

Urban Manufacturing Project

Policy & Peak Group Review

An examination of the planning, economic and industry support policies of relevance to Makers

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EXECUTIVE SUMMARY

The Urban Manufacturing Project (UMP) is a collaboration between the five inner city Councils of Melbourne, Port Phillip, Stonnington, Yarra and Maribyrnong, together with the City of Moreland and the State Government Metropolitan Planning Authority (MPA).

The UMP is managed by a Steering Group comprising representatives from each of the participating organisations.

The aim of the project is to determine what actions the participating Councils might take to support New Urban Manufacturers, termed 'Makers', described as small businesses employing up to 20 people that make or design high-value physical or digital products.

The UMP will provide the participating Councils with a report comprising:

- recommendations to support Makers, including new policies or changes to existing policies
- a well-researched business case supporting these recommendations.

The UMP Steering Group engaged the University of Melbourne (UoM) to research Makers in Melbourne's inner-city region as well as selected international cities, to provide an evidence base for any policy changes required. The UoM produced a Phase 1 research report in January 2016 and a review of policies relevant to Makers in selected international cities in February 2017. It is currently completing a Phase 2 report examining the nature of Makers and their needs.

The UMP Steering Group engaged Planning for Change to undertake a Policy and Peak Group Review. The purpose of this review is to provide a context within which findings from the UoM Maker research can be considered, to determine any appropriate policy and support changes.

The Policy and Peak Group Review examines the current support relevant to Makers, based on:

- an assessment of government strategic and statutory planning and economic development policies
- a survey of selected industry Peak Groups and their services.

Findings, conclusions and recommendations are made to the UMP Steering Group regarding:

- the extent to which relevant policies refer to the terms New Urban Manufacturing or Makers, and the extent to which the Peak Groups surveyed are familiar with these terms
- the extent to which relevant policies support the preservation of inner city industrial land, in general, or specifically for Makers, and the Peak Groups' views in this regard
- the extent to which relevant policies and the Peak Groups surveyed support Makers
- the likelihood of businesses closing or relocating to outer metropolitan areas due to the pressure on inner urban industrial land being rezoned for residential purposes.

EXECUTIVE SUMMARY

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1.0 INTRODUCTION

The Urban Manufacturing Project (UMP) is a collaboration between the Inner Melbourne Action Plan (IMAP) Councils, together with the City of Moreland and the State Government Metropolitan Planning Authority (MPA). IMAP comprises the five inner city Councils of Melbourne, Port Phillip, Stonnington, Yarra and Maribyrnong. The UMP is managed by a Steering Group comprising representatives from each organisation.

The six local governments referred to above are under significant pressure to re-zone industrial land for residential development. This has the potential to limit opportunities for urban manufacturers to develop and grow in the inner city, forcing them to either close or relocate to the outer suburbs. This also has the potential to limit the future size and diversity of employment opportunities in the inner city.

The aim of the UMP is to determine what actions the participating Councils might take to support New Urban Manufacturers.

New Urban Manufacturers are termed ‘Makers’ and described as small businesses employing up to 20 people that make or design high-value physical or digital products, derived from J. Day and V. Miller, (2017). They tend to operate in small industrial, warehousing, incubator spaces or hubs and fall within, but are not limited to, the classifications per Figure 1 below:

Figure 1: Maker Activity Classifications

Art and Culture

Installation art or sculpture

Electrical Parts and Materials

Metal products (excluding jewellery)
Plastic products
Motor vehicle parts
Electrical and electronic goods, including computing products

Home, Outdoors, and Hardware

Furniture, floor coverings, or housewares
Hardware, building, and garden supplies
Recreational goods
Chemicals, fertilizers, and cleaning products

Information Media and Telecommunications

Software publishing
Motion picture and video activities
Sound recording and music publishing

Publishing

Paper or paper products
Printing, publishing, screen-printing, or typesetting

Science

Pharmaceutical products and toiletries
Scientific or biotechnical

Personal Services

Personal services

Textiles and Fashion

Textiles
Clothing, footwear, and personal accessories
Jewellery

Wood, Glass, and Clay

Wood products (aside from furniture, floor coverings, or housewares)
Glass Ceramic, clay, or concrete products

The UMP will provide the participating Councils with a report comprising:

- recommendations to support Makers, including new policies or changes to existing policies
- a well-researched business case supporting these recommendations.

The University of Melbourne (UoM) was engaged to research Makers in Melbourne’s inner-city region, as well as selected international cities, to provide an evidence base for any policy changes required to support Makers. The UoM produced the UMP Phase 1 research report in January 2016 and a review of

policies relevant to Makers in selected international cities in February 2017. An unpublished draft Phase 2 report was produced in January 2017 and is currently being finalised to incorporate a more extensive survey of Makers.

A Policy Reference Group for the UMP, comprising representatives from each of the participating organisations, was established to consider any policy and support changes proposed by the UoM Maker research. (See Attachment 1 for a list of Policy Reference Group members).

This Policy and Peak Group Review, prepared by Planning for Change for the Policy Reference Group, examines government and industry planning policies and economic support of relevance to Makers. The purpose of this review is to provide a context within which findings from the UoM Maker research can be considered, to determine any appropriate policy and support changes.

It is based on a review of current government strategic and statutory planning and economic development policies. In addition, it reviews industry policies and support, based on a survey of selected industry Peak Groups.

It examines the extent to which these policies:

- refer to the terms New Urban Manufacturers or Makers
- support the preservation of industrial land in inner city regions in general or specifically for Makers
- provide economic development or business and industry support for Makers.

2.0 APPROACH

This report is based on a desk top review of the current strategic and statutory planning policies and economic development, business and industry support identified in:

- the University of Melbourne’s review of selected international cities
- the websites of the capital cities of Sydney, Brisbane, Adelaide, Perth, Hobart, Darwin and Canberra and Victorian State Government (see References in Attachment 5)
- information provided by members of the UMP Policy Reference Group
- a survey of selected industry Peak Groups (see Attachment 3).

Regarding this last dot point, the University of Melbourne’s draft Phase 2 report suggested that Makers were not engaged with Peak Groups nor the support services they provide (J. Day and S. Carter, (2017) p 46). The UMP Steering Group considered it important to understand the Peak Groups’ views with respect to Makers. Of the fourteen peak groups contacted, eight responded to the survey as listed below.

Responded

Design Institute of Australia (DIA)
Australian Design Alliance (ADA)
Victorian Chamber of Commerce and Industry (VCCI)
Australian Advanced Manufacturing Council (AAMC)
Australian Industry Group (AIG)
Property Council of Australia, Victoria (PCAV)
Manufacturing Skills Australia (MSA)
Australian Manufacturing Technology Institute Limited (AMTIL)

Did not respond

Council of textile & fashion
Specialised Textiles Association
Advanced Manufacturing Growth Centre
South East Melbourne Manufacturers Alliance Inc
Australian Furniture Association

The survey sought the Peak Groups’ views on:

- the extent to which they are aware of New Urban Manufacturers or Makers
- the organisation they consider would be most appropriate to represent Makers
- any current issues they consider would be relevant to Makers
- whether industrially zoned land in the inner city region should be kept for industrial activities in general or specifically for Maker activities
- whether the pressure from land being rezoned from industrial to residential would force Maker businesses to close or relocate to outer metropolitan areas.

3.0 FINDINGS

The following section summarises the findings of UM Policy and Peak Group Review.

3.1 The extent to which relevant policies refer to New Urban Manufacturing or Makers, and the extent to which the Peak Groups surveyed are familiar with these terms

The UoM research to date, J.Day and V. Miller, (2016) J.Day and S. Carter, (2017), has not defined Makers. The Maker description in Section 1.0, was derived from the characteristics common to Makers the UoM found in its research.

None of the relevant policies examined refers specifically to the terms New Urban Manufacturers or Makers. There are however a range of terms relevant to Makers activities described in the introduction to this report, as shown in Figure 2 below, and described in more detail in Attachment 2.

