

MINUTES

ECONOMIC AND SMART COMMUNITIES STRATEGIC REFERENCE GROUP

held in the Councillors Room, Manly Town Hall on

WEDNESDAY 19 FEBRUARY 2020

**Minutes of the Economic and Smart Communities
Strategic Reference Group
held on Wednesday 19 February 2020
in the
Commencing at 6:07pm**

ATTENDANCE:

Committee Members

Mayor Michael Regan (Chair)

(arrived at 6:07)

Cr Sue Heins

Saul Carroll

Andy West

Peter Middleton

Geri Moorman

Gordon Lang

Alexander Coxon

Stephen Pirovic

Matthew Aderton

Chris Wilcocks

Newport Residents Association

International College of Management

Council Officer Contacts

Nikki Griffith

Deb Kempe

Felicity Shonk

Zoe Johnson

Kate Lewis

Tamara Lukic

Acting Executive Manager, Community Engagement &
Communications

Team Leader, Economic Development & Tourism

Planner

Place Coordinator

Business Performance Executive

Governance Officer

Guests

Jeremy Gill

Tony Blunder

SGS Economics and Planning

Smart Beaches Project Manager, Lake Macquarie

Note:

Cr Heins welcomed new SRG members, Stephen Pirovic, Christopher Wilcocks and Matthew Adderton.

1.0 APOLOGIES

Apologies were received from Cr Walton, Cr Sprott, Stuart White and Ngaire Young and Drew Johnson.

2.0 ACKNOWLEDGEMENT OF COUNTRY

As a sign of respect, Cr Heins acknowledged the traditional custodians of these lands on which we gather and pays respect to Elders past and present.

3.0 DECLARATION OF PECUNIARY AND CONFLICTS OF INTEREST

There were no declarations of pecuniary or non-pecuniary conflicts of interest.

4.0 CONFIRMATION OF MINUTES OF PREVIOUS MEETINGS**4.1 MINUTES OF ECONOMIC AND SMART COMMUNITIES STRATEGIC REFERENCE GROUP MEETING HELD 6 NOVEMBER 2019**

Minutes of the Economic and Smart Communities Strategic Reference Group meeting held 6 November 2019, copies of which were previously circulated to all Members, are hereby confirmed as a true and correct record of the proceedings of that meeting, subject to the following amendment of the Item 6.3 Leases and Licences Register:

From:

Members agreed that the example of a low detail land register is the most appropriate form, with a high-level annual report on financials (instead of on a case by case basis).

To:

Based on the advised objectives of the Register proposal being 1) Transparency and 2) Showing Council's contribution to (various parts of) the community members considered that these resources could be more fruitfully expended on other business/community related matters, than on establishing such a register.

5.0 UPDATE ON ACTIONS FROM LAST MEETING

Nil

6.0 AGENDA ITEMS

Note:

With the approval of the group Cr Heins amended the order of the business so item 6.2 Northern Beaches Employment Study be brought forward and presented first.

6.2 NORTHERN BEACHES EMPLOYMENT STUDY DRAFT

Note: Cr Regan left at 7:20pm and returned 7:33pm.

F Shonk, introduced J Gill who presented on this item. A copy of the presentation is included in the minutes at Attachment 1.

OVERVIEW OF UPDATE

An employment study for the Northern Beaches Local Government Area (LGA) is being undertaken by SGS Economics and Planning. The study analysis socio-economic data about the community and economy, reviews trends and drivers shaping the employment lands and precincts.

Topics included:

- policy context for the greater Sydney Region Plan (2018), North District Plan (2018) and Shape 2028 Community Strategic Plan (2018)
- population
- employment
- journey to work and employment centre accessibility
- economic trends and drivers
- land use suitability analysis
- market data analysis
- growth distribution scenarios
- draft vision overview for the Northern Beaches (NB) (Brookvale, Frenchs Forest, Manly, Dee Why)
- local Centres vision to support local communities and the business network.

Key Messages from the study are attached to minutes at Attachment 2.

Items Discussed

After the presentation the group discussed the following:

- Northern Beaches having the second largest number of small businesses registered in Sydney – highlighting that small business is a key strength for local economy
- a substantial mismatch of business sizes and the available commercial floor space/s
- a convenience of various co-working spaces, that would benefit from a more networked approach

- how the availability of more diverse floor spaces could generate more commercial opportunities for small businesses on the Northern Beaches at different stages of growth
- interactions between the creative and industrial businesses and a need/requirement for interfaces to be carefully planned/designed to ensure that no increase in land value would deter and prevent businesses to operate in industrial area
- a benefit to developing and having a night time economy to support the vision for these precincts (ie Brookvale and Frenchs Forest) and to develop a sense of community– ie a place to work in the late evening and somewhere to eat at 10pm etc
- potential for Frenchs Forest to develop as a major logistics location for the Northern Beaches.

Interesting Perspectives:

Noting that currently a higher focus is on small business, the group agreed that a shift towards the medium size business would have a greater long term benefit. Furthermore, the group also discussed:

- having specialised types of business, such as Excellence in IT and Medical businesses and Frenchs Forest to be area known for it
- Council to approach universities, hospitals and work with these industries towards supporting and growing them locally.

The group also revisited previously presented topic of Council going out with expression of interest and using already available resources to attract universities; (i.e. Manly Dam Hydraulics Laboratory– UNSW).

While the group agreed that the opportunities such as the Manly Dam Hydraulics Laboratory are not promoted enough, it was also noted that the nature and structure of universities and campuses has shifted/changed and so has the need and demand for land.

It was highlighted that many councils across Sydney are chasing universities and giving them a position of negotiating power seeking the 'highest bidder' with regards to incentives such as free/discounted rents etc. The group also discussed whether Council resources could be better utilised to meet other needs in the community.

There was some discussion around future employment growth at Frenchs Forest Business Park noting significant issues around traffic, access and parking impacting the centre. The high vacancy rate at Frenchs Forest Business Park was also discussed and how the existing vacant office stock did not align with the needs of current businesses, commenting that this was potentially exasperated by the new hospital which resulted in businesses relocating out the business park.

QUESTION: What is the group's view on the proposed East/West Bus Rapid Transit (BRT) and that it would improve business prospects for the Frenchs Forest Business Park?

ANSWER: This could potentially create mixed opportunities and challenges for Frenchs Forest Business Park, as whilst it would improve access to the business park, it will also increase access for resident workers to office markets in Chatswood and Macquarie Park, increasing competition.

6.1 STREET PERFORMANCE (BUSKING) - COMMUNITY ENGAGEMENT UPDATE

Note: Cr Regan left the meeting at 8:02pm and did not return.

Z Johnson presented on this item. A copy of the presentation is included in the minutes at Attachment 3.

OVERVIEW OF UPDATE

The following information was shared with the group:

- A new busking policy is being created to harmonise the approaches of three former councils.
- Prior to implementing the policy, the following activities were undertaken:
 - intercept survey
 - performer online survey
 - staff workshop
 - external workshop.
- The following key positions were identified from surveys and workshops:
 - the current street performance standard is uneven and not diverse enough
 - repeat performers, repetitious sets and excessive amplification are issues on the Manly Corso
 - the current process, guidelines and costs present barriers to performers.

