



Frenchs Forest Strategic Centre

Economic Profile 2023

Supporting Study



northern
beaches
council

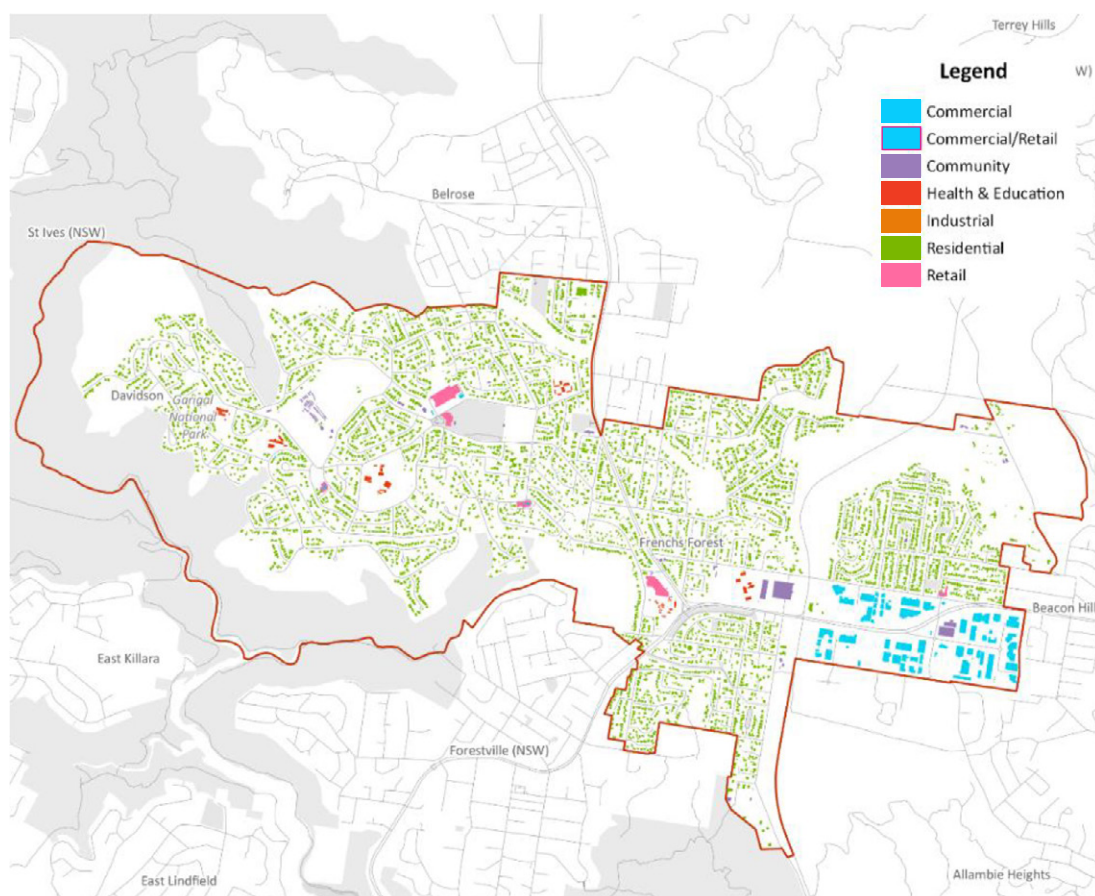
Frenchs Forest

Frenchs Forest is the gateway to the Northern Beaches at the nexus of the road network connecting from Chatswood and the Pacific Highway to the Northern Beaches in all directions with Mona Vale to the north, Dee Why to the east and Manly to the south. The precinct is located at the top of the ridgeline and is split into two distinct sections by Wakehurst Parkway. To the west of the Wakehurst Parkway will be the new Frenchs Forest Town Centre, designed to adjoin the new Northern Beaches Hospital which opened in 2018 and has been the largest health investment

for the Northern Beaches. To the east of Wakehurst Parkway is the Frenchs Forest Business Park with predominantly office and light industrial activity with large lots in landscaped settings. Frenchs Forest will benefit from improved B-line bus services to Brookvale and Chatswood, proximity to the proposed Beaches Link Tunnel which will allow connections directly into Sydney's motorway system, and 24-hour activity from the hospital and associated allied services.

Figure 1

Frenchs Forest Land Use Overview (Source: SGS Economics & Planning 2019, Northern Beaches Employment Study)









Frenchs Forest Town Centre

The new Frenchs Forest town centre will concentrate population-serving functions for Frenchs Forest, providing a vibrant, active, sustainable, and safe precinct, with high amenity for residents, workers and visitors, 24-hours a day. The NSW Government's Frenchs Forest 2041 Place strategy aims for Frenchs Forest to be a major driver of job growth and economic activity and a hub of knowledge-intensive jobs, innovation, and service delivery.