Figure 2: Terms relevant to Makers and the inner Melbourne zones that allow types of Maker activity

<i>Terms relevant to Makers (Note these terms are not specific to the Zones in the column on the right)</i>	<i>Inner Melbourne zones that would allow certain types of Maker activity</i>
<i>Entrepreneurs</i>	<i>Most Residential zones permit Home/Office/Occupation/Business (See Attachment 2)</i>
<i>Co-working Spaces/Hubs</i>	
<i>Digital businesses</i>	
<i>Startup Businesses</i>	
<i>Advanced Manufacturing</i>	
<i>Bespoke Manufacturers (Sydney)</i>	
<i>Creative Industry</i>	
<i>Cottage Industry (Adelaide)</i>	
<i>Low-Impact Industry</i>	
<i>Light and Service Industry</i>	
<i>High-Tech Industry</i>	
	<i>Commercial zone</i>
	<i>Business zone</i>
	<i>Capital City zone</i>
	<i>Mixed Use zone</i>
	<i>Industrial zones - most appropriately zone 1</i>

The terms listed in Figure 2 are relevant to Maker activities because they either describe an aspect of Makers or the spaces in which Makers operate. The Inner Melbourne zones listed in Figure 2 would appear to be able to accommodate a range of Maker activities. This would range from small home-based businesses in residential zones, to larger businesses employing up to 20 staff in Commercial, Mixed Use and

Industrial zones, depending entirely on the nature of the Maker activity. In January 2018, Amendment VC142 to the Victoria Planning Provisions, replaced the term ‘Home occupation’ with ‘Home based business’ as a land use which can now operate in many zones with double the floor area and staff without the need for a permit. See Attachments 2 and 4 for more details. These changes were introduced to support small business by:

- allowing greater flexibility for home based businesses
- reducing the costs to applicants and councils by increasing permit exemptions and updating provisions to provide greater clarity and certainty
- facilitating new forms of online business

Victoria Planning Provisions Amendment Vc142 Explanatory Report, January 2018

Hence, it would not appear necessary to define a specific zone or space to accommodate Makers in the inner Melbourne region, unless the current research being undertaken by the UoM provides evidence to the contrary. Depending on the outcomes of the UoM research, some of the conditions within these zones, or the activities they permit, might need to be changed.

The Department of Economic Development, Jobs, Transport and Resources (DEDJTR) describes Advanced Manufacturing businesses as having established sustainable global competitiveness through advanced capabilities and characteristics. These characteristics frequently feature a combination of the following:

- anticipating market opportunities and customers’ needs
- competing on value, including through developing and commercialising products and processes with significant international competitive advantage
- having strong leadership, and investing in a highly-skilled workforce
- being globally-oriented, integrated and connected
- utilising leading manufacturing technologies, techniques and data
- collaborating with business partners across value chains and with leading researchers.

(Advancing Victorian Manufacturing, a Blueprint for the Future, DEDJTR, p2, September 2017).

In contrast to this description of Advanced Manufacturing, the UoM research found that Makers tended to be more focussed on local, and less on international, markets. It found that:

- “Makers tend to be small and have minimal aspiration to expand to mass production
- Manufacturers tend to aspire to one or both of those features”

J.Day and S. Carter, Urban Manufacturing Phase 2 Report (2018) p, viii.

The UoM research could not provide a succinct and definitive set of criteria that can conclusively identify makers.

Only two of the eight Peak Groups that responded to the survey, the Design Institute of Australia (DIA) and Australian Design Alliance (ADA), were familiar with the term Maker and the nature of New Urban Manufacturing.

All peak groups interviewed were interested in the nature of the Urban Manufacturing Project. The DIA, ADA, and PCAV all expressed interest in further involvement in the project and the AIG and AAMC were interested in being informed about its progress.

A representative from one of the peak body's interviewed, but whom could not provide an official comment, suggested that:

- the Food Manufacturing sector should be included in the Maker description as it has many of the Maker features
- the definition should incorporate older manufacturers that operate in inner city locations, have incorporated new technology in their production and have incorporated retail and marketing activities.

The representative also explained that it is often hard to categorise firms into an Australian and New Zealand Standard Industrial Classification (ANZSIC). An example is the of classification of Advanced Manufacturing. In one sense, any manufacturing firm operating today falls into this category because they have had to update their production methods with new technology to stay in business. In a similar way, some firms might consider themselves as 'traditional' manufacturers, but could actually be classified as 'Makers' because they have had to diversify their products and incorporate other non-manufacturing elements into their operation in order to survive and grow.

DEDJTR's description, discussed above, emphasises that Advanced Manufacturing has a strong international focus, in contrast to the locally focussed nature of Markers described in the UoM research.

The above representative, (from the peak body who could not provide an official comment), suggested that maker description (set out in Figure 1) could be expanded to include the following three groups of manufacturers found in inner urban areas:

- the first group are those closely aligned to the Maker description in the Introduction section of this report. These are manufacturing activities that choose to locate in the inner urban areas because that is where their customer base /target markets are located
- the second group consists of manufacturers that have a requirement to be located close to a port and consequently, in Melbourne given the Port of Melbourne's location, are inner urban Makers
- the third group consists of established firms in locations that have been 'engulfed' by urban residential growth or their previously industrial locations have been 'gentrified'. Given the requirements for these firms to update their methods, diversify their products and/or incorporate other non-manufacturing elements into their operation in order to survive and grow, as described above, they have become Makers by default.

3.1.1 The Peak Groups' views regarding appropriate Maker representation

The DIA, the Peak Group for the design sector, considers that it would be the most appropriate organisation to represent Makers. Although the DIA does not currently provide specific services to Makers, it is aware of Makers and has undertaken a number of initiatives of relevance.

Design is an important common element in the manufacturing process that defines Makers. This includes Human Centred Design in the digital world. According to the DEDJTR, Victoria has a comparative advantage in design and engineering capabilities which is recognised globally and attracts manufacturing to Victoria. (DEDJTR (2017), *Advancing Victorian Manufacturing, a Blueprint for the Future*, Melbourne, P17).

The DIA would be interested in further discussions about potential engagement with Makers.

Apart from the DIA, none of the other organisations interviewed considered that they were the most appropriate to represent Makers, primarily because the description provided was considered too broad.

They felt that representation by one group would be too difficult due to the varied nature of activities within the Maker definition provided.

AMTIL, AAMC and AIG represent and provide advice to larger corporations and hence felt that their services would be more relevant, if and when a Maker became more established and employed more than 20 staff.

AAMC suggested the possibility that some large manufacturing firms might be interested in supporting Makers that operate within a similar industry sector, from a corporate social responsibility perspective as well as potentially being motivated to mentor and develop a future source of skilled workers.

The idea of a larger firm supporting some Makers was considered well intentioned by other peak groups who also felt the larger firm would have to be altruistic. Many larger firms have in-house training, are also Registered Training Organisations, or work directly with TAFE which could potentially assist Makers.

In addition, AAMC suggested that RMIT, Swinburne University and Victorian University of Technology, as well as other institutions, might be interested in supporting Makers because these institutions have a vested interest in the future employment opportunities for their students.

PCAV suggested a collaborative approach between universities, TAFE and local Councils might be the best way to support Makers. This approach could potentially be led by DEDJTR.

PCAV noted that the City of Melbourne's small business grants program was very helpful for small businesses and hence Makers.

3.1.2 The Peak Groups' views regarding issues they consider are currently facing Makers

Makers face difficulties with 'first and last mile' logistics, which involves moving goods and supplies in an increasingly congested urban environment. Some companies are adopting innovative delivery methods, for example, Davids Dairy, a micro-dairy in Fitzroy, which has special vehicles that can negotiate narrow laneways.

Food businesses face very difficult regulatory controls including planning, meat and food safety regulations, which make it difficult to diversify into other areas of food processing. Consequently, a potential area of support for Makers could be assistance in negotiating relevant regulations.

The Federal Government's Future Industries Manufacturing program and Entrepreneurs program is aimed at larger firms. These programs require firms to have a minimum turnover of \$1.5 million and to have been trading for a minimum of three years.

Programs aimed at exporters, such as the the Export Market Development Grants, don't suit Makers, the majority of whom, as discussed earlier, tend to be focused on serving local markets.

The DIA noted that Makers may need support with respect to the following:

- manufacturing capability for short runs, including product development and samples
- rent and utility costs are high in inner city areas
- the need for high-level machine operator skills and training in Computer Aided Design to operate high tech equipment such as 3D printers

- the need to maintain model making skills (using hands).

The DIA is going to create a design hub in 2018 and is also working with its partners to set up a model making capability (with a making area) for its members, as well as other not-for-profit design associations.

3.2 The extent to which relevant policies support the preservation of inner city industrial land, in general or specifically for Makers, and the Peak Groups' views in this regard

The international research, Federal and State policies and the six participating Councils, all recognise that industrial land in inner city areas needs to be preserved for employment opportunities and protected from the pressure to have it rezoned for residential purposes.

3.2.1 Examples of Policies supporting the preservation of inner city industrial land

The City of Sydney's Employment Lands Study found:

- increasing demand for, and concentration of, residential development
- increasing land values due to scarcity/availability putting upward pressure on rents and prices
- the shrinking role of traditional manufacturing and exodus of many businesses to industrial areas in Western Sydney where prices are cheaper
- increasing demand for adaptively reused warehouse space for 'creative uses', whether for light industry or commercial users.

(City of Sydney, February 2014).

The Brisbane City Plan 2014 refers to protecting major industrial areas and supporting small businesses and start-ups by allowing them to locate in Centre Zones and, where appropriate, low impact Industry zones.

The Planning Panel considering Maribyrnong Economic and Industrial Development Strategy agreed with the Council proposition that:

- once industrial land is gone, it does not come back
- the longevity and adequacy of employment land cannot be left to random rezoning or current desires of individual landowners based on their own economic plans
- there should be neither entitlement nor any reasonable expectation that employment land can easily be redeveloped for some non-employment purpose, namely residential.

