



**CONFIDENTIAL STRATEGIC PLANNING
COMMITTEE MEETING**

CONFIDENTIAL MATTERS

9.1 Playford Health Precinct - Statement of Intent for Development Plan
Amendment (Attachments).....4

9.1 PLAYFORD HEALTH PRECINCT - STATEMENT OF INTENT FOR DEVELOPMENT PLAN AMENDMENT

Contact Person: Mr Greg Pattinson

Why is this matter confidential?

Subject to an order pursuant to Section 90 (3) (m) of the Local Government Act 1999, this matter is confidential because this Development Plan Amendment has yet to be released for public consultation.

The Statement of Intent includes proposals for the rezoning of land. It is appropriate that members of the community who own land in this area or nearby are informed and provided with accurate information through engagement and consultation as part of the DPA process.

A. COUNCIL/COMMITTEE TO MOVE MOTION TO GO INTO CONFIDENCE

No action – this motion passed in the open section.

B. THE BUSINESS MATTER

9.1 PLAYFORD HEALTH PRECINCT - STATEMENT OF INTENT FOR DEVELOPMENT PLAN AMENDMENT

Responsible Executive Manager : Mr Greg Pattinson

Report Author : Mr Paul Johnson

Delegated Authority : Matters delegated to the Committee.

Attachments :

- 1 [↓](#). Draft Statement of Intent
- 2 [↓](#). Current Zoning
- 3 [↓](#). Proposed Zoning
- 4 [↓](#). Overall Precinct Plan
- 5 [↓](#). Playford Health Precinct Prospectus

PURPOSE

This report is intended to seek approval to submit a Statement of Intent to the Minister for Planning to enable the preparation of a Development Plan Amendment. A Development Plan Amendment is the means of undertaking the rezoning of land under the Development Act, 1993 to enable land to facilitate changes in the use of the land.

STAFF RECOMMENDATION

- 1) That Council supports the Statement of Intent (attachment 1) for the preparation of the Playford Health Precinct Development Plan Amendment pursuant to Section 25(1) of the Development Act for the purposes of reaching agreement with the Minister for Planning.
- 2) That the CEO is authorised to make minor amendments not affecting the general intent of the Statement of Intent as may be necessary to reach agreement with the Minister.

EXECUTIVE SUMMARY

The City of Playford has established a health precinct around the Lyell McEwin Hospital (LMH) in Elizabeth Vale, with a master plan prepared in 2011 and rezoning undertaken in 2013. The rezoning of the former Bi-Centennial tennis court site and some residential land on the northern side of Oldham Road, provided the potential for a broad range of new facilities in a mixed use area around the hospital with a particular focus on allied health services and facilities. Investigations undertaken by Council indicate that by building on the advantages of one of the three tertiary hospitals in Adelaide (the LMH), the Precinct has great potential to develop into a significant economic 'cluster'. This has also been recognised with the inclusion of the precinct in the 30 Year Plan 2017 update (a volume of the State Government's Planning Strategy) as a Business and Industry Cluster.

Success in attracting new development to the precinct means that there is now the need to provide additional land with potential for development, and this would be zoned as Suburban Activity Node. There are several new developments or proposed new developments in the precinct, which will mean that very little land would be available for development until land is rezoned. This report recommends that agreement is sought from the Minister for Planning to a Statement of Intent (See attachment 1). The Statement of Intent is essentially a brief for the rezoning work to be undertaken to commence the Development Plan Amendment process, enabling the rezoning of additional land in close proximity to the hospital.

1. BACKGROUND

The Playford Health Precinct is a priority project for the City of Playford. The LMH is the foundation and anchor of the precinct, serves an extensive regional catchment including parts of the mid-north of South Australia and is one of the three major hospitals in Metropolitan Adelaide. It has been the subject of major investment over many years by the State Government including a relatively recent \$336 million upgrade completed in the last few years. The State Government is investing a further \$52.5 million on the expansion of the hospital's emergency department.

Council has been driving the development of a health and innovation precinct focussed on the area around the LMH, in order to take advantage of the major opportunities for 'spin-off' developments that a facility like this presents. These opportunities have been confirmed through independent research undertaken for Council. Potential new development around the hospital presents opportunities for additional employment and better facilities for the local and regional communities. Already approximately 3,100 people are employed in and around the Precinct, of which 2,100 live in the northern suburbs. The hospital is the largest employer in Playford.

In 2011 a Master Plan for the precinct was prepared for Council and in 2013 Council rezoned land to enable the precinct to start developing around the hospital (see attachment 2 – current zoning). The Master Plan and rezoning was supported by SA Health and the State Government. The rezoning was modest in terms of additional land area and the following development has either been undertaken or is considered likely to develop since the land was rezoned:

- ACH development on the northern section of a 2.5 ha site which was formerly owned by Council (former Bi-Centennial tennis courts) and for which Council specifically sought a major allied health development. This is a multi-million dollar project to establish a substantial aged care and allied health development, expected to commence in 2019.
- Elizabeth Vale Shopping centre site (1.5ha). Recent discussion has been held with new site owners regarding their recent acquisition of the property and their intentions for development.

- The \$8 million four storey Fluid Solar office development on Haydown Road which is also off grid (power provided entirely by solar PV and wind turbines) and completed in 2017.
- Three developments have been completed on the northern side of Oldham Road on former residential land / house sites, including two private specialist / consulting room developments and a car park (privately owned pay parking), occupying a total of four residential allotments (out of the total of 14 allotments zoned in 2013 as part of the precinct on Oldham Road).

The majority of the land within the precinct which was rezoned in 2013 as part of a mixed use zone called a Suburban Activity Node Zone has now been occupied or is expected to be occupied (as discussed above), leaving only 10 residential allotments on the northern side of Oldham Road.

Additional land is required to be zoned and included in the precinct to enable ongoing development of the precinct.

2. RELEVANCE TO STRATEGIC PLAN

3: Smart Jobs and Education

Outcome 3.1 Growth and diversification of local jobs matched with relevant education and training.

Outcome 3.2 Commercial and industrial growth.

6: Smart Health

Outcome 6.1 Access to quality, local health services.

Outcome 6.2 Increased employment opportunities in health, disability and aged sectors.

The health precinct offers the potential to help realise a significant range of Council's objectives.

3. PUBLIC CONSULTATION

The Development Plan Amendment process under the Development Act includes a requirement for considerable public consultation. It is intended that all land owners within the area to be rezoned would be directly contacted through correspondence. It is also intended that a range of other techniques would be used to provide the opportunity for community and stakeholder input. Government agencies and local Members of Parliament are also required to be informed. Council will have the opportunity to review all submissions as part of the process.

4. DISCUSSION

- 4.1** Staff have been cognisant of the State Government's upcoming transition to a new Planning and Design Code which will replace Council's current Development Plan (zoning document). Discussions with the Department of Planning Transport and Infrastructure (DPTI) about the transition process indicate that there will be the ability to transition desired zoning changes to the Health Precinct into the Code, provided that the DPA has progressed past the public consultation phase of the process and preferably been considered after consultation by Council.
- 4.2** Two areas are recommended for rezoning. The first area is approximately 4.3 hectares of Council owned land (see attachment 3) which is located to the west of Mark Road and includes land adjacent John Rice Avenue and at the corner of

Philip Highway which provides a gateway into the precinct from Salisbury Highway. It is a prominent, strategic parcel within the precinct and provides Council with the opportunity to attract significant developments that would complement the hospital and ACH development (noting that the ACH development has been facilitated by Council in this manner). The removal of the community land designation of the land has already been approved by the State Government. There are no other large undeveloped parcels in such close proximity to the hospital.

- 4.3** The 2011 master plan identified a very broad range of development that could potentially locate within the precinct. More recent advice from strategic property advisers Oryx has confirmed the strategic importance of this land. Potential opportunities may include a university or research facility, private hospital or a broad range of allied health or other facilities which may not have been foreseen at this stage. Finding and attracting such uses to the area is likely to take time and considerable ongoing effort from Council.
- 4.4** The zoning proposed for the area is a mixed use zone called Suburban Activity Node which would enable a broad range of activities including those mentioned above. The zoning is used for the whole of the existing precinct.
- 4.5** The second area proposed for rezoning is an area of land to the north of Oldham Road (see attachment 3) and east of Haydown Road. As discussed previously, a number of the allotments along Oldham Road have been developed and there is currently limited opportunity for acquisition of relatively small parcels of land for allied health and other forms of development such as consulting and specialist rooms and hospital related accommodation. As discussed, Council's land on Mark Road has the potential to attract development which is more strategic in nature and likely to require larger areas of land.
- 4.6** Typically, few if any residential allotments in the rezoned area are on the market at one time. There are many residents who do not necessarily wish to sell immediately, or dwellings that have been purchased for longer term investment purposes. The proposed mixed use zoning recognises that existing and new residential development can and should be an integral part of the zone. The first objective for the Suburban Activity Node zone indicates: 'A zone that includes a range of medium and high density residential development supported by a mix of compatible land uses'. Given that residential development is intended to be an integral part of the area there is a need for a larger number of allotments to provide an ongoing supply of land for development of the commercial elements of the health precinct.
- 4.7** Through rezoning, the availability of more potential 'mixed use' allotments in this area would provide the opportunity for amalgamation of allotments to create deeper and/or wider sites which would accommodate a broader range and scale of development than the relatively small residential allotments. The unpredictability of the likely pace of development (particularly of the small allotments north of Oldham Road) makes it difficult to recommend the extent of the additional area to be rezoned. The area proposed is approximately 6.6ha in area and includes 70 allotments currently used for residential purposes. While attachment 3 indicates the potential extent of the zone extension to the north of Oldham Road and east of Haydown Road, it is intended that this will be reviewed by consultants as a part of the DPA preparation.
- 4.8** A variety of locations throughout Australia with health precincts or similar have been considered in making these recommendations. While efforts have been made to draw conclusions from these comparisons for Playford in terms of land areas that should be rezoned and set aside for future development, there are many varying factors that influence the development of land in such areas, including the extent to which land is available and the manner in which opportunities are

promoted. However, it is clear that a number of trends are driving the growth of facilities and services in the Playford Health Precinct including:

- Population growth within Playford and in the northern region (Region to grow from 360,000 to 454,000 by 2036) and increases in patient demand.
- Low self-sufficiency of the Northern Areas Local Health Network Catchment (61% of services met compared to 80 to 90% in other metropolitan health networks).
- An ageing population and high levels of chronic disease.

The lack of available zoned land combined with the factors likely to continue driving demand, means that there is a compelling case for the rezoning of both the Mark Road land and additional land north of Oldham Road and east of Haydown Road. This would provide a potential supply of relatively large undeveloped land (Mark Road) and smaller parcels of currently residential land to provide for a diversity of sizes and forms of development.

- 4.9** Economic clusters such as the Playford Health Precinct have the potential to 'snowball' with additional development attracted by the opportunities offered by additional activities in the precinct. There is a need to provide every reasonable opportunity to fully capitalise on potential to provide better facilities for the community and enhance economic and employment opportunities without compromising on good planning outcomes.
- 4.10** Precincts/innovation districts or economic clusters are recognised as drivers of economic activity. Australian research by SGS Economics and Planning shows that density of employment creates significant increases in productivity (wages, salaries, profits and taxes). The Deloitte Report (see attachment 4) indicates: 'Innovation Districts represent an intentional effort for the establishment of new products and services, the bringing together of new technologies, as well as market-based solutions through the convergence of numerous, sometimes disparate, sectors and specialisations. Innovation Districts emphasise geographic compactness, accessible and walkable spaces and a digitally connected urban environment that combines commercial, retail and residential to generate complementary economic activity.' As a result of Council's efforts, the Playford Health Precinct has been designated as a business and industry cluster in the State Government's 30 year Plan 2017 (a part of the Planning Strategy for SA).
- 4.11** The potential for further rezoning and development of the Precinct has been supported by investigations into the capacity of infrastructure in the area undertaken by staff and investigations undertaken by AARB consultants into traffic, parking and transport. Generally the area is well provided with physical infrastructure such as storm-water, gas and electricity. The road system is well suited to further development of the precinct, while noting that intersection upgrades by the Department of Planning, Transport and Infrastructure and Council will be required as the area is developed over time. Public transport to the area is satisfactory with a number of bus routes servicing the area. Current consideration, facilitated by Council staff, is being given to the development of a 'super stop' for buses where all services would converge to provide a single good quality shelter and location for patrons to catch services. Development of the Mofflin Reserve at the corner of Mofflin Road and Oldham Road to service the needs of the precinct and the surrounding residential areas is high on the list of Council's open space development priorities.