The Frenchs Forest Place Strategy plans for 2,000 new jobs within the new town centre in allied health, recreation, education, and accommodation sectors. The dedicated commercial spine along Warringah Road will accommodate more than 16,310 sqm of commercial floorspace including free-standing offices (including co-worker spaces for start-ups and local small businesses) and other uses such as a hotel and allied health. An additional 19,330 sqm of retail floorspace will be focused on a Civic Heart, with eateries surrounding public open spaces and a Market Quarter for shopping

and everyday services. The town centre will support a range of direct population-serving functions that complement the new Northern Beaches Hospital including retail, office and medical consulting rooms for allied services.

"Frenchs Forest is an urban forest, with green streets and new open space, making a feature of the forest that has always shaped the site's story.

Frenchs Forest will provide character and great places; it will foster healthy and connected communities, attract families, and encourage new business. It will set the benchmark for health and wellness, liveability, and prosperity in a new urban centre."

- Frenchs Forest 2041 Place Strategy, 2021

Source: NSW Government (2021)



Frenchs Forest Business Park

Frenchs Forest Business Park will continue to support an innovative, diverse, and resilient Northern Beaches economy by continuing to support a combination of logistics and high technology industry, providing high-skilled employment that matches the skills and aspirations of the Northern Beaches workforce, and in line with the NSW 2040 Economic Blueprint and Business on the Beaches and draft Northern Beaches Economic Development Strategy. Business Parks are important to local supply chains with economic multiplier effects generating downstream employment that is not always based on-site. They enable the economic transition to high value opportunities that generate local high-skilled employment including emerging advanced manufacturing and online retailing activity Northern Beaches Council (2022). The high visual quality and proximity to the high-skilled Northern Beaches resident workforce provides an opportunity for attracting a high-skilled workforce and local entrepreneurs with skills, capabilities and connections into emerging advanced manufacturing and high technology industry opportunities, addressing key challenges for growing the sector (CSIRO, 2016) .

The Business Park is transitioning; it features established light industrial and professional office floorspace in a pleasant, landscaped business park environment. The low level

of residential encroachment in the precinct, its potential for more intensive 24-hour automated operations, its ability to receive B-Double trucks due to its geography on the top of the ridgeline and its location at the nexus of the Northern Beaches road network will continue to drive investment in the Business Park. The Business Park is transitioning away from co-located campus style operational models towards stronger demand for industrial floorspace. With many supporting professional employment roles able to be undertaken remotely, high vacancy rates for commercial office space in the Business Park have been seen over recent years with an average floorplate size over 1000 sqm for vacancies. At the same time, demand for industrial floorspace is strong as local businesses struggle to find appropriate floorspace in existing industrial precincts given constrained supply of industrial land in the north district of Sydney (Greater Cities Commission, 2018).. Growing demand for last mile logistics floorspace and industrial units for local businesses has prompted a number of development applications seeking to intensify industrial uses in recent years.

It is important that the land use planning regime allows the Business Park to evolve in response to ongoing investment without introducing competition from direct population serving activity or from the introduction of land use conflict. Further, it is critical that the new Frenchs Forest Town Centre is supported to become established with restaurants, retail and services activity focused within the centre to achieve the vision outlined in the Frenchs Forest 2041 Place Strategy for a high amenity vibrant precinct.

The Business Park is split into two sections north and south of Warringah Road. The northern section of the Business Park contains varied uses including large floorplate offices, warehouse and distribution buildings with supporting indoor recreation facilities and childcare. There is a small cluster of medical and pharmaceutical businesses such as speech pathology, optometry, cardiology, cancer treatment and biotechnology (manufacturing of medical parts for surgical procedures). While the predominant character is of an industrial/warehouse nature with large floorplate offices, there are a few lots that are out of character, including self-contained seniors' apartments

and hotel or motel accommodation. This northern side of the business park is expected to see a strengthening of medical related technology, logistics and health services facilities leveraging off proximity to the Northern Beaches Hospital.

Frenchs Forest Business Park, located East of Wakehurst Parkway is shaded yellow.



The southern section of the Business Park contains larger lots, and like the northern section, contains varied uses including information technology, health services, medical and pharmaceutical businesses, media broadcasting, building supplies, transport and logistics, and indoor recreation. The predominant character is a mix of light industry and high technology. Due to the large lot sizes and distance away from residential activity, this precinct is particularly well placed to accommodate freight consolidation and support growth in more efficient last-mile delivery operations across the Northern Beaches to alleviate road network congestion. These functions could potentially grow to support 24-hour operations. It is important that the land use planning regime precludes all forms of residential activity from the Business Park to support its long term 24-hour operational potential.

Longer term, the Business Park provides an opportunity to take on a higher order commercial employment function for the Northern Beaches. This would depend on the success of the 16,310sqm of commercial office floorspace proposed within the Frenchs Forest Town Centre and on the success of Brookvale in developing a commercial office precinct to support growth beyond 2036.