Items Discussed

The group discussed the following:

- a desire to see Manly Corso badged as a premier site (with a different management approach to the rest of LGA)
 - high prices of busking permits
 - methods of having a permit that allows busking across Northern Beaches
 - adopting similar process to Sydney City Council
 - rotating performers in primary location/s.
-

6.3 SMART BEACHES - NEXT STEPS

OVERVIEW OF UPDATE

T Blunden and K Lewis, provided a quick update on this item. A copy of the presentation is included in the minutes at Attachment 4.

Key points relating to Smart Beaches included:

- overview of the types of sensors, data collection and proposed analysis
- update on progress and likely timeframes
- introduction to Ocean Live App (on App store)
- pilot grant funding until July 2020
- requires 6-12 months to continue data collection, analysis and interpretation.

This is an ongoing project with huge potential across the board. The group identified the need to discuss opportunities and how to promote the project.

ACTION

That the group attend a separate workshop to provide input and feedback on the future opportunities for Smart Beaches – Next Steps.

SUMMARY OF ACTIONS

ITEM NO.	ACTION	RESPONSIBLE OFFICER	DUE DATE
6.3	A workshop be organised for group members to provide feedback and input on Smart Beaches Next Steps.	K Lewis / T Lukic	12 March / 22 April 2020

The meeting concluded at 20:20pm

This is the final page of the Minutes comprising 7 pages numbered 1 to 7 of the Economic and Smart Communities Strategic Reference Group meeting held on Wednesday 19 February 2020 and confirmed on Wednesday 20 May 2020.

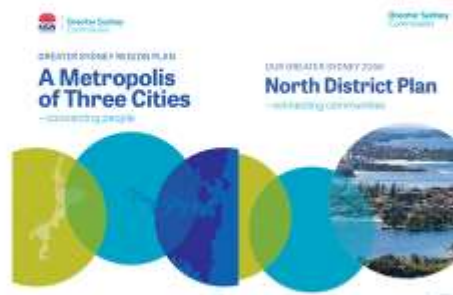


Content

- Study context
- Policy context
- Socio-economic profile (population, employment, journey to work)
- Key economic trends & drivers
- Market and floorspace analysis
- Vision for the Northern Beaches

Study context

- Northern Beaches Council commissioned SGS Economics & Planning to undertake an Employment Lands Study for the Northern Beaches Local Government Area (LGA).
- The Employment Study will:
 - Develop a coordinated strategy for economic development across the Northern Beaches and a vision for employment precincts
 - Inform Council's Local Strategic Planning Statement (LSPS), Local Environment Plan (LEP), Economic Development Plan and future Place Planning
 - Give effect to the Greater Sydney Region Plan and North District Plan (Greater Sydney Commission)



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Policy context

Greater Sydney Region Plan (2018)

Objectives:

- Develop internationally competitive health, education, research and innovation precincts
- Support investment and business activity in centres
- Industrial and urban services land is planned, retained and managed

North District Plan (2018)

Priorities:

- Support new infrastructure that enhances local employment opportunities
- Grow and invest in health and education precincts
- Grow investment, business opportunities and jobs in strategic centres

- Frenchs Forest: +2,700 – 3,700 jobs by 2056
- Brookvale-Dee Why: +3,000 – 6,000 jobs by 2056
- Manly: +1,000 – 1,500 jobs by 2056
- Mona Vale: +700 – 1,700 jobs by 2056

- Retain and manage industrial and urban services lands
- Support growth of targets industry sectors (tourism and rural industries)

Shape 2028 – Community Strategic Plan (2018)

Strategies:

- Facilitate innovative environments and hubs
- Facilitate local education
- Support telecommuting
- Activate urban centres and strategic centres
- Provide a platform for diversified job growth and locate in strategic and local centres
- Ensure creative activities and safe nightlife opportunities

North District Plan Centre Hierarchy

- Frenchs Forest:** Health and Education Precinct
- Brookvale-Dee Why:** Strategic Centre
- Manly:** Strategic Centre
- Mona Vale:** Strategic Centre

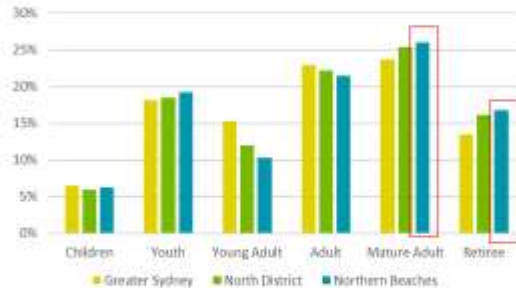
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Population

- **Low population growth** (+15,235 between 2011-2016) and forecast growth is lower than Sydney region and North District
- **Brookvale-Dee Why catchment** is seeing highest rate of growth
- **An ageing population**
Significantly higher growth in Retirees (12.3% Compound Annual Growth) than youth (9.4%) or Mature Adults (8.5%)
- **Professionals and Managers** are the largest occupation group for local residents
- **Local residents** work in Knowledge intensive (32%) and Population Serving (31%) jobs.
- **Overseas migrants** are mostly Adults and Young Adults locating in Manly and Brookvale

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FIGURE 20: COMPARATIVE AGE PROFILE STRUCTURE (2016)



Source: ABS Census 2016 (Territory Level Data)

Opportunity

- Ensure economic centres and the public domain, programs and activities cater to the range of ages in the LGA, including the ageing population.
- Grow local professional and knowledge intensive job opportunities to reduce outbound commuting

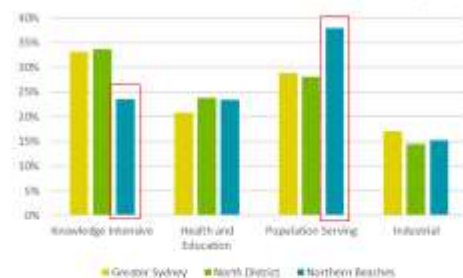
Employment

- **Local Population Serving** jobs are higher than Greater Sydney Average, while Health and education employment opportunities are growing, supported by an ageing population.
- **Local Knowledge Intensive** jobs have grown at a slower rate (+2,292) than the growth in local residents who work in this are (+6,035)
- **Industrial employment** is in decline, in line with Greater Sydney. This does not reflect demand for industrial and urban services activity (automation)
- **Industry Specialisations** – Retail Trade, Accommodation, Food Services and Construction are the most specialised local industries, albeit a low level of specialisation.
- **High self-containment** (54%) meaning over half of the resident workforce work locally. Rates of self-containment increase moving further north in the LGA (Manly 41%; Frenchs Forest 43%; Brookvale-Dee Why 55%; Mona Vale 61%)

Opportunity

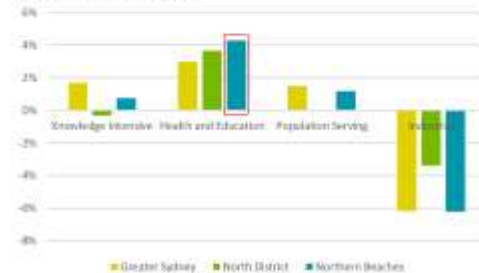
- Continue supporting development and specialisation of the Frenchs Forest Health and Education precinct.
- Recognise and communicate the value of industrial lands beyond employment and develop strategies to safe-guard these land uses.

