



Australian Government
Productivity Commission

Performance Benchmarking of Australian Business Regulation: Planning, Zoning and Development Assessments

Productivity Commission
Draft Research Report
Volume 2

February 2011

This is a draft research report prepared for further public consultation and input.

The Commission will finalise its report after these processes have taken place.

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The Productivity Commission

The Productivity Commission is the Australian Government's independent research and advisory body on a range of economic, social and environmental issues affecting the welfare of Australians. Its role, expressed most simply, is to help governments make better policies, in the long term interest of the Australian community.

The Commission's independence is underpinned by an Act of Parliament. Its processes and outputs are open to public scrutiny and are driven by concern for the wellbeing of the community as a whole.

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A Conduct of the benchmarking study

This appendix details:

- the progress of the study (below)
- how the study was initiated (the Terms of Reference — A.1)
- the organisations and individuals that have participated so far (A.2–A.5).

The Commission advertised the study in national and metropolitan newspapers following receipt of the Terms of Reference on 14 April 2010, and an initial circular advertising the study was distributed to interested parties. The Commission released an Issues Paper in May 2010 to assist participants in preparing their submissions. The 69 submissions received by the Commission prior to the release of this draft are listed in table A.1.

In addition, the Commission met with a number of industry stakeholders, including unions, business groups, individual businesses and government departments. A list of those meetings is in table A.3.

Participants are invited to send any additional submissions in response to this draft to the Commission by 31 March 2011. The Commission will send the final report to the Australian Government in April 2011.

The Commission would like to thank all those who have contributed to the study so far.

A.1 Terms of Reference

A1.1 Text of the overarching terms of reference (11 August 2006)

The Productivity Commission is requested to undertake a study on performance indicators and reporting frameworks across all levels of government to assist the Council of Australian Governments (COAG) to implement its in-principle decision to adopt a common framework for benchmarking, measuring and reporting on the regulatory burden on business.

Stage 1: Develop a range of feasible quantitative and qualitative performance indicators and reporting framework options

In undertaking this study, the Commission is to:

1. develop a range of feasible quantitative and qualitative performance indicators and reporting framework options for an ongoing assessment and comparison of regulatory regimes across all levels of government.

In developing options, the Commission is to:

- consider international approaches taken to measuring and comparing regulatory regimes across jurisdictions; and
 - report on any caveats that should apply to the use and interpretation of performance indicators and reporting frameworks, including the indicative benefits of the jurisdictions' regulatory regimes;
2. provide information on the availability of data and approximate costs of data collection, collation, indicator estimation and assessment;
 3. present these options for the consideration of COAG. Stage 2 would commence, if considered feasible, following COAG considering a preferred set of indicators.

The Stage 1 report is to be completed within six months of commencing the study. The Commission is to provide a discussion paper for public scrutiny prior to the completion of its report and within four months of commencing the study. The Commission's report will be published.

Stage 2: Application of the preferred indicators, review of their operation and assessment of the results

It is expected that if Stage 2 proceeds, the Commission will:

1. use the preferred set of indicators to compare jurisdictions' performance;

-
2. comment on areas where indicators need to be refined and recommend methods for doing this.

The Commission would:

- provide a draft report on Stage 2 for public scrutiny; and
- provide a final report within 12 months of commencing the study and which incorporates the comments of the jurisdictions on their own performance. Prior to finalisation of the final report, the Commission is to provide a copy to all jurisdictions for comment on performance comparability and relevant issues. Responses to this request are to be included in the final report.

In undertaking both stages of the study, the Commission should:

- have appropriate regard to the objectives of Commonwealth, state and territory and local government regulatory systems to identify similarities and differences in outcomes sought;
- consult with business, the community and relevant government departments and regulatory agencies to determine the appropriate indicators.

A review of the merits of the comparative assessments and of the performance indicators and reporting framework, including, where appropriate, suggestions for refinement and improvement, may be proposed for consideration by COAG following three years of assessments.

The Commission's reports would be published.

PETER COSTELLO

11 August 2006

A.1.2 COAG's response to stage 1 report (13 April 2007)

In its communiqué of 13 April 2007 (COAG 2007, Regulatory Reform Plan, p. 10), COAG responded to the Commission's stage one report as follows:

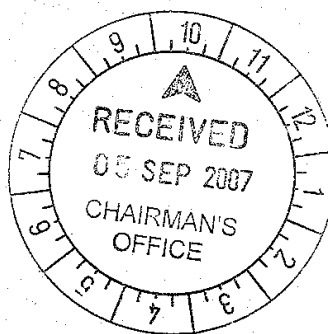
- COAG has agreed to proceed to the second stage of a study to benchmark the compliance costs of regulation, to be undertaken by the Productivity Commission. Benchmarking the compliance costs of regulation will assist all governments to identify further areas for possible regulation reform. The benchmarking study will examine the regulatory compliance costs associated with becoming and being a business, the delays and uncertainties of gaining approvals in doing business, and the regulatory duplication and inconsistencies in doing business interstate. COAG has asked Senior Officials to finalise by the end of May 2007 any variations to the areas of regulation to be benchmarked in the three-year program outlined in the Commission's feasibility study '*Performance Benchmarking of Australian Business Regulation*'. COAG noted the Commonwealth will fully fund the benchmarking exercise.

A.1.3 Letter from the Treasurer requesting the Commission to commence the second stage of the benchmarking program



- 3 SEP 2007

Mr Gary Banks AO
Chairman
Productivity Commission
PO Box 80
BELCONNEN ACT 2616



TREASURER

PO BOX 6022
PARLIAMENT HOUSE
CANBERRA ACT 2600

Telephone: 02 6277 7340
Facsimile: 02 6273 3420

www.treasurer.gov.au

Dear Mr Banks

On 11 August 2006 I requested that the Productivity Commission conduct a two stage study on performance benchmarking of Australian business regulation. The Commission's stage one report, released on 6 March 2007, concluded that benchmarking of regulatory burdens across jurisdictions is feasible and would complement other initiatives to monitor and reform regulation.

Accordingly, and consistent with the decision of 13 April 2007 by the Council of Australian Governments, I request that the Commission commence stage two of the study extending over the next three years. In keeping with the terms of reference, stage two of the study is to examine the regulatory compliance costs associated with becoming and being a business, the delays and uncertainties of gaining approvals in doing business, and the regulatory duplication and inconsistencies in doing business interstate.

The Commission is requested to begin stage two of the study by providing a draft and final report on the quantity and quality of regulation, and results of benchmarking the administrative compliance costs for business registrations within 12 months.

In undertaking stage two of the study, the Commission is requested to convene an advisory panel, comprising representatives from all governments, to be consulted on the approach taken in the first year. The panel should be reconvened at strategic points, providing advice on the scope of the benchmarking exercise and facilitating and coordinating data provision. It must also be given the opportunity to scrutinise and comment on the preliminary results.

The Commission is requested to review the benchmarking exercise at the conclusion of year three and report on options for the forward programme of the benchmarking exercise.

Yours sincerely


PETER COSTELLO

A.1.4 Letter from the Assistant Treasurer requesting the Commission to continue second stage of the benchmarking program with the 2009 workplan



The Hon Chris Bowen MP
Assistant Treasurer
Minister for Competition Policy and Consumer Affairs

16 DEC 2008

Mr Gary Banks AO
Chairman
Productivity Commission
GPO Box 1428
CANBERRA CITY ACT 2601

Dear Mr Banks

I am writing to you regarding the 2009 work plan of the Productivity Commission's Performance Benchmarking of Australian Business Regulation study.

In response to your request of 12 September 2008, this matter was raised at the 24 October 2008 Council of Australian Governments' Business Regulation and Competition Working Group meeting.

The BRCWG:

- noted the merit in continuing the benchmarking work program;
- agreed that occupational health and safety and food safety regulation should be considered by the Commission in year 2;
- requested that the Commission complete the OH&S and food safety benchmarking reports by December 2009; and
- agreed to revisit the Commission's future work plan in relation to the benchmarking study in 12 months time.

I would be grateful if you could undertake whatever action is necessary to fulfil the BRCWG's direction. The Commission may structure its work as it sees fit within the timeframe indicated above.

I have copied this letter to the Minister for Finance and Deregulation and the Minister Assisting the Finance Minister on Deregulation.

Yours sincerely

CHRIS BOWEN

PO Box 6022
Parliament House
CANBERRA ACT 2600



Telephone: 02 6277 7360
Facsimile: 02 6275 4125
<http://assistant.treasurer.gov.au>

A.1.5 Letter from the Assistant Treasurer requesting the Commission to commence this study



ASSISTANT TREASURER SENATOR THE HON NICK SHERRY

26 MAR 2010

Mr Gary Banks AO
Chairman
Productivity Commission
GPO Box 1428
CANBERRA CITY ACT 2601

Dear ~~Chairman~~ *Gary*

2010 TOPICS FOR THE PRODUCTIVITY COMMISSION'S PERFORMANCE BENCHMARKING OF AUSTRALIAN BUSINESS REGULATION

I am writing to you regarding the topics for the Productivity Commission's Performance Benchmarking of Australian Business Regulation in 2010.

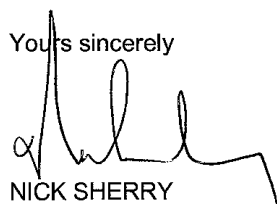
This matter was discussed at the Council of Australian Governments' (COAG) Business Regulation and Competition Working Group (BRCWG) meeting of 5 February 2010. It agreed that the Commission be asked to undertake performance benchmarking in 2010 of States and Territories' planning and zoning systems and land development assessments.

The performance benchmarking of States and Territories' planning and zoning systems is to be undertaken consistent with the enclosed terms of reference. The terms of reference have been agreed in consultation between the Commonwealth and the States and Territories, and were specified by COAG at its 7 December 2009 meeting.

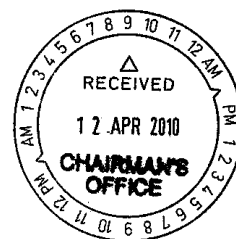
I look forward to receiving the reports on this further work.

I have copied this letter to the Minister for Finance and Deregulation and the Minister Assisting the Finance Minister on Deregulation.