4.12 Additional investigations which will be undertaken in preparing the Development Plan Amendment and are included in the Statement of Intent include to:

- Review the extent of the area of land proposed to be rezoned from Residential to Suburban Activity Node to the north of Oldham Road and to the east of Haydown Road.
- Identify any constraints related to existing industry (such as noise or emissions) in the area to the west of the Precinct through the inclusion of the additional Council land on Mark Road and on John Rice Avenue at the corner of Phillip Highway.
- Identify opportunities and constraints for access and egress in relation to the Council owned land at and near the corners of Mark Road, John Rice Avenue and Philip Highway.

4.13 Attachment 5 illustrates the overall configuration of development in the Health Precinct including both current and future zoned areas and importantly the relationship with surrounding areas of land. Two key features of the plan are as follows:

- The area to the south-west of the hospital site bounded by Trembath Road, Mark Road and John Rice Avenue, has been retained as Residential Zone based on the investigations for the 2011 Master Plan, enabling long term expansion of the hospital. Residential zoning of this area continues to be preferable to any alternative given the potential for increases in land value under the Suburban Activity Node or a Commercial Zone (for example) to create increases in land value and potential obstacles to future hospital expansion.
- The industry area shown on attachment 5 to the west of Mark Road and east of Philip Highway is currently zoned as Light Industry. The current zoning would enable health related industries to be established, but does not encourage commercial / office or consulting rooms and similar which are integral to the health precinct. While consideration has been given to the rezoning of the industry area south of Coglin Road into Suburban Activity Node, it has not been recommended. It is considered very likely that the transition to the Planning and Design Code will introduce the Urban Employment Zone which would potentially facilitate a range of activities in addition to industry such as those anticipated for the health precinct. This assists with a more straight forward process for the remainder of the rezoning process.

4.14 The Statement of Intent provides the brief for the rezoning process discussed above that requires the Minister for Planning's agreement. The following recommendation would enable the Statement to be forwarded to the Minister.

5. OPTIONS

Recommendation

- 1) That Council supports the Statement of Intent (attachment 1) for the preparation of the Playford Health Precinct Development Plan Amendment pursuant to Section 25(1) of the Development Act for the purposes of reaching agreement with the Minister for Planning.
- 2) That the CEO is authorised to make minor amendments not affecting the general intent of the Statement of Intent as may be necessary to reach agreement with the Minister.

Option 2

1) That Council supports the Statement of Intent (attachment 1) for the preparation of the Playford Health Precinct Development Plan Amendment pursuant to Section 25(1) of the Development Act for the purposes of reaching agreement with the Minister for Planning, subject to the following amendments:

- a) _____
- b) _____

2) That the CEO is authorised to make minor amendments not affecting the general intent of the Statement of Intent as may be necessary to reach agreement with the Minister.

6. ANALYSIS OF OPTIONS

6.1 Recommendation Analysis

6.1.1 Analysis & Implications of the Recommendation

The recommendation for Council endorsement of the Statement of Intent pursuant to Section 25(1) Development Act, 1993:

- 1) Enables the Statement of Intent (attachment 1) to be submitted for agreement by the Minister for Planning to Council's proposals including further investigations.
- 2) Will be provided to consultants for the preparation of a Development Plan Amendment after the Minister's approval.

A Development Plan Amendment for rezoning of land to form part of the Health Precinct would be presented to Council following approval of the Statement of Intent by the Minister, enabling 'fine tuning' of the approach, prior to public consultation or after public consultation (enabling consideration of submissions by Council). However, any substantial concerns should be resolved at the present stage if possible.

As discussed above, there are very strong arguments in support of extension of the health precinct to include additional land. These include the potential employment, economic development and additional facilities for the community that is likely to be attracted to the precinct. If any evidence is required of the potential outcomes, the ACH development and acquisition/proposals for the development of the Elizabeth Vale shopping centre site are sufficient evidence that positive 'spin-offs' are driven by a major facility such as Lyell McEwin Hospital when land is available with appropriate zoning. The potential for additional development is only likely to increase as these developments are under construction, finalised and marketing is undertaken.

6.1.2 Financial Implications

Funding for preparation of the Development Plan Amendment is available from the Strategic Projects budget.

There are a number of intersection upgrades likely to be required in the precinct which may be required in the precinct regardless of the proposed rezoning, based on development that is already occurring. Car parking in the precinct will require ongoing monitoring and attention over time and is likely to be the subject of future reports to Council. These matters will require consideration and funding allocations through the Annual Business Planning process.

The health precinct is an important initiative and will require Council's commitment for the long term.

6.2 Option 2 Analysis

6.2.1 Analysis & Implications of Option 2

Option 2 provides Council with the potential to make changes if required. However, for the reasons discussed above it is considered that there are very good reasons to proceed with the Statement of Intent in its current form.

6.2.2 Financial Implications

Likely to be similar to those detailed above from option 1 (dependent on the amendments made to the resolution).

Statement of Intent

By the Council

Playford Council

Playford Health Precinct

by the

City of Playford

February 2019

Pursuant to section 25 (1) of the *Development Act 1993* this Statement of Intent forms the agreed basis for the preparation of the proposed Development Plan Amendment.

**Sam Green
ACTING CHIEF EXECUTIVE OFFICER**

Date:

**Stephan Knoll
MINISTER FOR PLANNING**

Date:

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1. Introduction

1.1 Statement of Intent

Pursuant to section 25(1) of the Development Act 1993 (the Act) the City of Playford (the Council) has reached agreement with the Minister on this Statement of Intent (SOI) prepared by the Council in accordance with the Development Regulations 2008 (the Regulations).

The SOI details the scope, relevant strategic / policy considerations, nature of investigations to be carried out, the consultation process and timeframes to be followed in preparing the DPA.

1.2 Chief Executive Statement

The Chief Executive Officer of the Council confirms the following:

- The proposed DPA will assist in implementing the Planning Strategy.
- The proposed DPA has been endorsed by Council.
- All procedures, documentation and mapping will accord with relevant statutory requirements of the Act and Regulations.
- Sufficient Council resources will be devoted to completing the DPA within the agreed timeframe. Council acknowledges that the Minister can lapse the DPA if key timeframes are not met by Council pursuant to section 25(19) of the Act.
- Council may use the outcome of investigations and other information produced by external sources which will be reviewed by a qualified, independent professional advisor (pursuant to section 25(4) of the Act).

1.2.1 Council Contact Person

The key Council contact person who will be responsible for managing the DPA process and who will receive all official documents relating to the DPA is:

- Paul Johnson RPIA

Playford Health Precinct
2 Scope of the Proposed DPA

2. Scope of the Proposed DPA

2.1 Need for the Amendment

2.1.1 Rationale

The City of Playford has established a health precinct around the Lyell McEwin Hospital in Elizabeth Vale, with a master plan prepared in 2011 and rezoning undertaken in 2013. The rezoning provided the potential for a broad range of new facilities in a mixed use area around the hospital with a particular focus on allied health services and facilities. Investigations undertaken by Council indicate that by building on the advantages of one of the three tertiary hospitals in Adelaide (the LMH), the Precinct has great potential to develop into a significant economic 'cluster'. This has also been recognised with the inclusion of the precinct in the 30 Year Plan 2017 update as a Business and Industry Cluster.

Success in attracting new development to the precinct means that there is now the need to expand the mixed use area which is designated as Suburban Activity Node Zone. There are several new developments or proposed new developments in the precinct, which will mean that very little land is available for development until land can be rezoned. Development / likely developments include:

- A major new facility by ACH for allied health and aged care with planning approval.
- The redevelopment of the site of the 1960s style SAHT developed Elizabeth Vale shopping centre as a private hospital and related facilities, including car parking and office/commercial development
- Redevelopment of a number of small former residential allotments for smaller scale consulting room developments and a small commercial car park.

The following matters are to be addressed as part of this DPA:

- The extension of the Suburban Activity Node to include 4.3ha of Council owned land to the west of Mark Road, which also has frontage to John Rice Avenue and Phillip Highway.
- The extension of the Suburban Activity Node Zone to include additional residential allotments to the north of Oldham Road (additional to those allotments immediately north of Oldham Road which are already within the zone) and east of Haydown Road.
- Consideration of any minor amendments to existing local additions within the Suburban Activity Node where it is thought likely that these would form part of the policies in the zone to be transitioned to the new Code.

It is noted that consideration has been given to integration of land into the precinct that is currently included in the adjacent Light Industry Zone south of Coglein Road. This has the potential to be included as part of the Suburban Activity Node Zone, given that there is very little significant industrial activity. However, it is thought very likely that the land would be included as part of the Urban Employment Zone through the transition to the Planning and Design Code. This zone is thought appropriate as it can accommodate commercial activities where appropriate and supports the general objectives of the Health Precinct. It is therefore not intended to pursue the rezoning of this area of land at this stage as part of this DPA.

2.1.2 Affected Area

The area affected by the rezoning proposed in the DPA is illustrated on the attached map (attached map 1)

2.1.3 Potential Issues

Potential issues associated with the rezoning proposals include:

Playford Health Precinct
2. Scope of the Proposed DPA

- Providing adequate opportunity for the development of a broad range of enterprises that can benefit from and help to reinforce the Playford Health Precinct as an industry or economic cluster.
- Defining an appropriate area for rezoning to the north of Oldham Road and east of Haydown Road
- Ensuring compatibility of new development with existing, for example compatibility with the industrial area to the west of Mark Road.
- Identifying access/egress arrangements to Council land at the corner of Philip Highway and John Rice Avenue.

These matters are discussed where relevant in Section 4 below.

Playford Health Precinct
3. Strategic and Policy Considerations

3. Strategic and Policy Considerations

3.1 The Planning Strategy

3.1.1 Targets

The DPA will support the relevant volume of the Planning Strategy (or draft Strategy) by implementing the following targets:

Target	How the target will be implemented:
30 Year Plan for Greater Adelaide, 2017 Update (see targets on pages 36 and 37)	
1. 'Containing our urban footprint and protecting our resources'. 1.1 85% of all housing in metropolitan Adelaide will be built in established urban areas by 2045	The Playford Health Precinct and SAN zoning will help support and facilitate increased urban renewal in the suburbs around the precinct by providing services, facilities and employment to support higher densities and population growth.
2. 'More ways to get around' 60% of all new housing in metropolitan Adelaide will be built within close proximity to current and proposed fixed line and high frequency bus routes by 2045	The SAN zoning which incorporates the LMH and allied health facilities enables a mixed use environment including medium density housing in close proximity to a variety of bus routes that service the precinct. A bus super stop is proposed to be established in the precinct which will improve the level of service to the area.
3. 'Getting Active' Increase the share of work trips made by public transport modes by residents of inner middle and outer Adelaide by 30% by 2045.	An increase in the range of activities and residential densities within the Precinct will improve the potential for use of the range of buses already servicing the Precinct.
4. 'Walkable neighbourhoods' Increase the percentage of residents living in walkable neighbourhoods in inner middle and outer suburbs by 25% by 2045.	The SAN will facilitate the development of improved facilities and services to improve the walkability of the surrounding neighbourhoods. The progressive provision of improved pedestrian and cycle facilities and upgrade of the streetscape by the City of Playford as anticipated by master planning of the area will also encourage the walkability of the area.
5. 'A green liveable city'. Urban green cover is increased by 20% in metropolitan Adelaide by 2045.	<p>The inclusion of Council land on Mark Road in the SAN will result in a loss of canopy cover as the area has substantial tree coverage. The land is likely to be developed and while some vegetation would be retained, significant amounts would be removed.</p> <p>The City of Playford has adopted Open Space Guidelines (August 2018) which are of indirect relevance. The guidelines indicate that where remnant vegetation or tree removal is undertaken, revegetation or restoration may occur in a place near to the site or another appropriate location.</p> <p>Playford also has a vegetation management policy which indicates that where removal of vegetation is necessary that there should be an offset. Playford is currently investigating the potential to establish an offset scheme.</p> <p>The Council proposes to develop the Mofflin reserve (corner Oldham road and Mofflin Road) with a particular focus on servicing the Health Precinct and this would be likely to include additional tree planting.</p>
6. 'Greater housing choice' Increase housing choice by 25% to meet changing household needs in greater Adelaide by 2045	Increasing the footprint of the health precinct by extending the SAN zoning has the potential to increase housing choice in the precinct. The types of facilities and services existing and likely to be established in the precinct, and the presence of the LMH

Playford Health Precinct
3.Strategic and Policy Considerations

Target	How the target will be implemented:
	are also likely to also attract various forms of accommodation

3.3.2 Policies

The DPA will support the relevant volume of the Planning Strategy. Given the wide range of policies supported by the DPA, the following is a summary of the policies which will be implemented:

Policy	How the policy will be implemented:
30 Year Plan (2017 update)	
<p>Housing mix affordability and competitiveness P36 Increase housing supply near jobs, services and public transport to improve affordability and provide opportunities for people to reduce their transport costs P37 Facilitate a diverse range of housing types and tenures (including affordable housing) through increased policy flexibility in residential and mixed use areas.</p>	The SAN Zoning, which already applies to the precinct, would be extended to include additional land which would provide the potential for a greater range of housing types with good access to a number of bus services. The SAN would replace the current residential zone which while relatively flexible has limitations with conservative minimum site areas for dwellings.
<p>Health Wellbeing and inclusion P47 Plan future suburbs and regenerate and renew existing ones to be healthy neighbourhoods that include..... P50 Provide diverse areas of quality public open space in neighbourhoods (especially in high density areas) such as local parks, community gardens and sporting facilities to encourage active lifestyles and support access to nature within our urban environment.</p>	Planning has been undertaken for Playford Health Precinct which, in addition to providing a broad range of health and allied health facilities, will over time provide upgraded walking and cycling facilities and an upgraded park (Mofflin Reserve) to cater specifically for the health precinct and surrounding population.
<p>The economy and Jobs P55 Promote certainty to undertake development while at the same time providing scope for innovation P56 Ensure there are suitable land supplies for the retail, commercial and industrial sectors.</p>	The inclusion of additional land within the SAN will increase the certainty that a significant range of activities, including allied health, offices and consulting rooms, and retail development (in addition to a diversity of residential) will be able to establish within the precinct,. The DPA will increase the land supply for various forms of non-residential development, as well as medium density residential in the precinct.
<p>Transport P76 Improve the amenity and safety of public transport stops, stations and interchanges by improving their connections to adjacent development and encouraging mixed use development and housing diversity in close proximity.</p>	Council is planning to establish a superstop (a consolidated bus stop with upgraded shelter) for use by patrons and employees of businesses and services within the health precinct as well as local residents. The superstop would provide a single stop for all bus services servicing the precinct and potentially electronic real time bus information. Mixed use development is proposed for the existing and expanded precinct.
<p>Infrastructure P83 Define and protect strategic infrastructure sites and corridors from inappropriate development to ensure the continued functionality of the services they provide. P84 Protect major economic infrastructure such as airports, ports and intermodals from encroachments by incompatible development and facilitate further economic activity in these locations P89 Integrate and collocate different community infrastructure and services in community hubs to maximise their use and enhance their economic feasibility.</p>	<p>The hospital is strategic infrastructure. It is one of the three tertiary hospitals in Adelaide and essential for the servicing of the regional community. The LMH is currently intensely developed on its site and in the medium to longer term will be likely to require additional land to be able to meet community needs. The 2011 Master Plan (supported by SA Health) identified the area of land to the south west of the hospital for the long term growth of the hospital. This land is bounded by Trembath Road, Mark Road and John Rice Avenue (an arterial road). The DPA which followed retained the residential zoning of the land (rather than rezoning as SAN) in order to minimise the intensification of development in the area. Council intends to continue to retain the residential zoning of this area in the proposed DPA.</p> <p>The Playford health Precinct is designed to integrate and</p>

Playford Health Precinct
3. Strategic and Policy Considerations

Policy	How the policy will be implemented:
	collocate a variety of health facilities and retail and commercial development. It is essentially an economic health an innovation cluster.

3.2 Council Policies

3.2.1 Council's Strategic Directions (Section 30) Report

Council's most recent Strategic Directions Report was adopted by Council in February 2013. A DPA for the health precinct was underway at the time and was number two on Council's priority list for completion in terms of 'current policy work and DPAs'. The DPA was second in priority only to Council's involvement in Playford Projects which resulted in the Ministerial DPA for a number of growth areas throughout the City. The Lyell McEwin and Allied Health Precinct DPA was authorised in November 2013 and consolidated in Council's Development Plan in 2014. While Council has not undertaken a more recent Strategic Directions Review, Council's strategic planning has retained development of the health precinct as a high priority.

3.2.2 Infrastructure Planning

The proposed amendment will be consistent with current infrastructure planning (both social and physical) identified in council's strategic directions report, by the Minister or by a relevant government agency.

The State Government is currently planning for the upgrade of the Emergency Department of the LMH which will be entirely within the current envelope of the hospital site bounded by Oldham Road, Haydown road, John Rice Avenue and Mark Road. It is not anticipated that the DPA will have any significant implications for this project.

Overall the DPA will support the role of the hospital by continuing to develop complementary activities in close proximity. For example, there is potential for university, research and private hospital facilities to be developed in close proximity, as well as additional shopping and commercial development to provide for the staff (hospital and other development) and visitors to the precinct.

Infrastructure such as electricity, gas, storm water drainage have been investigated and found adequate to service development in relevant areas. A study commissioned by Council and undertaken by AARB indicates that roads have adequate capacity to service the needs of the precinct with potential for upgrades as required at key intersections as traffic volumes increase over time. Council is currently working towards the development of a bus superstop on Haydown Road. This would improve the service to bus service customers by enabling most services to the precinct to be accessible in this one location.

3.2.3 Other Policies or Local Issues

- The policies of this DPA will be consistent with the policies in the general provisions of the Development Plan.
- There are no other Council or known Ministerial Development Plan amendments that will influence this DPA.
- It is unlikely that there would be inconsistencies with Development Plans or DPAs of adjoining Councils
- Drafting of the DPA will take into account the need for integration with the new Planning and Design Code.

Playford Health Precinct
3.Strategic and Policy Considerations

- The DPA will investigate whether there is a need for the Minister to amend the existing determined areas for the purposes of Schedule 4—Complying development, clause 2 B—New dwellings.

3.3 Minister's Policies

3.3.1 Planning Policy Library

The DPA will draw on the following SA Planning Policy Library modules:

- Suburban Activity Node

The SAN was adopted for the precinct in the previous DPA and it is anticipated that the zone will be extended to additional land.

Should the investigations identify that any local additions are necessary (or adjustments to existing local additions), these will be minimised and consideration given to the need to integrate into the new Code.

3.3.2 Existing Ministerial Policies (Section 25(5), 26 and Section 29)

It is not anticipated that any Ministerial policies introduced through Section 25(5), 26 or 29 of the Act will be amended by this DPA. Any amendment to these policies will be justified in the DPA and the Council confirms that the policies will only be changed in a way that ensures consistency with the Planning Strategy.

3.3.3 Ministerial DPAs

There are no known relevant Ministerial DPAs.

Playford Health Precinct
4. Investigations and Consultation

4. Investigations and Consultation

4.1 Investigations

4.1.1 Investigations Previously Undertaken

As previously discussed, a Master Plan was undertaken by Hames Sharley in conjunction with Leedwell, WSP Lincoln Scott and InfraPlan and was finalised in 2011. This included substantial investigations and concluded with a Development Plan Amendment approved in 2013 which established a mixed use area around the hospital with Suburban Activity Node Zoning.

4.1.2 Investigations Initiated to Inform this DPA

The City of Playford has undertaken significant work since the 2011 Master Plan and 2013 rezoning was undertaken. This recognises that the Playford Health Precinct is an area that requires ongoing monitoring and review if it is to continue to develop to provide a comprehensive, broad range of facilities and services in addition to those provided by the Lyell McEwin Hospital.

Review of the Precinct was undertaken with the knowledge that the available zoned land in the precinct has been substantially reduced with the sale and imminent development of the former Council Bi-Centennial Tennis Courts to ACH for an aged care and allied health facility. Additionally the Elizabeth Vale shopping centre at the corner of John Rice Avenue and Haydown Road has been sold to a company which specialises in health care developments and is expected to be developed as a private hospital with other components such as multi deck car park and commercial/office building. The availability of smaller residential allotments for redevelopment on the northern side of Oldham Road opposite the hospital has reduced with the development of a number of sites for consulting rooms and a car park.

Work undertaken for the City of Playford by Oryx strategic property consultants identified that the Council owned land on Mark Road and John Rice Avenue is the 'most significant next stage expansion' of the Playford Health Precinct to cater for desired major land uses of strategic benefit to the Northern Region. The Precinct is designed in part to take advantage of the potential to drive economic development through increasing the density of employment in economic clusters / precincts (research undertaken by SGS Economics and Planning). It is intended to include this land in the Suburban Activity Node. Council also commissioned Deloitte to prepare a report on the Precinct which amongst other matters identified likely drivers of demand:

- Population growth within Playford and in the northern region (Region to grow from 360,000 to 454,000 by 2036) and increases in patient demand.
- Low self-sufficiency of the Northern Areas Local Health Network Catchment (61% of services met compared to 80 to 90% in other metropolitan health networks)
- An ageing population and high levels of chronic disease.

An analysis of infrastructure in the precinct has identified that the area has the capacity for substantial additional development. The most significant area for infrastructure upgrade would be in relation to road intersections as traffic increases over time as road traffic increases, as identified in the AARB report prepared for Council.

Additional investigations will be undertaken to:

- 1) Review the extent of the area of land to be rezoned from Residential to Suburban Activity Node to the north of Oldham Road and to the east of Haydown Road.
- 2) Identify any constraints related to existing industry (such as noise or emissions) in the area to the west of the Precinct through the inclusion of the additional Council land on Mark Road and on John Rice Avenue at the corner of Phillip Highway.
- 3) Identify opportunities and constraints for access and egress in relation to the Council owned land at and near the corners of Mark Road, John Rice Avenue and Philip Highway.

Playford Health Precinct
4 Investigations and Consultation

4.2 Consultation

Informal discussions have already been undertaken with the EPA, DPTI (Planning) and SA Health to ensure an appropriate understanding of relevant issues. These agencies will also be formally consulted during consultation on the DPA.

A broad range of agencies, State Members of Parliament, interested parties, individuals and Councils will be consulted during the consultation stage of the DPA:

- Department of Communities and Social Inclusion
- Department for Education and Child development
- Department of Environment, Water and Natural Resources
- Department for State Development
- Department for Health and Ageing
- Department of Justice
- Department for Manufacturing, Innovation, Trade, Resources and Energy
- Department of Planning Transport and Infrastructure
- Environment Protection Authority
- Renewal SA
- Full range of utility organisations
- City of Salisbury
- State Member for the electorate of Elizabeth and adjoining electorates
- Federal member for the electorate of Spence

Consultation with the public will be undertaken in accordance with the requirements of the Act and Regulations. This will include:

- A notice in the Government Gazette.
- A notice in the Advertiser Newspaper.
- A notice in relevant local newspapers.
- The scheduling of a Public Meeting at which any interested person may appear to make representations on the proposed amendment.
- Notices to the owners or occupiers of any land that is subject to or adjacent to the affected area of the proposed amendment.
- It is anticipated that a range of other consultation techniques will be applied beyond the requirements of the Act including:
 - Informal 'drop-in' sessions for the community
 - A web site with relevant information regarding the proposals
 - A fact sheet

Playford Health Precinct
5 Proposed DPA Process

5. Proposed DPA Process

5.1 DPA Process

Council intends to **undertake the following DPA process** (check box):

Process A

Agencies will be consulted on a draft version of the DPA for a period of 6 weeks. A copy of the DPA, and copies and a summary of agency submissions, will then be sent to the Minister for approval to release the DPA for public consultation.

Process B1 (with consultation approval)

A copy of the DPA will be sent to the Minister for approval to release it for concurrent agency and public consultation (not more than 8 weeks for agency comment and not less than 8 weeks for public comment).

Process B2 (consultation approval not required)

A copy of the DPA will be released for concurrent agency and public consultation (not more than 8 weeks for agency comment and not less than 8 weeks for public comment).

Process C

A copy of the DPA will be released for concurrent agency and public consultation (not more than 4 weeks for agency comment and not less than 4 weeks for public comment). Landowners and occupiers identified in the SOI will receive direct notification of the DPA.

5.1.1 Rationale

Council is extending existing zoning to take in additional land. The relevant issues are relatively clear and there should not be any substantial unforeseen issues.

Playford Health Precinct
6 Professional Advice and Document Production

6. Professional Advice and Document Production

6.1 Professional Advice

The professional advice required will be provided by:

- Paul Johnson RPIA

This person satisfies the professional advice requirements of the Act and Regulations and will provide advice to the council prior to the preparation of the DPA. This person is not considered to have a conflict of interest or perceived conflict of interest in the DPA.

6.2 Document Production

The DPA (including the structure, amendment instructions and mapping) will be prepared in accordance with the Technical Guide to Development Plan Amendments issued by the Department for Planning, Transport and Infrastructure (the Department) and any templates, except as mutually agreed.

To ensure certainty as to the correct version of the DPA, the DPA will contain a date in the footer (eg version 5 July 2007). The footer will be located on every page of the DPA, including the proposed amendments (including mapping).