FIGURE 21: COMPARATIVE INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2016)



Source: ABS Census 2016 (Territory Level Data)

FIGURE 22: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2006-2016)



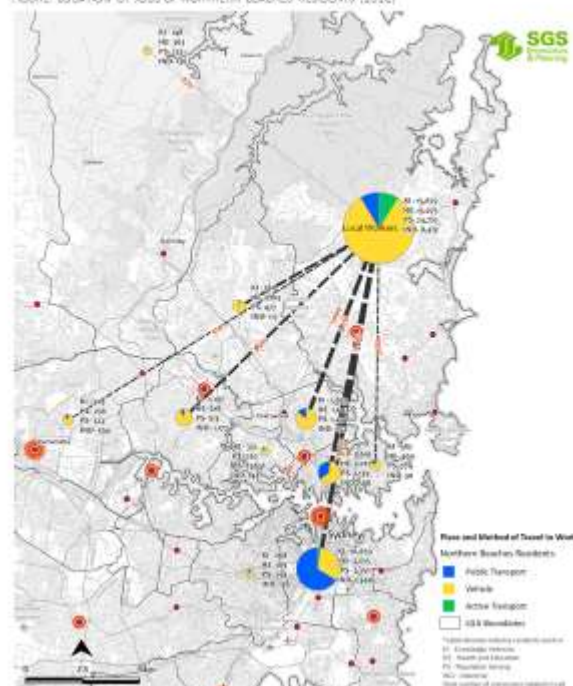
Source: ABS Census 2006, 2011 and 2016 (Territory Level Data)

Employment

- **Self sufficiency**
 - The majority of our local jobs are performed by local residents (77%)
 - Workers who live outside the LGA predominantly travel from Ku-ring-gai, Hornsby and North Sydney.
 - Industries of note include: Other Social Assistance Services; Computer System Design and Related Services; Aged Care Residential Services (161); Primary Education (156); Accountants (155)
- **Self containment**
 - Over half of resident workers work locally (54%).
 - Rates of self-containment increase moving further north in the LGA (Manly 41%; Frenchs Forest 43%; Brookvale-Dee Why 55%; Mona Vale 61%)
 - Industries of note include: Computer System Design and related services (1,460); Real Estate (1,241); Accounting Services (1,078); Local Government Administration (974); Early childhood, primary and secondary school teachers, registered nurses and private tutors (4,249 combined total)
 - Leakage in in CBD related industries such as Finance and other professional services

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FIGURE: LOCATION OF JOBS OF NORTHERN BEACHES RESIDENTS (2016)

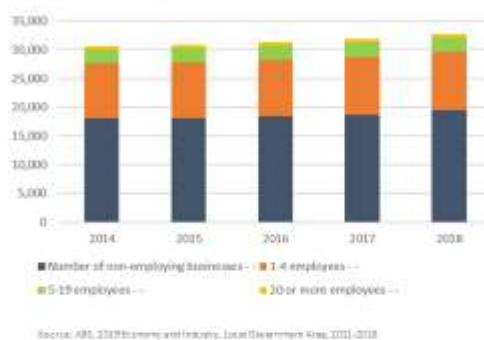


Business

- **High rate of Home Base Business** - A 2015 business survey of Warringah Council area indicated that a high proportion of respondents were home-based businesses (37%), almost double the NSW wide estimate at 20%.
- **An economy of small businesses** - close to 60% of local businesses are sole traders, while another 30% employ 1-4 employees
- **Second largest number of registered Businesses in NSW** - the Northern Beaches is second only to the City of Sydney with 31,823 business registered to the Northern Beaches Local Government Area
Source: Profit & ID, National Australia Bank survey for local government areas, 2017/18
- **Awareness, perception and habits impact business development** on the Northern Beaches. Residents and businesses are not aware of the business, workforce and professional environment in the area. Creating a better sense of network within the business community and working to change perceptions would help.
- **Distance** - the issue of distance to suppliers, clients, staff and customers is a key concern for local business in the area. This has been compounded by traffic congestion and a lack of public transport options and parking in employment centres.

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FIGURE: SIZE OF BUSINESS, NORTHERN BEACHES, 2014-2018

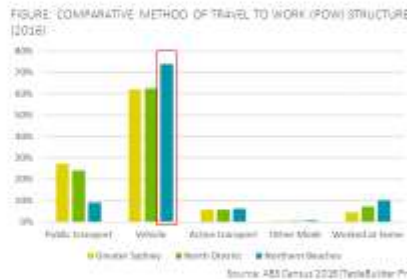


Opportunity

- Support home-based business and encourage stronger networks
- Co-working spaces can take many forms and offer home-based businesses a cheaper and more flexible solution when making that first move out of a home office (rather than signing a lease) and provide opportunity to collaborate with other businesses
- Improve transport connections and 30 minute access to employment centres

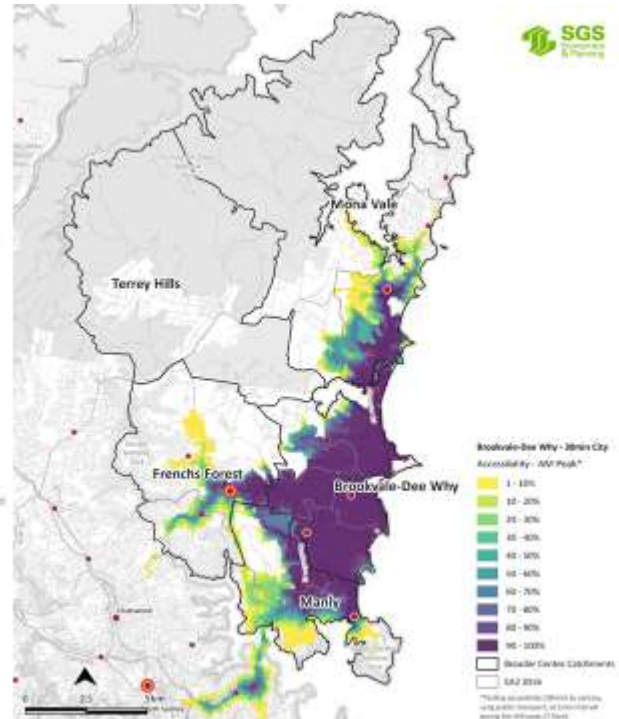
Journey to Work & Employment Centre Accessibility

- Brookvale-Dee Why has the **best 30 minute accessibility** by public transport during AM peak of our strategic Centres.
- Majority of workers use **vehicles to access work**,
- We have seen a **slight increase in public transport use** to access work (2006-2016)
- Most workers originate in the LGA, about 82 percent.



Opportunities

- Leverage the accessibility of Brookvale-Dee-Why centre.
- Improve connectivity for Frenchs Forest into the future.
- Improve internal and external connectivity.

