

Central Coast Strategy

Recommended Priorities for Economic Growth



Acknowledgement of Country



The Greater Cities Commission proudly acknowledges Australia's First Peoples as the traditional custodians of the lands and waters of what we call the six cities.

We pay respect to Elders past and present.

We recognise and value the extraordinary and ongoing contribution of First Nations peoples and communities to Australian life, and how this enriches all Australians.

We embrace the spirit of recognition, working towards ensuring both an equal voice and equity in all aspects of our society.

Original Artwork by Zachary Bennett-Brook c.2022.

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Foreword



The Central Coast offers outstanding economic and land use opportunities. The NSW Government is considering ways to work together to optimise these opportunities for the region's residents and businesses.

In July 2020, the NSW Government asked the Greater Sydney Commission to support the work already underway in the Central Coast City, by looking specifically at growing jobs and the economy in a Central Coast Strategy. In December 2021, the NSW Premier announced that the Greater Sydney Commission would become the Greater Cities Commission (the Commission) to bring the vision of the Six Cities Region to life. The Central Coast Strategy focuses on key priorities for unlocking the potential in the Central Coast and will directly feed into the development of the Region Plan for the Six Cities Region and the Central Coast City Plan.

The Commission has collaborated with NSW Government agencies, relevant Ministers and local Members of Parliament, Central Coast Council, businesses, industry and the community to identify the priority focus areas that will deliver more jobs and economic growth to the region. The Commission found that new tertiary education opportunities must be created on the Central Coast in order to grow a diversity of local jobs and drive innovation. Gosford must become a true regional capital and a renewed focus on unlocking employment lands is also needed, particularly in the Northern Growth Corridor from Tuggerah to Warnervale.

The Central Coast Strategy prioritises the key areas of focus for the NSW Government on the Central Coast. The priorities presented in this Strategy provide a balanced, equitable and timely opportunity to deliver on key projects and initiatives in the Central Coast.

The Commission recommends action on seven priorities:

1. Driving innovation and industry collaboration
2. Unlocking employment land and accelerating employment precincts
3. Activating a university campus in a revitalised Gosford CBD
4. Building on Gosford Health and Wellbeing Precinct
5. Improving transport connections within the Central Coast and with Sydney and Newcastle
6. Delivering a high-speed internet network
7. Improving planning processes to accelerate development approvals

Focusing on these priority areas will help deliver the 72,000 new jobs needed to meet the predicted increase in population, identified in the Central Coast Council's Economic Development Strategy.

The Commission acknowledges the significant work undertaken by all levels of government, industry, and community stakeholders, working together to deliver great outcomes for the Central Coast.

Geoff Roberts AM
Chief Commissioner



Central Coast at a glance

The Central Coast was identified by the NSW Premier as part of the vision for a Six Cities Region in December 2021. The Commission was tasked with coordinating and facilitating the delivery of key investments and infrastructure to drive a globally competitive Six Cities Region.

The Commission will develop a Six Cities Region Plan by the end of 2023, supported by a City Plan for each of the six cities in 2024.

The Central Coast City Plan will build on the significant work undertaken by the NSW Government and the Department of Planning and Environment (DPE) in developing the Draft Central Coast Regional Plan 2041. The Central Coast Strategy will form the foundations of the City Plan.

The Central Coast's many strengths provide the building blocks to create an economic and innovation powerhouse. Supporting economic growth requires new business investment and job creation.

Identifying key components to the Central Coast City

Six Cities Region

The region that includes the Lower Hunter and Greater Newcastle City, the Central Coast City, the Illawarra-Shoalhaven City, the Western Parkland City, the Central River City and the Eastern Harbour City.

Central Coast City

The city that comprises the Central Coast local government area.

Central Coast / Gosford Innovation District

The land identified in the State Environmental Planning Policy (Gosford City Centre) 2018 as the Gosford City Centre.



Celebrating First Nations peoples

In the 2016 Census, the Central Coast City's First Nations population was counted as 12,458 people, making up 3.8% of the population, compared to 2.9% across NSW.¹

The Darkinjung are the traditional custodians of the land identified as the Central Coast City. The Darkinjung peoples are represented by the Local Aboriginal Land Council (LALC) with significant landholdings in Lake Munmorah, Somersby, Wallarah and Kariong.

The Darkinjung LALC can achieve better economic outcomes for their members and communities with the activation, preservation and enhancement of their land holdings.



Location and affordability

A relaxed lifestyle and unique natural assets make the Central Coast City an idyllic place to live, work, study and do business.

Just an hour's drive from both Sydney and Newcastle, the Central Coast City offers affordable housing, with median house prices of \$690k compared to \$1.37m for Greater Sydney (2018).²

However, more than a quarter of the working population leave the area for work – most of these to Greater Sydney.³

Existing road and rail connections facilitate travel in and out of the Central Coast. The recent completion of the NorthConnex and announcement by the NSW Government for fast rail will enhance the attractiveness of the Central Coast City for families and professionals.



Innovation, health and education

Gosford Hospital's redevelopment, with the addition of the University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care, will drive investment and jobs in allied health and research.

The addition of a university campus will enshrine the Gosford CBD as a health and education innovation district with linkages to the University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care prominence in the Gosford CBD.

This industry collaboration will generate urban renewal opportunities and jobs growth for the hospitality industry, retail and local businesses.



Food manufacturing and advanced manufacturing

The Central Coast is home to major food manufacturing enterprises including McCain Foods, Sara Lee, Mars, Sanitarium, Life Health Foods, ABC Filling and George Weston Foods.

The prominence of these international food manufacturing businesses on the Central Coast is a drawcard for further investment in this area.

Advanced manufacturing, in areas such as food production, high tech software and hardware, fabricated metal products and other specialised manufacturing industries offer many employment opportunities.



Economic and business assets

Central Coast Council's Economic Development Strategy identifies the need for 72,000 new jobs on the Central Coast by 2040.

The Strategy identifies several assets that could be activated to deliver these jobs for the future including the Central Coast Airport as well as employment and industrial lands in Mount Penang, Somersby and Warnervale. In February 2022, the NSW Government announced a Hunter-Central Coast Renewable Energy Zone that will connect multiple renewable energy generators and storage projects (such as batteries and pumped hydro) and play a critical role in replacing the State's ageing coal-fire power stations.

It will ensure the Central Coast has a key role in a renewable energy future, powering existing industries and supporting economic growth, including emerging technology in green hydrogen, ammonia and metal production, electric vehicle fleet operations and electrification of industrial processes.

Activation could catalyse growth in aviation, aircraft manufacturing, maintenance and service operations as well as fill the need for more health products, advanced manufacturing and food production, transport and logistics, renewable energy and waste recycling.



Public spaces, natural places and tourism

The natural beauty of the Central Coast is well known and its most enduring attraction.

National parks, state forests, bushland, beaches and waterways occupy more than half the city's area and their enhancement and protection, as well as the area's recent certification as an Ecotourism destination, make for a thriving visitor economy.

The Central Coast already has a vibrant tourism economy, surpassing the \$1b mark for visitor expenditure in 2019⁴ and continuing to grow each year. There is great potential to renew and activate foreshore tourist areas, including the beach villages and Gosford Waterfront, to enhance their accessibility and attraction.

Peat Island represents a significant opportunity for additional open space, improved public access to the foreshore as well as new tourist facilities including hotel accommodation.

By 2040 the Central Coast will:



88,000

new residents
welcomed



\$21 Billion

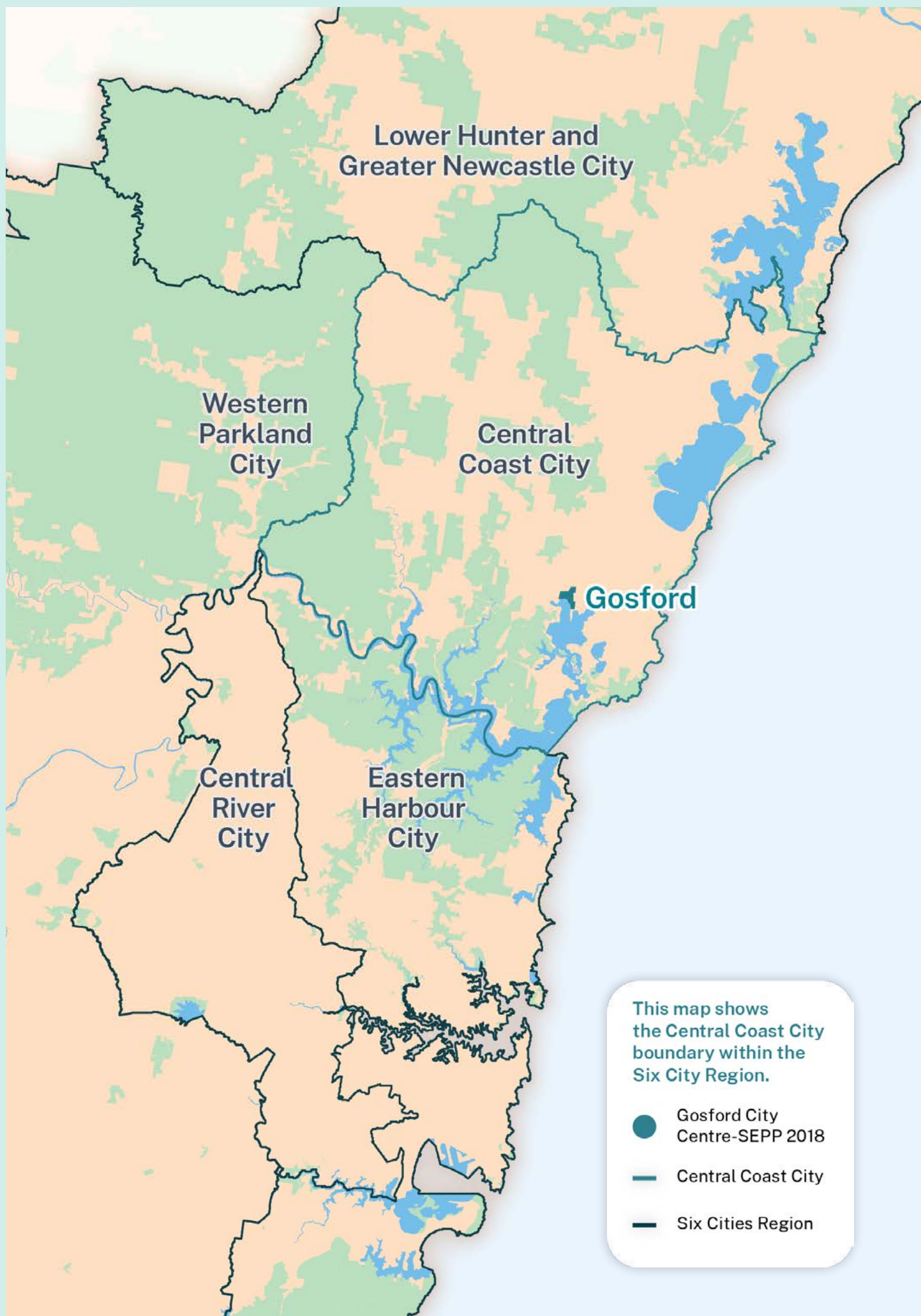
in economy
grown



72,000

new jobs
created

Source: Central Coast Council: Long Term Economic Development Strategy – March 2020





Policy Settings

The NSW Government and Central Coast Council have policies and plans in place that clearly establish the region's vast economic potential.