The Chief Executive Officer of the council will ensure that the policies implement the Planning Strategy, all procedures have been completed within the statutory requirements, and that mapping is correct prior to issuing a certificate in accordance with the Act. If this is not the case, the council will take responsibility for the DPA until the matter has been resolved.

6.3 Mapping

Council will obtain electronic copies of all the affected maps and/or figures from the Department prior to the commencement of mapping amendments to ensure all mapping is amended based on current map bases.

Amendments to maps will be provided in the required format to the Planning Division of the Department. Mapping amendments for this DPA will be undertaken by an appropriately qualified and experienced consultant.

Playford Health Precinct
7. Proposed DPA Timetable

Process B2 (consultation approval not required) Timetable

The following timetable is proposed for this DPA based on the selected process. Council will take steps to update this timetable if it appears at any stage that Council will require an extension to complete a task.

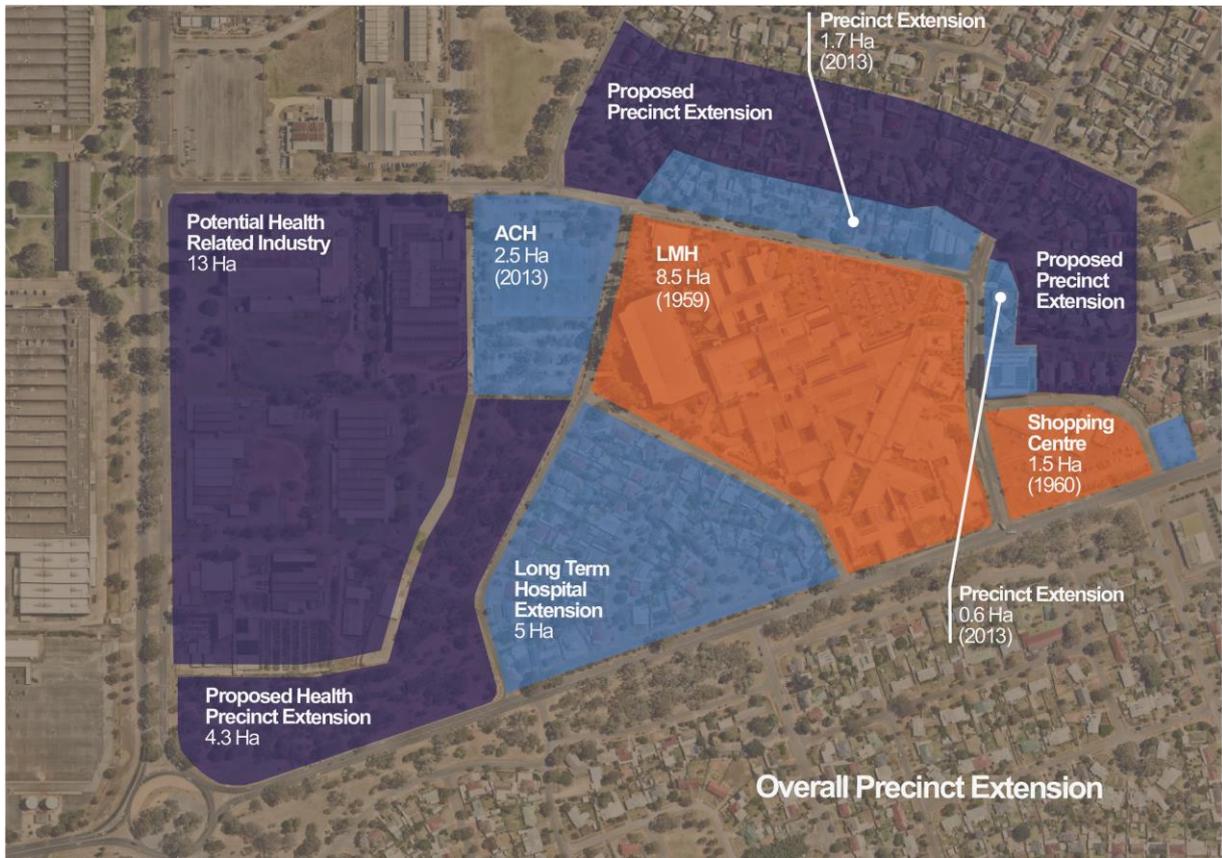
Steps	Responsibility	Agreed Timeframe from Minister's Approval
Development Plan Amendment (DPA)		
Investigations conducted; DPA prepared	Council	14 weeks SOI agreement – DPA commences consultation
Agency and public consultation concludes	Council	8 weeks
Summary of Consultation and Proposed Amendment (SCPA)		
Public Meeting held; submissions summarised; DPA amended in accordance with Council's assessment of submissions; SCPA prepared and lodged with the Department	Council	10 Public consultation closes – SCPA lodged with the Department
SCPA assessed and report on DPA prepared for Minister	Department	7 weeks
Minister considers report on DPA and makes decision	Minister	4 weeks
Approved amendment gazetted	Department	2 weeks

Following Ministerial approval of the proposed amendment, it is forwarded to the Environment, Resources and Development Committee of Parliament for review.









Deloitte.



Playford Health Precinct
A vision in the making

Executive summary

Playford Health Precinct – the vision

Leveraging the Lyell McEwin Hospital

The City of Playford recognises that there is a unique opportunity to develop the area surrounding the Lyell McEwin Hospital (LMH) into an integrated world-class health precinct – to be known as the Playford Health Precinct. Based around the LMH – one of Adelaide's major tertiary public hospitals, and the centrepiece of metropolitan Adelaide's northern health network – the vision for this precinct is to build upon the \$336 million investment made by the South Australian Government in the LMH over the last 15 years.

Located at the heart of Adelaide's northern suburbs, the Playford Health Precinct is uniquely placed for development and expansion.

A new model for economic growth

Future investment at the LMH site has the potential to generate further economic growth, creating new jobs and skilled employment opportunities in the health, aged-care, and social assistance sectors for residents of Adelaide's northern suburbs.

The City of Playford, along with Adelaide's other northern most areas - City of Salisbury, City of Tea Tree Gully, and Town of Gawler - are home to 360,000 people or about 21 per cent of South Australia's population. This area is projected to grow to 454,000 people by 2036. This region has recently undergone significant economic structural change with the demise of the automotive manufacturing industry in Australia. Where manufacturing once dominated the economic landscape, industries such as defence, health, retail, and education now provide a breadth of diversity in Adelaide's north.

Based on the Innovation Districts model that has proved successful both overseas and interstate, the Playford Health Precinct represents a place for leading-edge health and medical institutions, education and training institutions, and private companies to come together, cluster and connect.

The Playford Health Precinct is an opportunity to continue the northern suburbs economic transition, and to expand the breadth of the area's industrial diversity.

Health gateway

Geographically, the Playford Health Precinct is strategically situated to serve as a health gateway to the regional population well beyond Adelaide's northern suburbs.

Situated along key transport corridors connecting the Adelaide metro area to the greater northern region of South Australia, the Playford Health Precinct and the LMH is the nearest full-service tertiary public hospital for an additional 160,000 people living across country South Australia.

These areas include:

- Port Pirie in the north
- Kadina-Moonta-Wallaroo on the Yorke Peninsula
- the Riverland towns of Berri, Loxton and Renmark
- the Barossa and Clare Valley wine and tourism regions.

Currently, these areas have limited public health and hospital services, as well as a complete absence of adequate private hospital services.

The Playford Health Precinct sits as a health gateway, strategically placed to take advantage of the increasing health needs of a large and growing regional population.

A future leader in health services

Local and national trends mean that the future of health services is rapidly evolving and that there are numerous potential opportunities to integrate medical services and health care with education, research, as well as commercial development.

There is an opportunity for the Playford Health Precinct to be recognised as a leader in the treatment and delivery of health services by developing a specialist focus concentrated around:

- **Chronic diseases associated with socioeconomic disadvantage** – diabetes, obesity, and cardiovascular disease
- **Acute care services** – urgent medical and surgical treatment and short-term care
- **Conditions and illnesses associated with ageing** – gerontology and geriatric medicine
- **Longer term health care and recovery services** – aged and disability care
- **Allied health and social assistance services.**

The Playford Health Precinct is well positioned to embrace shifting local and national trends, and to develop into an integrated world-class health precinct.

What needs to be done?

Continued government commitment and investment in the LMH has the potential to sustain and grow private-sector and non-government interest and investment around the health precinct.

Leveraging the State Government's recent \$336 million investment to expand the LMH, there are opportunities for:

- **Expanded and improved health, medical and care services** – including private hospital services, allied health and additional aged and disability care services.
- **University education, training and research facilities**
- **Improved retail, hospitality, accommodation and transport offerings.**

Developing the vision

This document represents an important step in the journey to establishing the Playford Health Precinct.

For the precinct to succeed, however, more work is needed. While the City of Playford is providing the vision and acting as a catalyst for the precinct, it cannot achieve this alone. It will likely require close collaboration and support from the South Australian and Commonwealth Governments, engagement from university institutions, and, most importantly, private-sector investment.

Realising the full potential of the precinct ecosystem will require dedication, strong leadership, as well as appropriate planning and coordination. This needs to be built around:

- a strong evidence base gained from detailed and rigorous economic analyses
- an appropriate governance structure to build collaborative relationships and to take a coordinated view of the development and investment in the site.

The City of Playford is committed to acting as a catalyst to facilitate public and private investment to achieve this goal. Playford is looking to bring together key stakeholders and interested parties to help support and facilitate the development of the precinct.

Together, in a precinct environment, the sum of these parts will make for something much greater.

Scale of the opportunity

The value proposition of the site

Northern Adelaide

Population

- Home to 21% of SA's population** (360,000 people)
- Growing rapidly**
 - Experienced the largest population growth in SA (added 24,000 people between 2011 & 2016)
 - Projected to grow to 454,000 by 2036
- Youthful**
 - One-third of the population is aged 0-24 years
- Future ageing**
 - Population is expected to age faster than the state average (30% of residents expected to be aged 55+ in 2036)

Health services

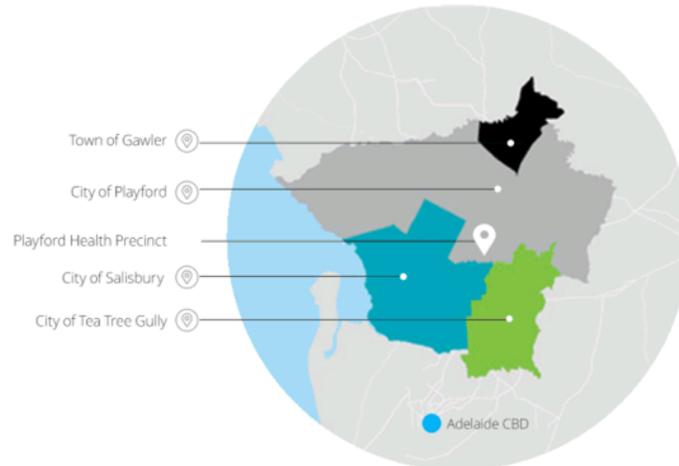
- Home to one of SA's largest public hospitals**, the Lyell McEwin
- Limited availability of health services locally**
 - 39% of residents travel outside the region for health services
- Limited private hospital services**
 - One small private hospital locally (<50 beds)
 - 42% of residents have private health cover

Economic growth

- Home to 14,500 health jobs** (15% of employment)
- Diverse economy**
 - 8,750 additional jobs created in health, education, retail and defence industries between 2011 & 2016
- Proximity to SA's Defence industry**
 - 6,400 people work at Edinburgh Defence Precinct (61% live in region)
- Future investment**
 - There is \$394m of planned investments into the City of Playford over the next 15-years

Health and social indicators

- Health outcomes**
 - 17% of adults smoke
 - 33% of adults are obese
 - 64% of adults are at risk of developing a chronic disease
- Incidence of welfare dependency**
 - 11% of people hold a Health Care Card
 - 7% of people are on a Disability Support Pension



Greater North

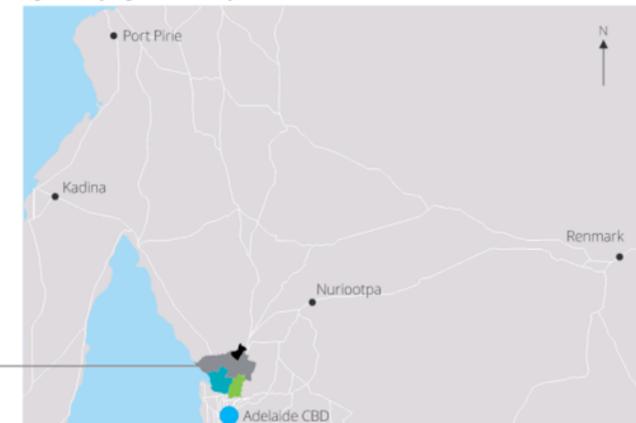
Population

- Home to another 162,000 people** (10% of SA's pop.)
- Greying population**
 - The region is popular with older people and retirees
- Modest travel times**
 - Within 2.3 hours drive of the Playford Health Precinct (adequate travel time from many regional towns)

Health Gateway

- Limited private health services**
 - No private hospital services, despite 34% of people having private health cover
- Health outcomes**
 - 19% of adults smoke
 - 37% of adults are obese
 - 67% of adults are at risk of developing a chronic disease
 - 17% of adults drink to excess

Figure 1: Key regions that a Playford Health Precinct could service



Context

A unique opportunity

The City of Playford recognises that there is a unique opportunity to develop the area surrounding the Lyell McEwin Hospital (LMH) into an integrated world-class health precinct – to be known as the [Playford Health Precinct](#).