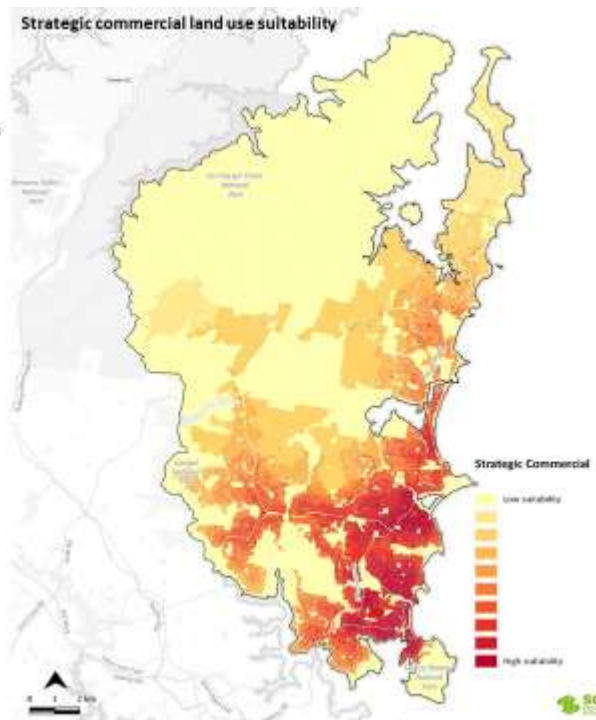


Land use suitability analysis

- Brookvale** is highly suited for a range of economic and employment uses (for example strategic commercial, local industrial, district retail).
- Strategic commercial suitability** is relatively weaker in the north of the LGA due to lower levels of public transport access and scale of centres.

Market data analysis

- Quality of Commercial Spaces** - vacancies exist, largely represented are poor quality shop-top offices or spaces suited to large businesses.
- An Economy of Small Businesses** - future floorspace needs to meet the needs of small and increasingly professional businesses.
- Growth in Manly** - Employment has grown 20% (2011-2016) with a higher proportion of professional jobs than the LGA. Tourism, high amenity and improved connections to the CBD have resulted in commercial floorspace that is more expensive than anywhere else in the LGA (\$854/sqm vs \$500/sqm LGA average).
- Frenchs Forest** - significant amount of vacant floorspace and low rents.
- Local Centres are increasingly attractive** - (Mona Vale, Newport, Balgowlah) Where a low amount of available space (low stock) plus high amenity is resulting in higher rent prices than more established commercial centres.
- Industrial land values are increasing**, sharpest in Brookvale with prices per square metre doubling. Growing population increases demand for urban services.
- Industrial precincts contribute an estimated \$4 billion** Gross Value to the Northern Beaches economy.



Economic trends & drivers



Emergence of strong café culture, food centres and experience dining. Food retailing is one of the stronger performers in the retail sector, largely driven by a boom in breakfast and lunch at cafes, and online take-away at dinner. This is helping main streets across the Northern Beaches to adapt to the rise of online retail.



Fine grain spaces as an alternate in the retail landscape. High street retailing has faced significant challenges in recent years, attributed to the popularity of regional shopping centres (e.g. Warringah Mall) and online retailing. A focus on improving the visitor experience in these spaces is key.



Developing the night-time economy. There is a renewed focus on developing NTE across Greater Sydney. There is more to a NTE than pubs, clubs and restaurants. A vibrant NTE can include 24-hour gyms, late night markets and supermarkets, late-night shopping options, museums and galleries; as well as services and facilities that support busy families and shift workers.



Changes in freight transportation and advanced manufacturing Online retailing has raised expectations that goods will be rapidly delivered to customers. 'Last mile' logistics has become a priority, making freight and logistics land uses close to populations valuable. 'Advanced manufacturing' – the evolution of manufacturing that merges technology, digital innovation, design and creativity.



The rise of coworking spaces. In recent years, there has been an increase in the number of co-working spaces in Australia (up to 300 in 2017) and across the Northern Beaches. Co-working spaces attract mainly professional service workers and knowledge-based workers in high amenity locations. Co-working is supporting local sole traders and small businesses by providing space and a more connected and collaborative community outside the home. Co-working spaces seed collaboration, creativity and present an opportunity to support local residents who want to be able to work locally.

Opportunities

- Leverage the location and appeal of Northern Beaches and continue to support good quality food retailing.
- Fine grain retailing offers a point of difference and could set the smaller local centres of the LGA apart from the larger strategic centres.
- Recognise the value of the industrial lands in the LGA for 'last mile' delivery and advanced manufacturing potential.
- Building a Night Time Economy that is inclusive, for all ages and locals/visitors to the LGA; as well as shift workers (hospital staff, industrial land workers)/
- Consider co-working spaces in centres, as an alternative for home-based businesses and developing businesses/start-ups.

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Supply/demand floorspace analysis

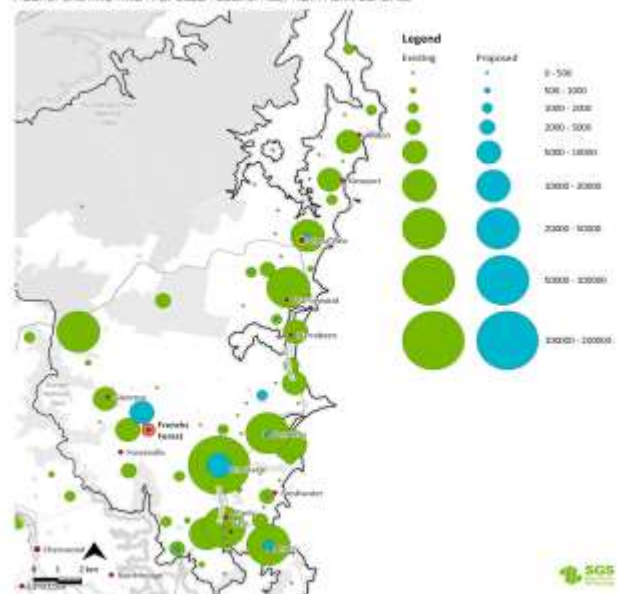
- Estimated job growth +21,800 (2016-2036)
- **Retail** - Future population growth will drive a need for more retail floorspace. It is expected there would be an undersupply of 30,500 sqm by 2036 under a practical redevelopment scenario.
- **Commercial & Industrial** - This future demand of floorspace results in a potential undersupply of an upper bound of 100,000 sqm by 2036, across the LGA under a practical redevelopment scenario.

Opportunities

- **Improve the functionality of Brookvale**, making the centre the focus of regional retail and industrial employment while developing a high amenity commercial component. Leverage the 'twin centre' of Dee Why to complement the functions of Brookvale, as a civic and population serving centre.
- **Leverage the growth and development of Frenchs Forest** to grow commercial and industrial floorspace.
- **Develop a clear vision for Manly** to help reduce future land use conflict between retail/commercial/tourism demands.
- **Industrial precincts** in Northern Beaches play a vital role, support the 'retain and manage' policy.
- **Grow local employment** by ensuring economic activity centres (including local centres) support the establishment of small and medium businesses.

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FIGURE: EXISTING AND PROPOSED FLOORSPEACE, NORTHERN BEACHES



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Growth distribution scenarios

Scenario 1 Brookvale focus

- Concentrate most future commercial floorspace demand in BV in a high-amenity core.
- Ensure future floorspace best suits needs of small and professional businesses.
- Leverage high accessibility, established business networks and good amenity.

Scenario 2 Frenchs Forest focus

- Concentrate most future commercial floorspace in Frenchs Forest.
- A concerted effort to leverage recent investment in Frenchs Forest.
- Improve the quality and amenity of FF Business Park and the developing town centre.
- Leveraging future public transport improvements.

