest opportunity for Joondalup to position itself to maximise prosperity and economic growth in the future.

High Value Strategic Sector	Specialist Focus Examples	JCA	GNGO
Health/Medical	ehealth; Cancer Care; Exercise Science; Mental Health; Health and Wellness; Aged Care; Nursing and Midwifery	✓	✓
Information Communication Technologies	Computing and Cyber Security; Software Development; IT Systems	✓	✓
Education	Education Software/Systems; International Education; Specialist Education; Online Education; Private Schooling	✓	✓
Engineering and Technical Education	Advanced Engineering; Electron Science; Microelectronics; Microphotonics and Nano-Technology; Electrical Engineering/Training; Automotive Engineering	✓	✓
Finance and Business Services	Finance, Wealth Management; Business Services; Contact Centres	✓	✓
Public Administration	State/Federal Government Agencies; Legal/Security Organisations	✓	✓
Creative Industries	3D Animation and Film; Web and Mobile Technologies; Augmented Reality	✓	✓
Retail	Specialist/International Retail; Online Retail; Parcel Distribution; Major Shopping Centres	✓	✓
Tourism	Nature/Coastal Tourism; Marine Activity; Visiting Friends and Relatives; Asia Pacific Markets; Hospitality Management; Corporate	✓	✓
Other	Ocean Resources and Marine Science; Environmental Sustainability	✓	✓

(JCA) Joondalup Competitive Advantage

(GNGO) Global/National Growth Opportunity



KEY PERFORMANCE INDICATORS

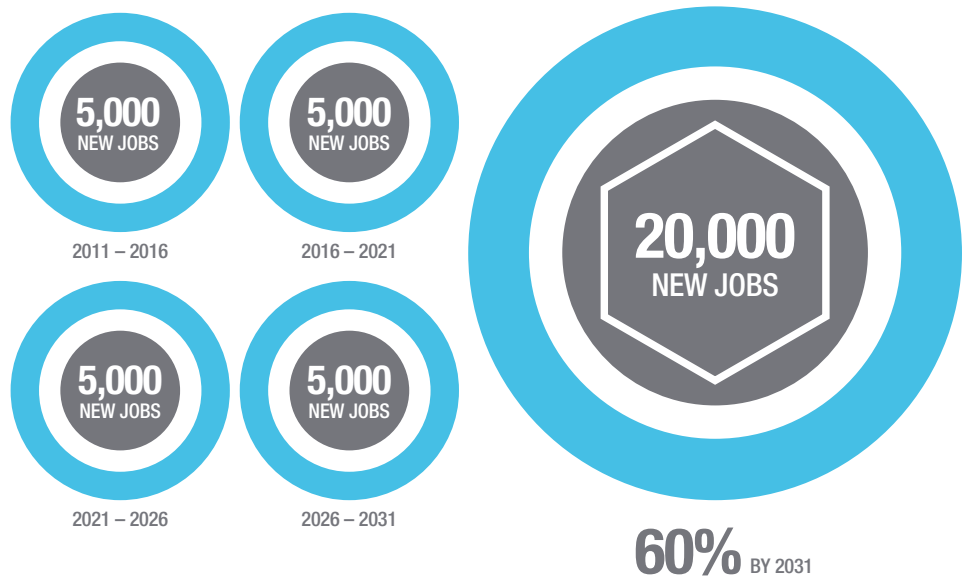
The *Expanding Horizons* Economic Development Strategy sets out a framework of activity for the City of Joondalup to the year 2022. It is aligned directly with the Strategic Community Plan *Joondalup 2022*.

However economic development is a long term, strategic activity and has alignment with the State Government plans and targets. Therefore the Key Performance Indicators (KPIs) are longer term to the year 2031 and aligned with the State Government *Directions 2031 and Beyond* document.