Yours sincerely


NICK SHERRY

enc



PO Box 6022
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A.1.5 Continued

PERFORMANCE BENCHMARKING OF STATES AND TERRITORIES' PLANNING AND ZONING SYSTEMS

TERMS OF REFERENCE

The Productivity Commission is requested to undertake a benchmarking study of States and Territories' planning and zoning systems, and report back by December 2010.

Context

Planning systems play an important role in managing the growth of cities. They aim to preserve the environment, provide and coordinate community services and facilities, and promote the orderly and economic use and development of land. The systems serve the valuable purposes of balancing the often competing social, environmental, and economic impacts of a development. Planning systems, and in particular the zoning of land, affect the location, quantity, and use of land for specific activities, but at the same time they can affect competition within local markets. The extent of this impact on competition within local markets varies across States and Territories, and over time.

The Productivity Commission is requested to examine and report on the operations of the States and Territories' planning and zoning systems, particularly as they impact on business compliance costs, competition and the overall efficiency and effectiveness of the functioning of cities. As part of the study, the Commission should report on planning and zoning laws and practices which unjustifiably restrict competition and best practice approaches that support competition, including:

- measures to prevent 'gaming' of appeals processes;
- processes in place to maintain adequate supplies of land suitable for a range of activities; and
- ways to eliminate any unnecessary or unjustifiable protections for existing businesses from new and innovative competitors.

A.2 Submissions

Table A.1

<i>Participant</i>	<i>Submission number</i>
Adelaide City Council	23
Aged Care Association Australia	69
Aldi Stores	11
Amana Living Incorporated	68
Australian Hotels Association	56
Australian Institute of Architects	6
Australian Local Government Association	33
Australian Logistics Council	46
Australian National Retailers Association	44
Australian Network of Environmental Defender's Offices Inc	7
Australian Property Institute and the Spatial Industries Business Association	20
AV Jennings Limited	64
Bingwood Pty Limited	67
Brisbane City Council	18
Bulky Goods Retailers Association	37
Business Council of Australia	38
Business SA	24
Cement Concrete and Aggregates Australia	4, 54
Certain Planning	36
City of Marion	3
City of Onkaparinga	52
City of Sydney	15
Council of Capital City Lord Mayors	31
Council of Mayors (South East Queensland)	40
Department of Infrastructure, Transport, Regional Development and Local Government	45
Department of Premier and Cabinet NSW	48
Department of Resources, Energy and Tourism	22
Development Assessment Forum	58
Environmental Defenders Office (Tas) Inc	12
Fremantle Ports	14
Heine Architects Pty Limited	66
Housing Industry Association (HIA) Ltd	42
Independent Retailers of NSW and the ACT Inc	16, 62
Institute of Public Affairs	35
Local Government Association of Queensland	29
Master Builders Australia	32
Mitre 10 Australia	39
National Association of Retail Grocers of Australia	47
North Sydney Council	17
NSW Aboriginal Land Council	26
NSW Business Chamber	25
Organisation Sunshine Coast Association of Residents	21

<i>Participant</i>	<i>Submission number</i>
Pacific Infrastructure Corporation	8
Planning Institute of Australia	27
Planning Institute of Australia — ACT	13
Planning Institute of Australia (NSW Division)	1
Ports Australia	60
Prospect Residents	34
Save our Suburbs — Adelaide	5
Save our Suburbs — NSW	28
Shopping Centre Council of Australia	43
South Australian Federation of Residents and Ratepayers Associations Inc	51
South Australian Government	57
Tasmanian Conservation Trust	49
The Australian Association of Convenience Stores	63
Timber Queensland	9
Tourism and Transport Forum (TTF)	50
Town of Vincent	2
Urban Development Institute of Australia	53
Urban Land Development Authority	19
Urban Taskforce Australia	59, 61
Victorian Tourism Industry Council	10, 30
Western Australian Local Government Association	41
Whyalla City Council	55
Woolworths Limited	65

A.3 Advisory committee meetings

Table A.2 **Government Advisory Panel Roundtable
5 May 2010 and 14 December 2010, Canberra**

Commonwealth	NSW
Department of Finance and Deregulation	NSW Department of Premier & Cabinet
The Treasury	NSW Treasury
Victoria	Queensland
Victorian Department of Premier & Cabinet	Department of Premier and Cabinet ^a
Victorian Department of Treasury and Finance	Queensland Office for Regulatory Efficiency
ACT	Department of Infrastructure & Planning ^b
ACT Treasury	Western Australia
South Australia	Department of Treasury and Finance
Department of Trade and Economic Development	Northern Territory
ALGA	Northern Territory Treasury
Australian Local Government Association	Tasmania
	Department of Treasury and Finance

^a 14 December 2010 meeting only. ^b 5 May 2010 meeting only.

A.4 Visits and consultations

Table A.3

<i>Commonwealth and National Organisations</i>
Australian Competition and Consumer Commission (ACCC)
Australian Local Government Association
Australian National Retailers Association
Australian Property Institute
Council of Australian Governments (COAG) Reform Council
Department of Families, Housing, Community Services and Indigenous Affairs (FaHCSIA)
Department of Infrastructure and Transport (Regional and Local Government Policy Branch)
Department of Prime Minister & Cabinet
Department of Resources, Energy and Tourism
Department of the Environment, Water, Heritage and the Arts
Housing Industry Association
Infrastructure Australia
Infrastructure Australia (Major Cities Unit)
National Capital Authority
Planning Institute of Australia
Urban Development Institute of Australia
Property Council of Australia
Shopping Centre Council of Australia
Australian Retailers Association
Australian Industry Group
Development Assessment Forum
Business Council of Australia
<i>Australian Capital Territory</i>
ACT Planning and Land Authority (ACTPLA)
Department of Treasury
CIC Australia
Department of Land and Property Services
Land Development Agency
Master Builders Association (ACT)
Planning Institute of Australia (ACT)
Independent Retailers of NSW and the ACT Inc
<i>South Australia</i>
Cheltenham Park Residents Association
Department for Transport, Energy and Infrastructure
Department of Planning and Local Government
Department of Premier and Cabinet
Environment Protection Authority
Makris Group
Masonic Homes
Masterplan Local Government Association of South Australia
Planning Institute of Australia (SA Branch)
Urban Development Institute of Australia (SA)

(continued next page)

Table A.3 continued

New South Wales

Queanbeyan City Council
CB Richard Ellis
Costco
Department of Planning
Department of Premier & Cabinet
Department Premier and Cabinet (Local Government)
Landcom
Leighton Holdings
Local Government and Shires Associations of New South Wales
Meriton
Planning Assessment Commission
Planning Institute of Australia (NSW)
Stockland
Sydney Water
Toll Holdings
Urban Development Institute of Australia (NSW)
Urban Taskforce
Woolworths

Tasmania

Environmental Protection Agency
Local Government Association of Tasmania
Property Council of Australia (Tasmanian Division)
Real Estate Institute of Tasmania
SEMF
Tasmanian Chamber of Commerce and Industry
Tasmanian Conservation Trust
Tasmanian Planning Commission
Department of Treasury and Finance

Western Australia

Department of Environment and Conservation
Department of Transport
Environmental Protection Authority
Landcorp
Urban Development Institute of Australia (WA)
Department of Treasury and Finance
Western Australia Local Government Association
Western Australian Planning Commission
Department of Planning

(Continued next page)

Table A.3 continued

Victoria

Aldi
Australian Conservation Foundation
Australian Housing and Urban Research Institute (AHURI)
Box Hill Institute
Bulky Goods Retailers Association
Coles
Department of Planning and Community Development
Department of Transport
Municipal Association of Victoria
Urban Development Institute of Australia (Vic)
Urban Land Development Authority
Urbis
Victorian Competition and Efficiency Commission
Growth Areas Authority
VicUrban
Department of Treasury and Finance
Department of Premier and Cabinet

Queensland

Delfin Lend Lease (Brisbane)
Delfin Lend Lease (Townsville)
Department of Infrastructure and Planning
Development Watch
Gold Coast City Council
Griffith University - Urban Research Program
Local Government Association of Queensland
Logan City Council
Metroplex Management
Organisation of Sunshine Coast Association of Residents (OSCAR)
Port of Townsville Limited
Queensland Office for Regulatory Efficiency
Sunshine Coast Council
Townsville Council
Tweed Heads Council
Urban Development Institute of Australia (Townsville)
Urbis
Wolter Consulting

Northern Territory

Department of Lands and Planning
Environment Protection Authority
Department of Natural Resources, Environment, The Arts & Sport (Environment & Heritage Division)
Department of Natural Resources, Environment, The Arts & Sport (Natural Resources Division)
Larrakia Development Corporation
Department of Construction and Infrastructure
Sitzler
Land Development Corporation
Northern Territory Treasury

A.5 Surveys and providers of information

Table A.4 Council responses by jurisdiction

NSW	Vic	WA
Albury	Banyule	Armadale
Ashfield	Boroondara	Bayswater
Auburn	Cardinia	Cambridge
Bankstown	Casey	Canning
Blacktown	Frankston	Gosnells
Botany Bay	Geelong	Joondalup
Camden	Glen Eira	Kalamunda
Campbelltown	Greater Dandenong	Peppermint Grove
Canada Bay	Hobsons Bay	Rockingham
Cessnock	Knox	South Perth
Gosford	Manningham	Subiaco
Hawkesbury	Maribyrnong	Swan
Holroyd	Melbourne City	Vincent
Hornsby	Melton	Wanneroo
Hunter's Hill	Monash	
Hurstville	Moonee Valley	Tas
Ku-ring-gai	Moreland	Clarence
Lake Macquarie	Mornington Peninsula	Derwent Valley
Lane Cove	Nillumbik	Glenorchy
Leichhardt	Port Phillip	Hobart City
Liverpool	Whittlesea	Launceston City
Maitland	Yarra	West Tamar
Manly	Yarra Ranges	
Marrickville	Wodonga	SA
Mosman		Adelaide City
Newcastle	Qld	Adelaide Hills
Parramatta	Brisbane City	Barossa
Pittwater	Cairns	Burnside
Queanbeyan	Gold Coast	Charles Sturt
Randwick	Lockyer Valley	Holdfast Bay
Rockdale	Logan	Light
Shellharbour	Moreton Bay	Mount Barker
Strathfield	Redland	Mount Gambier
Sutherland	Scenic Rim	Norwood, Payneham & St Peters
Tweed	Somerset	Playford
Warringah	Sunshine Coast	Port Adelaide Enfield
Wollondilly	Townsville	Prospect
Wyong		Salisbury
	NT	Tea Tree Gully
ACT	Alice Springs	Victor Harbor
ACT Planning and Land Authority	NT Department of Lands and Planning	

Table A.5 State and territory planning agencies which were surveyed

NSW	Department of Planning
Vic	Department of Planning and Community Development
Qld	Department of Infrastructure and Planning
WA	Western Australian Planning Commission
SA	Department of Planning and Local Government
Tas	Tasmanian Planning Commission
ACT	ACT Planning and Lands Authority
NT	Department of Lands and Planning

A.6 Cities selected for this study

As suggested by the terms of reference, this study focuses on cities. For the purposes of this study, the Commission has focused on a subset of 24 cities. These include each state and territory capital city (both the central business district and surrounding metropolitan area) and all cities with a population over 50 000. To that list was added two cross-border cities for inter-jurisdictional comparison (Queanbeyan and Wodonga). To ensure at least two cities from each jurisdiction (except ACT) were covered, Mt Gambier, Alice Springs and Geraldton-Greenough made up the final cities on the list.