Expected Growth



The Frenchs Forest 2041 Place Strategy identifies the delivery of approximately 4,360 dwellings over three phases with an expected household size of 2.2 persons per dwelling (based on household size of high density areas such as Dee Why and Manly). This translates into an additional 9,952 people living within the Frenchs Forest Hospital Precinct by the end of phase three.

Based on the Frenchs Forest Social Infrastructure Study Addendum by Cred Consulting (2019), the forecast resident population will most likely:

- be more **culturally diverse** than the Frenchs Forest suburb. Between 38% and 46% of residents in and around Dee Why Town Centre speak a language other than English at home.
- have a **lower proportion of children and young people** than Frenchs Forest suburb

Population forecasts for Hospital Precinct Structure Plan
(based on yield provided by Northern Beaches Council)

Phases	Dwellings	Forecast population	Proportion of growth
1	1,930	4,246	44%
2	1,115	2,453	26%
3	1,315	2,892	30%
Total precinct	4,360	9,592	100%

Changes to Frenchs Forest suburb population

Phases	Existing Frenchs Forest Population (2016)	Forecast population of proposed development	Frenchs Forest suburb population post development
Frenchs Forest	14,045		
1		4,246	18,291
2		2,453	20,744
3		2,893	23,637

Figure 2
Population forecasts (Source: Cred Consulting, 2019)

- have a **higher proportion of shift workers, tertiary students and working aged residents** (needing access to services day, nights and weekends)
- Have a **lower proportion of residents aged 70 and over**
- have a **higher proportion of key workers** given proximity to the Northern Beaches Hospital and the affordable housing target of 10-15% of floor space. These workers will have a lower average income than in Frenchs Forest suburb currently.
- have a **higher proportion of young adults and tertiary students** given the potential location of a university. The age profile for Dee Why Town Centre indicates a much higher proportion of 18- to 24-year-olds (21.8%) compared to the Northern Beaches average. Frenchs Forest provides an important opportunity to support retention of younger demographics on the Northern Beaches.

Interestingly, these demographics are the inverse of what is expected in the broader Frenchs Forest suburb, likely due to different housing typologies (noting that these projections do not appear to factor in the new town centre).

SGS Planning and Economics undertook modelling for the Employment Study which suggests that over 5,000 additional people are projected to be living in Frenchs Forest over the 20 years between 2016 and 2036. While Retirees are the fastest growing age group followed by Young Adults, Mature Adults are projected to make up the largest age group in Frenchs Forest by 2036.

Frenchs Forest Age Group Projections, 2016-36 (Place of Usual Residence)

Age Group	No. 2016	No. 2036	Growth Total 2016-36	% of Change 2016-36
Children	1,251	1,523	274	22%
Youth	4,748	5,629	879	19%
Young Adult	1,677	2,327	647	39%
Adult	3,680	4,062	382	10%
Mature Adult	5,361	6,721	1,357	25%
Retirees	3,323	4,887	1,562	47%
Total	20,040	25,149	5,101	

Figure 3

Age group projections 2016 to 2036

(Source: SGS Economics & Planning 2019, Northern Beaches Employment Study)



Employment Growth



Employment growth in Frenchs Forest is expected to deliver the following outcomes:

- **additional +2,889 jobs over 20 years**
 - An additional +2,889 jobs are projected to 2036 led by Health Care and Social Assistance (+1,429), Professional, Scientific and Technical Services (+626), Education and Training (+285) projected to grow as industries. (SGS Economics & Planning, 2019).
- **growing Health and Education industry**

Changes in employment numbers across four consolidated Broad Industry Categories (BICs) in Figure 4 show a strong overall shift towards growth in Health and Education jobs by 94% from 2016 to 2036 in Frenchs Forest. This will be driven by Northern Beaches Hospital which opened in 2018 and complimentary health facilities that are likely to emerge in proximity to the new hospital over coming years. Data from the Australian Bureau of Statistics (ABS, 2021) Census for the Business Park, hospital and future town centre site indicate that Health and Education employment has grown by 54% to 2,804 jobs in 2021 . This growth is expected to continue with development applications for a number of health services facilities in the business park including a specialist cancer treatment facility and mental health hub.

- **professional, Scientific and Technical Services industries are highly specialised**
 - Professional, Scientific and Technical Services employment in Frenchs Forest is expected to grow by 46% to 2036. Interestingly the subcategories demonstrate a far more specialist computer system design, engineering, and scientific research focus (see Figure 5), relative to many other centres across the Northern Beaches, which generally have stronger representation of professional services.

Frenchs Forest Employment Projections by BIC, 2016-26 (POW)

BIC Employment	2016 Jobs	2036 Jobs	Growth Total 2016-36	% of Change 2016-36
Knowledge Intensive	2,657	3,452	796	30%
Health and Education	1,820	3,534	1,714	94%
Population Serving	3,814	4,458	644	17%
Industrial	2,500	2,236	-263	-11%

Figure 4

Frenchs Forest Employment projections
(Source: SGS Economics & Planning, 2019).