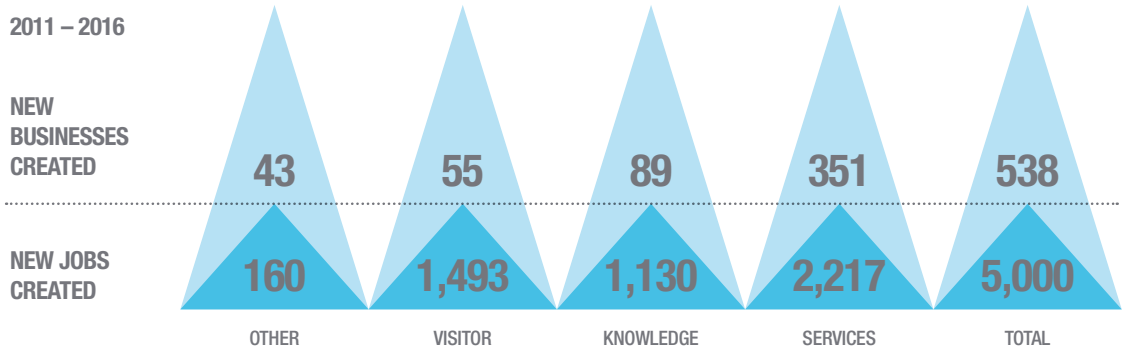


Business Forum at Joondalup Resort

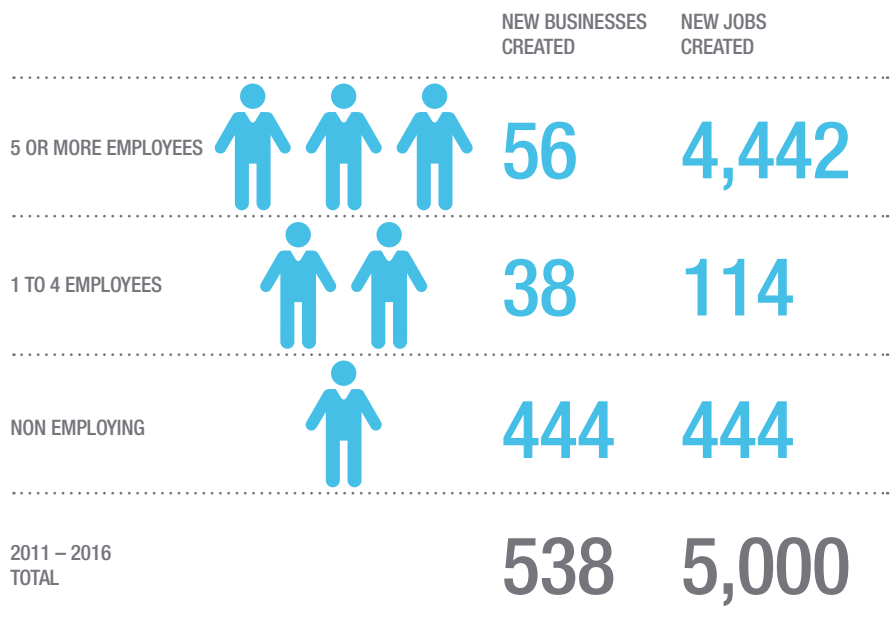
5,000 LOCAL JOBS IN EACH FIVE YEAR CENSUS PERIOD TO ACHIEVE 60% EMPLOYMENT SELF SUFFICIENCY FOR THE CITY OF JOONDALUP BY 2031