A 20-Year Economic Vision for Regional NSW

The 20-year vision sets out the NSW Government's priorities and plans to achieve long-term social and economic success for regional communities across the State. The vision was refreshed in February 2021 in recognition of the impact of recent bushfires, floods and the COVID-19 pandemic. The vision focuses on supporting industries to recover quickly and positions regional economies to further specialise in innovation and technology focused industries.

The economic vision highlights:

emerging sectors:

advanced manufacturing, renewable energy and gas and technology-enabled primary industries.

future industries:

critical minerals, ecotourism, recycling and waste management and high-quality food products.

Central Coast and Lake Macquarie Regional Economic Development Strategy

This Strategy developed with support of the NSW Government, as part of the Regional Economic Development Strategies program, assists Central Coast and Lake Macquarie Councils to leverage the region's endowments.

The Strategy aims to:

- **Facilitate commercial, manufacturing and mining development**
- **Grow new industries and employment opportunities through improved transport links**
- **Realise economic opportunity in the health and aged care sectors**
- **Support a highly liveable region that is attractive to both commuters and visitors.**

Central Coast Council Economic Development Strategy

In 2020, an Economic Development Strategy for the Central Coast was adopted, positioning the region as the place to do business, creating jobs and prosperity for the region. The Strategy details how by 2040 the Central Coast will welcome 88,000 new residents, grow the economy by over \$21 billion and create over 72,000 new jobs.

The key economic objectives of the Strategy include:

- **Improving economic leadership and coordination**
- **Advancing sustainability**
- **Enhancing economic efficiency and competitiveness**
- **Increasing skills and economic capabilities**
- **Building the Coast's profile as an economic destination**
- **Enhancing local innovation and enterprise**
- **Increasing community wellbeing**
- **Delivering infrastructure for the future**
- **Fostering economic diversity and vibrancy.**

Central Coast Regional Plan 2036

The NSW Government's Regional Plan sets a vision to 2036 for a region with a healthy natural environment, a flourishing economy and well-connected communities.

Its four goals are:

1. A prosperous Central Coast with more jobs closer to home.
2. Protection for the natural environment and managing the use of agricultural and resource lands.
3. Well-connected communities and attractive lifestyles.
4. A range of housing choices to suit needs and lifestyles.

Gosford Urban Design Framework

The Urban Design Framework for Gosford recommends the following for Gosford's revitalisation:

- **Foster a place-based approach and focus on public domain**
- **Respect and enhance built form**
- **Provide green infrastructure**
- **Streamline planning controls**
- **Need for strong leadership and coordination**
- **Leverage regional importance – including health and transport infrastructure assets**
- **Improve regional access and movement**
- **The Framework informs the decisions of the Central Coast Local Planning Panel.**

Central Coast Local Strategic Planning Statement

Council's Central Coast Local Strategic Planning Statement provides a land use vision to 2036 and beyond, that builds on the Economic Development Strategy. It identifies Gosford as a regional city; Woy Woy, Erina, Tuggerah and Wyong as strategic centres; and Warnervale and Lake Haven as emerging strategic centres.

The Statement also identifies two growth corridors:

1. Somersby to Erina – a priority location for future jobs, services, residential living and business growth in the southern Central Coast.
2. Tuggerah to Warnervale – a Northern Growth Corridor with two areas and two roles:
 - a. Area 1 from Tuggerah to Wyong will be a focus for local employment and enable primary commercial and economic centres on the Central Coast
 - b. Area 2 Greater Warnervale will be a focus for new greenfield housing and employment.

Draft Central Coast Regional Plan 2041

In December 2021 the NSW Government released the Draft Central Coast Regional Plan 2041, for public exhibition, identifying the planning, infrastructure and place opportunities to support the growth of housing, jobs and industry. Once finalised, the Draft Central Coast Regional Plan 2041 will apply as the Central Coast City Plan and will inform the Commission's Region Plan that will be completed by the end of 2023.



Collaboration and consultation



The Commission has partnered with the Central Coast Council, NSW Government agencies and key stakeholders to prepare this Strategy to identify opportunities for the Central Coast to capitalise on the region's significant potential.

The Region Plan for the new Six Cities Region will be developed by the end of 2023.

The DPE regional plans for the Central Coast will apply as District Plans until the Commission delivers a new City Plan for Central Coast in 2024.

This Strategy will accelerate action and inform the development of these key government policies.

This Strategy recognises the NSW Government's and the private sector's enthusiasm for the continued growth of the Central Coast City as well as the challenges and opportunities that exist for the city to meet its full potential.

The key challenges identified and agreed to are:

- Long and complex planning processes
- The need for better coordination and better targeted resourcing for economic development
- Few incentives to attract and retain investment
- Lack of transport and utility services infrastructure
- Limited supply of serviced, unconstrained employment land for larger employers.

The key opportunities for the Central Coast are:

- University expansion – universities are key economic drivers
- Existing and potential growth in the Northern Growth Corridor
- Existing diversity of businesses, with an appetite to expand
- Regional incentives to attract businesses
- “Open for business” branding that promotes the benefits of locating on the Central Coast.

The Commission undertook preliminary consultation with government agencies and key industry partners in the Central Coast, to identify focus areas for the Strategy, before seeking wider community feedback in December 2020/January 2021.

Identified areas of interest that will help stimulate the economy on the Central Coast include:

- **A university campus in a revitalised Gosford city centre** will stimulate the economy and provide jobs near where people live. New infrastructure, including adequate parking, affordable accommodation and new retail components are essential for its success.
- **Expanded health services in Gosford** will encourage a greater choice of jobs and attract much-needed specialists, reducing the need for people to travel for appointments. Similarly, better transport access to hospitals and increased parking would be key.
- **Faster and more frequent bus and train services** give residents access to a greater variety of jobs and also attract workers from outside the region.

- **An increase in serviced industrial lands** attract specialised jobs and encourage investment from local and international technical businesses. Any future industrial lands should not compromise the natural environment.
- **Streamlined planning processes** are essential to attracting new businesses and industries that have previously encountered slow approvals and complications. This should be balanced with quality development and community consultation.
- **A high-speed internet network** addresses a key barrier to attracting large businesses.

The consultation also showed strong support for:

- Revitalisation of the Gosford CBD and waterfront to support tourism
- Efforts to enhance the Central Coast's natural assets and green spaces
- More affordable housing for key workers
- An employment and education hub at Central Coast Airport in Warnervale.

The Commission has considered this feedback when developing this Strategy which is focused on the best ways to:

- Support more jobs within the Central Coast to enhance local productivity and reduce private vehicles commuting out of the region
- Promote health and education through innovation and new facilities
- Improve the economic, social and physical wellbeing of First Nations communities
- Improve business digital connectivity
- Improve planning approval processes to accelerate job creation
- Enhance industry specialisation especially in advanced food processing, freight and logistics and health services
- Improve public transport options and connectivity both within the Central Coast and to Greater Newcastle and Greater Sydney
- Increase participation in vocational training and higher education delivery
- Increase the number of jobs to support a growing population and assist the post COVID-19 recovery.



The NSW Government has recently announced significant investment and funding specifically for the Central Coast to help deliver the Strategy including:



Central Coast
fast rail
investigations



\$18 million for a new
Gosford Campus of
The University
of Newcastle



City-shaping
infrastructure to support
the six cities vision

The Commission will continue to collaborate with relevant agencies, organisations and industry to deliver on the government's vision to make the Central Coast City a part of our globally competitive region that has the scale to provide better jobs, housing, education, health and lifestyle opportunities for everyone.

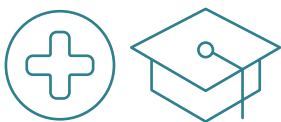
Priorities for the Central Coast City

The NSW Government is focussed on seven priorities for the Central Coast City to grow jobs, industry, connectivity and opportunities for the community.



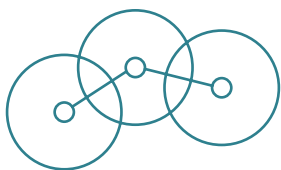
Jobs for the future

1. Driving innovation and industry collaboration
2. Unlocking employment land and accelerating employment precincts



Health and education

3. Activating a university campus in a revitalised Gosford CBD
4. Building on the Gosford Health and Wellbeing Precinct



Precinct Connectivity

5. Improving transport within the Central Coast and with Sydney and Newcastle
6. Delivering a high-speed internet network



Planning

7. Improving planning processes to accelerate development approvals

Jobs for the future



Current economic strategies for the Central Coast forecast around 72,000 new jobs will need to be added to the economy by 2040. The priorities outlined in this Strategy support around 55,000 jobs of the forecast 72,000 jobs by 2040 in sectors including food processing, health, disability care, aged care, education, freight and logistics as well as advanced manufacturing, retail and construction.