Table A.6

NSW	Vic
Sydney	Melbourne
Wollongong	Geelong
Queanbeyan	Wodonga
Albury	SA
Newcastle	Adelaide
Tweed	Mount Gambier
Qld	WA
Brisbane	Perth
Toowoomba	Geraldton-Greenough
Gold Coast	NT
Sunshine Coast	Darwin
Townsville	Alice Springs
Cairns	ACT
Tas	Canberra
Hobart	
Launceston	

B Approach to gathering information

In conducting this study, the Commission drew on submissions, as well as consultation with private sector developers and retailers, state and territory planning agencies and local councils to identify those differences in state and territory planning systems that warranted benchmarking. This appendix details the approach the Commission took to obtain the data to facilitate that benchmarking.

Gathering information for benchmarking

The Commission sought to minimise the burdens placed on government departments/agencies and businesses through requests for information by using existing data sources wherever possible. In particular, the Commission made use of:

- data from the Australian Bureau of Statistics
- surveys, studies and reviews completed by the jurisdictions and others, including consultants and researchers.

While these sources provided valuable information for the study, the specific areas of planning, zoning and development assessments selected for benchmarking required additional and in some cases, more current information. As a result, the Commission sought additional information via:

- surveys of state and territory planning agencies, local councils, ‘greenfield developers’ and retailers
- data on commercial and industrial land sales and median house prices, sourced from RP Data
- data on residential property listings, sourced by the Commission from publicly available information.

B.1 Surveys

To better understand the various aspects of planning, zoning and development assessment relevant to the benchmarking of jurisdictions, the Commission surveyed the jurisdictions' planning departments and agencies, local councils, greenfield developers and a small sample of retailers. This section outlines the nature of those surveys and how they were developed and distributed. Further, the Commission is currently undertaking surveys of businesses and the community. Results from these surveys will be presented in the final report.

Survey of state and territory planning departments and agencies

The state and territory planning departments and agencies have a detailed knowledge of the regulatory requirements relating to planning, zoning and development assessments in their jurisdiction and how those requirements are enforced and administered. As such, they are a vital source of information for this benchmarking study. To access this information the Commission developed a survey and sent it to each state and territory planning department/agency (table B.1). Data for the year 1 July 2009 to 30 June 2010 was sought in the surveys. The questions listed in table B.2 are a generalisation of the questions used in the actual surveys as each survey was tailored to subtleties of each jurisdiction's planning regime.

Table B.1 Lead planning agencies

NSW	Department of Planning
Vic	Department of Planning and Community Development
Qld	Department of Infrastructure and Planning
WA	Western Australian Planning Commission
SA	Department of Planning and Local Government
Tas	Tasmanian Planning Commission
ACT	ACT Planning and Lands Authority
NT	Department of Lands and Planning

The surveys were sent to the Chief Executive (or equivalent) of each department or agency during the week commencing 6 September 2010 with a requested return date of 8 October 2010. Most jurisdictions provided complete survey responses by 3 November 2010. However, Western Australia's complete survey response was not provided until 10 January 2011. The Commission reviewed the completed surveys and sought clarification from the jurisdictions on any anomalies in their responses. In December 2010, the Commission circulated a working draft of the study to the jurisdictions for their review and comment. The working draft contained the

benchmarking data (from all sources) for all jurisdictions. The circulation of the working draft was the first time the jurisdictions had seen their survey responses in the context of the data from other jurisdictions.¹ In response to the working draft, the jurisdictions had until 14 January 2011 to provide further comments and clarifications on the Commission's use and interpretation of their survey responses.

Table B.2 Planning, zoning and development assessments survey (2009-10) — State departments and agencies

PART 1 — Policy framework	
1.	In [relevant jurisdiction] is government policy currently guided by any of the following planning policies/instruments? (If so, please attach the latest versions of these documents to your survey response): <ul style="list-style-type: none"> a) a state or territory level economic development strategy b) regional strategic plans c) a metropolitan strategic and spatial plan for [relevant capital city] d) a state level infrastructure plan e) regional infrastructure plans f) an infrastructure plan for [relevant capital city] g) an activity centres policy h) any 'land audits' undertaken since 1 July 2008 (for example, studies on the availability of industrial land within the jurisdiction)
2.	What specific statutory powers (if any) do [relevant jurisdiction planning departments/agencies and land development agencies] have to realise the implementation of these planning policies / instruments? Do any other government agencies have statutory powers relevant to the implementation of these planning policies/instruments? If so, what are these powers and how are they used in practice to implement these planning policies/instruments?
3.	Is the cost to government of implementing each of these planning policies / instruments included in the forward estimates and updated annually as part of the Budget process? If not, by what process are the specific initiatives envisaged under these planning instruments prioritised and funded?
4.	When does your government intend to next review each of these planning policies/instruments?
5.	Does the current strategic and spatial plan for [relevant capital city] have statutory effect? When was it put in place? When was it last reviewed?
6.	Does [relevant state government] provide local councils with guidelines on centres policy and/or retail competition? In relation to these matters do the guidelines specify when an economic impact study is required?
7.	In the last five years are there examples in [relevant jurisdiction] of changes to the institutional arrangements underpinning the planning, zoning and DA system, which were intended to make the system more efficient and effective (e.g. the establishment of new government agencies, the implementation of new consultation and coordination mechanisms or changes to zoning classifications)? What problems were these initiatives trying to address?
8.	When was the planning law in your jurisdiction last comprehensively reviewed?
9.	Are there any Memoranda of Understanding (or similar agreements) in place with the Commonwealth Government or Commonwealth agencies in respect to planning matters for, and around, Commonwealth land (such as airports, defence sites and ports). If so, please provide copies of those agreements.

(continued next page)

¹ The working draft did not include any survey data from Western Australia as the relevant survey response was yet to be received by the Commission.

Table B.2 (continued)

PART 2 — Resourcing

10. What was the total expenditure in 2009-10 of each of the following **[relevant jurisdiction planning departments/agencies and land development agencies]**?
11. For each of these entities:
- a) what was their total expenditure on planning, zoning and DA-related activities in 2009-10?
 - b) what was their total expenditure on consultancies related to the planning, zoning and DA system in 2009-10?
 - c) how many full-time equivalent planning staff were employed by them in 2009-10?
 - d) how many full-time equivalent staff (including permanent and casual staff) with formal tertiary qualifications in town planning or civil engineering were directly employed by them as at 30 June 2010?
 - e) what proportion of their full-time equivalent staff with formal tertiary qualifications in town planning or civil engineering had more than 5 years professional experience as at 30 June 2010?
 - f) what was the staff turnover rate for their full-time equivalent staff with formal tertiary qualifications in town planning or civil engineering in 2009-10?
 - g) what was the total remuneration package for the most senior planner and for an entry level planner?
12. What was the expertise of government appointed members in each case of **[relevant jurisdiction planning departments/agencies and land development agencies]** in 2009-10?

PART 3 — Planning priorities

- 13.a) In terms of planning priorities, please identify for **[relevant jurisdiction]** the five highest and lowest priorities (Please mark with a X):
- Maintaining a vibrant city centre
 - Securing adequate urban water supply
 - Improving mobility within the city
 - Attracting skilled labour
 - Promoting healthy lifestyles
 - Enhancing the connectedness of the city with other Australian capital cities
 - Reducing socio-economic disparities across the city
 - Managing new 'greenfield' development at the city's edge
 - Accommodating population growth
 - Reducing traffic congestion
 - Addressing problems of crime and violence
 - Providing new economic and social infrastructure
 - Ensuring efficient waste management and/or recycling
 - Adapting to climate change
 - Enhancing the connectedness of the city with nearby regional population centres
 - Improving the accessibility of services for an ageing population
 - Maintaining existing economic and social infrastructure
 - Providing affordable housing
 - Enhancing the connectedness of the city with overseas cities
 - Making the transition to higher urban population densities
 - Protecting biodiversity
 - Providing diverse and appropriate housing
 - Improving air quality
 - Maintaining or improving social cohesion
 - Attracting new industries
- 13.b) Other comments on the planning priorities for **[relevant capital city]**:
-

(continued next page)

Table B.2 (continued)

14.a) To what extent (**no effect, minor effect, moderate effect, major effect**) can government use the planning, zoning and DA system to positively influence the following challenges (Mark with an X):

- Maintaining a vibrant city centre
- Securing adequate urban water supply
- Improving mobility within the city
- Attracting skilled labour
- Promoting healthy lifestyles
- Reducing socio-economic disparities across the city
- Managing new 'greenfield' development at the city's edge
- Accommodating population growth
- Reducing traffic congestion
- Addressing problems of crime and violence
- Providing new economic and social infrastructure
- Ensuring efficient waste management and/or recycling
- Adapting to climate change
- Enhancing the connectedness of the city with nearby regional population centres
- Improving the accessibility of services for an ageing population
- Maintaining existing economic and social infrastructure
- Providing affordable housing
- Making the transition to higher urban population densities
- Protecting biodiversity
- Providing diverse and appropriate housing
- Improving air quality
- Maintaining or improving social cohesion
- Attracting new industries

14.b) Other comments on extent to which the planning, zoning and DA system can be used to positively influence the challenges facing cities in **[relevant jurisdiction]**:

15.a) To what extent (**large effect, moderate effect, minor effect, not at all**) does the implementation of **[relevant capital city's]** current strategic and spatial plan assume the following?:

- Bipartisan political support for the objectives and priorities of **[relevant capital city's]** strategic plan
- Significant re-zoning of land to strengthen the role of cities and major centres within **[relevant capital city]**
- A higher proportion of businesses choosing to locate along key transport corridors
- A higher proportion of businesses choosing to locate in cities and major centres within **[relevant capital city]**
- Higher levels of public transport usage
- Greater community acceptance of medium and high density urban infill housing developments
- A greater proportion of the community living in smaller dwellings that are not conventional separate houses
- Greater community acceptance of user charges to recover the cost of infrastructure provision
- Greater community acceptance of using price signals to help manage negative externalities from higher population densities (e.g. congestion road charging)
- Commonwealth funding for new infrastructure investment
- **[State]** government funding of new infrastructure investment
- Local councils funding new infrastructure investment
- The cooperation and participation of local councils in implementing the plans
- The private sector either partially or fully funding new infrastructure investment
- Securing land corridors for new transport infrastructure

15.b) Other comments on factors that are likely to have a decisive effect on the successful implementation of your suite of planning policies/instruments?