Frenchs Forest breakdown of professional, scientific & technical services at a 4-digit ANZSIC, 2016 (POW)

4-digit ANZSIC Employment	2016 Jobs
Computer System Design and Related Services	442
Management Advice and Related Consulting Services	63
Accounting Services	60
Engineering Design and Engineering Consulting Services	55
Scientific Research Services	40
Market Research and Statistical Services	35
Other Specialised Design Services	29
Architectural Services	27
Legal Services	18
Advertising Services	18

Figure 5

Breakdown of Professional and Scientific jobs
(Source: SGS Economics & Planning, 2019)

- **decreasing demand for large format head office style business parks –**

Frenchs Forest has the lowest rents per square metre for vacant office space and looking specifically at commercial land values, they are the second lowest in the Northern Beaches. In comparison to the Northern Beaches average of \$2,534, Frenchs Forest land values were \$609 per square metre based on July 2018, according to data from the Valuer-General. Other supporting data shows that:

- o in August 2019, Frenchs Forest had the lowest rent per square metre for both commercial and industrial vacancies, at \$352 for commercial floorspace and \$235 for industrial floorspace
- o in August 2019, Frenchs Forest had approximately 38,040m² of vacant employment floorspace, of which 76% was commercial (29,188 sqm). While these vacancies were spread across only 38 listings compared to Brookvale (150) and Dee Why (97), the quantum of floorspace for commercial vacancies was a substantial 1,006 sqm (compared to 192 sqm in Brookvale). Of this vacant stock in Frenchs Forest, 63% was in refurbished condition and 30% was considered old.

The data suggests that large format head office style business park spaces are no longer aligned with the needs of the market and that large commercial floorplates are not meeting the needs of local businesses (tenants), 90% of which have fewer than 5 employees with Professional, Technical and Scientific Services businesses now the largest category for both sole traders and small businesses on the Northern Beaches.ID, 2023).

- **a higher proportion of workers who live locally –** according to 2016 ABS data (Journey to Work to Place of Work), workers in Frenchs Forest mostly live within the Northern Beaches and travel from Dee Why, Narrabeen, Warriewood, Brookvale and/or Narrabeena. 76% of these workers travel by car with only 7.7% travelling by public transport and 1.8% by active transport. Resident workers predominantly travel to the CBD for work, followed by Brookvale with 65% travelling by car. This is also supported by the demographic projections of residents living in Frenchs Forest, who will be Mature Adults, followed by Youth and Retirees. Note that these projections are based on the current state and that the new Frenchs Forest Town Centre may attract a different demographic mix into the suburb. Interestingly, Frenchs Forest residents are very established with 40% fully owning their dwelling outright and 41% having a mortgage, significantly higher than the Northern Beaches (33% and 34%) and Greater Sydney (28% and 32%) averages.

- **the Frenchs Forest Town Centre will play a pivotal role in meeting the jobs target** – the quantum of Frenchs Forest's employment growth is expected to occur in the Frenchs Forest Town Centre which is expected to generate around 2,981 jobs (see Figure 6). This falls within the employment targets for Frenchs Forest provided by the North District Plan which identifies employment growth of between

2,700 and 3,700 jobs in Frenchs Forest by 2036 (see Figure 7). This highlights the importance of investment in the new Frenchs Forest Town Centre to achieve employment targets and reinforces the opportunity for the Frenchs Forest Business Park to prioritise high skilled employment outcomes that align with its light industrial character.

Figure 6

Employment floorspace forecast in Phases 1, 2 and 3 of the Hospital Precinct
(Source: Cred Consulting 2019)

Employment	Phase 1 Structure Plan area		Phase 2/3 Structure Plan area	
	New FF Town Centre GLA sqm	New FF Town Centre Workers	Forest Way Shopping Centre extra GLA sqm	Forest Way Workers
Supermarket(s)	5,300	88	1,250	21
Mini majors	2,000	40	1,500	30
Food and liquor	750	13	250	4
Food catering	2,500	42	1,000	17
Non-food retail	2,000	40	1,250	25
Banks, services, other	1,500	30	750	15
Gym	1,500	30	0	
Childcare	750	15	0	
Hospital		2,000		
University	8,175	149		
Hotel	9,000	113		
School	9,140	166		
Commercial	5,116	256		
Total workers		2,981		112

- **the Frenchs Forest Business Park will deliver a low number of new jobs but will see a transition to higher skilled employment due to greater demand for industrial floorspace, increased automation and advanced manufacturing** – the existing Frenchs Forest Business Park is where most of the estimated 9,300 existing jobs are located. There is unlikely to be considerable demand for extra commercial office floorspace in the Business Park given the 29,188sqm of vacant commercial floorspace in the Business Park and an additional 16,310sqm planned for the Frenchs Forest Town Centre. The demand for floorspace is more likely to come from light industrial uses which have lower employment densities, including emerging advanced manufacturing activity which generates fewer but higher skilled jobs, and increasingly automated warehousing logistics operations, which provides

a low on-site employment outcome due to automation however generates significant downstream multiplier effects. The decline in employment self-sufficiency in the Northern Beaches is predominantly focused on lower paid occupations including community and personal services workers, sales workers, machinery operators and drivers and clerical and administrative workers. This is likely due to intensifying housing affordability challenges. A shift to fewer but higher skilled jobs in the business park is positive for achieving a 30-minute city.