Recommended Priority 1 - Driving innovation and industry collaboration

Overview

The Central Coast food industry is a dominant part of the manufacturing sector in the region. Major food processing businesses are in the Warnervale area along with freight and logistics operations. A food technology start-up accelerator in the region will help support the development of industry ready applications with open access laboratories, testing facilities and demonstration plants.

A new addition to the Gosford Hospital campus is the University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care. This Institute supports the unique collaboration between the University of Newcastle and the Central Coast Local Health District to create a world-class research, innovation and education environment that enables improved health and wellbeing for the local community but with global impacts and connections.

This collaboration creates opportunities for innovation and growth in:

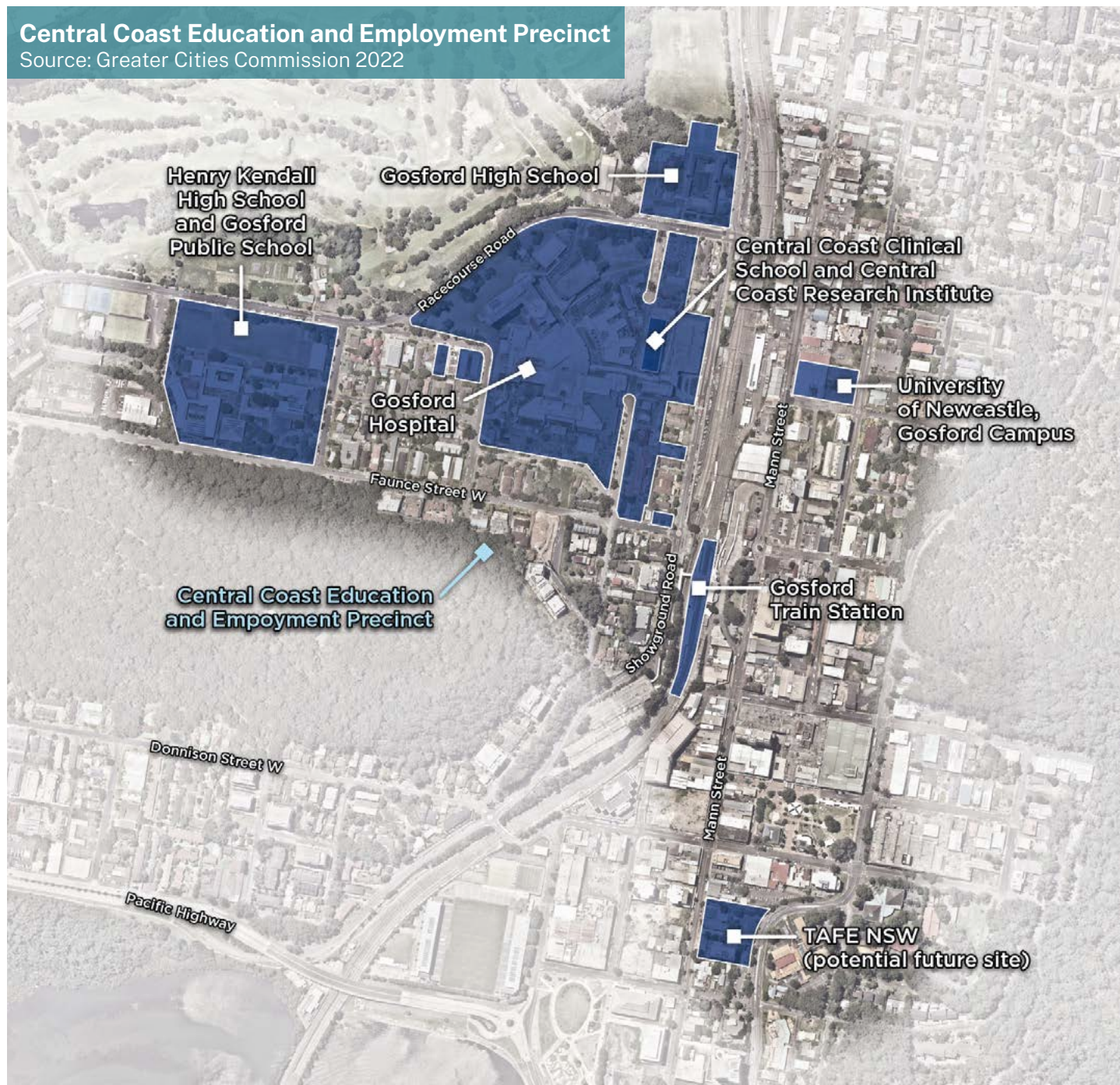
- Implementation of integrated health care models
- Research into the effectiveness of integrated models in health care delivery
- Training a workforce with the knowledge and skills to work in new models of health care
- The Central Coast as a leader in health care design and delivery.

The development of a new university campus and innovation hub by University of Newcastle will further support industry and build entrepreneurial culture and ecosystem on the Central Coast across sectors.

The proposed new TAFE NSW campus on Mann Street in Gosford will offer future courses (in food processing, advanced manufacturing, 3D printing, CNC engineering, digital supply chain management) that meet the future job needs of the region, supporting the delivery of VET education aligned with industry and employer expectations and will activate and enrich the Gosford CBD.

Central Coast Education and Employment Precinct

Source: Greater Cities Commission 2022



Measures of success

- Increased innovation activity and commercialisation
- Increased visibility of local specialisation and business
- Increased private sector investment
- Increased space for innovation and economic activity
- Increased number of knowledge-based and innovative jobs (and inclusion measures)
- Increased jobs and job containment

Economic rationale

The Central Coast Education and Employment Precinct forms the foundation of the Central Coast Innovation District and would transform the northern sector of Gosford into a new learning and business hub with a major university as a centrepiece.

Its proximity to Gosford public and private hospitals creates opportunities for shared research and education in health services and medicine. It would activate renewal of this northern CBD area with improved pedestrian and cycle access, student accommodation, new retail and office uses as well as bars and restaurants all underpinned by high quality physical and digital infrastructure.

It could be a beacon to innovators, entrepreneurs and start-ups in medical research, health, training and aged care services, digital communication, cyber security and data science.

Economic and community benefits

This precinct would be distinctive in offering a highly attractive Central Coast lifestyle for students and employees with nearby rail services linking to Sydney and Newcastle. The university at its core would increase education participation rates for the Central Coast, reduce youth unemployment by providing new pathways for education and training and generate job-ready graduates, especially in health and medical services.

In the food innovation space, there is potential to attract international organisations similar to Sanitarium, Mars and McCain that are already located in the Central Coast. The completion of NorthConnex and development of a 24-hour international airport in Western Sydney will create capacity to expand industries such as food technology, advanced manufacturing, freight logistics and supply chains.

Recommended Priority 2 - Unlocking employment land and accelerating employment precincts

Overview

The Central Coast has several areas with potential to provide employment within the region including:

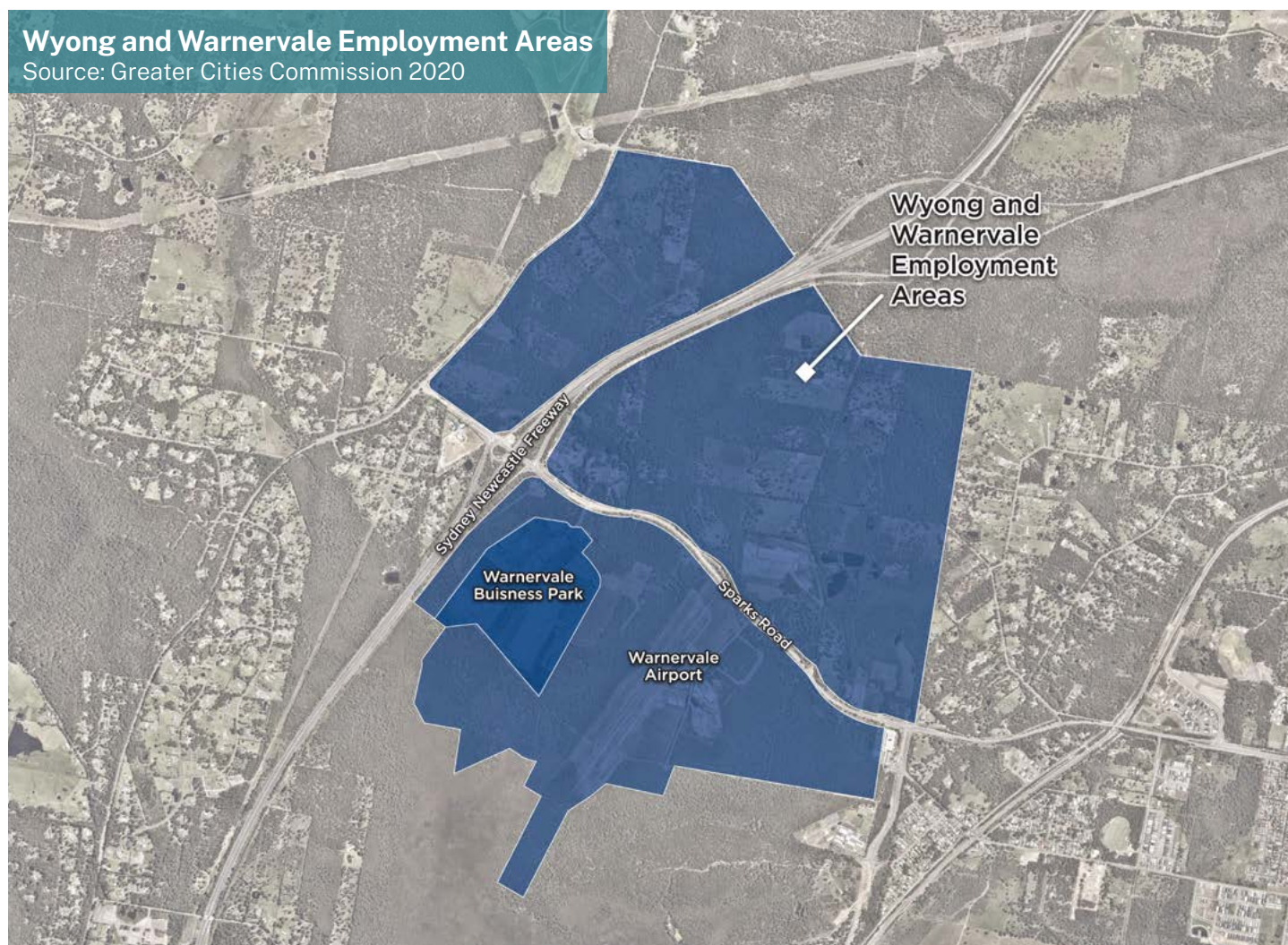
- Land in the Northern Growth Corridor around the Central Coast Airport at Warnervale, and Wyong,
- Sites within the Southern Growth Corridor at Somersby and Mount Penang Parklands, and
- A repurposed Munmorah Power Station site.