(Panel Report, Maribyrnong Planning Scheme Amendment C108, Planning Panels Victoria, 2015).

The following quote from the Premier of Victoria, Hon. Daniel Andrews, is particularly relevant to this issue of preserving industrial land in the inner Melbourne region:

'I've heard people say Victorian manufacturing is disappearing. It's simply not true. Victorian manufacturing is a \$26 billion industry employing more than 283,000 men and women – making it one of the state's largest suppliers of full-time jobs. Of course, Victorian manufacturing is going through a transition – moving away from being a sector dominated by automotive manufacturing towards a more diverse mix of industries ranging from food to aviation, biotech to construction. The point is this: Victorian manufacturing is not disappearing, but it is changing.'

(DEDJTR, (2017), *Advancing Victorian Manufacturing, a Blueprint for the Future*, Melbourne, p1).

The question is how best to ensure land opportunities remain to accommodate this transition. The transition is in process but is taking time. The short-term opportunities to rezone land previously occupied by older manufacturing to residential, should not prevent longer term opportunities for development of new manufacturing.

Plan Melbourne 2017-2050 sets out the Victorian Government's vision for Melbourne's growth. This plan emphasises the need to ensure there is sufficient industrial land for manufacturing, service industries, warehousing and distribution, and other employment generating activities. Long-term land use plans and business investment strategies are being developed incorporating significant national industrial precincts and employment and innovation clusters that will be a focus for jobs and investment growth. DELWP (2017), Plan Melbourne 2017-2050, Metropolitan Planning Strategy.

3.2.2 The Peak Groups Views' regarding the preservation of industrially zoned land in the inner-city

Only the DIA considered specific areas of inner-city industrially zoned land should be kept for Makers. The PCAV, AIG consider that specific areas of inner-city industrially zoned land should be kept for all industrial activities, not just Makers.

PCAV noted that increasingly industrial property in inner Melbourne is used for warehousing and distribution centres to support the freight and logistics industry. Other industrial uses, such as the Dulux factory in Melbourne's north, are high-tech facilities, often not employing a large number of staff. In the context of inner Melbourne, it is important to maintain a variety of land uses so that incubator, tech and start-up companies have access to the right workforce and the amenity that attracts this workforce.

PCAV notes that the traditional view of industry, associated with dirty manufacturing processes, is not representative of current or future industrial processes and hence Makers might be more appropriately located in a mixed use zone.

AIG makes an important point that while it is necessary to preserve land for industrial purposes, these industrial activities' associated transport, access and parking requirement also need to be preserved. Often these requirements are adversely impacted by the increase in residential development in the same or surrounding zones. For example, George Western Foods in West Melbourne face changes in traffic conditions and road closures that make it very difficult for them to operate.

The impact of changes to transport, access and parking to improve amenity for increased residential development, should be carefully considered to ensure they do not significantly impact on transport, access and parking requirements of industrial activities. Such changes are often incremental. Hence it is important to take a more comprehensive, strategic view of an area to consider industrial and residential transport, access and parking needs.

AIG also referred to the following two publications which are of relevance to this Policy and Peak Group review:

1. Towards the Re-Industrialization of Europe - A Concept for Manufacturing for 2030, Engelbert Westkamper, University of Stuttgart, Germany, Springer, 2014.' This publication discusses the nature of 'Good-Neighbourhood Factories' which use high-end technologies, contain their emissions, meet customer requirements in the best economic and ecological way and play a positive role in the community.

2. Made in Marrickville, prepared by QUT, University of Wollongong and Monash University. This publication examines enterprise and cluster dynamics at the creative industries-manufacturing interface. It states that:
 - creative industries and manufacturing are increasingly interwoven, through innovation-driven additive manufacturing, craft-based production, and bespoke Maker scenes
 - the assumption that the decline of Australian manufacturing is inevitable, is false and misleading because employment, exports, enterprise formation and R&D investment statistics all point to manufacturing’s endurance, as well as its transformation and increasingly diverse character
 - simplistic depictions of manufacturing’s decline override empirical evidence of complexity in favour of a simple narrative that justifies other ends, such as conversion of industrial land to high-density residential real estate developments.

(Enterprise and cluster dynamics at the creative industries-manufacturing interface, Carrington Road precinct, report. QUT, University of Wollongong and Monash University, 2017 p 61).

Further examination of these reports is beyond the scope of work in this current study and could be followed up by the UM Steering Group.

A representative from one of the peak body’s interviewed, but whom could not provide an official comment, commented that a ‘healthy’ city needs a balance of land uses between residential, commercial industrial and open space/recreation. ‘Artisan’ activities provide an attractive element to the city adding to its liveability, with food also being an important element.

3.2.3 The need for evidence to support the preservation of industrial land

While this review found that the relevant policies for the cities examined acknowledged that industrial land in inner areas is under pressure to be rezoned to residential, the statistical evidence supporting these policies varies. Where there is less evidence, the policies are likely to be more difficult to defend with respect to individual rezoning applications for industrial land.

Moreland’s Industrial Land Strategy (MILS) 2015-2030, provides the most comprehensive approach to industrial land policy of all the local Councils in this study. It assessed the nature of future demand and supply for industrial land within the municipality. It then determined which land should be retained for larger and more intensive industrial activities and which should be rezoned to mixed uses and for residential purposes.

MILS provides an evidenced based guide for planning decisions about the future of Moreland’s industrial land. It provides long term investment certainty for the business community which has the potential to reduce significant pressure from speculative development to rezone industrial land for residential uses.

The City of Yarra is currently developing a Spatial Economic and Employment Strategy for the management of its employment lands over the next 10 – 15 years.

This approach could be extended to the other municipalities to provide a consistent evidence base for the central region.

3.2.4 Approaches to preserving industrial land

Federal, State and Local government policies all refer to the need to increase employment opportunities within central cities and are looking at new and innovative ways to achieve this. They all acknowledge the decline in traditional manufacturing industries. They seek to preserve industrial land for future employment generating activities, not simply for retail and commercial employment. They are less clear about the type of activities and forms of employment this might involve.

3.2.4.1 Payment required

AIG suggests that someone will have to pay for the difference in the cost preserving land for industry versus the cost of the land for the use that generates the highest return, that is, residential.

3.2.4.2 Councils need to show leadership

AIG also notes that some local Councils appear hypocritical in wanting to preserve land for industry and at the same time rezoning their own industrially zoned land to residential, for example defence land in Maribyrnong.

3.2.4.3 Clustering and different land sizes are important for innovation

AIG also suggest that:

- larger manufacturing firms need to have a ‘manufacturing ecosystem’ (an environment that contains activities, assets and features that support local manufacturers) around them, to enable ‘scalability’ (small firms growing into larger firms)
- innovation in goods production requires high-end design and co-location (firms of a similar nature locating together)
- innovation is inversely proportional to the distance from these larger firms. (The greater the distance between smaller and larger manufacturers, the less likely interactions are to occur between them and consequently the lower the chances of them exchanging ideas which is the basis of innovation.)
- hence the lack of space (land) for new smaller firms around established manufacturing firms, hinders innovation and growth.

This point is supported by the PCAV who suggests that land use planning must be aware of the trend for new industries to cluster with a need to attract a critical mass of similar types of industries. There needs to be flexibility in the planning system to allow the market to grow organically.

The Metropolitan Planning Authority publication, Small Local Enterprise Precincts, sets out a range of case studies which provide examples of sites with varying formats and sizes including small boutique offices, compact warehouses, small warehouses, factoryettes/offices and residential/work/offices (Metropolitan Planning Authority, (2015) Small Local Enterprise Precincts). Although these case studies were developed for middle and outer suburbs and town centers, the principles they illustrate are relevant to the flexible land and space arrangements required to support innovation between Makers and larger manufacturers.

3.2.4.4 Setting Job Targets

The notion of setting job targets to ensure appropriate provision of employment land in city centers was raised in discussions with Peak Groups. An example is shown in Sustainable Sydney 2030 which states that

the city will contain at least 465,000 jobs, including 97,000 additional jobs (from the 2006 base), with an increased share in finance, advanced business services, education, creative and digital industries and tourism sectors.

The PCAV suggested that setting job targets for desired activities, not just in the government, retail and commercial sectors, might be effective in ensuring the provision of appropriate employment land in the inner city region. The PCAV would be interested in exploring this concept further.

The development of Job Targets could potentially support and assist the evidence-based approach to employment land protection adopted by Maribyrnong and Moreland, by enabling the tracking of industrial development and the jobs created against the job targets.

3.2.4.5 Preserving land for employment opportunities

The Policy Reference Group considers that the UMP should focus on the preservation of industrial land for smaller businesses that offer higher density employment opportunities, rather than land being preserved for industrial activities that offer lower employment opportunities.