- **higher skilled employment is already evident in the Frenchs Forest Business Park** as industry specialisation is led by Transport, Postal and Warehousing followed by Professional, Technical and Scientific Services (see Figure 8).

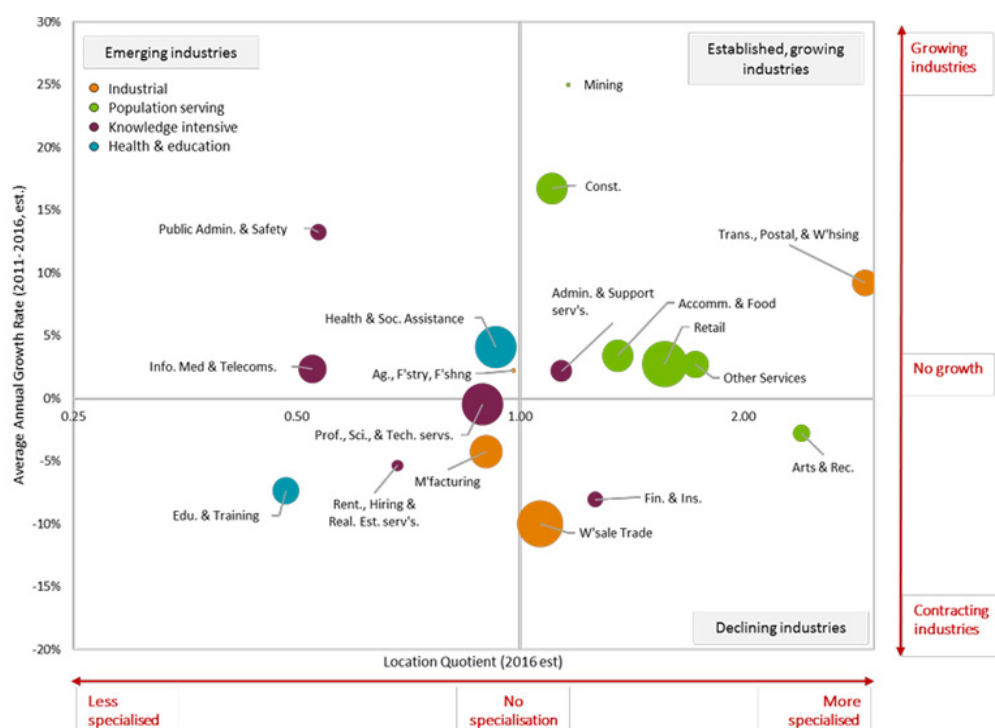
Figure 7
Frenchs Forest job targets (Source: Greater Cities Commission 2018)

Frenchs Forest	Jobs
2016 Estimate	9,300
2036 Baseline Target	12,000
2036 Higher Target	13,000



Figure 8

Location quotient of Frenchs Forest compared to the North District (Source: SGS Economics & Planning, 2019)





Opportunities and Challenges



Opportunities

The following opportunities for Frenchs Forest have been identified based on the data and vision described in policy documents:

- **to deliver a new, high amenity Town Centre which can encourage a night-time economy** -significant investment in the Frenchs Forest Town Centre will be undertaken to deliver the vision for a mixed-use centre with retail and offices, an open space plaza and community hub. An increased residential population will see significant change for Frenchs Forest and provides a unique opportunity to plan for 24-hour activity with safety by design and noise mitigation measures in-built from the outset to deliver resilient built form. Integrating sustainable design elements and design that supports place branding are important considerations to support the sustainability intent and high-skilled employment objectives for the Northern Beaches.
- **to deliver a 30-minute city and reduce travel times for workers** - by supporting the retention of larger employers in Frenchs Forest and continued investment in transport infrastructure such as the east-west B-Line and/or the Beaches Link Tunnel, this will improve accessibility to the Frenchs Forest Business Park. The reduced commute times for inbound workers is likely to make it easier for larger employers to attract a more diverse workforce, including lower paid positions that might not be able to afford to live locally. Thirty-minute accessibility to

Frenchs Forest centre is generally focused east-west within the Northern Beaches with strong access between Frenchs Forest and Brookvale-Dee Why. Frenchs Forest is also accessible in 30-minutes north to Terrey Hills. There is also good access between Frenchs Forest and Chatswood.