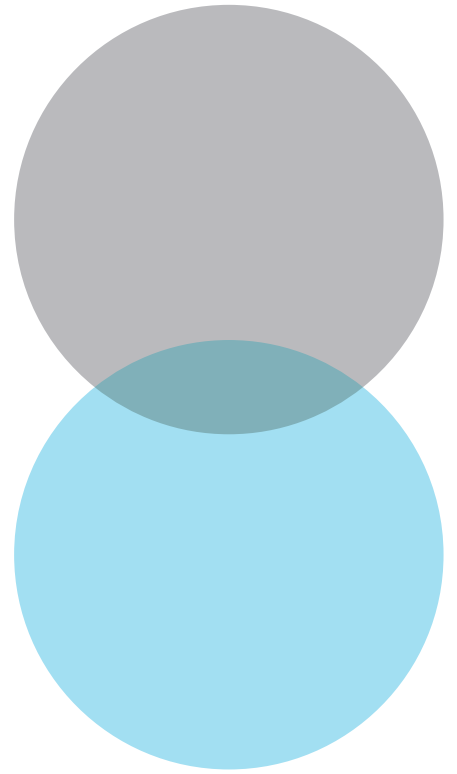


4% BUSINESS COUNT GROWTH BY SECTOR IN EACH FIVE YEAR CENSUS PERIOD TO 2031



GROW BUSINESS COUNT BY EMPLOYEE SIZE IN EACH FIVE YEAR CENSUS PERIOD TO 2031



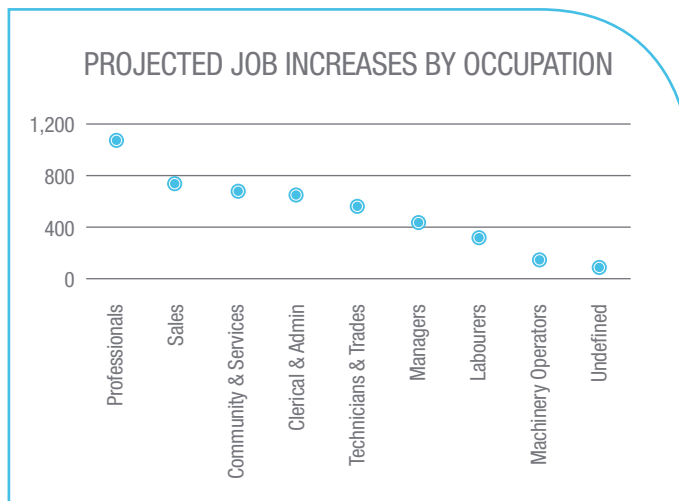


Edith Cowan University Security Research Institute

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



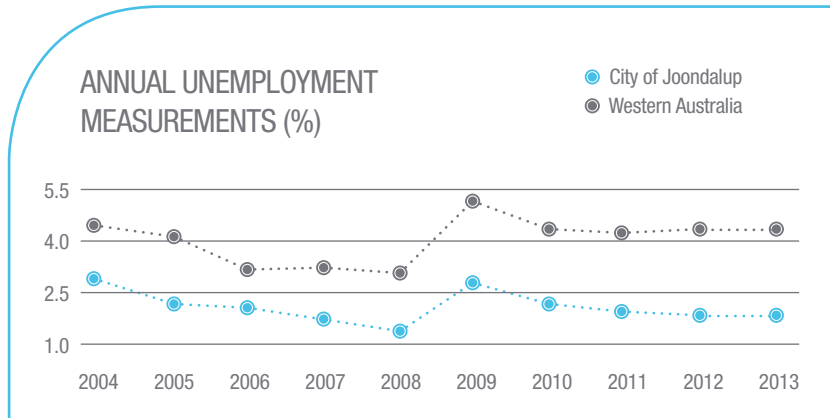
MONITOR JOB GROWTH BY OCCUPATION TYPE TO CITY OF JOONDALUP ESTIMATES OVER FIVE YEAR CENSUS PERIODS TO 2031



**PROJECTED JOBS
CREATED IN EACH
CENSUS PERIOD**

5,000

MAINTAIN UNEMPLOYMENT UNDER THE WESTERN AUSTRALIA AVERAGE RATE



ABS (Labour Force Survey)
DEEWR (Small Area Labour Markets Australia)

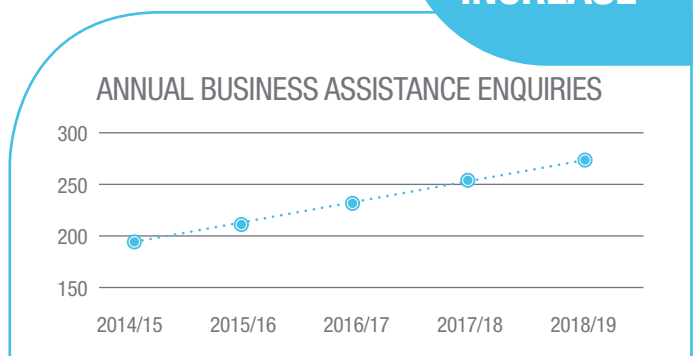
EXCEED THE CURRENT LOCAL GRP TREND IN FIVE YEAR CENSUS PERIODS TO 2031

ANNUAL GRP \$ BILLION



INCREASE BUSINESS ASSISTANCE ENQUIRIES EACH FINANCIAL YEAR BY 10%

**10%
INCREASE**





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This document is available in alternate formats upon request.

A full, detailed version of Expanding Horizons is available upon request.

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