The international evidence from the S. Carter and J. Day (2017) *International Policy Review*, suggests that, rather than preserving industrial land for specific types of activities, a flexible approach should be adopted. This is because the nature of industry, employment and work is changing so rapidly, that preserving land for specific activities, may restrict the development of new activities in the future.

Maribyrnong Economic and Industrial Development Strategy's aim is to retain and enhance industrial employment opportunities rather than specifically maximise employment opportunities per se.

Port Phillip's overall objective is to ensure availability of land for industry by:

- protecting and planning existing industrial areas to (where possible) facilitate further industrial development
- providing an adequate supply of industrial land in appropriate locations including sufficient stocks of large sites
- protecting industrial activity in industrial zones from the encroachment of unplanned commercial, residential and other sensitive uses which would adversely affect industry viability

(Port Phillip Planning Scheme Ordinance p 82).

3.2.4.6 30-minute cities, 20-minute neighbourhoods and village economies

The Federal Government's Smart Cities Plan supports productive, accessible, liveable cities that attract talent, encourage innovation and create jobs and growth. It incorporates the '30-minute city' concept in which residents can access employment, schools, shopping, services and recreational facilities within 30 minutes of their homes. The Smart Cities Plan notes that Plan Melbourne has a more ambitious goal of 20 minute neighbourhoods. Consequently, by supporting the location of employment opportunities close to places of residence, both the Smart Cities and Melbourne Plans would appear to support the location of Makers in inner Melbourne's highly concentrated residential areas.

The City of Sydney refers to 'Village economies' as employment hubs with distinctive economies and their own specialisation and the need to develop industry clusters or activities. These clusters underpin city

productivity and innovation by encouraging the exchange of ideas through the interaction of people and businesses. To address these priorities, the City of Sydney aims to use its property portfolio by balancing financial returns with broader economic and social outcomes. It will achieve this by making space available in its properties, for social and creative enterprise. In conjunction with private property and business owners, the City will work on short and long-term solutions to activate underutilised property, to attract and retain the right mix of tenants, and to implement sustainability programs. (Sustainable Sydney, 2030) All the above points emphasise the need to preserve industrial land for employment opportunities.

3.2.5 Actions being taken to preserve industrial land and spaces

There is a wide range of actions being taken to preserve industrial land and spaces. These actions support activities that generate higher employment near residential areas, while minimising the nature of any negative emissions on those residential areas.

Maribyrnong Economic Development Strategy (MEDS) Update 2016 notes on page 7:

“As with any program, it will be important to monitor and measure the success of the economic development strategy over time.”

Maribyrnong monitored the success of 2013 Economic Development Strategy by listing the completed actions from that strategy. MEDS Update 2016 (Appendix B)

MEDS Update 2016 has set out a revised list of actions to be achieved. Among this list it is interesting to note that Maribyrnong annually reviews strategic sites and considers acquisition (as a catalyst for development). It maintains a registry of development sites and vacant premises and investigates the need to provide space and services for businesses. (MEDS Update 2016, Activities 2.2.6 and 3.2.6 Appendix C, Table B1 pages 19 and 23 respectively. The annual review would appear to provide the opportunity to identify and potentially preserve industrial land and spaces.

MILS (discussed earlier) guides planning decisions about the future of Moreland’s industrial land and informs the Moreland Economic Development Strategy 2016-2021.

MEDS and MILS provide evidence-based strategies that enable their respective Councils to make decisions about what industrial zoned land to retain and appropriate land uses in these areas. In this way, they can:

- maintain an appropriate supply of industrial and other commercial zoned land suited to employment sectors that have positive long-term growth outlooks
- protect core industrial areas
- transition some precincts to residential uses which do not have a long-term future as industrial land
- allow some land to be redeveloped for mixed use
- provide for a broad range of different economic sectors, not just traditional industrial use.

MILS Amendment C158, Explanatory Report, p 4, and MEIDS Part 1, p.7

Stonnington has very little industrial land. Its planning scheme objectives for industrial activity focus on:

- retaining industrial properties for industrial use and development. (The preference is for innovative, technology intensive uses, that provide local employment opportunities)
- making more efficient use of commercial land, including existing shop tops

- avoiding residential-only high-rise developments by requiring higher ceiling heights at ground and first floor levels to accommodate commercial uses
- encouraging home occupation and home office uses in residential areas that will not affect the amenity of the residential area.

(Clause 21.04-5 Industrial Uses, Stonnington Planning Scheme Ordinance, P 124).

The policies and initiatives above, all support Maker activities indirectly.

3.3 The extent to which relevant policies and the Peak Groups surveyed support Makers

This review did not find any specific support for Makers. There is however, substantial support for the many activities described in Section 1.0, which include Makers and extensive support for small businesses.

3.3.1 Federal Government Support for Small Business

The following summarises the Federal Government’s business support activities of relevance to Makers.

The Office of the Australian Small Business and Family Enterprise Ombudsman launched in March 2016. Its role is to advocate and ensure that government policies consider the needs of small businesses and family enterprises.

The Federal Government website: Business.gov.au, provides advice on starting, running and growing a business. It acts as a portal for links to other government departments of relevance to small businesses and provides a search facility for assistance, such as research and development, trade, innovation, employment, local advisers and training. In addition, it provides links to support for marketing, sales and funding in order to help get an idea to market. (Although it notes that there aren’t many government grants to help start a business).

The Federal Government Entrepreneurs’ Programme uses experienced industry advisers and facilitators to provide advice to businesses to improve competitiveness, productivity and to identify growth opportunities. This support includes connection and collaboration opportunities.

Australia.gov.au provides [Digital Business Kits](#) with industry-specific resources to assist small-to-medium enterprises and not-for-profit organisations engage in the digital economy and take advantage of the opportunities available through digital technology. One of the nine Digital Business Kits available is specifically designed for the Manufacturing sector.

3.3.2 Victorian Government Support for Small Business

The following summarises the State Government’s business support activities of relevance to Makers.

The Business Victoria website lists current grants and assistance on offer from State Government. Grants of up to \$500,000 are available under the Victorian Manufacturing Future Program, to assist companies to implement new manufacturing technologies and processes. Companies can apply if they have a minimum three years trading history and intend to invest in new manufacturing technologies and processes that will generate new local jobs, improve productivity and competitiveness, and target new growth opportunities. This program can support capital equipment purchases and projects that improve process and products, including prototyping, evaluation and testing.

The Sustainability Victoria website provides information and advice on current funding opportunities relating to business sustainability, resource efficiency and waste and recycling programs.

The DEDJTR's Future Industries Fund Sector Growth Program, provides grants of up to \$100,000 for scoping, planning and feasibility studies, and up to \$1 million to implement projects consistent with the Future Industries Sector Strategies. Applications for these grants must involve consortia, comprising at least two members, including at least one Victorian small or medium enterprise.

LaunchVic is an independent company, created by the Victorian government, to accelerate Startups and new ideas in Victoria. Its aim is to encourage more people, firms and entrepreneurs to be involved in Startup activity and improve their capabilities. It partners entrepreneurs with industry, business and educational institutions and provides:

- entrepreneur mentoring, scholarships and corporate placement programs
- help for entrepreneurs to find ways to better navigate the system
- events and marketing campaigns to profile Victoria's startups locally and ecosystem internationally.

LaunchVic also attracts high profile entrepreneurs and global thought leaders to Victoria.

Creative Victoria's 'Creative Industries Strategy' incorporates two programs that assist Makers as follows:

The first is the Business Acceleration Program which provides entrepreneurial creative-enterprises access to management, technical, legal, marketing and governance support. It aims to create new partnerships, help exploit new technologies and explore different forms of funding, financing and investment from government and private sources. Where possible, it partners with LaunchVic and leverages support from other sources, such as the Melbourne Accelerator Program (the UoM's entrepreneurship program and Startup accelerator).

The second program, "Co-working Spaces and Creative Places", focuses on activating co-working spaces and hubs across the state. It aims to leverage partnerships with Councils, property owners, philanthropic supporters and other stakeholders to identify and unlock creative spaces in metropolitan and regional areas using a mix of capital, infrastructure and operational grants.

As noted earlier in section 3.1, Victoria Planning Provisions Amendment Vc142 was introduced in January 2018 to, among other things, support small business by allowing greater flexibility for home based businesses, reducing the costs to applicants and councils and facilitating new forms of online business. (See Attachments 2 and 4).

3.3.3 Victorian Local Government Support for Small Business

The following summarises the UMP Councils' business support activities of relevance to Makers.

All the UMP Councils' have Economic Development departments and business support officers. Their websites provide information to support new and existing businesses which generally includes:

- advice on starting and growing a business
- lists of co-working, temporary and pop-up spaces for short term leases in vacant commercial premises
- a business register and subscription service that provides information for current events, networking opportunities and profiles of local businesses
- training and professional development opportunities
- access to local marketing and promotional opportunities usually associated with the Council's events calendar.