- **facilitate growth of Advanced Manufacturing and high technology industries** - advanced manufacturing and high technology industries are a priority of the future identified by NSW Treasury in its 2040 Economic Blueprint: investing in the State's future (NSW Government, 2019). Advanced Manufacturers are research intensive and apply novel technologies, systems and processes in their supply chains and products to subvert traditional industries, for example by replacing traditional products and services or enabling a step change in the productivity of competing supply chains, products or services. They tend to have long supply chains and drive advanced technology ecosystems in supporting components and servicing (NSW Government, 2019). The CSIRO Advanced manufacturing roadmap (2016) identifies the strong latent potential for advanced manufacturing to contribute to Australia's future GDP growth and identifies the ability to attract high skilled workers into manufacturing environments as a key challenge. The transition of Frenchs Forest Business Park to a stronger industrial function provides a convenient and attractive opportunity for high skilled workers and entrepreneurs to be able to work locally, particularly in the valuable pre-production design and post-production sales and services.

- **to strengthen the growing medical and health cluster** - the new Northern Beaches Hospital provides economic opportunities for associated medical and health activity to locate within the adjoining Town Centre precinct, along Frenchs Forest Road West and within the northern portion of the Frenchs Forest Business Park for wholesale trade, professional technical and scientific services activity. While severed by the Wakehurst Parkway, the Frenchs Forest Business Park provides large floorplates for warehousing and/or manufacturing activity with an existing cluster of pharmaceutical and medical technology companies already present. These include established businesses such as Pharmaxis, Conmed, Kirsch Pharma and DJO Global. It is important that this cluster is allowed the opportunity to develop without competing pressures from other activities such as seniors living, hotels and public facing retail activity.
- **to encourage logistics and distribution activity to cluster within the southern side of the Frenchs Forest Business Park** - this area of the precinct will be the most accessible for large truck movements and should be leveraged to allow heavy vehicle movements with minimal impact on the Northern Beaches road network and the residential population. In addition, this precinct is in proximity to the future Beaches Link Tunnel which will allow greater accessibility to Greater Sydney. Frenchs Forest's location at the intersection of two major arterial roads servicing the Northern Beaches is a large reason that Transport, Postal and Warehousing functions are the most specialised industry in Frenchs Forest. Flexibility with building heights in the Business Park provides a

rare opportunity on the Northern Beaches for automated high bay warehousing, which would provide a highly efficient outcome to support growing demand for floorspace. Growth in e-commerce activity has been further accelerated by COVID-19 and increasing demand for rapid delivery is leading to increased focus on last mile delivery operations. While employment numbers related to this activity are likely to further decline due to increased efficiency, given the trajectory of resident skillsets and likely labour shortages in this area, automation of this activity will be welcome. Demand for this floorspace has no correlation with employment trends, making it very difficult to predict future demand. This distribution activity is an essential urban services function that helps our city to function.

- **to encourage last mile delivery and reduce traffic congestion** - freight consolidation solutions could help to reduce traffic congestion by improving efficiency of last mile parcel delivery and streamlining deliveries to local centres across the Northern Beaches with goods going to the same centre consolidated onto one truck as an example to reduce the number of truck movements. This southern side of the Frenchs Forest Business Park provides an ideal opportunity for vertical automated warehousing to improve efficiency, reduce low skilled labour inputs, and distance of this precinct from residential land use in all directions provides a rare opportunity for 24-hour operations, enabling truck movements to be timed for periods of lower road congestion.

- **to improve connectivity between the Frenchs Forest Town Centre and the Frenchs Forest Business Park** -improvements in public transport, particularly towards the eastern end of the Business Park will help to improve connectivity. Further, investment in opportunities to support user friendly active travel infrastructure will be important. Improving these connections can assist with the opportunity to generate 24-hour synergies between the Frenchs Forest Town Centre and Frenchs Forest Business Park. Any built form should consider amenity and safety in design to cater for potential 24-hour activity.
- **to protect the south-eastern portion of the Frenchs Forest Business Park for specialised land uses that benefit from lower cost floorspace** - the south-eastern portion of the Frenchs Forest Business Park currently provides low cost floorspace with the lowest commercial rates on the Northern Beaches. Lots within this precinct have large floorplates (approximately 1,000 sqm) with car parking. While appetite for corporate businesses to relocate or establish satellite offices may not be as strong, further opportunities could include educational establishments, community facilities (including non-profit organisations) and emergency services facilities which would all benefit from lower cost floorspace. These uses should be promoted and encouraged.