The potential of these areas needs to be considered in the context of a review of NSW Government land being undertaken by the NSW Department of Planning and Environment to identify opportunities to support NSW Government objectives for the Central Coast. This could be underpinned by a precinct property strategy that would make recommendations on land use, intra-government transfers and transactions for NSW Government-owned land.

Other activities contributing to the potential of employment land being realised across the region, include the Central Coast Strategic Conservation Plan to facilitate biodiversity assessments and approvals, and investigations into transport and traffic matters.

Wyong and Warnervale Employment Areas

Source: Greater Cities Commission 2020



Northern Growth Corridor

Central Coast Airport, owned by Central Coast Council, can generate jobs allied with and in aviation. The repeal of the Warnervale Airport (Restrictions) Act 1996 opens opportunities to support local aviation and allow emergency services to better respond to bushfire and medical incidents. The adjoining areas could be developed for new businesses such as aircraft manufacturing and maintenance, as well as subdivision for advanced manufacturing activities (subject to land servicing and traffic management at Sparks Road and potential biodiversity constraints).

Further north is the former Munmorah Power Station site. The site has access to gas, electricity and other services and is close to the M1 Motorway. The site, subject to remediation of contaminated lands, has potential for a range of industrial and manufacturing uses including recyclable energy production, heavy industry, biodiversity offsets and a large-scale battery energy storage facility.

Somersby Growth Area and Mount Penang Employment Precinct

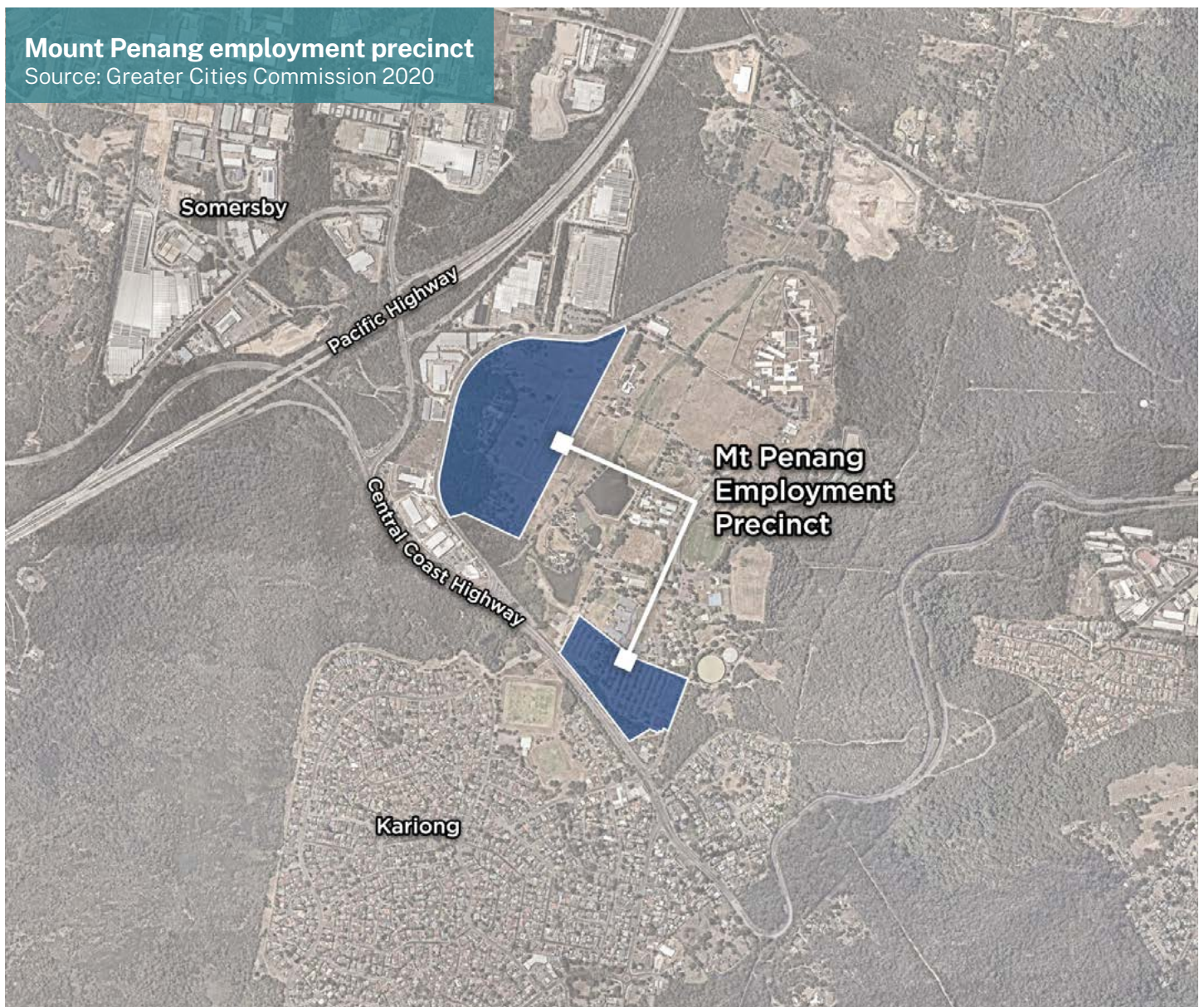
Somersby is identified in the Draft Central Coast Regional Plan 2041 as a regionally significant growth area that will coordinate industry growth and secure freight capacity.

There are opportunities to futureproof Somersby and make it a more sustainable employment area by planning for bushfire resilience and promoting circular economy activities. Despite these opportunities, there is only a relatively small supply of unconstrained, developable land remaining. New opportunities will need to capitalise on the need for local jobs and responses to changes in technology and supply changes.

Mount Penang Parklands was a 158-hectare site located at the Gosford junction of the M1 Motorway to Sydney, adjacent to Somersby. The Mount Penang Employment Precinct comprises approximately 25 hectares of employment land in two employment precincts that were formerly part of the broader Parklands but have been sold for employment generating uses. The balance of the site is owned by the Hunter and Central Coast Development Corporation (HCCDC) and includes significant bushland, heritage buildings and open space.

Mount Penang employment precinct

Source: Greater Cities Commission 2020



Development of the Mount Penang employment precincts would attract employment across various commercial uses alongside the uses on the land owned by the HCCDC which is focused on recreation, education and work within a natural and heritage setting. To accelerate the creation of jobs within the employment precinct further investigation is needed to determine the traffic and transport requirements and public transport connectivity.

Measures of success

- Better coordination and retention of government land and assets to further place-outcomes
- Aligned land use, transport and infrastructure planning and progress action on key identified areas for economic activity
- Increased focus and prioritisation of investment to employment areas
- Increased development certainty and protection of biodiversity

Economic rationale

The Central Coast offers up to 30% lower establishment costs per hectare than areas surrounding Sydney, making the region more attractive to large scale businesses.⁵

The employment lands at Wyong and Warnervale in the Northern Growth Corridor connect the area's many strengths including connections to producers and markets, environmental values, food and beverage offerings, recreation and sporting assets.⁶

The combined area of the Wyong Employment Zone and Warnervale Business Park is 318 hectares. Based on similar business parks in NSW,⁷ an average of 2.8 businesses could be established per hectare,⁸ equating to around 900 businesses.⁹ The number of jobs in the Northern Growth Corridor is projected to increase by 26% from 13,100 jobs in 2016 to 16,500 jobs in 2036.¹⁰

These areas are located next to the M1 Motorway, Sparks Road Interchange and Sydney to Brisbane freight line, making them an ideal location for transport, freight, warehousing, logistics, recyclable energy generation and storage and manufacturing industries.¹¹

Somersby and the Mount Penang Parklands is ideally located at the Gosford junction of the M1 Motorway to Sydney, 10-15 minutes from Gosford CBD and within the Southern Growth Corridor, an area that has been identified for infrastructure and jobs growth within the Central Coast City.¹² The Mount Penang Employment Precinct will reach its potential as a significant employment hub once traffic and transport connectivity in the area is improved, as well as east toward Gosford. Infrastructure servicing of employment sites in the Corridors will also enhance the developable land and encourage local employment opportunities.

Economic and community benefits

The activation of employment land would deliver more local jobs, reducing the time and cost of long commutes for residents. New businesses in the food processing sector would strengthen that industry cluster and support new directions for jobs growth. Activating the Wyong and Warnervale employment lands will increase capacity for employment, with 6,000 jobs estimated to be created in the precinct.¹³ The Draft Tuggerah to Wyong Economic Corridor Strategy estimates that retail trade, public administration, health care and social assistance, professional services, education and training, and construction will account for most of the new jobs.¹⁴

The creation of a large local workforce close to markets and producers would be attractive for businesses interested in relocating to the Central Coast. In 2014, the development of the Wyong Employment Zone was estimated to generate \$1.5 billion of investment from the private sector.¹⁵ That figure could be higher if the potential of the Zone is realised.

Mount Penang Employment Precinct could support office and warehouse industries, recreation, education and business. The development of the site is expected to create 3,000 ongoing jobs, which would produce benefits of \$12.5m to employed workers.¹⁶



Health and education



Residents of the Central Coast can have access to the best in training, skills development, higher education, health and medical services. More jobs linked to education, health, innovation and research would be part of a new activated precinct in Gosford.

Recommended Priority 3- Activation of a university campus in a revitalised Gosford CBD

Overview

Higher education is one of the key drivers of growth, prosperity, and competitiveness in global and local economies. Universities benefit cities and communities by providing a quality workforce, driving innovation, increasing employability of locals, upskilling existing workforces to meet the needs of growing economies and through knowledge-sharing and collaboration.