(continued next page)

Table B.2 (continued)

-
16. The Australian community has traditionally favoured relatively low density forms of housing. In contrast, Australian city planning is generally seen as moving in the direction of trying to contain the rate of urban expansion by favouring the construction of higher density forms of housing, including in existing built-up areas. Are community preferences leading or lagging changes occurring through the planning, zoning and DA system? If they are lagging, to what extent is this contributing in **[relevant capital city]** to conflict and delays in processing development applications?
17. Given the goal of housing an increasing population and the differences in housing preferences of people at different stages of their lives, how do you determine the growth rates for different areas of **[relevant capital city]** – is it equal rates of growth? If variable, how is this determined?
18. Compared with past iterations, are the current versions of your strategic and spatial plan and associated infrastructure plan for **[relevant capital city]** largely ‘evolutionary’ or ‘revolutionary’? If ‘evolutionary’ what key aspects give them a sense of continuity with the objectives and direction of past planning exercises? If ‘revolutionary’ what key aspects represent significant departures from past planning exercises? If mixed, please identify the key aspects that are ‘evolutionary’ and those that are ‘revolutionary’.
19. During the development of the strategic and spatial plan for **[relevant capital city]** and associated infrastructure plan, were the following sources of information and advice made publicly available?
- a) supporting commissioned research
 - b) the advice of expert advisory panels
 - c) submissions received from local government
 - d) submissions received from residents
 - e) submissions received from the business sector
 - f) the assumptions and results of modelling exercises
- If so, how was this information made publicly available (such as by request, accessible on the internet)?
20. Is there a statutory requirement that local government planning, zoning and DA decisions must be consistent with **[relevant state government’s]** regional or metropolitan strategic plans? If not, what is the process by which **[relevant state government]** seeks to align state and local government decision making in relation to planning, zoning and DA matters?
21. Does **[relevant state government]** take any specific actions to encourage local councils to cooperate with each other in tackling regional or metropolitan level planning, zoning or DA related challenges?

PART 4 — The consideration of development proposals

22. We want to confirm the exact roles and functions of key institutions within **[relevant jurisdiction’s]** planning system.
- a) Please briefly describe the role and functions of the **[listed relevant jurisdiction planning departments/agencies and land development agencies]**.
 - b) What is the delineation of roles and responsibilities between each of these entities and the **[listed relevant jurisdiction planning departments/agencies and land development agencies]**?
 - c) What criteria apply to the make up of the **[listed relevant jurisdiction planning departments/agencies and land development agencies]**?
 - d) Do the **[listed relevant jurisdiction planning departments/agencies and land development agencies]** provide these entities with secretariat services?
 - e) Are meetings of these entities open to the public? For each of these entities, what proportion of meetings were open to the public in 2009-10?
-

(continued next page)

Table B.2 (continued)

23. Please fill in Tables 1, 2 and 3 concerning the activities of the **[listed relevant jurisdiction planning departments/agencies and land development agencies]** in 2009-10.

Table 1 Activities of the [relevant jurisdiction planning department/agency] in 2009-10

	<i>Residential</i>	<i>Commercial/business</i>	<i>Industrial</i>	<i>Other</i>
Number, development proposals				
Total value of those proposals				
Average approval time				
Total application fees and charges				
Total infrastructure charges / levies				
Number court appeals (outcomes)				

Table 2 Activities of the [relevant land development agency] in 2009-10

	<i>Residential</i>	<i>Commercial/business</i>	<i>Industrial</i>	<i>Other</i>
Number, development proposals				
Total value of those proposals				
Average approval time				
Total application fees and charges				
Total infrastructure charges / levies				
Number court appeals (outcomes)				

Table 3 Activities of the [relevant redevelopment authority] in 2009-10

	<i>Residential</i>	<i>Commercial/business</i>	<i>Industrial</i>	<i>Other</i>
Number, of development proposals				
Total value of those proposals				
Average approval time				
Total application fees and charges				
Total infrastructure charges / levies				
Number court appeals (outcomes)				

24. Are development applicants able to apply to the court for a review of the following matters:

- a) rezoning
- b) the development assessment
- c) enforcement of conditions imposed on development
- d) other issues. Please list:

25. Are development applicants able to apply for a review (other than by a court) of decisions taken by the **[listed relevant jurisdiction planning departments/agencies and land development agencies]**? If so, how many development proposal decisions of each of these entities were subject to such an appeal in 2009-10?

26. Are development applicants able to appeal decisions taken by the **[listed relevant jurisdiction planning departments/agencies and land development agencies]**? If so, what types of decisions are subject to appeal? What is the nature of the appeals process? How many development proposal decisions of these departments were subject to appeal in 2009-10?

27. How many development proposals were considered under state government development approval processes in 2009-10? For each of these, how were they brought into the scope of state government development approval processes (for example, Ministerial call in, being declared a state significant project, other)?

28. In **[relevant jurisdiction]**, how common is it for businesses to repackage or up size development projects in order to satisfy the requirements for consideration under state government approval processes? In 2009-10, what proportion of projects considered under these processes do you think had been repackaged in order to avoid going through local government DA processes?

(continued next page)

Table B.2 (continued)

29. What legislative or administrative processes are in place at the state government level for preventing, investigating and prosecuting corruption which specifically applies to planning, zoning and DA matters?

PART 5 — ‘Greenfield’ land supply

- 30.a) Please review the figures for their accuracy. Please advise of any changes to the figures that are necessary in order to appropriately reflect the processes in **[relevant capital city]**.
- 30.b) Please confirm that a ‘structure planning’ process is not a mandatory step in the land supply process for **[relevant capital city]**?
- 30.c) In 2009-10, what proportion of your subdivision approvals issued in 2005-06 (with a four year expiry) and 2006-07 (with a three year expiry) lapsed without the subdivisions being finalised?^a
- 30.d) Please provide the timeframes and land details associated with the different stages of the land supply processes in table 4 (below).

Table 4	Land designated for future development	Land zoned for development (figure 1 process)	Subdivided land (figure 2 process)	Total
For residential/housing land:				
Estimate of shortest actual elapsed time to complete this process in 2009-10 (calendar days)	not required ^a			
Estimate of longest actual elapsed time to complete this process in 2009-10 (calendar days)	not required ^a			
Estimate of the total area of land within the [relevant capital city] region with this process completed as at 30 June 2010				
Estimate of the total number of lots within the [relevant capital city] region with this process completed as at 30 June 2010				
Estimate of the proportion (by area) of the land within the [relevant capital city] region with this process completed that is government owned or controlled (%)				
For industrial land:				
Estimate of shortest actual elapsed time to complete this process in 2009-10 (calendar days)	not required ^a			
Estimate of longest actual elapsed time to complete this process in 2009-10 (calendar days)	not required ^a			
Estimate of the total area of land within the [relevant capital city] region with this process completed as at 30 June 2010				
Estimate of the total number of lots within the [relevant capital city] region with this process completed as at 30 June 2010				
Estimate of the proportion (by area) of the land within the [relevant capital city] region with this process completed that is government owned or controlled (%)				

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Table B.2 (continued)*Table 4 (continued)*

	<i>Land designated for future development</i>	<i>Land zoned for development (figure 1 process)</i>	<i>Subdivided land (figure 2 process)</i>	<i>Total</i>
For commercial land:				
Estimate of shortest actual elapsed time to complete this process in 2009-10 (calendar days)	not required ^a			
Estimate of longest actual elapsed time to complete this process in 2009-10 (calendar days)	not required ^a			
Estimate of the total area of land within the [relevant capital city] region with this process completed as at 30 June 2010				
Estimate of the total number of lots within the [relevant capital city] region with this process completed as at 30 June 2010				
Estimate of the proportion (by area) of the land within the [relevant capital city] region with this process completed that is government owned or controlled (%)				

^a No response is required for this cell as: 1) it is the starting point for the analysis; 2) the focus of the analysis is on the rezoning and subdivision processes; and 3) the land may have been so designated many years previous and sat idle since.

Comments: Please include any comments on the above or on any other aspect of the land supply process (such as the provision of infrastructure and final issue of separate titles by the land registry).

31. Please provide the following data for [relevant capital city] for 2009-10:

- a) What was the total land area approved for subdivision for:
 - i) residential/housing
 - ii) industrial
 - iii) commercial
- b) What was the total number of lots approved for subdivision for:
 - i) residential/housing
 - ii) industrial
 - iii) commercial
- c) What was the total number of new lots/titles actually created:
 - i) residential/housing
 - ii) industrial
 - iii) commercial

PART 6 — 'Greenfield' infrastructure provision

32. Please complete tables 5 and 6 for [relevant capital city's] greenfield developments. Please use the following codes to describe the provider of each category of infrastructure: D for The developer; LC for Local council; S for State government agency or department; GBE for State government business enterprise; P or Private sector provider; Other - Please provide further details if making an 'other' response.