Located at the heart of Adelaide's northern suburbs – some 20-30 kilometres from Adelaide's CBD – the Playford Health Precinct is uniquely placed for development and expansion. The strength of the health services delivered at the LMH, combined with its proximity to a large and growing population, as well as its relatively central position within the urban landscape, are all contributing factors that enhance the value proposition of the Playford Health Precinct.

There is a unique opportunity for the Playford Health Precinct to be recognised as a leader in the treatment and delivery of health services.



Playford's commitment

The City of Playford is committed to acting as a catalyst to facilitate public and private investment to achieve its vision, and is looking to bring together key stakeholders and interested parties to help support and facilitate the development of the precinct.

Building on a track-record of investment

The vision for this precinct is to build upon the continued success of the existing LMH, which has seen more than \$336 million in government investment over the last 15 years to expand its facilities and health offerings. Continued government commitment and investment in the LMH has the potential to sustain and grow private-sector and non-government interest and investment around the health precinct.

Proximity to South Australia's defence industry

Located some 7 kilometres from the Edinburgh Defence Precinct, the epicentre of South Australia's growing defence industry. The close proximity of the health precinct presents opportunities for knowledge spillovers involving specialist health research focusing on defence, and to provide health and medical services specific to these workers and their families.

Positioned as a 'health gateway'

Geographically, the health precinct sits as a health gateway, strategically situated to serve the increasing health needs of a large regional population. The health precinct sits along key transport corridors connecting the Adelaide metro area to the greater northern region of South Australia. Currently, these areas have limited public health and hospital services, as well as a complete absence of adequate private hospital services.

The next step in a long and industrious history

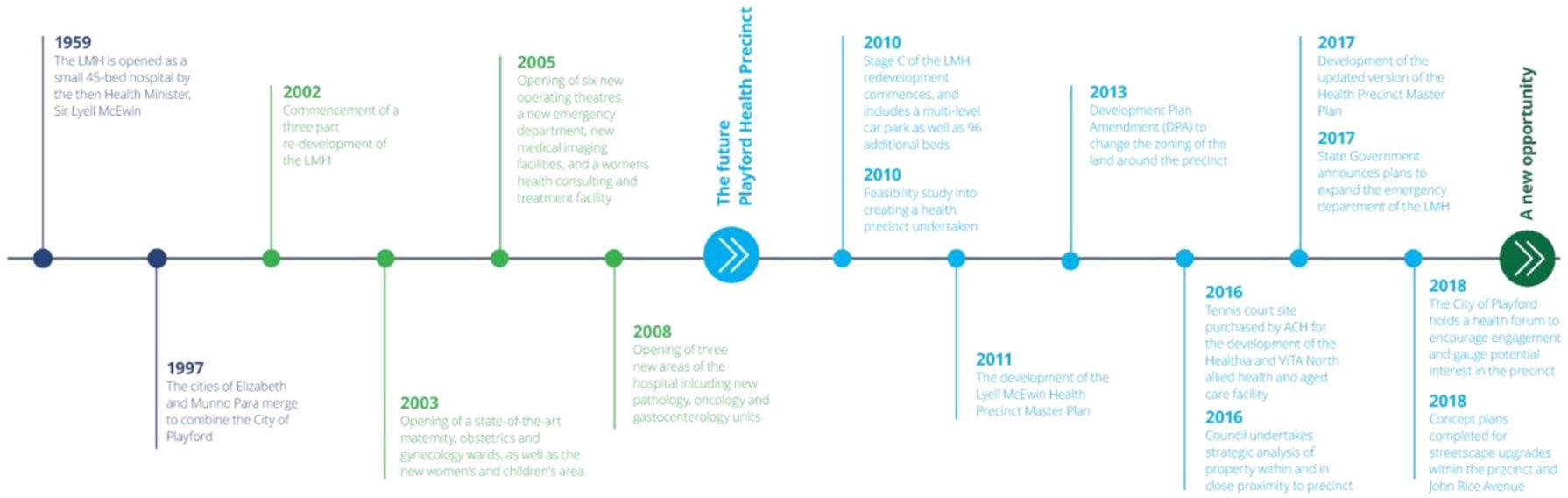
Playford, along with Adelaide's other northern most areas – the City of Salisbury, the City of Tea Tree Gully, and the Town of Gawler – have a proud and industrious history built on the hard work of generations of migrants. At the forefront of Australia's golden age of manufacturing following World War II, these areas were defined for many years by the automotive manufacturing industry. Manufacturing sustained the economic welfare of the region for three generations, and provided good jobs for many new Australians.

Since 2006, however, the economic composition of Adelaide's northern suburbs has undergone significant structural change. Following the decline of Australia's automotive manufacturing industry, the area is now in a period of economic renewal.

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A short history of the Lyell McEwin Hospital



LMH in 1961



LMH in 1968



LMH in 1970



LMH in 2018

Playford Health Precinct | A vision in the making



The Playford Health Precinct

Current and future economic uses

About

Located in the heart of Adelaide's northern suburbs, the Playford Health Precinct involves the clustering and expansion of the health and medical facilities currently located around the LMH. Anticipated to cover 198,000m² of the surrounding area, it will also encompass allied health services and retail services, as well as drive the urban revitalisation of the area.

1. The current LMH site
2. The Elizabeth Vale Shopping Centre - a 17,000m² retail precinct
3. The Fluid Solar building - housing offices and consulting rooms
4. The former Bicentennial tennis court site - this site was recently sold by the City of Playford to the ACH Group to develop an \$80 million aged-care and allied health facility
5. Rezoned land - current privately held residential land rezoned for commercial development
6. Residential land - currently privately held (33 allotments) retained for long term hospital expansion
7. Vacant land - two 'greenfield' sites, currently owned by the City of Playford, intended for future development related to health and hospital services or tertiary education
8. Industrial land - potential area for future development related to health and medical education and research, or health and medical manufacturing



The Lyell McEwin Hospital

Located approximately 24 kilometres north of Adelaide's CBD and 4 kilometres from the Elizabeth city centre, the Lyell McEwin, or 'Lyell Mac' as it is affectionately known by locals, is one of three major public tertiary hospitals located across metropolitan Adelaide.

Founded as a small country hospital in 1959, the LMH is now a global health facility providing services to over 65,000 patients a year.¹

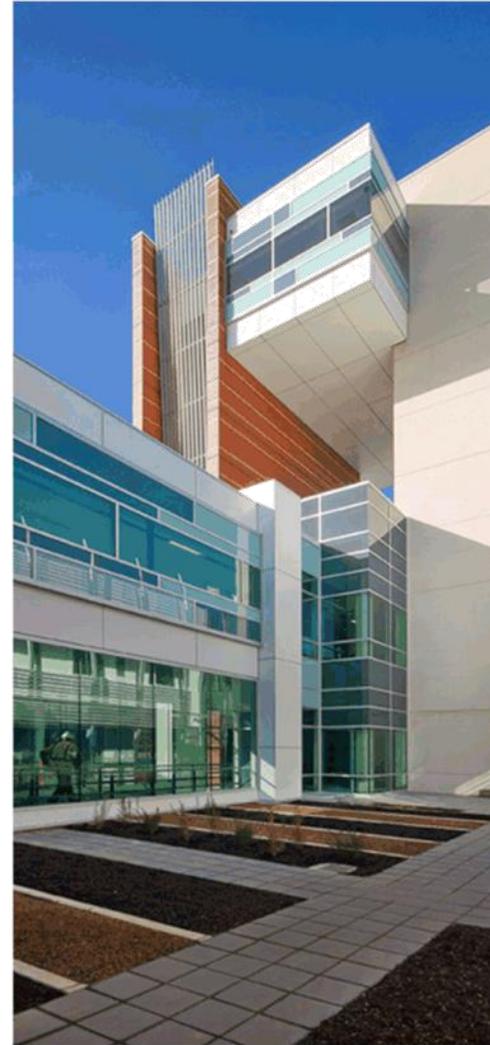
A full-service hospital

The LMH provides a 24/7 emergency department as well as twenty-four hours a day access to orthopaedic surgery. The hospital also hosts a number of locally focused clinical research programs aimed at tackling chronic diseases prevalent in the local community. These include research in areas such as aged care, diabetes, heart disease and speech therapy. It is also the premier maternity hospital for the north of Adelaide.

A generator of local employment

The LMH is a major employer of residents from Adelaide's northern suburbs.

In 2016, 3,100 people worked in and around the LMH site, of which 2,100 lived within the northern suburbs.²



Investing in world-class facilities

Over the last 17 years, the LMH has seen more than \$336 million in government investment and has undergone three stages of major redevelopment and rezoning programs³, transforming it into a world-class facility, with increased hospital beds, operating theatres and an expanded range of specialist services. The final round of upgrades increased the number of beds at the facility by 96, introduced a women and children's hub and incorporated a helipad into the sites facilities.

A further \$52.5 million expansion of the LMH's emergency department is planned.⁴

Growing demand for health services

Since its redevelopment and expansion, the LMH has seen continual growth in inpatient admissions. Emergency service admissions, in particular, increased from 17,000 in 2011 to 23,000 in 2016. In total, the hospital recorded over 47,000 inpatients in 2016, up from around 42,000 in 2011.⁵

A centre of future economic growth

The LMH sits at the centre of a shifting health landscape driven by the socio-economic profile of the northern suburbs. The hospital is ideally placed to play a pivotal role in shaping the economic future of the surrounding region.

Future investment at the LMH site has the potential to generate further economic growth, creating new jobs and skilled employment opportunities in the health, aged-care, and social assistance sectors for the residents of Adelaide's northern suburbs.

Northern Adelaide today

Trends in population

Adelaide's northern suburbs comprise the local government areas of:

- City of Playford
- City of Salisbury
- City of Tea Tree Gully
- Town of Gawler

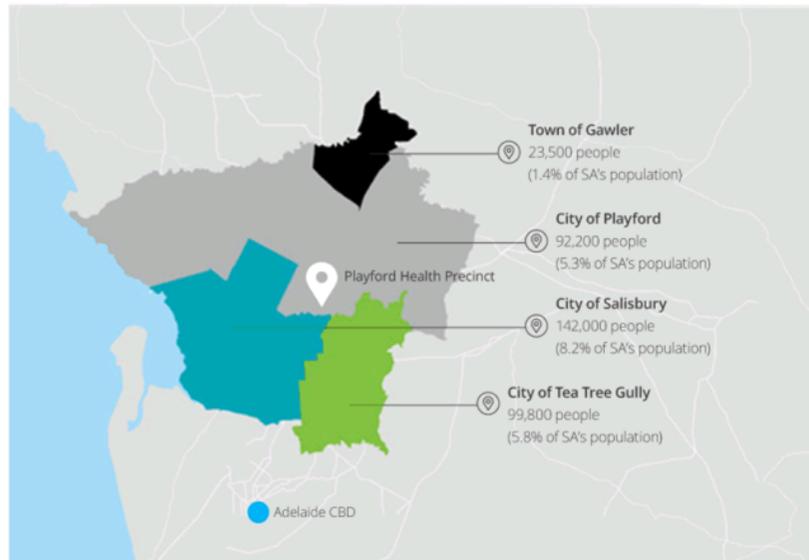
Together, these areas take in a diverse demographic cross-section of South Australia's population – ranging from prosperous and comfortable middle-class households, at one end of the spectrum, to poor socioeconomic and severely disadvantaged households, at the other.

However, the demographics of the northern suburbs are changing rapidly as its population grows and the local economy undergoes a period of transition and renewal.