The Central Coast is home to a campus of the University of Newcastle, located at Ourimbah, and has expanded to include a Clinical School in Gosford's Hospital's Health and Wellbeing Precinct. Further expansion is needed to create more educational opportunities for the growing community of the Central Coast.

In February 2019, the Premier committed to an integrated Central Coast Education and Employment Precinct as part of a revitalised Gosford CBD. The NSW Government has identified a site at 299–309 Mann Street, Gosford for a new university campus, to be delivered by the University of Newcastle, which will support an innovation district in the Central Coast City.

The 4,650 square metre site is near Gosford Rail Station, Gosford Hospital, Gosford High School, University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care and could easily accommodate the university campus and student accommodation. Discussions around potential partnership arrangements with the Vocational Education and Training (VET) sector, including TAFE NSW should also be explored.

Measures of success

- Increased educational attainment
- Increased job participation
- Increased amenity of Gosford and opportunity for work placement
- Increased opportunity for micro-credentials designed for business
- Almost 270 jobs supported during construction
- An estimated 420 ongoing jobs supported through operation of the campus
- New higher education pathways for around 900 Central Coast students and upskilling through vocational education and training
- Employment growth in key industries by the end of financial year 2025-26
 - Healthcare + social assistance – increase by 8.5%
 - Accommodation + food services – increase by 5.5%
 - Professional, scientific, and technical services increase by 7.3%

Economic rationale

A new university campus in Gosford CBD will underpin Gosford's revitalisation as a regional capital and build on strengths such as Gosford Hospital, the University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care and TAFE NSW.¹⁷

The average higher education participation rate is just 14% (compared to 28% for Greater Sydney and 22% nationally).¹⁸ Just 30% of Central Coast residents aged 18 to 24 attend TAFE or university compared to 46% in Greater Sydney.¹⁹ Around two-thirds of undergraduate university students' study outside the region.²⁰

Australian Government estimates indicate 45% of new jobs will require a bachelor's degree or higher by 2023.²¹ Vocational training is also essential to ensuring strong employment outcomes. Students starting university in 2021 are expected to earn an estimated \$500,000 more than they would without a university degree to 2043, while students commencing in 2032 could earn \$200,000 more to 2043.²² This could bring broader economic benefits, with an increase in consumer spending of more than \$44 million between 2020–2044.

Economic and community benefits

A new university campus will create educational opportunities for around 900–1,000 students each year.²³ This could be optimised by leveraging partnerships with the VET sector, including TAFE NSW potentially offering sub-bachelor's degrees, micro credentialling and creating new ways to engage with many of the 24,000 Central Coast residents with diplomas.

The potential relocation of TAFE NSW's Central Coast presence to the Gosford CBD and closer location to the university campus will support students moving between vocational and university education, helping to build an innovative education and training offering that benefits students and employers.²⁴

A new university campus will reduce the need for many students to travel outside the region – saving time and money – while also helping to create an estimated 270 construction jobs and 420 ongoing jobs.

The presence of a new university campus in Gosford CBD will increase educational participation, upskilling the population to meet current and future business needs. The leveraging of the university's research capabilities will contribute to growth in innovation and entrepreneurship and cement local corporate, health and government partnerships in the City.

Recommended Priority 4 - Building on the Gosford Health and Wellbeing Precinct

Overview

The Gosford Health and Wellbeing Precinct is going through a major transformation with a consolidation of health services, new treatment models, greater capacity and improvements to patient care. Stage 1, completed in 2019, saw a new \$348m 11-storey Acute Services Building and car park delivered.

Stage 2 involves construction of:

- Building A:** University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care opened on 14 March 2022.
- Building B:** a final and essential step that could be made available for complementary State agencies or private sector health related services to create a complete Health and Wellbeing Precinct.



Measures of success

- Increased space for health and wellbeing industry activity
- Activation of precinct
- Reduce potentially preventable hospitalisations and barriers to healthcare

Economic rationale

Expanded health services are critical to providing adequate health and allied services for the growing population of the Central Coast and in helping achieve Gosford CBD's regional city status. 88,000 new residents will call the Central Coast home by 2040²⁵ increasing the overall population but particularly the ageing population with many choosing to retire to the Central Coast.²⁶

Servicing this growing and ageing population will see health care and social assistance emerge as the primary employment driver of new jobs. In 2019 this sector provided 18.7% of all new jobs²⁷ and \$1,997m to the local economy.

The current redevelopment of the Gosford Hospital, the University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care, will drive investment in allied health and research, and create the settings for a local talent pipeline.²⁸ Combined with the potential university campus, the area would be well positioned to evolve into a broader innovation-rich precinct that connects people to services while driving employment.

Case Study: Economic benefits of hospital expansions

The redevelopment of the Tamworth Hospital and Cancer Centre contributed more than \$79m to the local economy with a flow-on impact of more than \$100m a year. A similar redevelopment in Wagga Wagga initially contributed \$94m from capital works with a flow-on impact of \$132m from operating expenses.

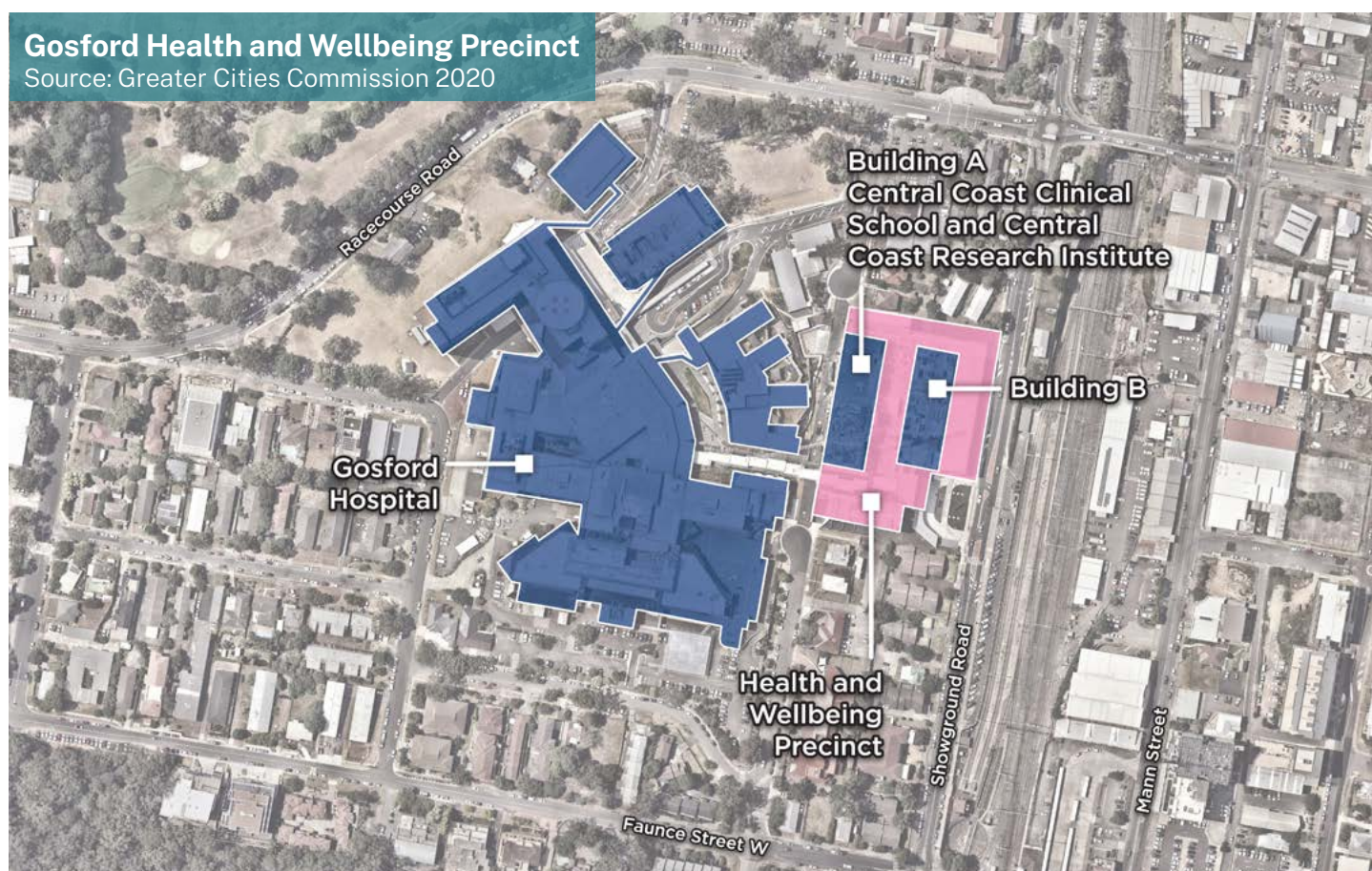
Both investments supported an increase in local health jobs, 31% in Wagga Wagga and 16% in Tamworth between 2011 and 2016. In Wagga, more than two-thirds of the construction workforce were local and in Tamworth it was 43%.

Economic and community benefits

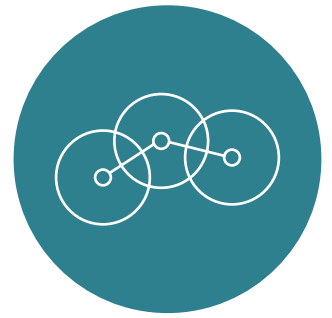
A future Gosford Health and Wellbeing Precinct leverages the links between the Central Coast Local Health District, the University of Newcastle Central Coast Clinical School and the Central Coast Research Institute for Integrated Care. Adopting a world-leading integrated care framework for the local population²⁹ mean fewer potentially preventable hospitalisations.

The precinct will provide 765 of the additional 4,300 health care and social assistance workers required to meet future demand, adding \$61.2m to the local economy every year.^{30,31} These quality jobs will be more resilient to economic downturns as they do not rely on the broader domestic or international economy.

The construction of the final Health and Wellbeing building will provide a local employment boost of around 200 jobs.³²



Connectivity



Improved transport networks and services both within and external to the Central Coast create new opportunities for local employment and business relocation, improve travel times and increase access for freight vehicles servicing regionally based businesses.