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Table B.2 (continued)

Table 5 *Body providing infrastructure (in practice) in greenfield areas*

Roads^a

Trunk/arterial roads

Local roads

Water

Headworks

Minor works^b**Sewerage**

Headworks

Minor works^b

Storm water

Electricity

Gas

^a Roads and associated infrastructure such as bridges. ^b For example, the reticulation pipe works that connect properties to the headworks.

Table 6 *Body responsible for maintaining infrastructure*

Roads^a

Trunk/arterial roads

Local roads

Water

Headworks

Minor works^b**Sewerage**

Headworks

Minor works^b

Storm water

Electricity

Gas

^a Roads and associated infrastructure such as bridges. ^b For example, the reticulation pipe works that connect properties to the headworks.

33. Aside from the infrastructure listed in tables 5 and 6, are there any other infrastructure items a subdivision developer is typically asked to provide in [relevant jurisdiction]?

PART 7 — Rezoning^a

34. The Commission is seeking as detailed information on the land rezoned in [relevant capital city] for the period 2009-10 as possible. (The local government areas defining [relevant capital city] for the purposes of our study are listed in the [the relevant attachment]).
- Our first preference is that, where you are able, you complete table 7a (below – on the landscape page) for each rezoning approved for [relevant capital city] during 2009-10.
- We appreciate you may not be able to complete table 7a due to issues such as data limitations or that such a request may be an unreasonable drain on resources. Where this is the case we ask you provide the following information, including completing table 7b:
- How many rezonings were approved for [relevant capital city] in 2009-10?
 - Is your response an estimate or is it based on records kept?
 - From the list below, please rank 3 most common rezoning proposals approved in 2009-10 (1 being the most common, 2 the 2nd most common, etc) in table 7b:

(continued next page)

Table B.2 (continued)

<i>Table 7a Rezoning — [relevant capital city] planning area</i>								
<i>Initiated by (council, department, proponent)</i>	<i>Local council</i>	<i>Land owner</i>	<i>Location (greenfield or infill)</i>	<i>Previous zoning</i>	<i>New zoning</i>	<i>Area rezoned (m²)</i>	<i>Number of lots rezoned</i>	<i>Elapsed time taken from initiation of request to decision (weeks)</i>

<i>Table 7b Rezoning — [relevant capital city] planning area</i>		
<i>Rank (please complete for 3 most common)</i>	<i>Rezoned from:</i>	<i>Rezoned to:</i>
	Rural use	Housing/Residential use
	Rural use	Industrial use
	Rural use	Commercial use
	Industrial use	Housing/Residential use
	Industrial use	Commercial use
	Industrial use	A different industrial use
	Commercial use	Housing/Residential use
	Commercial use	Industrial use
	Commercial use	A different commercial use
	Housing/Residential use	Industrial use
	Housing/Residential use	Commercial use
	Housing/Residential use	A different housing/residential use

- i) Is your response an estimate or is it based on records kept?

PART 8 — Coordination across government agencies

35. Please complete tables 8, 9, 10 and 11 below. If there is more than one agency in **[relevant jurisdiction]** that is relevant to the different tables, please provide details for each within the relevant table. If there are more than four agencies, please add sufficient rows to the tables so that responses can be recorded for each.

Please use the following codes to describe the role of each agency:

A for Advisory function (statutory compulsion for the planners to at least consider the input of the agency)

C for Consulted

R for Referral agency (can refuse, can require conditions, but no 'approval' function)

DP for Decision maker under planning legislation

DO for Decision maker under other legislation — for example, environmental legislation (where the decision is related to the planning/development activity in question)

Other - Please provide details.

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Table B.2 (continued)**Table 8** *Involvement of environment agencies*

<i>Department/ agency</i>	<i>Strategic planning — capital city plan</i>	<i>Rezoning</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
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Table 9 *Involvement of heritage agencies*

<i>Department/ agency</i>	<i>Strategic planning — capital city plan</i>	<i>Rezoning</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
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Table 10 *Involvement of transport agencies*

<i>Department/ agency</i>	<i>Strategic planning — capital city plan</i>	<i>Rezoning</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
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Table 11 *Involvement of fire fighting services*

<i>Department/ agency</i>	<i>Strategic planning — capital city plan</i>	<i>Rezoning</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
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36. Is there a government body responsible for coordinating state significant planning and development matters (including infrastructure) across government? If so, please provide details of the body and its responsibilities.

PART 9 — Relationships between stakeholders

We are seeking to understand the nature and quality of engagement between key stakeholders. For the tables below we are seeking a separate response from each **[relevant state government]** agency that has significant engagement with stakeholders on planning, zoning and DA issues.

37. Are there guidelines setting out how **[relevant state government agencies]** should engage with the community on planning, zoning and DA issues? If there are, what principles underpin these guidelines? Please attach any document that states the guidelines or principles.
38. For those **[relevant state government agencies]** with significant engagement with the community on planning, zoning and DA issues, how important **[Major, Moderate, Minor or Not relevant]** are the following motivations?:
- To discover community preferences
 - To help the community understand the implications for their local area of proposed developments at a regional or metropolitan level
 - To empower the community in the decision-making process
 - To ensure community concerns are considered
 - To minimise the potential for community opposition and avoid delays
 - Other reasons (please explain)

(continued next page)

Table B.2 (continued)

39. What amount did the **[relevant jurisdiction planning departments/agencies and land development agencies]** each spend on community consultation in 2009-10? What proportion of total expenditure did this represent for each?
40. Typically, at what stage in the strategic planning process does community consultation first and last occur? At these stages in the process what form does community engagement typically take?
41. What specific actions (if any) does **[relevant state government]** take to ensure the community understands the implications of regional or metropolitan strategic plans for the community's local areas?
42. In your experience, to what extent does public consultation on the nature and content of regional or metropolitan strategic plans mitigate community opposition to development proposals at the site level?
43. What is the scope of third party appeal rights in **[relevant jurisdiction]** in 2009-10? Over the last 10 years, has **[relevant state government]** amended third party appeal rights? What was the nature and extent of the changes? Was there community consultation on these changes?
44. Are there separate guidelines setting out how **[relevant state government agencies]** should engage with the business sector on planning, zoning and DA issues? If there are, what principles underpin these guidelines? Please attach any document that states the guidelines or principles.
45. Using a separate table for each, can each **[relevant state government agency]** with significant engagement with the business sector on planning, zoning and DA issues please indicate the extent **[Strongly agree, Agree, Neither agree or disagree, Disagree or Strongly disagree]** to which it considers the following statements reflect the quality of engagement between government officials and the private sector?:
- Officials have a good understanding of the commercial realities facing the businesses they deal with
 - Officials have a good understanding of the community's actual preferences in relation to development proposals
 - Officials are outcome focussed
 - Officials genuinely try and minimise the compliance burden associated with government planning, zoning and DA regulation
 - Officials adopt a collaborative approach to problem solving
 - Officials readily share knowledge and information
 - Engagement between officials and the business sector engenders a sense of trust
 - Quality of engagement between officials and the business sector exerts a *strong* influence on your government's ability to effectively bring about change through the planning, zoning and DA system
46. Are there guidelines for how **[relevant state government agencies]** should engage with local councils on planning, zoning and DA issues? If there are, what principles underpin these guidelines? Please attach any document that states the guidelines or principles.
47. For each **[relevant state government agency]** with significant engagement with local councils on planning, zoning and DA issues, how important **[Major, Moderate, Minor or Not relevant]** are the following motivations? Please use a separate table for each agency.
- To satisfy legislative requirements concerning the state and local government engagement
 - To discover the preferences of local councils
 - To help local councils understand the implications for their local area of proposed developments at a regional or metropolitan level
 - To empower local councils in the development and implementation of regional or metropolitan plans
 - To ensure the concerns of local councils are considered
 - To fast track infrastructure of regional or metropolitan importance
 - To minimise the potential for opposition from local government and avoid delays
 - To monitor local government performance in planning, zoning and DA and ensure compliance with the state's requirements
 - Other reasons (please explain)
-

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Table B.2 (continued)

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48. For each [relevant state government agency] with significant engagement with local councils on planning, zoning and DA issues please indicate the extent [**Strongly agree, Agree, Neither agree or disagree, Disagree or Strongly disagree**] to which you feel the following statements reflect the quality of engagement between state and local government officials? Please use a separate table for each agency.
- Engagement is based on a good understanding of the challenges in the local council area
 - Engagement is based on a common view about broader regional or metropolitan planning objectives and priorities
 - Engagement is collaborative
 - Engagement is outcome focussed
 - Engagement involves the two way flow of knowledge and information
 - Engagement engenders a sense of trust
 - Engagement with local government officials exerts a *strong* influence on your government's ability to effectively bring about change at a regional or metropolitan level through the planning, zoning and DA system
-

^a Question(s) are unique to Western Australia's survey.

Survey of local councils

Local councils are integral to the planning, zoning and development assessment systems of the Australian states and as such, they also possess valuable data for benchmarking jurisdictions in these areas.² To access this data, the Commission developed a survey with input from a number of state local government associations. This initial survey was further refined in light of the results from a small round of pilot surveys completed by individual local councils. The final versions of the survey were sent to the relevant senior council personnel across 173 metropolitan and regional cities (table B.3) during the first two weeks in September 2010. Personnel were requested to respond within two weeks of receiving the survey. Once completed, the surveys were returned directly to the Commission. The first response was received on 8 September 2010. The close off-date for the draft report was 4 February 2011 with responses received after that date to be used in the final report.

² The planning functions of local councils are the responsibilities of ACT Planning and Lands Authority in the ACT and the Department of Lands and Planning in the Northern Territory. Both of the ACT Planning and Lands Authority and the Department of Lands and Planning received a similar survey to the local council survey in addition to their 'state regulator' survey. This allowed the Commission to capture comparable data across all the states and territories.