Today, Adelaide's northern suburbs are home to some **360,000** people, representing **21 per cent** of the state's population.⁶

Figure 2: Key local government areas that comprise Adelaide's northern suburbs



Source: ABS⁷

A growing population

Adelaide's northern suburbs are among the fastest growing population areas in South Australia. In recent years, more people have chosen to call Adelaide's northern suburbs home than any other area in South Australia. From 2011 to 2016, an additional 24,000 residents chose to live in the area.⁸

Looking forward, rapid population growth in Adelaide's north is forecast to continue and to outpace the state more broadly – illustrated in Chart 1.



A young population

An increase in the youthfulness of the area has accompanied the population boom. Adelaide's northern suburbs now have a higher proportion of young people (aged 0-24 years) than South Australia more broadly, as well as a lower share of older people and those most likely to be retired (aged 65 years or more) – illustrated in Chart 2.



Ageing quickly

While the northern suburbs are expected to continue to grow, its population is also expected to age at a faster rate than the state as a whole. Based on current trends, the gap between young and old in the area is anticipated to narrow over the next 20-30 years, as the number of people aged 55 years and above grow to equal people aged 0-24 years – illustrated in Chart 3.



Chart 1: Population growth (indexed %) (2006-2036)



Chart 2: Age distribution (2016)

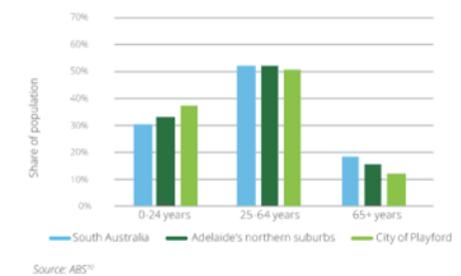
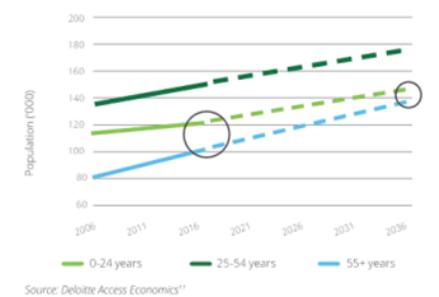


Chart 3: Population size by age cohort (indexed %) (2006-2036)



Northern Adelaide today

An economy in transition

Once the beating heart of Australia's manufacturing sector, the economic landscape of Adelaide's northern suburbs for decades was determined by the automotive manufacturing industry. Since 2006, however, the economic composition of the northern suburbs, particularly the cities of Playford and Salisbury, have undergone significant structural change following the decline of manufacturing in Australia.

Economic diversification

While the decline of manufacturing jobs from the northern suburbs dealt a blow to the region, much of this loss has since been made up for by the growth of other industries, specifically:

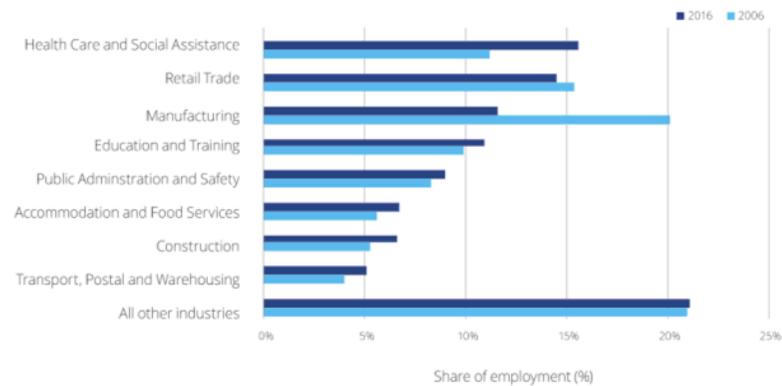
- Health care and social assistance
- Education and training
- Construction
- Accommodation and food services
- Public administration and safety
- Transport, postal and warehousing

Combined, these industries approximately added an additional 8,750 jobs to the northern suburbs economies between 2006 and 2016 – more than compensating for the net loss of 5,500 manufacturing jobs.¹²

Where manufacturing used to dominate the economic landscape of Adelaide's north, industries such as health, retail, education, and defence now provide a breadth of economic diversity.

This is not to say that manufacturing is no longer important. On the contrary, it continues to remain a key industry in Adelaide's north accounting for 14 per cent of employment – illustrated in Chart 4.

Chart 4: Share of employment by industry: Adelaide's northern suburbs, 2006 and 2016



Source: ABS¹²

Working locally

While the economic transition of Adelaide's northern suburbs presents a number of challenges, it is important to note that the demand for skills by businesses and employers at and around the LMH are currently met largely at the local level. Figure 3 shows that the majority of people who work in and around the LMH live within the boundaries of Adelaide's northern suburbs.

In 2016, the average distance travelled by those working at the LMH site was 15.3 kilometres.¹⁴

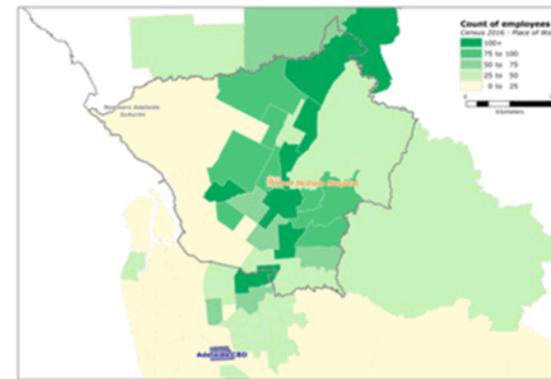
Transportation barriers

Despite the close proximity of many workers at the LMH to their homes, 96 per cent indicated that they travelled to work by car.¹⁵ This equates to about 2,400 cars travelling to the site on a daily basis, and highlights that there are serious transport and connectivity issues that need to be addressed as the precinct develops.

Playford is currently working with the South Australian Department of Transport and Infrastructure to develop a bus 'super stop' at the LMH.

There has been considerable success around other precincts in relation to their integration with public transport networks – both road and rail. This integration will be crucial to the growth and attractiveness of a precinct.

Figure 3: Where workers live

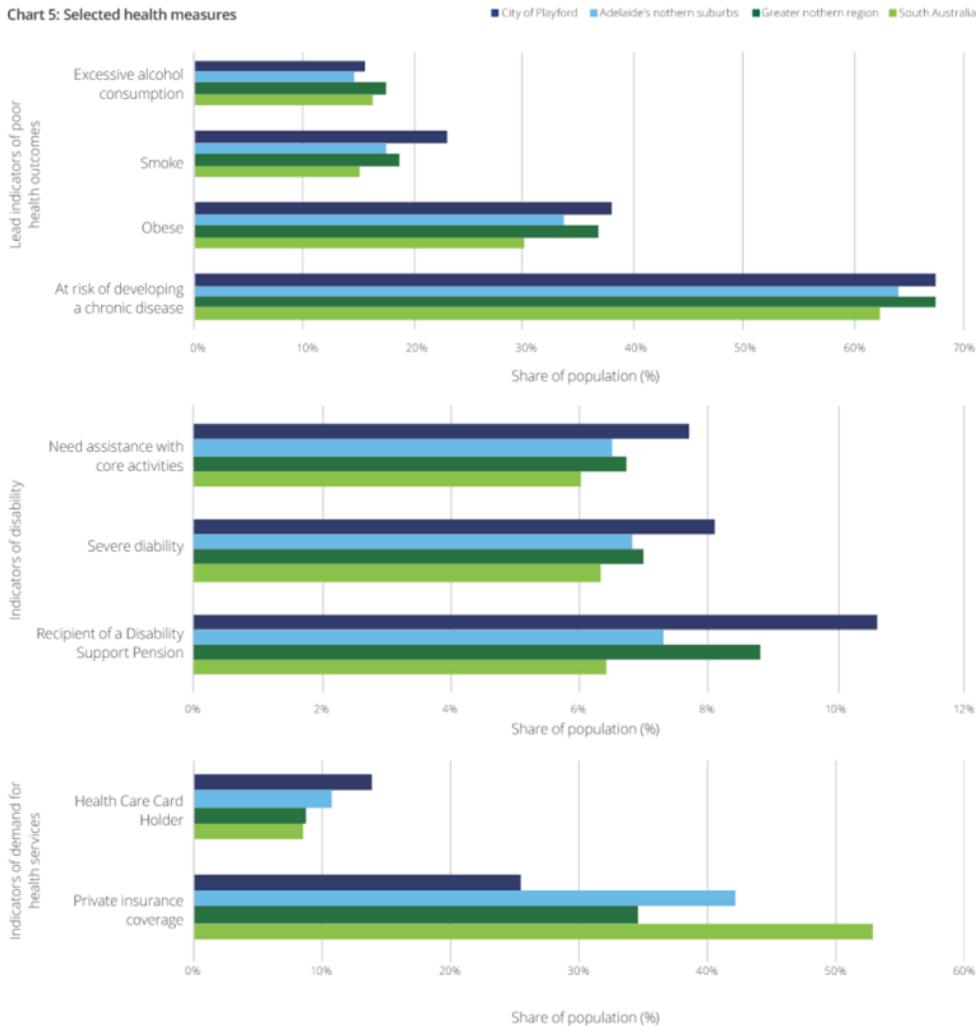


Source: Deloitte Access Economics, ABS¹⁴

Northern Adelaide today

Health and socioeconomic indicators

Chart 5: Selected health measures



Source: ABS¹⁷, PHIDU¹⁸

Adelaide's northern suburbs, particularly Playford, perform poorly on a range of health and socioeconomic indicators when compared against South Australia more broadly – as illustrated in Chart 5.

Combined, these factors present a risk to the social and economic future of Adelaide's northern suburbs, but also provide a strong indicator of the need for the provision of quality health services in the north.

Poor health outcomes coupled with poor social outcomes entail a higher burden for the provision of health care services, particularly publicly funded services, right across the spectrum – from prevention, to treatment, and palliation.

Health challenges

Adelaide's northern suburbs are home to a disproportionate number of adults who **smoke** and are **obese**. Both of these are lead indicators for cancer and heart disease. A disproportionate share of residents are also at an increased risk of developing a **chronic disease**.

In addition to indicating poor health outcomes of the resident population, these also indicate high levels of socio-economic disadvantage.

A spectrum of disadvantage

According to the ABS SEIFA index of relative socioeconomic advantage, Playford ranks in the bottom decile.^{19,20} By contrast, the neighbouring local government areas – Salisbury, Gawler and Tea Tree Gully – rank in the third, fourth and ninth deciles, respectively.

Typically, people who live in areas with poorer socioeconomic conditions tend to have worse health outcomes than people from less disadvantaged areas.²¹

In need of assistance

A high proportion of adults with a severe disability, as well as those in need of assistance undertaking daily activities, also live in Adelaide's northern suburbs. The share of residents holding a Commonwealth Government Health Care Card or receiving a Disability Support Pension is also higher than the state average.

Demand for private health services

While private health coverage in certain parts of Adelaide's northern suburbs are exceptionally low, on the whole, a sizeable minority of adults have private health insurance – approximately 42 per cent. We explore the implications of this later.

Health gateway to South Australia's greater northern region



Pondsiflowe Bay on the Yorke peninsula.¹⁹



Sevenhill Cellars in the Clare Valley.²¹



Big Bend, Murray River.²²

Table 1: Top 10 regional centres

Population centre	Population size	% of SA pop.
Port Pirie	13,743	8.5%
Nuriootpa	5,685	3.5%
Renmark	4,638	2.9%
Kadina	4,583	2.8%
Tanunda	4,325	2.7%
Moonta	4,175	2.6%
Berri	4,086	2.5%
Walleroo	3,988	2.5%
Loxton	3,843	2.4%
Greater northern region	162,258	9.7%

Source: ABS²³

SA's greater northern region

Home to about 162,000 people (10 per cent of the state's population), this vast area stretches across South Australia's northern agricultural regions and takes in major population centres, including:

- Port Pirie to the north
- Kadina-Moonta-Walleroo to the north-west on the Yorke Peninsula
- the north-east riverland towns of Berri, Loxton and Renmark.

It also includes major townships in the prosperous Barossa and Clare Valley wine and tourism regions. The location and sizes of the townships are further explored on the next page.

Home to a greying population

Adelaide's greater northern region is particularly popular with older people and retirees. While the population growth of this area is considerably slower than in Adelaide's northern suburbs, these regional areas are ageing at a faster rate because population centres, such as Kadina and Wallaroo on the Yorke Peninsula, are attracting older retirees.

An increasing number of people who choose to live in regional SA are at the stage in life when access to health services becomes increasingly important.

Health gateway

The Playford Health Precinct sits along the key transport corridors connecting the Adelaide metro area to the greater northern region of South Australia. For the 162,000 people living in the region, the LMH is the nearest full-service tertiary public hospital.

Geographically, the Playford Health Precinct is strategically situated to serve as a health gateway to a regional population well beyond Adelaide's northern suburbs.