Scenario 3 Staged growth

- Blends scenario 1 and 2.
- Short-medium term Floorspace development in Brookvale.
- Recognition that Frenchs Forest is in transition, and a likely long-term solution given the disconnect between the precinct's commercial built form and that demanded by the market, and the severance of the precinct.
- Recognises the value of both centres.

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Vision overview

Frenchs Forest
To become an established strategic centre – health, education, potentially taking commercial/ industrial in the long term

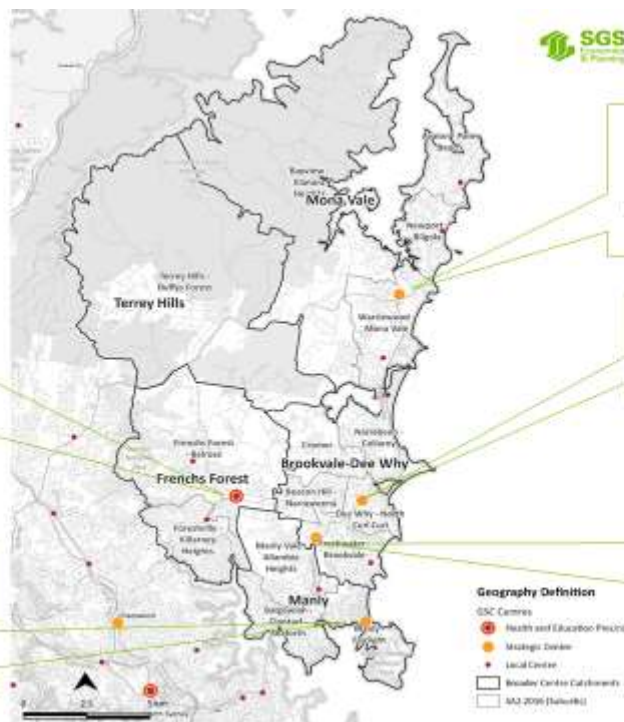
Manly
The visitor gateway and unique character to be retained

Mona Vale
The local centre supporting the north – village feel retained

Dee Why
Complement Brookvale, mixed use

Brookvale
The Northern Beaches hub of economic activity – retail, industrial and commercial

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Brookvale

The Northern Beaches hub of activity

Vision

- Consolidate the role of Brookvale as the major strategic centre of Northern Beaches.
- Concentration of development around a civic space between Pittwater Rd and Roger St.
- Mix of commercial, civic and entertainment functions.
- Leverage the informal food and dining scene from Brookvale's breweries.
- Highly walkable centre
- Activation day and night
- A civic and community hub for the LGA, as well as a commercial one.



Draft actions/principles include:

- Recommence Brookvale structure plan process, with a focus on commercial and civic functions, testing location preference and building massing options
- Consider a town centre site, rezone to B3 (Commercial Core), relocate community infrastructure in the centre (B3 objectives wide range of retail, business, office, entertainment, community uses)
- Require Westfield to focus future growth towards future town centre site to integrate into town centre, with an externally facing approach that reduces Warringah Mall's enclosed identity
- Engage with TfNSW and consider relocation of bus depot site to free the land for alternate uses.

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Frenchs Forest

An established strategic centre at Frenchs Forest

Vision

- To grow as a population and health-related centre with a mix of residential, community and commercial functions to the west of the hospital.
- Frenchs Forest Business Park to attract health-related businesses, that may require full building floorplates (e.g. med-tech, pharma companies). It could also be home to distribution and storage related functions that don't require visibility.
- The precincts is to soak up some of the businesses displaced from Brookvale, either through changing land uses or price points.

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Draft actions/principles include:

- Recognise it is centre in transition and work towards its long-term prospects.
- Potential long-term transition to incorporate Forestway retail into the new town centre, freeing up the Forestway site.
- Constrain on large plate commercial supply in future town centre (excluding smaller commercial allied health) given Frenchs Forest Business Park is already underperforming.
- Frenchs Forest could also focus on more warehousing, logistics and car sales.
- Consider the potential to absorb Brookvale bus depot.
- Investigate longer or flexible trading hours for low impact businesses to support vibrancy and night time economy.

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Manly

The Northern Beaches' visitor gateway

Vision

- Continue to be the tourism gateway of the Northern Beaches, providing a range of cultural, retail and accommodation services.
- The centre is to retain its unique and characteristic urban form, and strong pedestrian core.
- Increased links to future uses at North Head (future hospital site functions, North Head national park)
- Shop-top commercial development will remain in demand and can be encouraged in future developments.

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Manly Corso

Draft actions/planning principles include:

- Continue to encourage commercial development in Manly town centre as shop-top (as commercial is in low supply and high demand).
- Retain building height controls to retain urban scale and the structural appeal of Manly. While market demand for commercial floorspace is high in Manly, the focus of Brookvale's transition towards a high amenity commercial centre will divert the pressure from Manly.
- Accommodate future discretionary retail demand - moderate population growth is projected to 2036. Delivery of future retail floorspace should consider the changes in bricks and mortar retail sector, ensure floorspace is not approved when there are significant vacancies, future floorspace should concentrate in the centre.
- Do not permit additional supermarket floorspace in the town centre, as what is planned to 2036 is sufficient (dependent on any major changes, eg: hotel/student accommodation).

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Dee Why

Supporting the needs of the local population both day and night

Vision

- Continue to fulfill a mixed-use, population serving role for local residents.
- Complementing the role and function of Brookvale.
- A revitalised centre offering strong links to the beach, a social program of activities and a vibrant night-time economy.

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Examples of fine-grain retailing with a mix of open space and built form, smaller lot sizes, human scale streetscape and active street frontages.

Draft actions/planning principles include:

- Offer a retail point of difference in Dee Why – support fine grain retailing opportunities.
- Investigate longer or flexible trading hours to help build the night-time economy.
- Link the town centre to the beach, with public domain improvements, safety by design, an active transport links.
- Have an inclusive social program of events that fits the diverse and changing population profile (ageing and young adults)
- Require no net loss of commercial floorspace in Dee Why and require new developments to provide first floor commercial floorspace as part of mixed-use developments.

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Mona Vale

The centre servicing the north of the LGA

Vision

- The Strategic Centre of the north of the LGA, Mona Vale will continue to provide a range of retail and commercial options for locals and visitors to the area.
- Brookvale and Frenchs Forest will be the strong attractors for commercial growth in the LGA, leaving Mona Vale to focus on playing a complementary role with population-serving commercial floor space.
- Support small businesses and encourage home based businesses into the village
- Maintenance of the 'village' feel is key.

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Mona Vale

Draft actions/planning principles include:

- Retain retail and commercial floorspace, retaining first floorspace commercial uses will help ensure adequate floorspace is retained into the future.
- Accommodate future discretionary retail demand, being aware of changes in the bricks and mortar retailing landscape.
- Retain and manage industrial and urban services, and maintain buffers.
- Implement public domain improvements that are sensitive to the needs of the local population (retirees are expected to have the highest level of growth to 2036 at 42%).