Table B.3 Local council areas surveyed

New South Wales	New South Wales (cont.)	Victoria (cont.)	Queensland (cont.)	South Australia (cont.)	Western Australia (cont.)
Sydney	Ryde	Darebin City	Logan City Council	Tea Tree Gully City	Stirling City
Ashfield	Strathfield	Frankston City	Moreton Bay Regional	Unley City	Subiaco City
Auburn	Sutherland Shire	Glen Eira City	Redland City Council	Victor Harbor	Swan City
Bankstown	Sydney	Greater Dandenong	Scenic Rim	Walkerville	Victoria Park Town
Blacktown	The Hills Shire	Hobsons Bay	Somerset	West Torrens City	Vincent Town
Blue Mountains	Warringah	Hume City	<i>Other local council areas</i>	Yankalilla	Wanneroo City
Botany Bay	Waverley	Kingston City	Gold Coast	<i>Other local council areas</i>	Mandurah
Burwood	Willoughby	Knox City	Sunshine Coast	Mount Gambier	Murray
Camden	Wollondilly	Manningham City	Toowoomba	Western Australia	<i>Other local council areas</i>
Campbelltown	Woollahra	Maribyrnong City	Cairns	<i>Perth</i>	Geraldton-Greenough
Canada Bay	Wyong	Maroondah City	Townsville	Armadale City	Tasmania
Canterbury	<i>Newcastle</i>	Melbourne City	South Australia	Bayswater City	<i>Hobart</i>
Fairfield	Newcastle City Council	Melton Shire	<i>Adelaide</i>	Belmont City	Brighton
Gosford	Lake Macquarie City Council	Monash City	Adelaide City	Cambridge Town	Clarence
Hawkesbury	Cessnock City Council	Moonee Valley City	Adelaide Hills	Canning City	Derwent Valley
Holroyd	Maitland City Council	Moreland City	Alexandrina	Claremont Town	Glenorchy
Hornsby	Port Stephens Shire Council	Mornington Peninsula	Barossa	Cockburn City	Hobart City Council
Hunter's Hill	<i>Wollongong</i>	Nillumbik Shire	Burnside City	Cottesloe Town	Kingborough
Hurstville	Wollongong City Council	Port Phillip City	Campbelltown City	East Fremantle Town	Sorell
Kogarah	Shellharbour City Council	Stonnington	Charles Sturt City	Fremantle City	<i>Launceston</i>
Ku-ring-gai	Kiama Shire Council	Whitehorse City	Gawler Town	Gosnells City	George Town

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Table B.3 (continued)

New South Wales (cont.)	New South Wales (cont.)	Victoria (cont.)	South Australia (cont.)	Western Australia (cont.)	Tasmania (cont.)
Lane Cove	<i>Other cities</i>	Whittlesea City	Holdfast Bay City	Joondalup City	Launceston City Council
Leichhardt	Albury	Wyndham City	Light	Kalamunda Shire	Northern Midlands
Liverpool	Queanbeyan	Yarra City	Mallala	Kwinana Town	West Tamar
Manly	Tweed	Yarra Ranges Shire	Marion City	Melville City	Australian Capital Territory
Marrickville	Victoria	<i>Other local council areas</i>	Mitcham City	Mosman Park Town	Australian Capital Territory
Mosman	<i>Melbourne</i>	Geelong	Mount Barker	Mundaring Shire	Northern Territory
North Sydney	Banyule City	Wodonga	Norwood, Payneham & St Peters City	Nedlands City	Northern Territory
Parramatta	Bayswater City	Queensland	Onkaparinga City	Peppermint Grove	Alice Springs
Penrith	Boroondara City	<i>Brisbane</i>	Playford City	Perth City	
Pittwater	Brimbank City	Brisbane City Council	Port Adelaide Enfield	Rockingham City	
Randwick	Cardinia Shire	Ipswich City Council	Prospect City	Serpentine-Jarrahdale	
Rockdale	Casey	Lockyer Valley	Salisbury	South Perth City	

In addition to questions about approvals activity, the survey asked a range of questions related to the factors that influence planning, zoning and DA outcomes at the local government level. The questions listed in table B.5 are a generalisation of the questions used in the actual surveys as each survey was tailored to subtleties of the state planning regime under which the local council operated.

The Commission undertook follow-up activities to ensure an adequate mix of council representation across jurisdictions and to attain acceptable response rates. The final national response rate for the local council survey was 65 per cent. Details of final response rates by jurisdiction are shown in table B.4.

Table B.4 Local council survey responses

	<i>NSW</i>	<i>Vic</i>	<i>Qld</i>	<i>WA</i>	<i>SA</i>	<i>Tas</i>	<i>ACT^a</i>	<i>NT^b</i>
Number of surveys sent	54	33	13	32	27	11	1	2
Number of completed surveys returned	38	24	11	14	16	6	1	2
Response rate (%)	70	73	85	44	59	55	100	100

^a As there are no local councils in the ACT, the survey was sent to the ACT Planning and Lands Authority whole is responsible for duties performed by local councils in other jurisdictions. ^b A survey was sent to the Department of Lands and Planning in the Northern Territory as it is responsible for duties performed by local councils in other jurisdictions.

Source: Productivity Commission surveys of local councils (2010, unpublished).

Table B.5 Planning, zoning and development assessments survey (2009-10) — local councils

PART 1 — Council Information

1. Local council name
2. State/Territory
3. How many planning instruments related to planning, zoning and development assessments did council have in 2009-10?

PART 2 — Resources

4. How many full-time equivalent staff (including permanent and casual staff) did council directly employ in planning, zoning and development assessment roles as at 30 June 2010?
5. For those staff directly employed by council with planning, zoning and development assessment responsibilities, what percentage of their time was devoted to the following activities?:
 - Strategic planning
 - General planning advice
 - Assessment of development applications
 - Post development application work
 - Enforcement
 - Administration
 - Other
6. What minimum qualifications are required before council employs staff as Strategic/Statutory Planners?:
 - Bachelor of Science/Arts (Town/Urban Planning)
 - Bachelor of Science/Arts (Other)
 - Diploma in Town Planning
 - Certificate
 - Year 12
 - Other (please specify)
7. What was the total remuneration package (\$) for the Head of Planning and for entry level planners employed by council in 2009-2010?:
 - Head of planning
 - Entry level planner
8. What was council's planning, zoning and development assessment expenditure (\$) on staff salaries, consultancies and other expenses in 2009-2010 (see definitions above)?:
 - Staff salaries
 - Consultancies
 - Legal expenses
 - Other expenses

(continued next page)

Table B.5 (continued)

9. Please indicate the extent of influence [**No impact, Minor impact, Moderate impact, Major impact**] on council's capacity to effectively manage the planning, zoning and development assessment process of each of the listed factors?:
- Incomplete/poor quality applications
 - Workload pressures
 - High staff turnover
 - Difficulty employing suitably qualified staff
 - Legislative complexity
 - Conflicting state objectives
 - Insufficient guidance
 - Delays from objections/appeals
 - Delays from consultation
 - Political interference
 - Other (please specify)
10. Please comment on any other issues relevant to resourcing? For example, have the resources devoted to planning, zoning and development assessment changed in recent years and, if so, for what reasons?

PART 3 — Activity indicators

11. What was the total number of rezonings (and, if known, a breakdown by council-initiated and proponent-initiated rezonings) in 2009-2010?:
- Council-initiated
 - Proponent-initiated
 - Total
12. For those rezonings which were finalised/gazetted in 2009-2010, what was the average time taken in whole months (and, if known, a breakdown by council-initiated and proponent-initiated rezonings) to reach finalisation/gazetted?:
- Council-initiated
 - Proponent-initiated
 - Total
13. What was the total number of development assessments (and, if known, the number of residential, commercial/business, industrial and other development assessments) determined by council in 2009-2010?:
- Residential
 - Commercial/business
 - Industrial
 - Other
 - Total
14. What was the mean gross determination time (in days) for total development assessments (and, if known, the mean gross days to determination for residential, commercial/business, industrial and other development assessments) determined by council in 2009-2010?:
- Residential
 - Commercial/business
 - Industrial
 - Other
 - Total

(continued next page)

Table B.5 (continued)

15. Did council use a track-based system (eg. complying development, prohibited, self assessable, code assessable, merit assessable, impact assessable etc) to assess development proposals in 2009-2010?
16. If yes to Question 15, please estimate the number of development proposal determinations in each category in 2009-2010:
 - Total
 - Complying development (eg. CDCs)
 - Non-complying development
 - Prohibited development
 - Self assessable
 - Code assessable
 - Merit assessable
 - Impact assessable
 - Other 1 (please specify in the text box in Q17 below)
 - Other 2 (please specify in the text box in Q17 below)
 - Other 3 (please specify in the text box in Q17 below)
 - Other 4 (please specify in the text box in Q17 below)
17. Additional information on Question 16.
18. If known, what was the total number of development proposals approved by council in 2009-2010 that have not yet proceeded beyond approval stage?
19. If known, what was the total number of development proposals approved by council in 2009-2010 that have not yet led to commencement of construction or change of use phases?
20. For how many development applications were there pre-lodgement meetings held in 2009-2010?
21. What impact [**No effect, Minor effect, Moderate effect, Major effect**] did the listed features have on expediting development assessment processes in 2009-2010?:
 - Electronic applications
 - ePlanning
 - Track-based assessment
 - Limited/prohibited third party appeals
 - Private certification
 - Appeal fees/costs
 - Other (please specify)
22. Additional comments on activity indicators.