The City of Moreland has around fifty co-working, creative and Maker spaces. It plans to do an environmental scan of how these places are growing and to explore the possibility of linking them to partners, funding support, training providers and other like-minded enterprises.

The City of Yarra offers businesses access to an online job portal named “Yarra Joblink” to connect local people to local jobs.

Most of the UMP Councils do not provide grants or funding support for small businesses, instead they redirect enquiries to the Federal or respective State Economic Development websites.

The City of Melbourne provides small business grants and funds capital improvements (such as office fit-outs or factory upgrades) as well as website development, IT and specialised equipment and software.

The City of Melbourne’s Startup Action Plan provides Melbourne based Startups with the opportunity to share in \$80 million in financial support. The Jiangsu-Victoria Innovation Centre is a partnership between the City of Melbourne, the Jiangsu-Suzhou Science and Technology Town, RMIT University, the University of Melbourne, Victorian Government and Australia China Association of Scientists and Entrepreneurs (ACASE). This Centre will provide Melbourne based Startups with access to coaching, information and entrepreneurial guidance. It will also link their ideas with universities, research institutes and the Chinese based Suzhou accelerator, to expand their reach into Asia.

Maribyrnong, Moreland, Stonnington, Port Phillip and Yarra administer a special rate/charge scheme for the purpose of the enhancement and development of activity centres through marketing and promotion. City of Yarra also provides access to small infrastructure grants to support creative industries through its “Room to Create” grants program <https://www.yarracity.vic.gov.au/about-us/grants/room-to-create-responsive-grants> .

As can be seen from the above review, there is an extensive range of small business support available to Makers at the Federal, State and Local Government levels. It appears that this fact might need to be better communicated to Makers. Adelaide’s Entrepreneurial Ecosystem Map in Figure 3 below, (which summarises services available to support entrepreneurs) provides an excellent example of how this might be done.

Figure 3: Adelaide’s Entrepreneurial Ecosystem Map (Draft 7.6 February 2017)

Networking, Community & Start-up Events			Formal Education	Industry Education	Coworking Spaces			Incubators & Accelerators	Advisory Services	Government Assistance		Investors
Adelaide CleanTech Network	Entrepreneurs Organisation	TechInSA Networking	eChallenge (University of Adelaide)	Adelaide Business Hub (Port Adelaide)	Base64 (KentTown)	Insite Arts	Tooth & Nail (for artists and printmakers)	Innovation and Collaboration Centre (UniSA)	Adelaide Commercial Univ of Adelaide	Commonwealth Assistance	Export Market Development Grants (EMDG) Scheme	AMP Tomorrow Fund
Adelaide Fintech Meetup	Entrepreneurs Week	TechJam	ECIC (Uni of Adelaide)	Business SA Coaching & Mentoring Program	Brick & Mortar (Norwood)	Intersect 1. Flinders St & 2. Wakefield St	Todd Street Coworking Hub (Port Adelaide)	Innovyz Programs	Eastside BEC	EP - Accelerating Commercialisation (AusIndustry)	New Enterprise Incentive Scheme (NEIS)	ASSOB
Adelaide University Entrepreneur Club	Hack SA Music industry hackfest	The Engine Room	First Lego League Project Competition for students	Entrepreneurs Organisation Accelerator	Catalyst Collaborative	Jam Factory	WOTSO Adelaide	Microsoft Innovation Centre	Enterprise Adelaide	EP - Business Management (AusIndustry)	R&D Tax Incentive (AusIndustry)	Bank SA Start-Up Grant
AsiaAus Leaders	Innovation in the City	The Executive Connection (TEC)	ThInkLab Commercialisation Accelerator	Futurepreneurs Launchpad	Co-HAB (Tonsley)	Little City (Prospect)	Adelaide Smart City Studio	Moonshine Distillery	Flinders Partners Flinders Uni	EP – Innovation Connections (AusIndustry)	Women in Global Business	Beyond Bank Entrepreneur Program
behind closed doors Entrepreneurs Program	Kaplan Entrepreneur Club	The SASS	TAFE Business education programs	Mentoring for Success Polaris Centre	Co-Lab (Stretton Centre)	Mache	Amazing App Challenge	Renew Adelaide	Flinders Enterprise Consulting			BioAngels
Business Growth Breakfasts Adelaide City Council & UniSA	New Venture Month (NVI)	Unearthed Hackathon	WEA Business education programs	Northern Adelaide Entrepreneur Scholarship	Drink Eat Work	SASS Place (Parkside)	TechInSA Incubator	Social Ventures Incubator Program	ITEK Ventures UniSA	State Government Assistance		Blue Sky Private Equity
Boomerpreneurs	Seniorpreneurs	Unleashed / GovHack SA	Carnegie Mellon University Business education programs	Restaurant Bootcamp	Fab Lab Adelaide	St Pauls Creative Arts Centre	Elevate61 Advance / KPMG	SouthStart Accelerate	Northern Adelaide BEC	Business Growth Program (with UniSA)	SA Innovation Voucher Program	Brandon Capital
Business SA Networking	SouthStart Conference	Women in Innovation (SA)	Flinders University Business education programs	SA Young Entrepreneur Scheme (SAYES)	Fifth Quarter	SouthStart Cowork	eNvision Incubator New Venture Inst	Space SA	Polaris Business and Innovation Centre	Carbon Neutral Entrepreneurs Challenge	Seed Company Development SA Film Corporation	Innovation Capital
Club Kidpreneur	Start Lean, Go Global		Torrens University Business education programs	Skills for All Diploma of Management	Format	That Space (Norwood)	EO Accelerator Entrepreneurs Org	TechStars (Defence)	Tea Tree Gully BEC	Export Partnership Program	TradeStart	SA Venture Capital Fund
D3 Digital Challenge	Startup Grind		University of Adelaide Business education programs	Salisbury Twelve25 Enterprise Program	Hackerspace Adelaide	The Cook's Base (Prospect)	Fifth Quarter (Carlewis)	ThInkLab Business Incubator	Tonsley Small Business Advisory Service	SA Early Commercialisation Fund (TechInSA)	Venture Catalyst (with UniSA)	Terra Rosa Capital
Entrepreneurs in Conversation (New Venture Inst)	Startup Weekend		University of South Australia Business education Programs	Unfinished Business	Hub Adelaide	The Mill (for artists)	Impact Accelerator	Todd Street Incubator (Port Adelaide)	Unearthed Accelerator		Acumen VC Fund	Young Entrepreneur Scholarship Peter Kille Toyota

Loosely in the order in which a budding entrepreneur or new venture may first need the services and assistance

Prepared by motivated individuals for the benefit of the entrepreneurship community in Adelaide. Feedback on the map welcome – email pauldaly@internode.on.net.

3.4 The likelihood of businesses closing or relocating to outer metropolitan areas due to the pressure on inner urban industrial land being rezoned for residential purposes.

As noted earlier in Section 3.2.1, the City of Sydney’s Employment Lands Study found that, the demand for residential development increased land values and put upward pressure on rents and prices. These elements have combined with the shrinking role of traditional manufacturing, to stimulate the exodus of many businesses to industrial areas in Western Sydney where prices are cheaper.

Moreland’s Industrial Land Strategy (MILS) 2015-2030 adopted in July 2016, notes manufacturing jobs are relocating to the fringes of Melbourne where there are less land use conflicts and better transport connections.

The peak groups suggested that older, more traditional manufacturers, generally relocate to outer areas when land prices and rents increase. If businesses in the three categories described in Section 3.1 are to remain in the inner-city areas, they will need to adapt and/or diversify. If not, they will be forced to relocate.

PCAV expressed the property industry’s concern at increasing tension between commercial/industrial land and residential. This tension can occur in growth areas, where there is a need to provide affordable housing as well as set aside enough land to accommodate future industrial growth. In established areas, there is immense pressure to develop land to achieve its greatest potential return, namely residential.

PCAV also expressed the view that costs, including rates, land tax and the car parking levy, all put pressure on developers to achieve the highest returns on property. The introduction of Rate Holidays was cited as one option to encourage developers to provide spaces for Makers.

4.0 CONCLUSIONS

The following section sets out the Policy and Peak Group Review conclusions.

4.1 The extent to which relevant policies refer to New Urban Manufacturing or Makers, and the extent to which the Peak Groups surveyed are familiar with these terms

None of the international research, Federal and State policies, nor the six UMP Councils, refer specifically to New Urban Manufacturing or Makers. These are relatively new terms and have the potential to be used more widely in the future. This is provided that new urban manufacturers identify themselves as Makers, as the initial UoM research has suggested.

The description of Makers provided in Section 1.0, should include older manufacturers, (operating in inner city locations and employing up to 20 staff), that have incorporated new production technology and retail and marketing activities. This could include food manufacturers, and restaurants and cafes that produce their own products.