Limited local health services

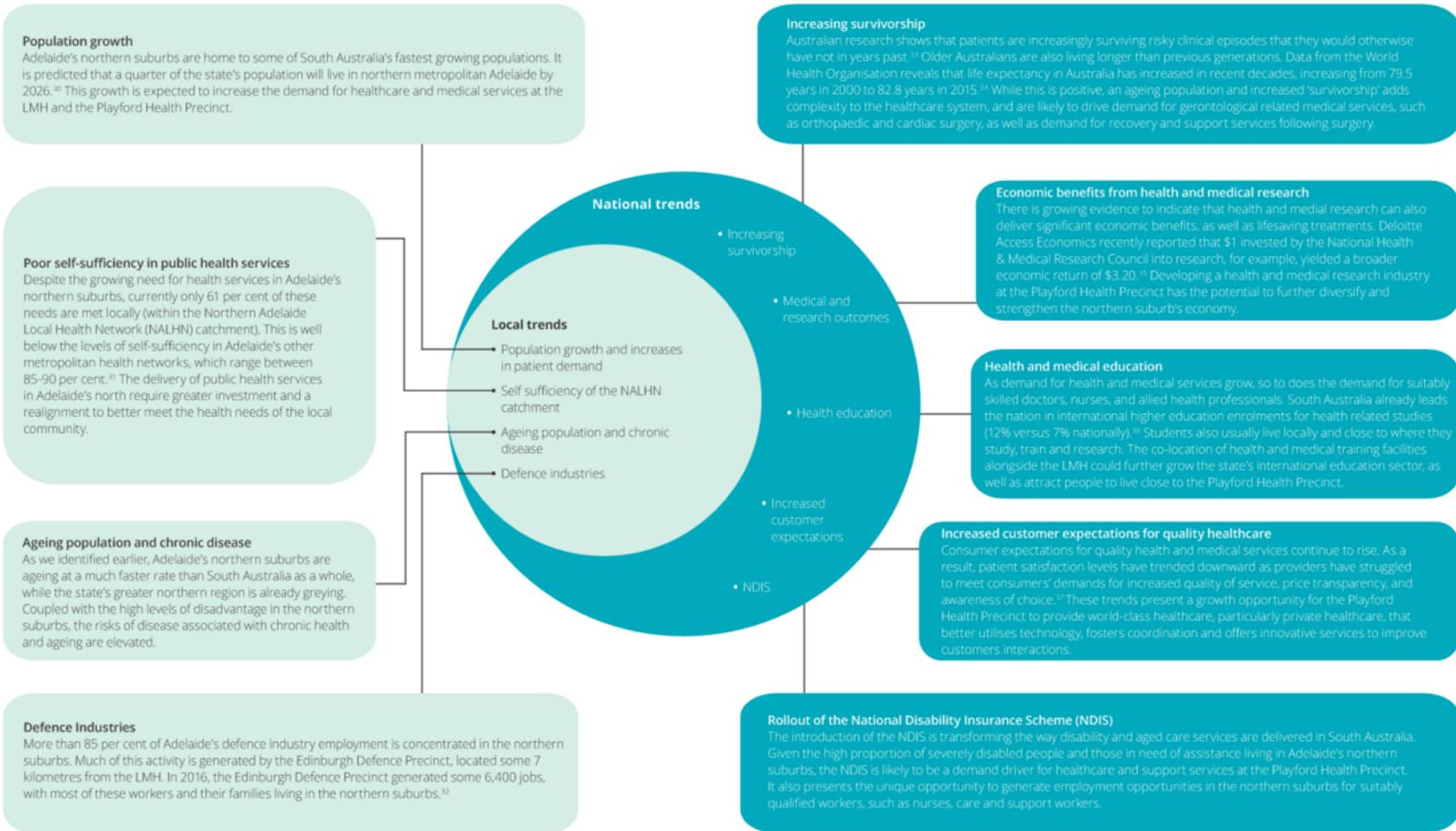
Although there are many health services and hospital services dotted across the greater northern region, these are all small public facilities that offer a very limited number of services. The majority of the health facilities across the region have fewer than 50 beds, and offer limited emergency services and no significant surgical services.²⁵

There is also a complete absence of private hospital services in the region.

The estimated maximum drive travel time to the LMH from the furthest location in the region, Renmark, is 2 hours and 33 minutes.²⁷



Drivers of growth for health services



Opportunities for change

Building a precinct eco system

A new model for economic growth

The concept of a precinct acting as driver of local economic development was posited in the 2014 Brookings Institute paper, *The Rise of Innovation Districts*.²⁸ This paper considered precincts, or Innovation Districts, as geographically compact areas where leading-edge anchor institutions and companies cluster and connect.

Innovation Districts are integrated environments that create a mutually beneficial eco system to increase the likelihood of knowledge spillovers, new product development and innovation, which drive economic growth.

Innovation Districts represent an intentional effort for the establishment of new products and services, the bringing together of new technologies, as well as market-based solutions through the convergence of numerous, sometimes disparate, sectors and specialisations.

Innovation Districts emphasise geographic compactness, accessible and walkable spaces, and a digitally connected urban environment that combines commercial, retail and residential to generate complementary economic activity.

Embracing a changing environment to develop a world-class health precinct

Local and national trends mean that the future of health services are rapidly evolving. There are numerous potential opportunities to integrate medical services and health care with education, research, and commercial development.

Further opportunities exist around the site to leverage the past success of the LMH and the more than \$336 million in government investment the hospital has received over the last 15 years, and also to leverage future investments, such as the soon to be established ACH facility and the \$52.5 million expansion of the LMH's emergency department. There is potential for private and non-government businesses and industries to benefit from the continued investment and commitment by government to sustain and grow the economic activity around the hospital.

As the demand drivers around the site grow, there are an increasing number of prospective opportunities for:

- Expanded hospital services – especially private hospital services
- Expanded and improved health, medical and care services – particularly relating to the treatment of chronic disease and conditions associated with ageing
- University education, training and research facilities – particularly relating to allied health, aged and disability care, as well as Defence health.

Vision of the Playford Health Precinct eco system

- Existing precinct drivers
- Current development
- Future opportunities



Diagram is provided for conceptual purposes only and includes selected anchor institutions, networks and local drivers for the Playford Health Precinct eco system

Hospital services

Building a reputation as a leader in the treatment of chronic diseases, acute care and geriatric medicine

Based on the health and medical services already provided at the precinct, combined with current and expected health needs of those living within the precinct catchment, there is an opportunity for the Playford Health Precinct to develop a specialist focus and to build a reputation as a leader in the treatment and delivery of certain health services. These could include:

- Chronic diseases associated with socioeconomic disadvantage – diabetes, obesity, and cardiovascular disease
- Acute care services – urgent medical and surgical treatment and short-term care
- Conditions and illnesses associated with ageing – gerontology and geriatric medicine
- Longer term health care and recovery services – aged and disability care
- Allied health and social assistance services.

Private hospitals

There are limited private hospital facilities servicing the populations of Adelaide's northern suburbs. As a result, residents are forced to travel long distances to utilise private health facilities around Adelaide's CBD. Not only does this adversely affect those living in Playford, Salisbury and Tea Tree Gully, but also those living in regional areas such as the Barossa and Clare Valleys, as well as those choosing retirement hotspots, such as Kadina and Moonta on the Yorke Peninsula, or Berri along the Murray River.

Despite 42 per cent of the population in Adelaide's northern suburbs having private health coverage, there is only one small-scale private hospital facility within close proximity to the LMH. Further, there are no private hospital facilities located across the greater northern region.

The development of a private hospital at the Playford Health Precinct could leverage off the adjacent LMH by establishing specialist centres focusing on the delivery of medical and care services complementary to those already delivered at the LMH. These services could include:

- Cardiothoracic surgery
- Ear, nose and throat surgery
- General surgery
- Maternity services
- Orthopaedic surgery
- Paediatric surgery
- Vascular surgery.

This relationship between private and public hospital services at the Playford Health Precinct could reduce the pressure on the LMH and free up resources, which are only likely to increase as the population and health demands grow.

A private hospital at the Playford Health Precinct could also complement and help to improve services at the LMH by attracting a greater number and range of medical specialists and professionals.

The Lyell McEwin Hospital (LMH)

As reported earlier, the LMH has seen significant investment over the last decade. There is an opportunity for the Playford Health Precinct to further capitalise on this investment and leverage the State Government's commitment to the LMH by concentrating future development at the precinct around the treatment of, for example:

- chronic illnesses
- acute care
- geriatric medicine.



Aged care, allied health and other health services

Servicing local health needs

Aged care

As already identified, a rapidly ageing population in Adelaide's northern suburbs is likely to place increasing pressure on health services in the region. This will likely increase the demand for:

- acute medical and recovery services
- specialist medical gerontology services
- residential aged care facilities.

Already, the development of the ACH Healthia and VITA North aged-care and allied health facility at the precinct is a significant step. The planned capacity of this facility, however, accounts for a fraction of what is likely to be required in the future.

Establishing a cluster of health and care services targeting an ageing population could also provide the 'critical mass' necessary to help attract training providers specialising in aged-care and the development of education facilities at the precinct.

Allied health

The recent launch and rollout of the NDIS is expected to increase the demand for allied health workers with specialist skills, such as:

- physiotherapists
- speech pathologists
- occupational therapists
- social workers.

In addition, the new scheme is also expected to generate demand for workers in support roles – such as, nursing and direct care workers, as well as administrative workers with knowledge of clinical health services.³⁹ Growing this workforce to meet anticipated demand will require expanding education and training facilities.

Further, the population of Playford has a much higher proportion of those with a severe disability than the state average. This presents an opportunity for the precinct to capture the demand for these services due to the high incidence of disability in the northern suburbs.

There is an opportunity for the Playford Health Precinct to meet the increasing demand for both allied health services and workers.

Defence Health

The proximity of the Edinburgh Defence Precinct to the Playford Health Precinct presents a unique opportunity to cater to the specialist health needs of the large defence workforce, serving Australian Defence Force (ADF) personnel and their families, as well as those transitioning out of the ADF and veterans. This could include niche services such as:

- Specialist general practice medicine and allied health services
- Mental health and specialist psychological services in the treatment of depression or post-traumatic stress
- Treatment and rehabilitation services for physical trauma.

There is also scope for these services to be integrated with institutes for defence health research at the precinct. These research institutes could focus on understanding and developing better health treatments, particularly in mental health, for defence personnel and veterans of conflict. This could involve the development of digital technologies, such as virtual reality, or innovations involving the advanced manufacture of artificial body parts and prostheses. The roll-out of GigCity, for example, is likely to enhance these sort of developments.

Other health business

There is potential for the precinct to go beyond education and research and participate more actively in the development, commercialisation and manufacture of health innovations.

The precinct could serve as a 'test bed' for the trial of new health and medical technologies as part of the commercialisation process.

There is also the potential for a range of other health services at the precinct, including:

- Dental services
- Radiology services
- Specialist consulting rooms
- Audiology services
- Counselling services.

Further, the precinct could attract auxiliary services whose business it is to support the activities of health and hospital services, including:

- Pharmaceutical services
- Pathology services
- Optometry services
- Natural therapy services
- Health and medical equipment suppliers.



Education, training and research

Growing a greater university presence and creating a medical research community

While there are tertiary education institutions located around Adelaide's northern suburbs, the presence of these facilities is limited and none have a health or medical focus. Further, the northern suburbs have some of the lowest per capita densities of university education in South Australia.⁴⁰

The Playford Health Precinct has the potential to grow the presence of university level education in Adelaide's north, as well as broaden the courses and qualifications offered. This could include both TAFE and vocational education as well as university institutions. Co-locating one or more tertiary education institutions at the health precinct would create a complementary mix of students, researchers, academic leaders, medical professionals and industry.

The co-location of university education and research facilities alongside hospital and healthcare facilities could help to promote innovation and creativity within the health precinct, as well as provide the sorts of high-skill education opportunities to those living in Adelaide's north that are likely to drive future economic growth and fuel employment demand.

Tertiary education and training

The Playford Health Precinct presents opportunities to integrate the delivery of medical and healthcare services with education and training, and research concentrated around the precinct's potential specialist health areas, including:

- Acute and aged care
- Chronic diseases
- Allied health
- Social assistance and disability care.

In partnership with the health precinct, research institutes could assist in training medical students and improve the skills base of the local workforce.

There is potential to train students at the Playford Health Precinct and contribute to creating a skilled workforce in the northern suburbs.

International education

Demand from overseas students wanting to study at Australian universities is expected to continue to increase.⁴¹ To capitalise on international education and attract overseas students to live and study at the precinct, there are opportunities to establish high quality teaching and research facilities at the precinct. These include:

- Digitally enabled teaching and conference spaces
- State-of-the-art simulation facilities for practical learning, particularly in acute, aged and disability care
- Well-equipped laboratories suitable for clinical research and testing.