PART 4 — Accountability and transparency

23. Were development proposal applicants able to apply for a review (other than by a court/tribunal) of a council development assessment decision in 2009-2010?
 24. If yes to Question 23, please indicate the nature of the review option (eg. S82A in NSW).
 25. If yes to Question 23, how many reviews of council development assessment decisions were held in 2009-2010?
 26. What was the total number of proponent appeals against development assessment decisions by council that were lodged with, and upheld by, the relevant appeals court/tribunal in your state/territory during 2009-2010?:
 - Appeals lodged
 - Appeals upheld
-

(continued next page)

Table B.5 (continued)

27. What was the total number of third party appeals against development assessment decisions by council that were lodged with, and upheld by, the relevant appeals court/tribunal in your state/territory during 2009-2010?:
- Appeals lodged
 - Appeals upheld
28. Please comment on the nature and extent of appeals by potential business competitors on development proposals in 2009-2010?
29. Did council have a strategy to deal with frivolous or vexatious appeals by business competitors and, if so, how in 2009-2010?
30. Which of the following practices does your council employ to facilitate accountability and transparency in the planning, zoning and development assessment system? (Please rank according to importance with 1 being the most important and so on. Equal rankings are allowed. Leave blank if practice not employed):
- Register of pecuniary interests
 - Public disclosure of donations
 - Declaration of independence
 - Whistleblowing policy
 - Public access to meetings/decisions
 - External auditing of assessment decisions
 - Non-discretionary decision-making
 - Structured supervision
 - Performance reporting
 - Other (please specify)
31. Please indicate which of the listed planning, zoning and development assessment information was available on the internet in 2009-2010?:
- Planning scheme/LEP information
 - Fees and charges
 - Infrastructure levies
 - Electronic DA application
 - DA proposals
 - DA submissions
 - DA progress
 - DA decisions
 - Other (please specify)

PART 5 — Fees and charges

32. What was the total value of development proposal assessment fees (\$) collected by council in 2009-2010?
33. What was the total value of infrastructure charges/developer contributions (\$) collected by council (on its own account) and the value provided by developers in-kind or through a transfer of land in 2009-2010?:
- Monetary payments
 - In-kind
 - Transfer of land
34. What was the total value of infrastructure charges/developer contributions (\$) collected by council on behalf of the state government and other agencies in 2009-2010? (Please provide detail on other agency collections in Question 35 below.):
- State Government
 - Other agencies
-

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Table B.5 (continued)

35. Additional detail on other agencies infrastructure charges/developer contributions from Question 34.
36. Did council provide infrastructure charge/developer contribution relief or other incentives to encourage certain developments in 2009-2010? If yes, please provide detail in the comments box below.
37. What was the extent of cost recovery (%) from total infrastructure charges/developer contributions in 2009-10?
38. What percentage of total council revenue was accounted for by infrastructure charges/developer contributions in 2009-2010?
39. For each of the following development examples, what would the total infrastructure charges/developer contributions (\$) have been in 2009-2010 for a typical location?:
 - Low density residential block
 - Retail development (up to 1,000 sqm floorspace)
 - Industrial development (up to 5,000 sqm floorspace on a 1 Hectare site)

PART 6 — Competition issues

40. Does council impose restrictions on the use of particular retail, commercial or industrial sites that are additional to state/regional planning and zoning guidelines? If yes, please provide additional information in the comment box below.
41. If yes to Question 40, do these council-imposed restrictions vary according to business size (floor area, turnover or other size aspect), business type product mix or other business characteristic? If yes, please provide additional information in the comment box below.
42. Does council consider or take account of any of the listed impacts of a rezoning or development proposal on competition?:
 - Costs and benefits to existing businesses
 - Impact on viability of town centre
 - Transport impacts & infrastructure capacity
 - Community and lifestyle impacts
 - Other (please specify)
43. Does council implement an Activity Centres policy approach to the assessment of retail and commercial development proposals?
44. If yes to Question 43, how many development applications for retail, commercial and industrial developments within and outside activity centres were refused on the basis of being inconsistent with the Activity Centres policy in 2009-2010?:
 - Inside activity centre
 - Outside activity centre

PART 7 — Consultation and coordination

45. Does council have a formal community consultation strategy?
 46. How important to council are the following reasons for engaging with the community on planning, zoning and development assessment issues?:
 - To discover community preferences
 - To keep the community informed about developments in their local area
 - To empower the community in the decision-making process
 - To ensure community concerns are considered
 - To minimise the potential for community opposition and avoid delays
 - Other (please specify)
-

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Table B.5 (continued)

47. Typically, at what stage in the planning, zoning and development assessment process does community consultation first occur? (Please select one.):
- During the development of council's strategic plan
 - During the development of individual neighbourhood plans
 - When re-zoning is being considered
 - When a development application is being assessed
48. In 2009-10, which of the following forms of community engagement did your council use in relation to small and large scale development proposals. Please also indicate if you regard these as an effective way of engaging with the community.
- Advertising in the local newspaper
 - Letter box drops
 - Erecting signage at the site
 - Contacting local community groups that are likely to have an interest in the development
 - Posting information on the council's website
 - Setting up a dedicated shopfront
 - Holding community information forums
 - Other (please specify)
49. In 2009-10, which of the following practices did your council use to assist the community understand the nature, scale and implications of small and large scale development proposals. Please also indicate if you regard these as an effective way of helping the community understand the implications of development proposals.:
- The council providing a 'plain' English' description of the nature and scale of the proposed development in information provided directly to the council's website or in letters sent to residents) public (e.g. posted on the council's website or in letters sent to residents)
 - Requiring developers to provide a 'plain English' description of the nature and scale of the proposed development to those in the community who are directly affected by it
 - The council responding in writing to questions received from the community
 - Allowing the community to access plans of the proposed development on request
 - Displaying plans of the proposed development
 - Displaying plans and an artist's impression of the proposed development
 - Displaying a model of the proposed development
 - Presentations by council officials at community information forums
 - Other (please specify)
50. What percentage of the council's planning, zoning and DA assessment expenditure was spent on community consultation/engagement in 2009-10?
- Less than 1 per cent
 - 2-5 per cent
 - 6-10 per cent
 - more than 10 per cent
-

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Table B.5 (continued)

51. Please indicate the extent to which you feel the following statements reflect the engagement between officials from your council and state government officials.:
- Engagement is based on a good understanding of the challenges facing your local area
 - Engagement is based on a common view about broader regional or metropolitan planning objectives and priorities
 - Engagement is collaborative
 - Engagement is outcome focussed
 - Engagement involves the two way flow of knowledge and information
 - Engagement engenders a sense of trust
 - Engagement exerts a strong influence on your council's ability to effectively manage the planning, zoning and permit assessment process

PART 8 — Council priorities

52. Please comment on council's priorities for local development (eg. environmentally sustainable development, urban consolidation, employment generation, creating liveable communities etc).
53. Of the following list of challenges, what are the five highest and lowest priorities in your local council area:
- Maintaining the viability of local retail and commercial centres
 - Integrating new medium or high density housing developments into existing suburbs
 - Addressing regional or metropolitan level development challenges (such as gaps in essential regional or metropolitan transport links)
 - Promoting healthy lifestyles
 - Enhancing economic and social integration with neighbouring local council areas
 - Maintaining existing parks, gardens and green spaces
 - Re-developing unused industrial, retail or commercial sites
 - Reducing traffic congestion
 - Promoting water conservation and/or recycling
 - Addressing problems of crime and violence
 - Protecting local business
 - Providing new economic and social infrastructure
 - Accommodating population growth
 - Ensuring efficient waste management and/or recycling
 - Adapting to climate change
 - Providing more and for different local government services as a result of changing demographics
 - Improving the accessibility of local government services for an ageing population
 - Maintaining existing roads and water and sewerage infrastructure
 - Providing affordable housing
 - Improving the aesthetics of local retail and commercial centres
 - Providing the amenities and infrastructure needed to support-a growing tourism industry
 - Protecting biodiversity
 - Providing diverse and appropriate housing
 - Providing new parks, gardens and green space
 - Redeveloping land along key transport corridors
 - Fostering a stronger sense of community
 - Attracting new businesses

PART 9 — Contact details

54. Please provide the details of a person who can be contacted to seek clarification on the information provided in this survey:
- Name
 - Phone number
 - Email address

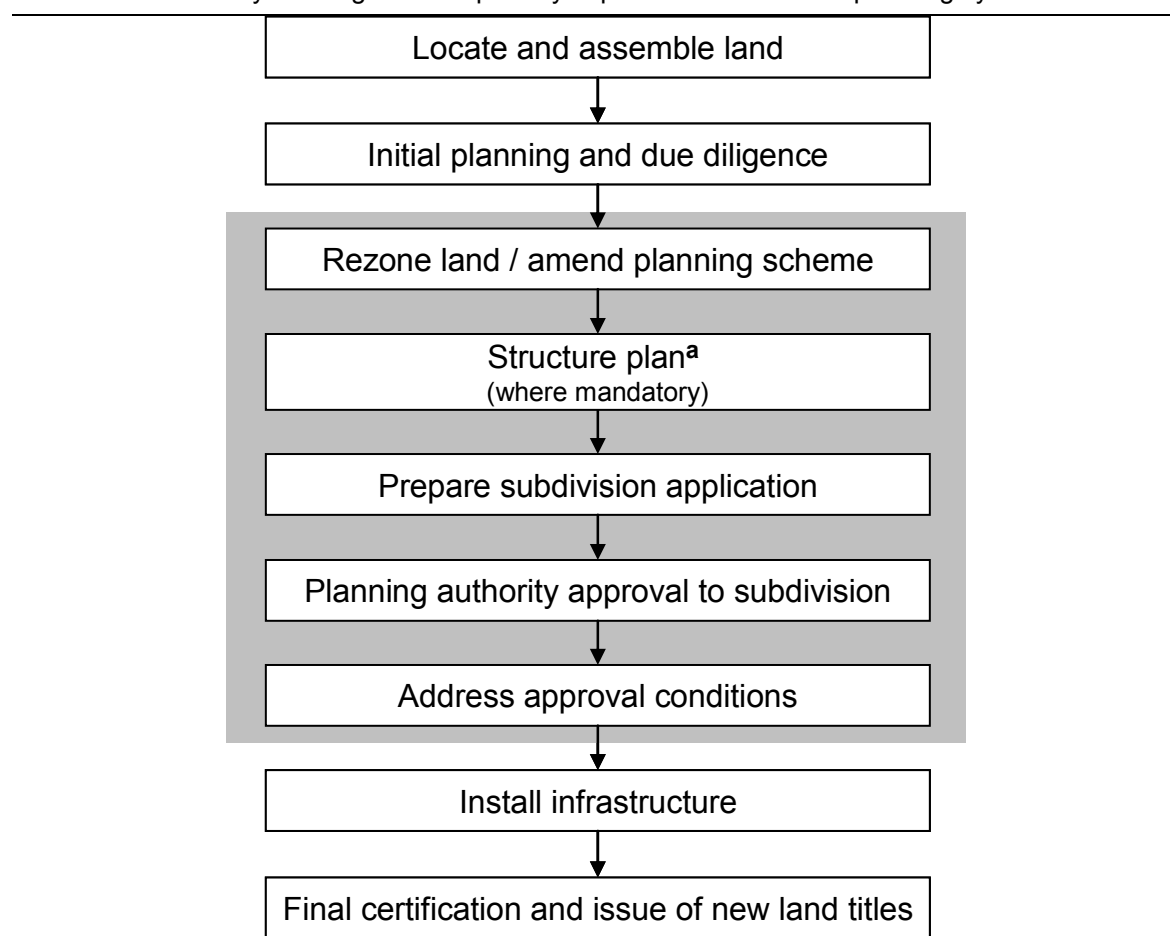
Survey of ‘greenfield developers’

Developers in greenfield areas are users of the planning, zoning and development assessment systems of the jurisdictions and so have valuable insights into how these systems work in practice and how they affect land supply processes. In consultation with peak bodies from the property development industry, the Commission developed a survey of greenfield developers to gain access to some of these insights.