Challenges

The following challenges for Frenchs Forest have been identified based on current trends and observations:

- severance between the Frenchs Forest Town Centre, Forestway Shopping Centre and the Frenchs Forest Business Park** - the existing road layout and steep topography creates significant severance issues with the Frenchs Forest Town Centre, Forestway Shopping Centre and Frenchs Forest Business Park. Improving connectivity between these precincts will need to be considered.
- impact to other centres** - the growth of the Frenchs Forest Town Centre may impact other retail/commercial centres in the Northern Beaches. Economic analysis for the Frenchs Forest Town Centre will need to be undertaken to determine the quantum of retail and/or commercial floor space that can be accommodated without adverse impacts to other centres.
- ‘Health and Education’ precinct branding is at the expense of targeting high skilled jobs and high growth potential industries of the future that are equally important elements of society** - a significant number of other precincts (over 10) across Greater Sydney have been designated ‘health and education precincts’ by the Cities (ie Greater Cities Commission), however there has been no state or federal government commitment to progress tertiary education at Frenchs Forest. Health investment is primarily a result of the establishment of the new Northern Beaches Hospital, which will be a drawcard for population serving health-related employment with 486 new patient beds and a range of public and private health services, including allied health and commercial uses in the broader Frenchs Forest Town Centre. While the population serving employment outcomes for the hospital are positive, the likelihood of attracting more diverse high skilled employment opportunities such as medical research are limited as Frenchs Forest will be competing against nearby well-established clusters of activity with better accessibility.

- Frenchs Forest has an established but under-performing Business Park** - the Frenchs Forest Business Park is well established however, suffers a number of issues. It lacks connectivity to the new hospital site; it has no central focus; its built form is geared towards large organisations seeking whole buildings or large floors and it lacks amenity and retail provision. This appears to be a wider trend in other similar business parks in Sydney and has resulted in low rents and high vacancies for large commercial floorplates. Improving connections to the new town centre and supporting a transition towards a stronger industrial focus will be key.
- new uses are creeping into the Frenchs Forest Business Park** - an independent seniors living apartment complex has recently been approved in the Frenchs Forest Business Park. This is in response to a demand for housing for seniors and the site's proximity to the Northern Beaches Hospital. However, such development introduces residential activity which undermines the current and future potential functioning of the business park and introduces future land use conflicts to the precinct.



Recommendations



Recommendations

1. **support development of the Frenchs Forest Town Centre to achieve the jobs target** - a high amenity environment should be encouraged. This should be achieved by encouraging a diverse cluster of population serving activities including medical, education, retail, services, recreation, entertainment, and hospitality activities near public transport. A cluster of medical consulting rooms and related floorspace are planned in proximity to the hospital at Frenchs Forest Road West to accommodate population serving activity within the town centre. Commercial space adjoining Warringah Road is expected to provide office-based environments to accommodate professional services, tertiary education, co-working and support for medical and aged care activity.
2. **encourage development of a vibrant and diverse night time economy in the Frenchs Forest Town Centre** - consider hours of operation, target different types of community and social infrastructure as third spaces and resilient built form to recognise the potential of the precinct to transition towards a night time economy, reflecting the 24-hour operations of the hospital, the needs of shift workers, the more diverse demographics of future residents in the town centre and the high level of accessibility. A night-time economy will retain a more diverse range of age groups on the Northern Beaches. The delivery of resilient built form will support quiet enjoyment by residents alongside amenity and vibrancy for the broader community in the evenings.
3. **limit commercial floor space in the Frenchs Forest Town Centre** - to give the established Frenchs Forest Business Park as much chance of success as possible, commercial floorspace in the Frenchs Forest Town Centre should be limited to the proposed 16,310sqm. This will ensure that demand for existing commercial floor space in the Business Park continues, with the potential for the Frenchs Forest Business Park to transform into a satellite health and medical technology precinct (which it shows signs of nurturing now with some of the established businesses).
4. **protect the Frenchs Forest Business Park from inappropriate uses including direct population serving activity and residential development** - encroachment of population serving activity such as large format retail (bulky goods), restaurants, retail or hospitality functions that rely on a broader catchment of customers beyond workers in the immediate Business Park, residential, affordable housing, boarding houses, independent seniors housing, hotel and motel accommodation are inappropriate as they are planned for in other locations in the Northern Beaches. Large format retail and other associated uses are accommodated at Roseberry Street in Balgowlah and Niangala Close in Belrose, while a broad range of population serving floorspace will be provided in the new Frenchs Forest Town Centre. An exception to this may be permitting Vehicle Sales or Hire Premises in the Frenchs Forest Business Park to accommodate future uses if a future Brookvale Town Centre were to result in displacement of these important urban services.

5. prioritise the Business Park for quality employment outcomes (rather than jobs growth) by encouraging high skilled employment, office and light industrial and high technology industry activity

- the Frenchs Forest Town Centre is to be the focus for population serving activity and knowledge intensive jobs growth while the Frenchs Forest Business Park should continue its current trajectory to provide quality employment outcomes. While there is currently a high vacancy rate in the Business Park, this precinct will be well placed to benefit from major infrastructure investment in the medium to long term. An east-west B-line will make a big difference to improve accessibility for a more diverse cohort of workers which will help medium and larger businesses to retain and grow their workforce. The future Beaches Link Tunnel entrance nearby on the Wakehurst Parkway will see further strengthening of freight, logistics and wholesale trade activity as one of the few employment precincts accommodating accessibility for larger truck movements on the Northern Beaches road network.