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Local centres

Northern Beaches local centres to support local communities and the business network

Vision

- Smaller locally focussed centres will continue to provide appropriate local retail and small office functions.
- Centres to support evening and weekend café and restaurant demand.
- Provide walkable access.
- Support local home-based businesses to utilise local centres through Co-working and 'third spaces'.



Example of a localised co-working space, Yackandandah VIC

Draft actions/planning principles include:

- Anticipate retail floorspace growth at Warriewood of up to 5,400 sqm by 2036.
- Encourage shop top housing (supported and retained in the consolidated LEP)
- Co-location of social infrastructure – population growth will drive future demand, local centre are well suited to this use, consider shop top housing above small-scale community facilities.
- Co-working spaces in vacant retail floorspace. Council can work with local business owners or landlords to actively find vacant floorspace (particularly in centres with high vacancies such as Avalon) to locate these uses that may support small work groups of 5-10 people.

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LGA wide

- **Industrial precincts** - will continue to support range of businesses and industries, providing a home for multiple supply chain functions in the local and district economy.
- **Metropolitan Rural Lands** - Continue to support rural land operations along Mona Vale road, as the cluster of nurseries and landscaping businesses play an important district level function and are unlikely to be able to relocate (particularly as a cluster) elsewhere.

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Headlines

- **Northern Beaches demographic profile is changing.** Locally employed tradies and health professionals are being displaced by knowledge sector jobs that are primarily located out of the Northern Beaches
- **The LGA's largest centre is a mixed industry and retail precinct.** Brookvale is a hub of activity and a destination for residents (Warringah Mall) and businesses (industrial precincts). Its diversity is an asset and needs to be protected.
- **Brookvale is a centre without a centre.** Brookvale is at the heart of the LGA both economically and geographically but it does not have a clearly defined centre. Other centres (Manly and Mona Vale) that do have this are at opposite ends of the LGA and lack connections with the rest of the LGA to play this centre role.
- **A new floorspace offer is needed.** Creative and services businesses that are growing in the LGA are small and their operational and locational requirements are not met in the business parks of Frenchs Forest, the shop top offices along Pittwater Road or some of the older industrial facilities.

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Headlines

- **Frenchs Forest is a long term prospect.** The realisation of a fully functioning town centre integrated with the nearby business park will take time, as its prospects are reliant on public and private transport investment and there are other centres well connected to the LGA.
- **Brookvale is a significant opportunity.** The creation of a town centre that complements the important light industrial service role, integrates with Warringah Mall's regional pull and provides a new type of floorspace and built form to support a diversity of local business needs presents a game-changing opportunity for the Northern Beaches to leverage its most accessible and largest centre.
- **Manly will continue to draw local and international visitors.** While it is a centre in demand for businesses, it is important to ensure that its tourism function continues to inform future directions. The creation of a commercial and community precinct in Brookvale with high amenity and good public transport connectivity will give the Northern Beaches a compelling alternative for a commercial centre.

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Attachment 2

Key Messages from the Study

- **Balancing local aspirations with the commercial reality** - We need to consider the position of the Northern Beaches economy and employment precincts relative to the greater Sydney commercial market and strengths/aspirations of competing precincts. A focus on developing the commercial core at Chatswood is likely to be a more competitive offer to the commercial market given accessibility via train line and Metro. Increased accessibility to this precinct from the East-West B-line will further support outward movement of our workforce to this precinct.
- **Manly has seen high employment growth** - Manly has seen the highest rate of employment growth on the Northern Beaches (with a relatively high portion of professional jobs), along with highest prices and demand for commercial stock driven by high amenity and accessibility. However competing priorities for this precinct make it unsuitable to develop into a commercially focused precinct.
- **Manly provides a nationally significant tourism destination** supported by its unique heritage facades and European inspired built form, creating a sense of place which has been critical to the success of Manly as a tourism destination. While any commercial development that occurs in Manly within existing controls is welcome, SGS do not recommend changing controls to increase heights or scale of the built form to accommodate growth of commercial office space as this would undermine the character and tourism strengths of Manly
- **Brookvale has a number of key strengths** that differentiate it from competing precincts outside the LGA. It's the most accessible economic precinct on the Northern Beaches and features the largest concentration of economic activity. The industrial precinct performs a regionally significant function and changes to Artarmon industrial area resulting from development around the Metro line further strengthen the regional importance of Brookvale. A high level of access to the CBD supports the potential for Brookvale to accommodate overflow of commercial demand from Manly.
- **A focus on Brookvale in the short to medium term** to prioritise and elevate its economic function is recommended. Particularly focusing on high quality/ high amenity small and flexible commercial stock (similar to Lifestyle working building), but co-located with regional social infrastructure to create a 'heart' for Brookvale in close proximity to transport and the regional 'pull' and amenity of Warringah Mall. We can take learnings from the success of Manly to inspire development of a unique character and built form for Brookvale that leverages its industrial strength.
- **Flexible stock that caters to different stages of small business** - There is an opportunity to cater to the demands of local small businesses within the one precinct. As an example a startup founder might work from home and visit a library in Brookvale when there for meetings with suppliers of clients. From there they may upgrade to a commercial coworking space in the same precinct and as they grow they might move into small/flexible commercial spaces as they start to hire staff or seek a more professional space to present to customers and clients. These businesses would be able to leverage the full end-to-end supply chains that already exist in Brookvale, where a designer or engineer working in the commercial core would be in close proximity to the fabricators, specialist trades or importers/wholesalers in the industrial area.
- **Frenchs Forest presents a longer term opportunity** for the Northern Beaches economy, particularly given current challenges with high vacancies and commercial stock in the B7 business park that does not meet the needs of local businesses, but yet isn't old enough for redevelopment. Frenchs Forest will continue to evolve incrementally as the town centres develops, the East-West B-line and with close proximity to the Beaches link tunnel. While

these changes are unlikely to see rapid change in the business park, a longer term focus will follow a 'wait and see' approach to see how the precinct naturally evolves.



Street performance

Economic and Smart Communities
Strategic Reference Group
19 February 2020



Project overview

New policy required

- At present the busking guidelines combine the approaches of three former Councils (inconsistencies in price, location, permit duration)
- By developing a policy we can set the vision for street performance and respond to community aspirations for greater access to culture and music (CSP, Arts and Culture Strategy)
- Because Council plays a regulatory, compliance and development function



Engagement timing

Date	Activities	Output/outcome
Pre October 2019	Research and literature review	Background Paper
October 19 – January 2020	<ul style="list-style-type: none"> - Staff workshop - Intercept surveys - Performer surveys - External workshop 	<ul style="list-style-type: none"> - Identify shared values and pathways to improve street performance - Audience sentiment - Performer sentiment and trends - Scoping issues that should be addressed through the new policy
February – May 2020	<ul style="list-style-type: none"> - Strategic Reference Group meetings - Targeted interviews (City of Sydney) 	<ul style="list-style-type: none"> - Testing engagement findings - Insight into CoS's approach to policy development and subsequent policy
2020	Public exhibition and amendments phase	Broad community input on draft policy