Internet speeds need to also be improved as they are critical to the digital connectivity of businesses (and homes) on the Central Coast. Improved internet speeds in Gosford and targeted employment areas will attract new start-ups to the region and grow existing business' productivity.

Recommended Priority 5 - Improving transport connections within the Central Coast and with Sydney and Newcastle

Overview

The NSW Government has delivered upgrades to the transport network within the Central Coast including to the M1 Pacific Motorway at Kariong and Tuggerah, the Pacific Highway between Ourimbah and Lisarow, and Wyong and Sparks Road. These upgrades have improved transport connectivity to key employment hubs and attracted business growth along these corridors.

The Commission notes that further improvements to public transport and the road network are being planned to reduce congestion and improve connectivity to key employment areas. This work includes a review of bus services to create better links to town centres, railway stations, education and employment hubs. On the road network, improvements are focusing on continuing the upgrade to four lanes of the Pacific Highway through Wyong Town Centre and Lisarow to West Gosford, upgrading the Central Coast Highway between Wamberal and Bateau Bay, and longer-term improvements on Sparks Road and Wyong Road.

These infrastructure improvements represent \$1 billion investment by the NSW Government into the Central Coast. Consideration is being given to how best to optimise opportunities for regional growth and improved services through a fast rail network including a possible route on a northern corridor including Central Coast, Newcastle, Taree and Port Macquarie. A commitment of an initial \$80 million has already been made towards developing a new rail alignment between Woy Woy and northern Sydney.

Measures of success

- Reduced use of private vehicles
- Reduced travel times within the Central Coast and to Sydney and Newcastle
- Better access to higher value employment and more jobs
- Higher business migration to Central Coast, better access to workers and increasing land values

Economic rationale

Prior to COVID-19, around a quarter of working residents – or more than 44,000 people – commuted out of the Central Coast to work every day,³³ usually to Sydney and Newcastle.

Two-thirds of these commuters travel by car – the road corridor between Sydney and the Central Coast is the third most congested in Australia.³⁴ This results in \$88.1m of lost productivity each year and delays are expected to increase by 53% by 2031.³⁵

Better transport connections would reduce delays, improve access to higher value employment opportunities in the Central Coast and broaden the available labour pool for Central Coast businesses.

Investment in rail and bus services would achieve time and cost savings, reduce road congestion and create road space for freight travel. Better connections would then open more opportunities to leverage the growth associated with the Western Sydney International Airport and more efficient trips from Sydney via NorthConnex.

Furthermore, improved connectivity would open opportunities in business and employment for Central Coast residents, and better connect young people to universities and other educational institutions.

Economic and community benefits

Infrastructure improvements that improve connectivity, reduce travel times and liveability, are attractors to both employers and employees seeking opportunities to relocate to the Central Coast.

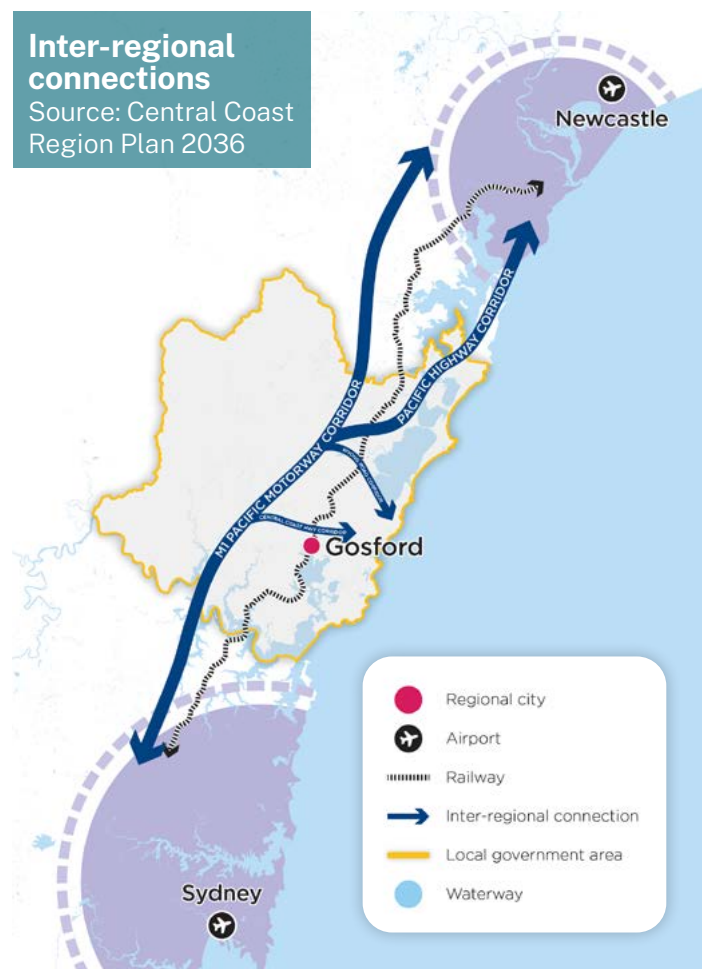
The planned road improvements will create more than 1,000 jobs to the Central Coast, over the life of the projects, with many workers seeking to relocate to the city. Indirect employment for local business during planning and construction of major infrastructure projects is also estimated to be significant, providing consultancy support, technical and construction expertise, and supply and support activities.

Fast rail along the northern corridor route will reduce travel times from Gosford to Sydney, and shift commuter travel mode to a greater use of rail over private car.³⁶ Residents will be able to access high value jobs but with more work-life balance enabling them to make the most of the great lifestyle and spend their earnings locally.

Fast rail will attract a new skilled workforce to the Central Coast, from Greater Sydney, and with it new businesses looking to relocate and take advantage of the opportunity, generating thousands of local jobs. This increased accessibility will result in an uplift in land value for local residents, due to a greater demand for housing, which in turn would create construction jobs.

Inter-regional connections

Source: Central Coast Region Plan 2036



More efficient public transport will not only boost employment connections but the tourism and the visitor economies as well.

Recommended Priority 6 - Delivering a high-speed internet network

Overview

The Central Coast Council has developed a proposal to establish a 10 Gigabyte high-speed internet network in the Gosford CBD to grow and expand existing businesses and attract new businesses. The NBN is expanding its program of Business Fibre Zones to include areas on the Central Coast. These Zones can offer businesses up to 1 Gigabyte speed internet services.

Measures of success

- Increased understanding of service needs and costs
- Increased business attraction in identified zones
- Office capacity for an additional 20,000 employees
- More than 35,000 jobs created through the economic multiplier effect across the Central Coast
- Improved quality of lifestyle for residents and speed of internet access for businesses

Economic rationale

COVID-19 public health orders saw approximately 65% less adult fare trips taken on the Central Coast Line between April and September 2020. Many Australians left major cities to live in regional areas with Sydney experiencing a net loss of 14,000 people and Melbourne 10,000. Most moved to regional or rural areas.³⁷ This may foreshadow an era of 'regionalism'—an outflow of people from capital cities.³⁸

More businesses support the shift of city workers to regional areas, with Australian majors such as KPMG, Commonwealth Bank, NAB and Telstra joining the Regional Australia Council 2031.³⁹

The absence of a secure, high-speed internet network is a potential barrier to regionalism and the growth, expansion and attraction of businesses. An audit of the NBN rollout on the Central Coast found that 17.6% of respondents rated their connection quality as 'poor' (regular drop-outs and/or speed limitations) and 14% 'very poor' (constant drop-outs and/or speed limitations).⁴⁰

Case Study: Ten Gigabit Adelaide

The Ten Gigabit Adelaide project was Australia's first city-wide fibre optic network. Businesses in more than 1,000 connected buildings can reliably share and receive data at 10Gbps. The Ten Gigabit project has delivered the following benefits for Adelaide:

- Between \$16m and \$76.4m in economic benefits a year
- Creation of more than 2,500 jobs in the first six years, including 40 jobs a year of construction
- Attracted new businesses, entrepreneurs, government and institutions
- Improvements in productivity and operational efficiencies

- 90% decrease in internet service costs with speeds four times faster
- Quality of life improvements for residents and workers.