Although current policies do not refer to the term Makers, they use other closely related terms such as:

- | | |
|---|-----------------------------------|
| <i>Home Occupation/Business/Offices</i> | <i>Creative Industry</i> |
| <i>Entrepreneurs</i> | <i>Cottage Industry</i> |
| <i>Co-working Spaces/Hubs</i> | <i>Low-Impact Industry</i> |
| <i>Digital businesses</i> | <i>Light and Service Industry</i> |
| <i>Startup Businesses</i> | <i>High-Tech Industry</i> |
| <i>Bespoke Manufacturers</i> | <i>Mixed Use</i> |

The fact that the DIA and ADA were familiar with the term Maker and the nature of New Urban Manufacturing, is perhaps not surprising. These peak groups are involved with new and emerging areas of manufacturing for which design is an important element. Design is also an important element in manufacturing that defines Makers. It is very encouraging that the DIA has expressed interest in further discussions about its potential engagement with Makers.

The lack of the other Peak Groups' familiarity with the term Maker and the nature of New Urban Manufacturing presents an opportunity. The PCAV expressed particular interest in the Urban Manufacturing Project and Makers.

The UMP Steering Group should follow up the Peak Groups that have expressed interest in the UMP.

It would appear that Melbourne's existing zones are capable of accommodating Makers. To better accommodate Makers into existing zones, some performance standards could be developed to minimise the impacts of any Maker activities on the amenity of surrounding uses. The current UoM research will need to clearly demonstrate why the UMP Policy Reference Group should consider any changes to existing zones or conditions to support Makers.

To assist in refining the term Maker, one additional conclusion can be drawn from the findings of the research undertaken for this Policy & Peak Group Review and the UoM Phase 2 report. Makers could be classified as "small manufacturers" based on their size as follows:

- the Australian Taxation Office defines a small business as one that has annual revenue turnover (excluding GST) of less than \$2 million
- the Australian Bureau of Statistics (ABS), defines a small business as one that employs fewer than 20 people, whereas Fair Work Australia defines a small business as one that employs fewer than 15 employees

See link: <http://asic.gov.au/for-business/your-business/small-business/small-business-overview/small-business-what-is-small-business/>

- the UoM research showed that the Makers researched used or occupied spaces that were less than 1800 square meters. J.Day and S. Carter, Urban Manufacturing Phase 2 Report (2018) p, 44.

The UM Steering Committee could seek advice from the Australian Bureau of Statistics as to how the above elements could be refined to create a "small manufacturing" definition. Defining "small manufacturing" in this way does would not provide a precise description of Makers. It does however provide a practical term that could assist in overcoming the limitations of the "Other Manufacturing" category in the Australian and New Zealand Standard Industry Codes (ANZSIC). It could therefore enable researchers and planners to better identify Makers and determine how they might be supported.

4.2 The extent to which relevant policies support the preservation of inner city industrial land, in general or specifically for Makers, and the Peak Groups' views in this regard

The international research, Federal and State policies and six UMP Councils, all recognise that industrial land in inner city areas is under pressure to be rezoned for residential purposes and needs to be protected for employment opportunities. They acknowledge the need to have high value-adding employment opportunities (not simply retail and commercial) near residential areas, while also minimising the potential for any negative effects on residential areas.

It is very important to ensure that industrial land isn't rezoned by stealth and that the transport, access and parking needs of industrial activities are considered. That is, incremental changes to improve amenity for

increased residential development, should be carefully considered to ensure they do not significantly impact on transport, access and parking requirements of industrial activities. Over time, the cumulative impact of such changes can force the industrial activities to close or relocate. Hence it is important to take a more comprehensive, strategic view of an area to consider industrial activities' transport, access and parking needs.

Once industrial land has been rezoned it is highly unlikely that it would ever be used for industrial purposes again. Consequently, its preservation should not be left to random rezonings, nor should there be an expectation from individual industrial landowners that they can rezone their land simply due to the current high residential demand.

4.2.1 Approaches to preserving industrial land

The statistical evidence supporting each UMP Council's industrial strategies and policies varies. It is important to have a solid evidence base which can be used to defend against individual rezoning applications. The approaches adopted by Moreland and Maribyrnong provide useful models that other Councils could adopt. These approaches, which are based on comprehensive research and consultation, make it clear which land should be retained for larger and more intensive industrial activities and which should be rezoned to mixed uses and for residential purposes.

The question remains just how specific policies should be in encouraging certain types of activities to locate in industrial, mixed use and residential zones. None of the policies reviewed refer specifically to New Urban Manufacturing or Makers. Only the DIA considered specific areas of inner-city industrially zoned land should be kept for Makers. Whereas the PCAV, and AIG consider that industrially zoned land should be kept for all industrial activities, not just Makers.

International evidence suggests that, rather than preserving land and space for specific types of employment opportunities, a flexible approach should be adopted. This is because the nature of employment, industry and work is changing so rapidly, that trying to define specific activities may restrict new ones in the future.

The UMP Policy Reference Group recommended to the UMP Steering Group that the UMP should focus on industrially zoned land intended for smaller activities that provide higher density employment, rather than areas intended for larger more traditional industrial activities. It is important that a flexible approach is employed that enables varying land sizes, to support the notion of smaller activities clustering around larger ones, to promote opportunities for innovation.

The above approach could be complemented by setting job targets, in total and for specific industry sectors, to ensure the provision of desired employment opportunities in the inner-city region.

In addition, the development of performance standards, to minimise the impacts of any Maker activities on the amenity of surrounding uses, could be an effective way of providing for future employment opportunities in specific locations. This approach would be based less on what a business does, and more on how they do it. It would not rely on naming or classifying an activity based on what it does or how it refers to itself. It would rely on controlling the nature of any externalities the business creates and ensuring the business is compatible with surrounding land uses.

Such an approach would potentially provide greater opportunities for Maker activities to operate in commercial areas including ‘shop tops’ (the first floor above shops located on streets). It could also assist in avoiding residential-only high-rise developments, by encouraging Maker activities on ground and first floors.

Although Amendment Vc142 to the Victoria Planning Provisions has improved the opportunities for Makers to operate in residential areas, a performance standards-based approach could provide further support, provided the Maker Activities do not negatively impact the amenity of the residential area.

The current UoM research may provide further information that could support this performance-standards based approach.

4.3 The extent to which relevant policies and the Peak Groups surveyed support Makers

As none of the international research, Federal and State policies, nor the six UMP Councils, refers specifically to New Urban Manufacturing or Makers, it is not surprising that no Maker specific support policies were identified. There is however, substantial support for the many Maker activities described in Section 1, Figure 1.

All levels of government provide extensive support for small businesses including, but not limited to:

- advice on starting, running and growing a business from experienced industry advisors
- the availability of grants to buy equipment or technology for a new project or to grow a business
- funding opportunities relating to sustainability, resource efficiency and waste and recycling programs
- co-working, temporary and pop-up spaces for short term leases in vacant commercial premises
- business registers and subscription services that provide information on current events, networking opportunities and access to local marketing and promotional opportunities.

There are also many opportunities for Melbourne based Startups and entrepreneurs to access coaching, market information and entrepreneurial guidance, linking their ideas with universities, research institutes and accelerator programs.

The current UoM research may identify more specific support required for Makers. If this is the case, given the above range of support services, it will be interesting to see:

- what additional support might be required
- whether this support would be applicable only to Makers and not to other small businesses.

Although none of the Peak Groups who responded to the survey offer specific Maker related services, it is important that those who expressed interest in the UMP, and supporting Makers, are followed up.

It is important to ensure that Melbourne Makers are made aware of the numerous support services available to them. The Adelaide Entrepreneurial Ecosystem Map, shown in Figure 3, provides a useful example of how this might be done.

4.4 The likelihood of businesses closing or relocating to outer metropolitan areas due to the pressure on inner urban industrial land being rezoned for residential purposes

This has been the case in Sydney where increasing demand for residential development has put upward pressure on rents and land prices. These factors, combined with the shrinking role of traditional

manufacturing, has led to the exodus of many businesses to industrial areas in Western Sydney where prices are cheaper.

The Peak Groups responding to the survey generally agreed that manufacturing activities will be forced to relocate.

The adoption of an evidence based strategic approach to preserving industrial land and the adoption of performance standards, as outlined in Section 4.2.1 above, appears to be the most effective way of addressing this issue.

It could be useful to draw a distinction among the types of uses which may be more or less suitable to inner urban areas. For example, large format warehousing or uses with significant adverse amenity impacts may be more efficiently located in other areas. On the other hand, smaller-scale operations with less off site impact may be better targets for retention.

Further research could be undertaken to examine which land uses or industrial activities should be targeted for inner city locations.

In addition, the introduction of “Rate Holidays” could be explored as one possible means of alleviating pressure, by giving developers an incentive to provide land and spaces for inner city manufacturers, including Makers.

5.0 Recommendations

The aim of the UMP is to provide the participating Councils with a well-researched business case for changes to existing policies to support Makers. This Policy and Peak Group Review provides information to be considered together with the Maker research being undertaken by the University of Melbourne, to determine any appropriate policy changes.