Engagement findings summary - activities up to January 2020

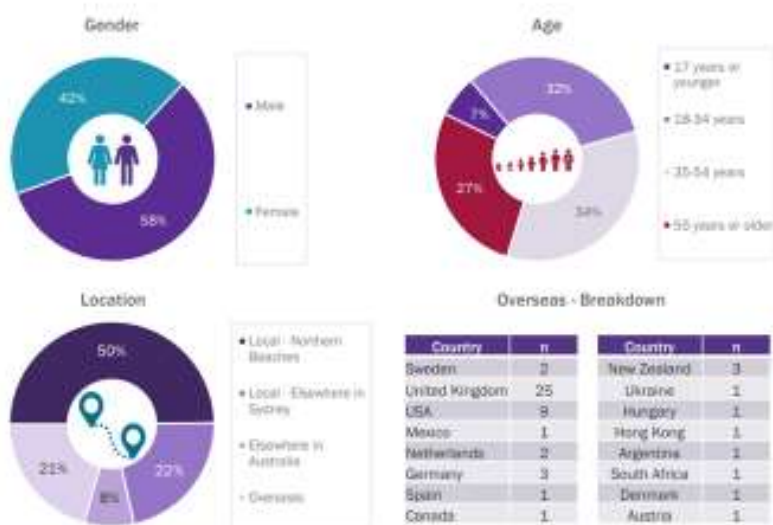


Intercept surveys

Face-to-face surveys
Undertaken November 2019
Lonergan



Who completed surveys? 270 participants



Key findings/directions

- Street performance on the Northern Beaches – particularly in Manly - is well received by audiences
- The majority of respondents think there are too few performers
- There is strong support to grow permitted locations, particularly in Manly town centre and beach fronts
- Talent and quality are perceived as hallmarks of good street performance – but supporting diversity, local and emerging performers is also a high priority

Performer surveys

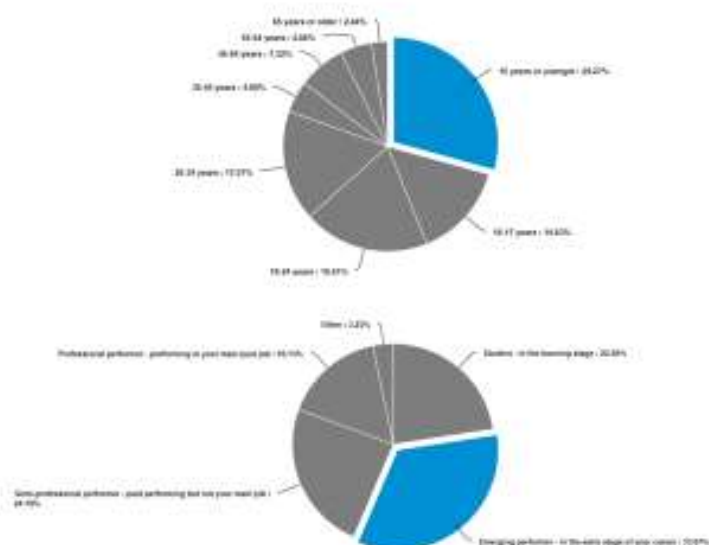
Online surveys

Undertaken December 2019

Designed and distributed by Northern Beaches Council



Who completed surveys?



- Current and previous and prospective performers
- Young people (over half under 24 years)
- 94% from Northern Beaches
- Varied career levels
- Equal numbers had performed at Manly as other Sydney suburbs (30%)



Key findings/directions

- Proximity to home, receptive audiences, and good pedestrian flow attract performers
- Motivations to perform are evenly spread. Earning, self-promotion, connecting with audiences, enhancing the local vibe and practising were all motivators.
- The biggest inhibitors to permit take-up are Council controlled: application permit process (30%) and limits on performance type/location (20%)
- Very high support for increasing permitted locations, especially in Manly town centre (95%) and beachfronts (90%)
- Permit prices perceived to be too high in Manly
- Performers identify talented artists and high quality acts as key elements of good street performance, along with supporting young and local performers



Staff workshop

3 hour workshop

24 October 2019

Place, Tourism, Compliance, Arts and Cultural Development,
Property, Youth Development, Risk, Events, Community
Development, Parks and Recreation, Roads and Transport staff



External workshop

2.5 hour workshop with facilitator

21 January 2020

Targeted invitees from creative sectors, chambers of commerce, business representatives, current and prospective performers, music teachers and young performers



Key positions/proposals

- The current street performance standard is uneven
- Repeat performers, repetitious sets and excessive amplification are issues on the Corso
- Current process, guidelines and costs present barriers to performers

No one-size-fits-all approach:

- The Corso ought to be badged as a premier site (with a different management approach to the rest of LGA)
- Transitioning the street performance scene will require support (resources, curation, rangers, education etc.)
- Processes must be streamlined; and guidelines loosened to encourage a variety of performance
- There must be places/pathways/development programs for emerging performers (particularly young but also mature)



City of Sydney

1 hour targeted interview

13 February 2020

Meeting Lex Davidson, Cultural Strategy Advisor –
Live Music and Performance, City of Sydney



Key engagement learnings

Project summary:

A two-year project, with rich engagement and research component. New policy adopted late 2019.

Engagement reflected:

- A strong appreciation for the contribution of performers to the city's vibrancy and reputation as an international city
- Strong values around Sydney as a creative city, which nurtures and showcases creativity
- Clear values around valuing Aboriginal and Torres Strait Islander culture
- Some discrepancy between attitudes: buskers as workers vs buskers as beggars
- Strong support from local business, who understand the promotional power of performers
- A love of all types of performance – even weird and wacky performances!



Key principles and outcomes

Principles:

- Underpin busking as valuable— buskers contribute to city life, vibrancy and connectedness
- Busking as legitimate – for performers to make an income and hobbyists to express themselves
- Busking as an important part of the creative ecology of the city
- Supports the unfettered continuation and practise of culture by Aboriginal and Torres Strait Islanders
- Confirms that other users have the right to enjoy the public domain without being exposed to loud, repetitive or unsafe behaviour.

Outcomes:

- An egalitarian approach, that removed as many obstacles as possible to participation (no auditions, lowest possible fees, the City covers public liability insurance)
- A self-regulated busking scene, where buskers hold each other to account to adhere to the *Sydney Busking Code*.
- Buskers can perform anywhere, but Pitt Street Mall, Martin Place and Circular Quay have limitations
- 1000 permits/year - \$13/quarter, \$43/year, no cost for Aboriginal cultural practise
- Millions of views of Pitt Street Mall on social media, international TV vs limited complaints
- 1 FTE staff person who manages compliance and complaints
- Currently no digital booking system – but have tested with success during Vivid



Thank you!
Any questions or comments?