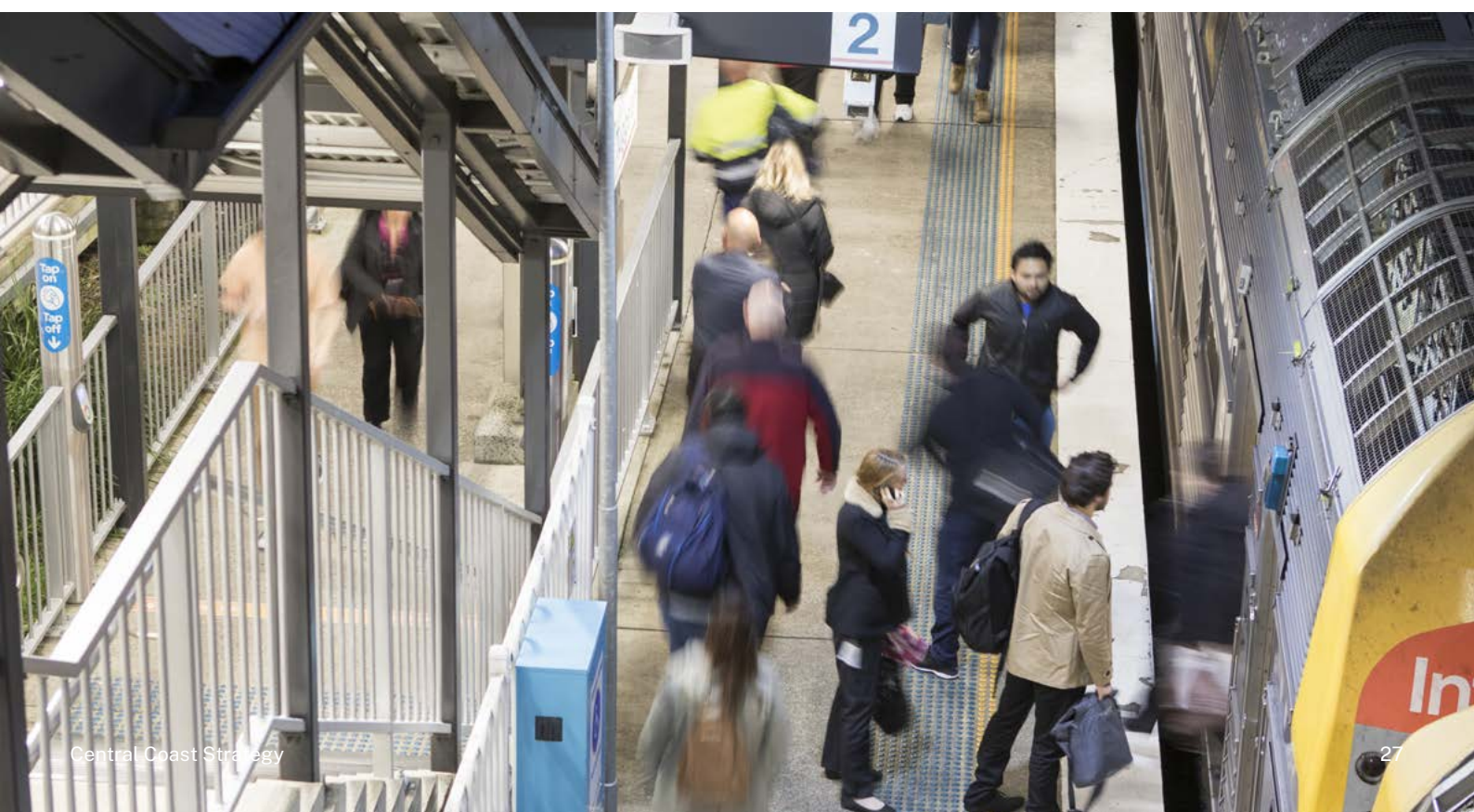
NBN has initiated a Business Fibre network program to support Business Fibre Zones across NSW, including the Central Coast. The Business Fibre Zones can offer high speed internet services to 1 Gigabyte which is expected to meet the internet needs of most small to medium size businesses. There is no Business Fibre Zone for Warnervale, an area rich in potential for business growth which can be supported by high-speed internet services.

Economic and community benefit

Central Coast Council estimates high-speed internet will increase demand for an additional 200,000 sqm of Grade A office space.⁴¹ Using this assumption, capacity could be created for an additional 20,000 employees.⁴² The multiplier effect, of these new employees, will see job generation on the Central Coast of over 35,000.⁴³

The creation of more local jobs will ensure a 50% reduction in commuters (keeping 20,000 residents off the roads), reducing rail passenger trips by 2,600 commuters each day, and attract new talent to the region.⁴⁴ The cost saving for commutes to Sydney or Newcastle is estimated to be \$83.90 per return trip, with approximately 40 commutes avoided per person.⁴⁵

Economic benefits have been experienced through the implementation of similar projects in Australia.⁴⁶



Planning



The population of the Central Coast is forecast to grow to 415,000 residents by 2036. The six cities vision, of which Central Coast is now a part, is to accelerate economic growth to provide better jobs, housing, education, health and lifestyle opportunities for everyone.

This will mean more people working within 30 minutes of where they live, increased access to homes that families can afford, more equal access to higher education and training opportunities. We need a planning system that will create these new jobs, industries and housing while protecting the lifestyle and natural environment that people love about the Coast.

Streamlining planning processes will help remove barriers, such as uncertainty and wait times, for businesses looking to relocate to new industrial lands and for the creation of new housing to meet the needs of the growing population. A robust planning system can be optimised by further strengthening collaboration, and the systems that support collaboration, between all the different parties involved in planning for a city.

Recommended Priority 7 - Improving planning processes to accelerate development approvals

Overview

Given the Central Coast is one of NSW's most valuable food production areas, agricultural land use planning is extremely important to this region. This is particularly critical in relation to the proposed acceleration of development approvals.

The NSW Government is providing support and additional resources to councils, including Central Coast Council to address planning processes. Council launched an online planning portal in July 2020, to help reduce processing times. A new Central Coast Local Environmental Plan (LEP), has been finalised and will come into effect on 1 August 2022 alongside the consolidated Central Coast Development Control Plan (DCP). All Development Applications lodged with Council from 1 August 2022 will be subject to the new LEP. The Gosford Town Centre remains subject to State Environmental Planning Policy (Precincts Regional).

The NSW Government and Central Coast Council are working to accelerate the assessment of major applications including case management approaches to finalise longstanding regionally significant development applications. Since August 2020, the Hunter Central Coast Planning Panel has determined eight major Central Coast development applications, removing 7,379 assessment days from the system.

The NSW Department of Planning is currently investigating strategic conservation planning across the Central Coast to support urban development while protecting plants, animals and their habitat at a landscape scale. This work includes assessing impacts on biodiversity from future urban growth on the Central Coast.

Darkinjung LALC have developed a comprehensive set of planning measures to assist all LALCs across NSW achieve better economic outcomes for their land, meet the objectives of state level planning policy and strengthen the economic self-determination of Aboriginal communities, known as the Darkinjung Delivery Framework. The Framework will assist Darkinjung LALC with a suitable pathway to obtain biodiversity approvals and to identify opportunities for placing land into conservation, protecting high biodiversity values while removing constraints and costs. A trial is underway to support Darkinjung LALC with the biodiversity approvals for development ready sites.

Measures of success

- Reduced backlog of development applications
- Increased efficiency of assessment process
- Increased development certainty and protection of biodiversity.
- Increased activation of First Nations land, economic and social outcomes
- Reduced interest rate costs on financing building works

Economic rationale

Industry stakeholders highlighted many barriers with the planning process and development assessment on the Central Coast including:

- Complex and conflicting strategic planning
- Outdated planning controls
- Slow assessment timeframes for development applications and regionally significant development
- Uncertainty around the outcome and timing for land rezoning.

In addition, post-consent infrastructure charges such as costs to connect to water and waste, reduce project feasibility and could be why many construction projects do not proceed following consent.

Businesses clearly have an appetite to expand and re-locate to the Central Coast, yet these barriers impact investor attraction and confidence. Improved assessment processes early in a project lifecycle reduce risks, streamline development projects, and attract regional investment.

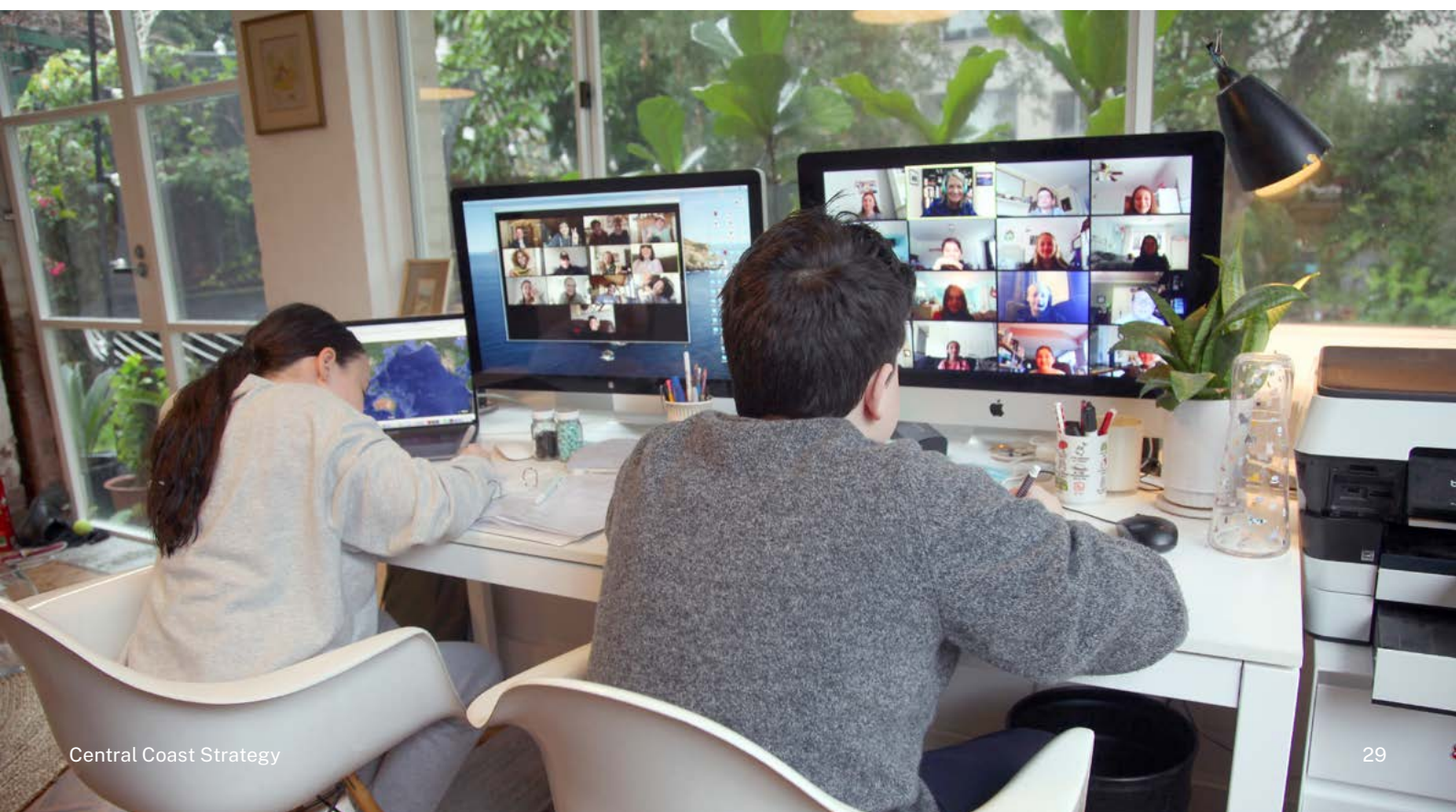
Improvements to planning processes attract businesses and investors and contribute to the value of building approvals (\$781.6m in 2019-20).⁴⁷

Economic and community benefits

Better planning assessments and processes benefit local economies (Productivity Commission,⁴⁸ Reserve Bank of Australia,⁴⁹ and Infrastructure NSW⁵⁰).