In addition, international education also presents an opportunity for a range of accommodation facilities, sporting and recreation facilities, as well as a range of culturally diverse retail and food outlets that are likely to appeal to overseas students to be established at the precinct.

Growth in international education presents an opportunity to develop university education and training facilities at the health precinct, as well as attract students from overseas to study in one of the precinct's potential specialist health areas.

Health and medical research

As we reported earlier, health and medical research can be a significant driver of economic growth. Several fields of health research – such as, those related to ageing, gerontology and geriatric medicine – are increasing in significance and are the same areas of health that align with the Playford Health Precinct's strengths.

Co-locating health research with clinical facilities and teaching activities has the potential to result in knowledge spillovers and generate innovation.

Growing the research profile at the precinct also has the potential to create a focus for new private sector investment that further attracts skilled workers to the area.





Playford's commitment

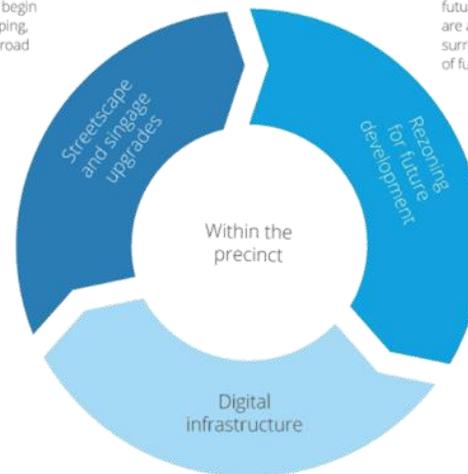


An expanded Playford Health Precinct has the potential to reinvigorate the surrounding areas and create an environment where doctors, health researchers and students choose to live, not just work.

A clear urban structure and coordinated layout will make living and working around the Playford Health Precinct increasingly attractive. In the future, this will likely make it easier for workers, visitors, as well as potential students and residents to access the precinct's many facilities. At a street level, there are opportunities for activation at the precinct to further enhance the appeal of the urban space, as well as better connect the precinct to its surrounds.

To support and complement the expansion of the area surrounding the LMH, Playford is committing \$144,000 to upgrade streetscapes and signage as part of its Asset Management Plan. These upgrades are expected to begin in 2018 and include new landscaping, footpaths, streetlights, curb and road seal replacement, and smart city infrastructure.⁴²

The City of Playford rezoned 9.5 hectares of residential and council land surrounding the LMH site, in 2013, for the purpose of future commercial development. There are also plans to rezone additional land surrounding the precinct for the purpose of future expansion.⁴⁴



The council is exploring the option of expanding its dark fibre optic network cable into the health precinct to help promote investment, connectivity and research capabilities at the site. The Dark Fibre network currently links the Playford CBD to operations at Davoren Park, offering new tenants internet speeds of up to 10 gigabits.⁴³

Delivering on a precinct vision

The creation of a thriving and inclusive precinct eco system requires buy-in from both public and private sector partners and stakeholders. While the City of Playford is providing the vision for the Playford Health Precinct and acting as a catalyst for change, it cannot (nor should be expected to) build an eco system alone.

Governance

A collaborative precinct governance and leadership model that engages influential representatives from community, business and community development sectors is a proven method for making things happen.

An engaged Precinct Management Alliance (PMA) will create a neutral, open and inclusive forum for stakeholders to share ideas, develop policy and projects that advance the precinct. A good PMA would be a continuation and expansion of existing stakeholders in the precinct to include prospective commercial stakeholders and community interests.

Securing Government support

Government involvement and leadership across all levels of government is required. The key role of government in the development of the precinct is to facilitate and support private sector development and to deliver the public infrastructure necessary to attract investment.

Investment attraction

New models of partnership between the public and private sectors need to be established. Strong private sector involvement in a PMA is an important part of this. However, to strengthen collaboration, the public-sector needs to ensure that opportunities for private sector investment exist. This could involve:

- Public sector involvement in the delivery of public projects
- Joint public-private funding of new research and health promotion programs.

Planning and regulatory levers

Future planning frameworks established for the City of Playford need to emphasise the high priority of the Playford Health Precinct and encourage uses consistent with the vision.

A unified voice for the health precinct across all planning and investment decisions by the City of Playford will signal the importance of the precinct and council's commitment to state and commonwealth governments, as well as potential private-sector investors.

Monitoring progress

What gets measured, improves.

Establishing targets for the precinct and setting goals will be crucial to the development of the Playford Health Precinct, and another reason in support of the establishment of a PMA.

Next steps

This document is an important step along the journey in the establishment of the Playford Health Precinct. However, it does not take the place of nor fulfill the requirements of the rigorous economic analyses required by prospective stakeholders, particularly the State and Commonwealth Governments, before making serious and firm commitments.

These types of studies include:

- cost-benefit analyses
- economic feasibility studies
- economic impact and contribution studies.

Furthermore, business cases for the involvement for each prospective stakeholder would need to be made. These should align with the singular unified vision of the precinct. Ensuring this process is undertaken and evaluated should form part of the PMA's mandate.





Case studies from around Australia

In Australia, the economic benefits of precincts are being recognised, and numerous precinct developments focusing on health, education, science and innovation have been established by state and local governments. Deloitte has extensive experience in examining a variety of precinct developments across Australia, and quantifying their contributions to the local and state economies.

These include:

- The Westmead Innovation Precinct in Western Sydney
- The Prince Charles Hospital Campus in Brisbane
- The Campbelltown Health and Education Precinct in Western Sydney.

These precincts are featured as case studies to provide examples of what precincts can look like, as well as the economic benefits that they are delivering to their local communities.



Westmead Innovation Precinct, Western Sydney

Located in the heart of Western Sydney, about 25 kilometres from Sydney's CBD, Westmead has grown from humble beginnings to become Australia's largest health services precinct. Situated in an area with a rapidly growing population and unique health challenges, the precinct now employs 18,000 people and provides essential health services to almost 10 per cent of Australia's population.⁴⁵ In addition, the precinct provides education services to over 3,400 students from pre-schoolers to PhD candidates.⁴⁶

Originally home to a dusty showground on the outskirts of Sydney, today Westmead is a national and international leader in health delivery, research, education and commercialisation. The precinct is home to a range of complementary institutions, with major tenants of the precinct including the University of Sydney, Western Sydney University, the Children's Hospital, Westmead Hospital and Children's Medical Research Institute. The focus of Westmead is on integrating both research and education with clinical care. The precinct has a distinct position within the research areas of cell biology, cancer genomics, bioinformatics and diagnostic sciences. In addition, the paediatric capabilities of the precinct are world class.

Westmead's composition and growth has allowed it to capture increasing demand for medical care, education and commercially integrated research, driven by the meteoric growth of Western Sydney's population and growing demand from Asia. Alongside this, it is playing a pivotal role in the economic transformation of the Western Sydney area, helping to tackle the range of social and economic challenges faced by Western Sydney.

In 2016, Westmead contributed over \$1.9 billion, or 1.6 per cent, to Western Sydney's local economy.⁴⁷ Furthermore, Westmead continues to be a destination for public and private investment. In the last four years alone, over \$1.5 billion was committed by government and universities to upgrade the precinct, with \$950 million of this contributing toward a facility capable of accommodating 9,000 students.⁴⁸ In the near future, upgrades to commercial amenity are anticipated to accompany university expansion, with \$3.4 billion worth of capital currently mobilising within the precinct.⁴⁹

Lessons for Playford

- A model for how a successful innovation and health precinct can be developed and governed
- The economic impact that precincts can bring to a local economy
- How a precinct can attract public and private investment



Case studies from around Australia

Prince Charles Hospital Campus, Brisbane

The Prince Charles Hospital Campus (TPCH) is situated on a 35 hectare site, ten kilometres from the Brisbane CBD.⁵⁰ Surrounded by parklands and recreational facilities, the site is home to a full service public hospital, which provides secondary and tertiary care, and is co-located with the privately operated Holy Spirit Northside Hospital. TPCH campus is one part of the Metro North Hospital and Health Service - one of the largest health services in Australia, with a catchment of over 900,000 people.⁵¹

TPCH is a global leader in clinical and translational research programs, with a particular focus on cardiac thoracic surgery and orthopaedic and critical care, with other areas of research including stem-cell therapy, additive manufacturing and robotics.

TPCH has achieved international recognition for facilitating the research of Dr Daniel Timms, who designed the world's first bionic heart. Currently, TPCH has proposals underway for the development of a specialist endoscopy service and new heart and lung institute.

TPCH campus offers a prime example of the benefits which can potentially flow from the effective integration of education, training, research, clinical delivery and the commercialisation of products and services. These benefits include knowledge spillovers and innovative solutions driven by scaled resources through institutional collaboration. It is also a great example of the tremendous opportunities for investment and growth, which flow from housing a range of complementary

leading health and research institutions on the same site. In recognition of these opportunities, TPCH is making a concerted effort towards investment attraction in order to further upgrade and transform the hospital site into a world class research and innovation and education facility.

With the help of Deloitte, TPCH has made a strong case for investment at the site, identifying a number of economic drivers, including:

- Exceptional historical returns on investment for health research
- The comparative advantage of investing in a Research sector which already has a strong base and an international reputation
- Pre-existing comparative advantage in the International Education and Training sector
- A high and increasing demand for healthcare in the Asia-Pacific region, which is geographically close to TPCH
- The ability to build on past investments in the healthcare industry, which have built world class research institutes and scientific capabilities
- A unique IP policy - under which intellectual property generated through research is retained by the partners who develop it
- Extensive land available which will allow for developments of up to 12 stories high.

Lessons for Playford

- How a precinct can find success through specialised and focused health and medical services



Campbelltown Health and Education Precinct, Western Sydney

The Campbelltown Health Precinct is located at the heart of the regional city of Campbelltown in south-western Sydney. Of the five Health and Education precincts that make up Western Sydney's regional health network, the Campbelltown precinct is the largest, at approximately 400 hectares. Campbelltown Hospital is part of the South Western Sydney Local Health District, an area with a catchment of around 966,000 people.⁵²

Major Infrastructure in the zone, such as Western Sydney University and Campbelltown Hospital have been there since the 70's, but in recent decades the precinct has grown in size and moved into areas such as manufacturing and research.

Campbelltown is one of the nation's fastest growing population centres and is expected to grow by another 48 per cent over the next two decades to 1.59 million people.⁵³ This population boom is great news for Campbelltown, but it is accompanied by more than a few socioeconomic challenges.

With low SEIFA scores and poor health outcomes compared to rest of New South Wales, Campbelltown is also one of the most disadvantaged regions in the state.⁵⁴ To add to this, Campbelltown also has a higher concentration of social housing residencies, as well as residents with disabilities than the rest of the state. The combination of these factors present a serious challenge for Campbelltown, but they also present a significant opportunity

to pivot its economic trajectory in a positive direction.

In early 2017, the Campbelltown City Council engaged Deloitte Access Economics to collaborate with strategic stakeholders to establish a vision and framework for the Campbelltown Health and Economic Precinct.⁵⁵ As part of this vision, social and economic factors were identified as key drivers for the development of a world leading Health and Innovation Precinct within the Campbelltown CBD.

In addition to addressing population health issues, implementing this vision will also allow Campbelltown to leverage its unique endowments in ways that address local challenges around access to employment opportunities. Campbelltown is in the early stages of implementing this vision. Underpinning Campbelltown's vision are strategic goals to:

- Become a national leader in medical science education
- Grow the research and services presence in children's, maternal and indigenous health
- Build on existing comparative advantage in gastro motility, paediatrics, Chinese and maternal medicine.

Lessons for Playford

- How a precinct can be established in a disadvantaged area and be seen as a new model for economic growth locally



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C. COUNCIL/COMMITTEE TO DECIDE HOW LONG ITEM 9.1 IS TO BE KEPT IN CONFIDENCE**Purpose**

To resolve how long agenda item 9.1 is to be kept confidential.

STAFF RECOMMENDATION

Pursuant to Section 90(2) and Section 91(7) of the Local Government Act 1999, the Council orders that the following aspects of Item 9.1 be kept confidential in accordance with Council's reasons to deal with this item in confidence pursuant to Section 90 (3) (m) of the Local Government Act 1999:

- Report for Item 9.1
- Attachments 1, 3 and 4 for Item 9.1
- Decision for Item 9.1

This order shall operate until the commencement of the public consultation period, or will be reviewed and determined as part of the annual review by Council in accordance with Section 91(9)(a) of the Local Government Act 1999, whichever comes first.