places@northernbeaches.nsw.gov.au



SRG Briefing Economic & Smart Communities

Smart Beaches Next Steps

February 2020



SMART BEACHES

A SMART CITIES AND SUBURBS ROUND TWO PROJECT



February 2020

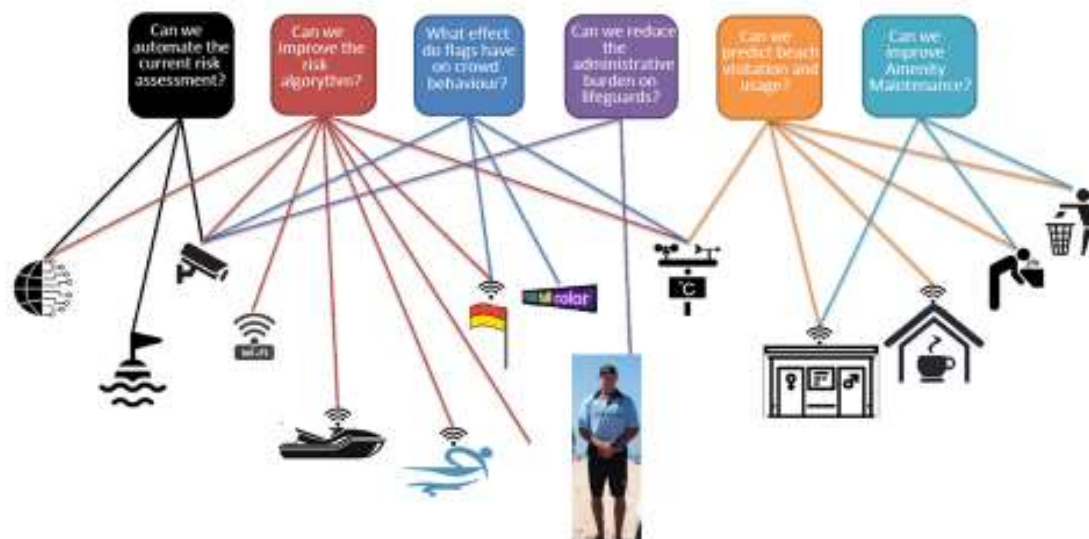
Manly Beach (South Steyne)
Shelly Beach

Redhead Beach
Blacksmiths Beach



SMART BEACHES
A SMART CITIES AND SUBURBS ROUND TWO PROJECT

Smart Beaches Pilot Project What are we trying to achieve?

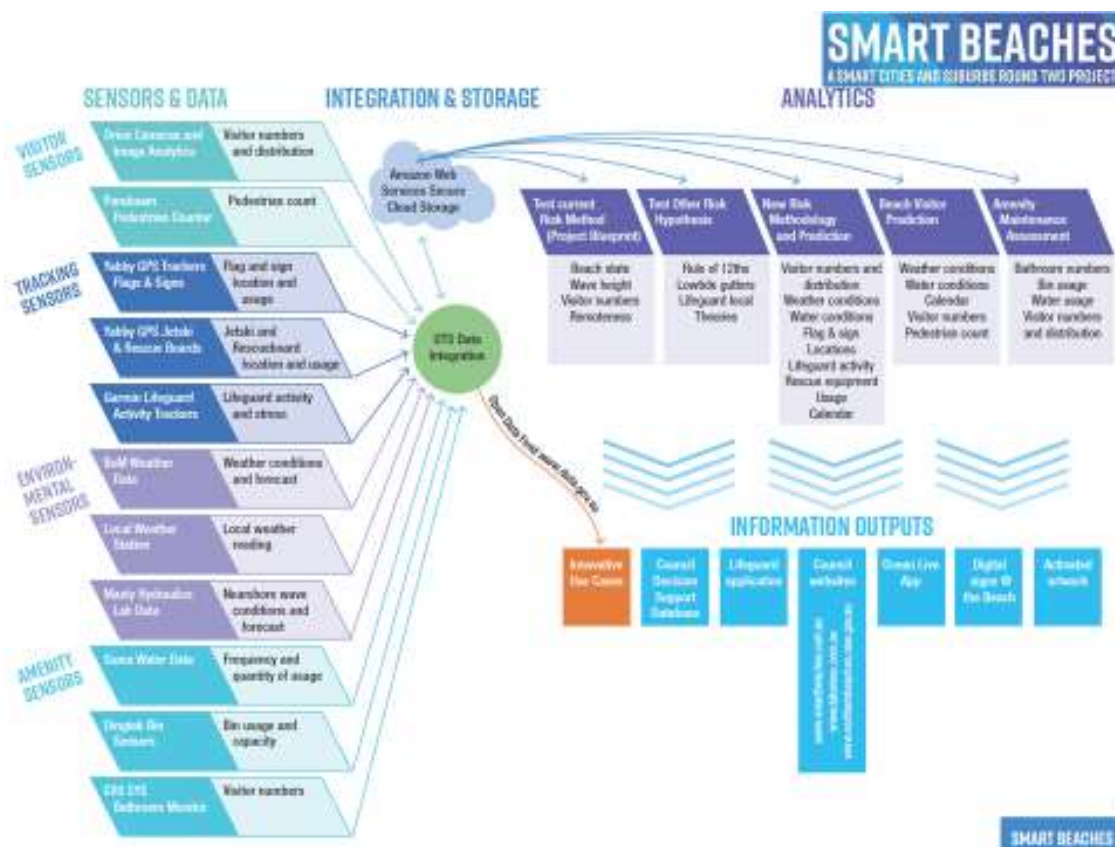


SMART BEACHES
A SMART CITIES AND SUBURBS ROUND TWO PROJECT

Sensing Equipment - Manly / Shelly

Device	Where	Why	When
Yabby LoRaWAN GPS Tracker	50 x Flags, beach signs, paddle boards, buggies & jetskis	Location & movement	Installed
Garmin devices/ iPads	2 x Manly Lifeguards	Activity level data	Installed
ERS Eye Sensors	12 x 4 amenity blocks	Movement sensors	Installed
Orion Cameras	1 x Shelly Beach 1 x Manly Surf Club	People counting data	Installed
Antennas	1 x Shelly Beach 1 x Amenity block near Pantry	Data transmission	Installed
Self-compacting Smart Bins	2 x Shelly Beach	Bin usage and fill-level	Installed
Bin sensors	7 x bins along Marine Parade & Shelly Beach	Bin usage and fill-level	Partial installation
Weather Stations	1 x Shelly Beach 1 x Manly Surf Club	Wind and weather	Due Feb
	Data from Manly Hydraulic Laboratory	Wave / Surf conditions	In progress
	Free Wi-Fi at Shelley beach	Public access	In progress





Project Status - Completed

Project commenced	Feb 2019
Co-design & collaboration workshops:	Feb – Oct 2019
<ul style="list-style-type: none"> Beach Operations Antics development Technology Review Hardware selection 	
Pre launch Stakeholder engagement (Nov – Dec 2019)	Nov – Dec 2019
<ul style="list-style-type: none"> Meeting with key stakeholders and groups Letters to community groups etc Ocean Care Day 	
Equipment installation and set up (90% complete)	Dec 2019 – Feb 2020
Workshops with key stakeholders:	Dec 2019
<ul style="list-style-type: none"> All partners On-board newer partners: Ocean Live, Safe2Swim 	
Initial future project options and scalability workshop	Jan 2020



Project Status – Ongoing and Next Steps

Finalise equipment installation and set up	Feb – Mar 2020
Data collection and validation, Data lake	Feb – Apr 2020
Analytics development	Mar – May 2020
Data portal and displays	Apr – Jun 2020 (Ongoing)
Community Education (Manly Surf Pro)	Mar 2020
Operational workshops (Life Guards)	Feb / Mar 2020
Technology Training (UTS transfer knowledge)	April 2020
Data Sharing & Release Framework	Feb – June 2020
Project Trial Report on Outcomes and Scalability	Jun 2020
Ongoing project assessment and application (6-12 months)	July 2021



Where to next?