Central Coast Council has an average wait period of 43 days for development applications. Even if broader reforms reduced the wait by 20%⁵¹ (34 days), this could avoid between \$0.3m and \$1.4m in interest rate holding costs on building works across the Central Coast, per annum.⁵²

Establishing upfront biodiversity approvals through the Central Coast Strategic Conservation Plan will be a major job creator as Darkinjung LALC develops its landholdings and as more certainty attracts development in the Mount Penang employment precinct and employment land at Wyong and Warnervale. Unlocking approvals for residential subdivisions will go a long way to meeting housing demand and creating local construction jobs.



Implementation

The Commission believes the seven priorities are the right ones to focus on immediately to open up economic opportunities and spur on investment and grow jobs.

Implementing this Strategy would require collective action and investment from stakeholders, all levels of government, the private sector and the community.

The Commission welcomes the strong progress already made on a number of actions since the consultation and coordination of the Strategy and will continue to work with stakeholders to develop effective governance. The recommended actions include several studies and business cases that will identify follow-on actions to fully implement the priorities and deliver outcomes.



Recommended Actions

Priority 1: Driving innovation and industry collaboration

Measures of success:

- Increased innovation activity and commercialisation
- Increased visibility of local specialisation and business
- Increased private sector investment
- Increased space for innovation and economic activity
- Increased number of knowledge-based and innovative jobs (and inclusion measures)
- Increased jobs and jobs containment









Recommended Actions	Progressed	FY22/23	FY23/24
1. Develop innovation skills and a commercialisation program to support food tech start-ups and a food roundtable.		●	
2. Develop Central Coast and Six Cities innovation ecosystem program.		●	
3. Progress Central Coast innovation district vision and investment attraction.		● — ●	
4. Develop a plan for improving amenity, vibrancy and inclusion for the innovation district.			●



Priority 2: Unlocking employment lands and accelerating employment precincts

Measures of success:


- Better coordination and retention of government land and assets to further place-outcomes
- Aligned land use, transport and infrastructure planning and progress action on key identified areas for economic activity
- Increased focus and prioritisation of investment to employment areas
- Increased development certainty and protection of biodiversity

Recommended Actions	Progressed	FY22/23	FY23/24
5. Seek funding or exchange land to support biodiversity offset scheme.			
6. Develop government property strategy.			
7. Progress Central Coast Airport and Warnervale Employment Zone and coordination of plans.			
8. Progress Munmorah Power Station revitalisation and future land use.			
9. Undertake traffic analysis for Mount Penang Employment Precinct.			
10. Progress Mount Penang employment precinct and Somersby Growth Area.			
11. Progress Tuggerah urban and business centre.			
12. Undertake Southern and Northern Growth Corridor traffic studies.			

Priority 3: Activating a university campus in a revitalised Gosford CBD

Measures of success:

- Increased educational attainment
- Increased job participation
- Increased amenity of Gosford and opportunity for work placement
- Increased opportunity for micro-credentials designed for business

Recommended Actions	Progressed	FY22/23	FY23/24
13. Test market interest with suitable universities to develop new campus.			

14. Prepare business case for the relocation of TAFE facility to Mann Street.



15. Investigate partnerships between schools, industry, VET sector providers, including TAFE NSW and the University.



16. Coordinate delivery of developments within education and health precincts.



Priority 4: Building on Health and Wellbeing Precinct

Measures of success:

- Increased space for health and wellbeing industry activity
- Activation of precinct
- Reduce potentially preventable hospitalisations and barriers to healthcare.

Recommended Actions	Progressed	FY22/23	FY23/24
17. Proceed with Stage 2 of the Health and Wellbeing Precinct development to undertake analysis of funding options for Building B.			
18. Develop and activate integrated care innovation hub and program of activity.			

Priority 5: Improving transport connectivity

Measures of success:




- Reduced use of private vehicles
- Reduced travel times within the Central Coast and to Sydney and Newcastle
- Better access to higher value employment and more jobs
- Higher business migration to Central Coast, better access to workers and increasing land values

Recommended Actions	Progressed	FY22/23	FY23/24
19. Prepare Gosford CBD transport study to inform business case.			
20. Undertake analysis of infrastructure improvements of the Central Coast road/access network.			
21. Coordinate planning for rail alignment to connect to fast rail.			
22. Complete bus network review to connect to employment centres and rail stations.			

Priority 6: Delivering a high-speed internet network

Measures of success:





- Increased understanding of service needs and costs
- Increased business attraction in identified zones
- Office capacity for an additional 20,000 employees
- More than 35,000 jobs created through the economic multiplier effect across the Central Coast
- Improved quality of lifestyle for residents and speed of internet access for businesses

Recommended Actions	Progressed	FY22/23	FY23/24
23. Prepare a business case for a high-speed internet network for the Central Coast City.			
24. Request NBN to designate Warnervale a Business Fibre Zone.			
25. Initiate a marketing program to increase the take up of higher speed internet services through all Central Coast Business Fibre Zones.			

Priority 7: Planning

Measures of success:

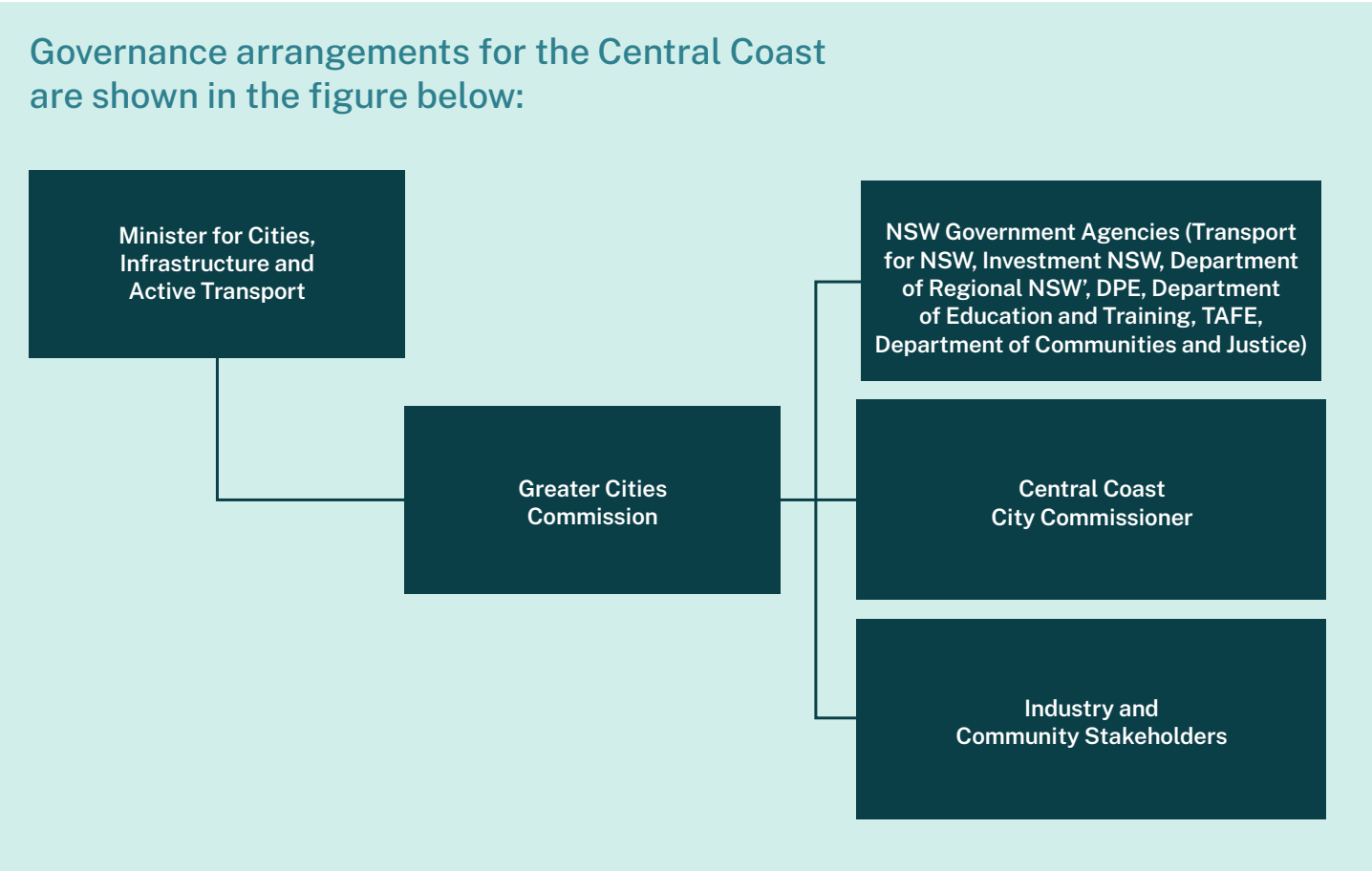
- Reduced backlog of development applications
- Increased efficiency of assessment process
- Increased development certainty and protection of biodiversity
- Increased activation of First Nations land, economic and social outcomes
- Reduced interest rate costs on financing building works

Recommended Actions	Progressed	FY22/23	FY23/24
26. Support Council in the assessment of development applications and regionally significant development.			
27. Finalise the consolidated Central Coast Local Environmental Plan and operations plans for Central Coast Airport.			
28. Seek funding for up-front offsets and finalise the Central Coast Strategic Conservation Plan.			
29. Continue to support Darkinjung Delivery Framework.			

Governance

The Commission will lead the coordination, collaboration and consultation of stakeholders throughout the implementation of the Central Coast Strategy and during the development of the Six Cities Region Plan and the Central Coast City Plan.

The priorities identified in this Strategy focus on delivering key projects and initiatives that will enable innovation, education, jobs and connectivity for the Central Coast City.



The Commission will lead the coordination of NSW government agencies and work closely with key stakeholders including Central Coast Council and Darkinjung LALC to ensure a transparent and efficient management of the Central Coast. Technical working groups will be established to collaborate on the priorities outlined in this Strategy.

Efficient coordination and successful delivery would require strong governance. A whole-of-government led delivery program with representation from delivery agencies would be needed together with an implementation plan to establish timing, responsibilities and reporting mechanisms.

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