The following recommendations are made regarding the four main areas of investigation.

5.1 Regarding the extent to which relevant policies refer to New Urban Manufacturing or Makers, and the extent to which the Peak Groups surveyed are familiar with these terms, it is recommended that the UMP Steering Group:

- 5.1.1 agrees to expand the description of Makers provided in Section 1.0 of this report to include older manufacturers, (including the food sector) operating in inner city locations and employing up to 20 staff, that have incorporated new production technology and retailing and marketing activities into their operations.
- 5.1.2 seeks advice from the Australian Bureau of Statistics as to practicality and potential benefits of:
 - defining the term “small manufacturing” based on an activity’s size as described in section 4.1
 - using this term to analyse the “Other Manufacturing” category in the Australian and New Zealand Standard Industry Codes (ANZSIC), to gain a better identify and quantify Makers.

5.2 Regarding the extent to which relevant policies support the preservation of inner city industrial land, in general or specifically for Makers, and the Peak Groups’ views in this regard, it is recommended that the UMP Steering Group:

- 5.2.1 Determine how the participating Councils together with the State Government could develop a consistent evidence-based Industrial Land Strategy for the Inner Melbourne Region. This would include consideration of the following:
- current and completed work by the State Government and participating Councils, ensuring the evidence base is consistent
 - employment targets for manufacturing activities consistent with, but not limited to, the Maker description
 - Clear identification of:
 - land to be retained for larger industrial activities and more intensive industrial activities
 - land to be rezoned for other purposes, including mixed use and residential
 - heritage industrial spaces
 - identification of the types of uses and activities which are more suitable for inner urban areas, such as smaller-scale operations with limited off-site impacts, and potentially using the small manufacturing definition describe in 5.2.1 above
 - identification of the types of uses and activities which are less suitable for inner urban areas, such as large format warehousing or uses with significant off-site impacts
 - flexibility of land sizes within areas identified for more intensive industrial activities
 - examine the potential for the performance standards to be developed, (based on how a business operates and relevant findings from the University of Melbourne research) to assist in the assessment of new activities’ compatibility with existing activities
 - examine how the transport, access and parking needs of manufacturing activities would not be significantly impacted on by increased residential growth in co-occupied or adjoining zones
 - gain insights from the ‘Made in Marrickville’ authors and the publication, ‘Re-Industrialization of Europe - A Concept for Manufacturing for 2030’, (Engelbert Westkamper, University of Stuttgart, Germany, Springer, 2014).

5.3 Regarding the extent to which relevant policies and the Peak Groups surveyed support Makers, it is recommended that the UMP Steering Group follow up:

- 5.3.1 the DIA’s interest in further discussions about their potential engagement with Makers and access to the DIAs design hub in 2018 and model making capability
- 5.3.2 the potential that the peak groups represent some Maker activities and how this might be better communicated to Makers
- 5.3.4 the AAMC’s suggestion that RMIT, Swinburne, VUT, TAFEs and some schools might be interested in supporting Makers due to the potential employment opportunities Makers could offer their students

5.3.5 with AIG, AAMC and DEDJTR to discuss the potential for larger manufacturing companies to be interested in supporting Makers in a similar industry sector from an altruistic or corporate social responsibility perspective. Discussions in this regard would include:

- access to training and training facilities, in particular, the need for high-level machine operator skills and training in Computer Aided Design to operate high tech equipment such as 3D printers
- discussions about ‘first and last mile logistics’, to overcome difficulties of moving supplies and goods in an increasingly congested urban environment
- negotiating regulations and controls relevant to their activities and industry sector
- making some of the Federal Government’s Future Industries Manufacturing program and Entrepreneurs’ program available for smaller firms
- assistance with manufacturing capability for short runs including product development and samples
- overcoming high rent and utility costs in inner city areas.

5.3.6 Once the University of Melbourne Maker research has been completed, the UMP Steering Group should examine:

- the most effective methods of ensuring Makers are made aware of the existing support available from all levels of Government and relevant Peak Groups
- the extent to which Makers need assistance negotiating regulations and whether they would avail themselves of support in this regard and, if so, what form it should take
- any specific support required for Makers, in addition to that which is currently available
- if this support should be made available to other small businesses.

5.4 Regarding the likelihood of businesses closing or relocating to outer metropolitan areas due to the pressure on inner urban industrial land being rezoned for residential purposes, it is recommended that the UMP Steering Group:

5.4.1 responds to the above recommendations.

ATTACHMENT 1: The Urban Manufacturing Project, Policy Reference Group

The Urban Manufacturing Project, Policy Reference Group comprises the following representatives from each of the participating organisations.

Project Manager: Ray Tiernan, Senior Project Officer, Economic Development City of Port Phillip,
(replaced Virginia Miller, Economic Development Officer, Economic Development, City of Port Phillip)

Elissa McElroy, IMAP Executive Officer

Kim Swinson, Coordinator Economic Development, City of Yarra

Yuriy Onyshchuk, Team Leader City Research, City of Melbourne

Michelle Cobb, Coordinator Economic Development, City of Stonnington

Katy McMahon, Manager City Business, City of Maribyrnong

Maria-Luisa Nardella, Manager Economic Development City of Moreland

State Government Observer: Emily Mottram Structure Planning Manager MPA

Chair: Austin Ley, Planning for Change

ATTACHMENT 2: TERMS RELEVANT TO MAKERS ACTIVITIES

As noted in Section 3 of this report, none of the relevant policies examined refers specifically to the terms New Urban Manufacturers or Makers. There are however, a range of terms relevant to Makers activities shown in Section 1. These terms include the following:

Advanced Manufacturing

Advanced manufacturing describes businesses and supply chains that have established sustainable global competitiveness through advanced capabilities and characteristics. These characteristics frequently feature a combination of the following:

- anticipating market opportunities and customers' needs
- competing on value, including through developing and commercialising products and processes with significant international competitive advantage
- having strong leadership, and investing in a highly-skilled workforce
- being globally-oriented, integrated and connected
- utilising leading manufacturing technologies, techniques and data
- collaborating with business partners across value chains and with leading researchers.

Advancing Victorian Manufacturing, a Blueprint for the Future, Department of Economic Development, Jobs, Transport and Resources, p2, September 2017.

Home Occupation/Business/Offices

The City of Stonnington estimates that it is home to over 3500 home based businesses. Objective 75 of Adelaide' Development Plan encourages development which reinforces clusters and nodes of activity and distinctive local character and incorporating compatible non-residential uses such as home offices, art/craft workshops and galleries at ground floor level.

Most Councils have a number of criteria which if met, mean that the Home Occupation/Business/Office can operate without the need for planning approval. These criteria are set out below.

A home-based business is defined as being part of a dwelling used by a resident for non-residential purposes and meets most of the following general range of conditions:

- a business suitable for residential areas and conduct the business from inside the resident's house, garage or shed
- has is no more than 1 non-resident worker/employee (in some Councils allow 2 employees). In most cases, one person must:
 - be a permanent resident of the townhouse, apartment or house, or
 - must use the dwelling as their principal place of residence, or
 - have no more than one non-resident employee, if the business is run in a house, and no non-resident employees in other kinds of dwellings (such as apartments or townhouses)
- a business which takes up no more than 30 square metres, (in some Councils 50 square metres or 30 per cent of the total floor area, whichever is less)

- all vehicles used by the business are parked on the site, or have no more than 1 (in Councils 2 commercial vehicles each less than 2 tonnes) or manage any potential impacts, such as traffic, visitors, car parking for as long as the business operates
- has limited hours of operation and deliveries
- manages any potential impacts of noise and odour for as long as the business operates
- has no signs unless required by law to identify a registered business. If a sign is required, it is to be no larger than 0.6 square metres there is, on the site. In some Councils advertising is restricted to 1 non-illuminated sign that does not exceed 0.2m² in area
- does not include the sale or hire of any goods
- any load on a utility is no greater than for a domestic use and there is no activity that causes electrical interference to other land
- there is no on the site storage of hazardous materials, display of goods for sale and no refuelling, servicing or repair of vehicles not owned by a resident.

It is important to note that Amendment VC142 to the Victoria Planning Provisions, replaced the term 'Home occupation' with 'Home based business' as a land use which can now operate in many zones with double the floor area and staff without the need for a permit. (See Attachment 4). VC142 Renames Clause 52.11 to:

- replace the land use term 'Home occupation' with 'Home based business'
- increase the number of allowable people who do not live in the dwelling to work in the home based business, from 1 to 2;
- change the measurement of floor area from gross floor area to net floor area and increase the floor area used from 50 to 100 square metres, (including storage of materials)
- clarify that vehicles may not be adjusted or modified for commercial gain
- clarify the ability to sell online goods

Entrepreneur

An entrepreneur can be described as someone who starts or accelerates a business and in doing so provides new products, new production methods, new markets and new forms of organisation. Entrepreneurs are agents of change and it is understood that to support entrepreneurs to become employers is an effective way to grow jobs and job diversity in the community.