6. protect the 24-hour operational potential of Frenchs Forest Business Park - by deliberately prohibiting residential development in the land use planning regime, this will provide an ideal location for 24-hour activity. In particular, the southern side of Warringah Road provides a perfect location for emerging advanced manufacturing activity, automated logistics and freight consolidation operations where activities can run overnight,

making the most of limited employment floorspace on the Northern Beaches and to encourage trucks to use the road network outside of peak congestion periods.

7. safeguard the Frenchs Forest Business Park for long term commercial growth

- it is important to hold off making further changes to the Frenchs Forest Business Park to see the impacts of infrastructure investment including the Northern Beaches Hospital stimulating the health and pharmaceutical clusters, the east-west B-line investment and the future Beaches Link Tunnel. Longer term, the Frenchs Forest Business Park provides significant opportunities to accommodate high quality commercial floorspace leveraging regional views. In the meantime, it will be important to see how the Business Park evolves considering growing demand for last mile logistics and just-in-time deliveries, high technology industries and advanced manufacturing activities, which would all be well suited to the Business Park.

8. improve accessibility between the Frenchs Forest Town Centre and Frenchs Forest Business Park -

opportunities to advocate for improved public transport and active travel links will be essential to support connectivity.

9. Undertake a Northern Beaches Freight

Plan - in consultation with the logistics industry, this will help to understand and promote opportunities for freight consolidation at Frenchs Forest given its strategic location. The plan will also reduce impacts of growing last mile delivery activity on the local road network in line with the 'Move – Northern Beaches Transport Strategy 2038'.

10. Review the statutory planning controls for the Frenchs Forest Business Park -

further work will need to be undertaken to determine appropriate land use planning controls to be applied in the Local Environmental Plan and Development Control Plan. This could include changes to land use zoning and building heights.

a. Land use zone - the Frenchs Forest Business Park was rezoned from B7 Business Park to SP4 Enterprise as part of the NSW Government's Employment Zones Reforms. If the intended outcome for the Frenchs Forest Business Park for high skilled employment, office and light industrial activity is not being achieved, consideration should be given towards rezoning the land as E4 General Industrial Zone to reflect the strong light industrial character of the business park including specialisation of wholesale trade and freight. The E4 General Industrial Zone should be accompanied with an additional permitted use to support stand-alone office in this location to support ongoing

high skilled employment activity directly aligned with resident skillsets including Professional, Technical and Scientific Services which is one of the largest industries in Frenchs Forest. Note that an E3 Productivity Support Zone would present a direct threat to the ongoing functioning of the business park by enabling conversion to population serving uses, resulting in further oversupply of specialised retail uses and further exacerbating undersupply of land that supports industrial activity in line with what has occurred in Roseberry Street in Balgowlah.

b. Building heights - options include the identification of a maximum building height of 11m to reflect other SP4 Enterprise zoned land in the Northern Beaches or 18m, as proposed in the NSW Government's Building Business Back Better policy. It is noted that industrial lands policy is moving towards increased heights to support investment in emerging technology, more efficient use of space such as fully automated high bay warehouses. The Frenchs Forest Business Park's specialisation in transport/warehousing functions lends itself to vertical warehousing opportunities, particularly to support last mile consolidation activity.

Resources

Cred Consulting (2019), Addendum - Frenchs Forest Social Infrastructure Study, August; <https://www.planningportal.nsw.gov.au/frenchsforest>

CSIRO (2016), Advanced Manufacturing Roadmap - A roadmap for unlocking future growth opportunities for Australia, CSIRO; <https://www.csiro.au/en/work-with-us/industries/manufacturing/advanced-manufacturing-roadmap>

Greater Cities Commission (2018), Greater Sydney Region Plan; <https://greatercities.au/metropolis-of-three-cities/industrial-and-urban-services-land-planned-retained-and-managed>

.ID Demographic Resources (2023), Northern Beaches Council Economic Profile; <https://economy.id.com.au/northern-beaches>

SGS Economics & Planning (2019), Northern Beaches Employment Study; <https://www.northernbeaches.nsw.gov.au/planning-development/planning-northern-beaches/planning-our-future/employment>

Draft Northern Beaches Economic Development Strategy – Business on the Beaches, November 2022; <https://yoursay.northernbeaches.nsw.gov.au/business-on-the-beaches>

NSW 2040 Economic Blueprint, 2019; NSW Treasury; <https://www.treasury.nsw.gov.au/nsw-economy/nsw-2040-economic-blueprint>

NSW Government (2021), Frenchs Forest 2041 Place Strategy, NSW Government Department of Planning and Environment, <https://www.planning.nsw.gov.au/plans-for-your-area/priority-growth-areas-and-precincts/frenchs-forest>



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