Coworking Spaces/Hubs

Coworking Spaces/Hubs are generally shared, individual and collective business spaces which can be booked for an hour, week, month or long-term part time or full time. Their open plan design is intended to increase collaboration, encourage innovation and create business connections and opportunities. These spaces tend to target entrepreneurs and start-ups.

Startup Businesses

Virtually all the cities reviewed make references to the importance of Startup businesses, but do not define them. Based on the activities described on the city websites, Startups can be described as new businesses

that focus on rapidly growing their markets from local to global, using digital and internet technologies including computing, mobile applications, electronics, software and hardware.

Bespoke Establishments

The City of Sydney refers to ‘bespoke establishments’ that offer workers and residents places to meet, socialise and share ideas. The City of Sydney’s Employment Lands Study refers to small, often unique and bespoke businesses that occupy the fine grain of the city and offer diverse employment opportunities. With respect to the Green Square project growth and demand is expected to continue from:

- quasi-commercial uses (e.g. creative uses) accommodated in adaptively reused space or in newly constructed space and conveying the ‘bare finished look’
- high-tech industrial strata units in response to high land values and demand from small business.

Creative industries

The City of Adelaide refers to Creative Industries, businesses that turn creative ideas into commercial outcomes. Creative Industries include music and performing arts; film, television and radio; advertising and marketing; software development and interactive content; writing, publishing and print media; and architecture, design and visual arts.

Creative Victoria’s Creative Industries Strategy 2016–2020, p 10. describes Creative Industries as an evolving mix of sectors spanning arts, culture, screen, design, publishing and advertising. They cover disciplines as diverse as game development and graphic design, fashion and filmmaking, performing arts and publishing, architecture and advertising, media and music, comedy and craft. They include activities that are commercially-driven and community based, experimental and export-intense.

Cottage industry

The City of Adelaide refers to a Cottage Industry which it describes as a trade or light industry producing arts and crafts goods, which cannot be carried out as a home occupation and which:

- does not adversely affect the amenity of the locality
- is conducted in an out-building which is compatible with the principal uses to which land in the area in which it is located may be put
- where operated in conjunction with a residential use, does not employ any person other than a member of the occupier’s household
- does not occupy an area greater than 50 square metres
- does not display a sign greater than 0.2 square metres in area.

Low Impact Industry

The Brisbane City Plan 2014 refers to Low Impact Industry as activities that include the manufacturing, producing, processing, repairing, altering, recycling, storing, distributing, transferring or treating of products and that have one or more of the following attributes:

- negligible impacts on sensitive land uses due to off-site emissions, including aerosol, fume, particle, smoke, odour and noise

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- demand imposed upon the local infrastructure network consistent with surrounding uses
- generally operates during the day (for example 7am to 6pm)
- off-site impacts from the storage of dangerous goods are negligible
- the use is primarily undertaken indoors

The business examples of Low impact industry include repairing motor vehicles and fitting and turning workshops. These would appear to be less compatible with residential and perhaps a 'tighter' definition would be required for Makers.

Light and Service Industry

Light Industry includes activities:

- in which the processes and machinery used and the goods carried to and from the premises, do not affect the amenity of the locality
- the conduct of which would not impose an undue load on any existing or proposed service for the supply of water, gas, electricity, sewerage facilities or other similar services

Service Industry refers to premises on which light industry is undertaken and that have a retail shop front relating to that light industry.

The Light Industrial Zone provides for manufacturing, processing, repair, storage and distribution of goods and materials where off-site impacts are minimal or can be managed to minimise conflict or impact on the amenity of any other uses. Its aim is to minimise land use conflict in order to protect industrial viability and the safety and amenity of sensitive land uses in adjacent zones.

High Tech Industry

High Tech industry is referred to but not defined in policy documents. In general, the term refers to activities that employ cutting edge technology, that is the most advanced technology currently available.

Mixed Use

Mixed Use zones are common in most of the planning documents and allow a range of activities including, business and professional services, residential, research and development and service industry.

ATTACHMENT 3: PEAK GROUP SURVEY

The Urban Manufacturing Project is an initiative of the Inner Melbourne Action Plan (IMAP)

<http://imap.vic.gov.au/>

The aim of the project is to determine what actions the inner-city Councils might take to support New Urban Manufacturers or ‘Makers’.

The project seeks to provide local and state government with evidence to make decisions about land and policy that affects ‘Makers’ in the inner Melbourne region.

New Urban Manufacturers or ‘Makers’:

- make or design high-value physical or digital products
- range from sole traders, to larger businesses employing up to 20 people
- tend to operate in small industrial, warehousing and incubator spaces or hubs
- fall within, but are not limited to, the classifications listed on page 3.

Local governments in inner Melbourne are under significant pressure to re-zone industrial land for residential apartment development.

This has the potential to limit the opportunities for urban manufacturers to develop and grow in the inner city, forcing them to either close or relocate to the outer suburbs.

The Urban Manufacturing Project is a collaboration between:

- City of Melbourne
- City of Port Phillip
- City of Stonnington
- City of Yarra
- Maribyrnong City Council
- City of Moreland
- Metropolitan Planning Authority

The contacts for this component of the project are:

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IMAP has engaged Austin Ley from Planning for Change to obtain your response to the following:

1.0 To what extent is your organisation aware of New Urban Manufacturers or ‘Makers’, as described above?

- We are not aware of New Urban Manufactures or ‘Makers’.
- We are aware of them but do not offer and specific support to them.
- We are aware of them and provide specific support to them, as follows:

.....
.....
.....

2.0 Do you consider your organisation is the most appropriate to represent the interests of ‘Makers’?

- Yes.
Please list the three main issues facing ‘Makers’.

.....
.....
.....

Please list details of any studies your organisation has undertaken of relevance to supporting ‘Makers’.

.....
.....
.....

- No, ‘Makers’ would be better represented by: (please state the peak group or association).

.....
.....
.....

3.0 Does your organisation agree that specific areas of industrially zoned land in the inner-city should be kept for industrial activities?

- No, the market should determine the future of industrial land in inner city locations.
- Yes, specific areas of inner-city industrially zoned land should be kept for ‘Makers’.
- Yes, specific areas of inner-city industrially zoned land should be kept for all industrial activities, not just ‘Makers’.

Please provide details of any studies of relevance to preserving industrially zoned land in inner-cities.

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.....

4.0 With pressure on inner urban land being used for residential, do you have an indication of whether businesses would locate to outer metropolitan areas or just cease business?

.....
.....
.....

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New Urban Manufacturers or ‘Makers’ are within, but not limited to, the following classifications:

<p>Art and Culture Installation art or sculpture Other</p>	<p>Publishing Paper or paper products Printing, publishing, screenprinting, or typesetting Other</p>
<p>Electrical Parts and Materials Metal products (excluding jewellery) Plastic products Motor vehicle parts Electrical and electronic goods, including computing products Other</p>	<p>Science Pharmaceutical products and toiletries Scientific or biotechnical Other</p>
<p>Home, Outdoors, and Hardware Furniture, floor coverings, or housewares Hardware, building, and garden supplies Recreational goods Chemicals, fertilizers, and cleaning products Other</p>	<p>Textiles and Fashion Textiles Clothing, footwear, and personal accessories Jewellery Other</p>
<p>Information Media and Telecommunications Software publishing Motion picture and video activities Sound recording and music publishing Other</p>	<p>Wood, Glass, and Clay Wood products (aside from furniture, floor coverings, or housewares) Glass and glass products Ceramic, clay, or concrete products Other</p>
<p>Personal Services Personal services Other</p>	<p>Other Please specify</p>

ATTACHMENT 4: Amendment VC142 to the Victoria Planning Provisions

Amendment VC142 introduced the first phase of State Government reforms to the Victoria Planning Provisions on 16 January 2018. The Amendment affects all planning schemes in Victoria and is part of the State Government’s Smart Planning program. Among other things, it replaces the term ‘Home occupation’ with ‘Home based business’ as a land use which can now operate in many zones with double the floor area and staff without the need for a permit.

Amendment VC142:

- replaces the land use term ‘Home occupation’ with ‘Home based business’
- increases, the number of “allowable people who do not live in the dwelling” to work in the home based business, from 1 to 2
- changes the measurement of floor area from gross floor area to net floor area and increases the floor area that can be used from 50 to 100 square metres, (including storage of materials)
- clarifies that vehicles may not be adjusted or modified for commercial gain
- clarifies the ability to sell online goods.

According to the Amendment VC142 Explanatory report, these changes were introduced to support small business by:

- allowing greater flexibility for home based businesses
- reducing the costs to applicants and councils by increasing permit exemptions and updating provisions to provide greater clarity and certainty
- facilitating new forms of online business by supporting online retail activities.

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