The Commission developed the framework in figure B.1 to underpin the survey as well as provide the basis for its analysis of the land supply process. The Commission arrived at this framework after considering how the jurisdictions characterise the land supply process in their land management/supply programs, as well as how it was characterised by the National Housing Supply Council (NHSC 2010) and Urbis (2010), and after consulting with developers.

Figure B.1 Stylised land supply process

Grey shading denotes primary impact and influence of planning systems



^a For simplification, includes the step of master planning which applies in SEQ.

The Commission sought information from developers on all aspects of figure B.1, except for the structure planning process and the process of final certification and issue of new titles — the former being predominantly undertaken by planning authorities rather than developers and the latter primarily involving interactions with land titles offices/land registries rather than the planning system. The questions used in the survey are listed in table B.6. In answering these questions, developers were asked to provide information on individual projects completed since 1 July 2008, as well as any current projects – those projects could be residential, commercial or industrial in nature. Respondents were free to provide the details of multiple developments in their responses.

Table B.6 Planning, zoning and development assessments survey (2009-10) — private sector greenfield developers

-
1. Local council area
 2. Approval authority
 3. State/Territory
 4. Brief description of development (including: value of land; size of land (ha); number of lots to be produced and nature of land use (housing, commercial or industrial))
 - 5a. Please advise the elapsed time taken (in weeks) to:
 - Locate a suitable site and, if necessary, assemble land
 - Complete initial planning and due diligence
 - Have site rezoned, if necessary
 - Prepare subdivision application (including having studies prepared, etc)
 - Have subdivision application approved
 - Meet any approval conditions
 - Install the requisite infrastructure
 - 5b. Total time (*provide 'na' response if any step was not necessary*)
 6. Number of objections to subdivision application (if known)
 - 7a. Number of conditions on approval
 - 7b. Matters covered in conditions (for example, environmental considerations, construction requirements, access requirements)
 - 8a. Types of studies required for application (economic impact, environmental impact, traffic studies, etc)
 - 8b. Cost of each study (\$)
 9. Estimate of staff costs incurred in preparing and lodging application and responding to council inquiries (\$)
 10. Estimate of other resource costs (including consultants, but excluding the cost of studies above) incurred in preparing and lodging application and responding to council inquiries (\$)
 11. Local council DA fees and charges (for the subdivision) (\$)
 12. Local council infrastructure charges (\$)
 13. State infrastructure charges (\$)
 14. Details of any 'payments or works in kind' required under the DA such as infrastructure and community facilities (including equivalent dollar cost, if known)
-

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Table B.6 (continued)

- 15a. Was approval for the project required under the *Environment Protection and Biodiversity Conservation Act 1999* (Cwlth)? If so, please advise the elapsed time (in weeks) from making the referral to receiving the decision
- 15b. If land offsets were required as part of the approval, please advise the area of offset land required and the cost of that land
- 16a. Was approval for the project required under state/territory environment laws? If so, please advise the elapsed time (in weeks) from making the referral to receiving the decision
- 16b. If land offsets were required as part of the approval, please advise the area of offset land required and the cost of that land
- 16c. If both EPBC and state/territory environmental approvals were required, did they proceed through the same assessment process?
- Only complete the following questions if you subsequently undertook the construction of a building (or buildings) on the land**
17. If you also constructed dwellings/offices/warehouses on the developed land what was the elapsed time in weeks for obtaining development approval from council for that construction?
18. What was the amount of council fees associated with obtaining that approval?

The survey was sent to over 25 developers recommended by the peak bodies over a period of two weeks from 21 September 2010. Each developer was contacted by telephone and surveys were only sent to those who agreed to participate in the survey. Survey recipients were requested to return their responses by 5 November 2010 and non-respondents were followed up by the Commission one week before the surveys were due to be returned.³ In total, surveys were returned by 16 developers who provided information on 29 individual development projects (table B.7).

Table B.7 Summary, greenfield developer questionnaire responses

	Syd/ NSW	Mel/ Vic	Qld/ SEQ	Adel/ SA	Per/ WA	Hob/ Tas	Dar/ NT	Can/ ACT
Number of developers responding	2	2	5	4	3	nil	nil	nil
Number of projects covered by all responses	2	6	10	5	6	nil	nil	nil
Number of responses including data on capital cities	2	6	4	4	4	nil	nil	nil
Smallest project for which data was provided (number of lots) ^a	> 1000	> 1 000	100-200	< 50	100-200	n.a	n.a	n.a
Largest project for which data was provided (number of lots) ^a	> 1 000	> 1 000	>1 000	> 1 000	>1 000	n.a	n.a	n.a

n.a not applicable. ^a All projects were primarily residential in nature, although some included a commercial component. Number of lots relate to the number of residential lots and have been 'broad banded' to protect the anonymity of respondents.

Source: Productivity Commission survey of greenfield developers (2010, unpublished).

³ The majority of developers returned their surveys within four weeks of receipt and all but three responses were received by 5 November.

How the survey data was used

The survey responses from developers were primarily used to generate estimated time frames for the completion of land subdivision projects listed in table 4.12 of chapter 4.⁴ While some developers responding to the survey did not provide time estimates for different steps in the land supply process (figure B.1), they were able to provide information on the source of delays for their projects. Table 4.13 in chapter 4 summarises the source of the delays and extended timeframes experienced in the land supply processes of the jurisdictions. Finally, data on the costs associated with environment studies and flora and fauna assessments necessary for a referral under the *Environment Protection and Biodiversity Conservation Act 1999* (Cwlth) (EPBC Act) are reported in chapter 13.

Developer surveys were also used to provide real world examples of the direct costs associated with applying for development approval for different types of projects. These costs included application fees, requisite consulting studies, infrastructure charges and staff costs involved in preparing development applications.

Survey of retailers

Retailers have knowledge of the impacts on planning systems on matters such as the availability of retail floor space and their ability to progress retail developments through the planning systems (including any factors that contribute to delays in that process), as well as the costs they incur in progressing such developments through the planning system. In consultation with retailers, the Commission developed a survey that drew together the available information that would be useful to this study — the survey questions are reflected in table B.8. The survey was focused on obtaining details of individual development projects completed by the retailers (for example, developments to construct new stores).

The survey was provided to a small number of retailers between August to October 2010. Retailers were encouraged to provide responses on as many projects as they could. While only two retailers provided responses, those responses included details of 20 individual projects. Retailer surveys were used to provide real world examples of the direct costs associated with applying for development approval for different types of projects. These costs included application fees, requisite consulting studies, infrastructure charges and staff costs involved in preparing development applications.

⁴ As part of the survey of state and territory planning departments and agencies, information was sought on the timeframes for approving rezonings and subdivision applications. The information was used to supplement and validate the corresponding data obtained from the greenfield developers survey.

**Table B.8 Planning, zoning and development assessments survey
(2009-10) — retailers**

Details on individual development projects

1. Local council name
 2. State/Territory
 3. Brief description of development (including: value of land; size of land (m²); and value of buildings)
 4. Nature of application (Combined development application and rezoning, development application or other — please provide details)
 5. Date application lodged
 6. Date decision(s) received (please provide separately for rezoning and development approval if they were received on different dates)
 7. No. of objections to application (if known)
 8. Decision (approved/refused)
 - 9a. Number of conditions on approval
 - 9b. Matters covered in conditions (for example, environmental considerations, construction requirements, access requirements)
 - 10a. Types of studies required for application (economic impact, environmental impact, traffic studies, etc)
 - 10b. Cost of each study (\$)
 11. Estimate of staff and resource costs incurred in preparing and lodging application and responding to council inquiries (\$)
 12. Local council DA charges (\$)
 13. Local council infrastructure charges (\$)
 14. State infrastructure charges (\$)
 15. Details of any 'payments or works in kind' required under DA such as infrastructure and community facilities (including equivalent dollar cost, if known)
-

C Indicators of the functioning of cities

Box C.1 Measuring population density

Measures of population density differ according to how the urban area is defined. Demographia (2010) uses maps and satellite photographs to estimate land area and defines an urban area as a continuously built up land mass or the lighted footprint that can be seen from an aeroplane at night. Density based on satellite photography may produce higher urban densities than other methods. For example, national census approaches may include some land in rural fringe areas.

In Australia, the ABS measures density according to Statistical Local Areas (SLAs) which are defined in the ABS Australian Standard Geographical Classification. However, for this study the Commission chose to measure density by Local Government Area (LGA), using ABS data. The LGAs included in each city are consistent with the areas defined in each capital city's strategic plan (except for Darwin and Hobart which do not have spatial strategic plans). The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However, when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. The note at the bottom of the table details the exact differences between the SLA and LGA data. All three measures produce significantly different results. For example, population density in Adelaide is measured as 1400 people per square kilometre, 650 people per square kilometre and 146 people per square kilometre depending on how the area is defined.

Differences in the measurement of urban density, people per km²

<i>City</i>	<i>Demographia</i>	<i>ABS SLA estimates</i>	<i>LGA based estimates^a</i>
Sydney	2000	371	371
Melbourne	1600	519	453
Brisbane	900	337	118
Adelaide	1400	650	146
Perth	1200	308	238
Hobart	1000	156	36
Darwin	900	40	40
Canberra	1100	436	na

^a Areas included in the LGA data and excluded in the SLA data are Yarra Ranges part B, in Melbourne; Scenic Rim, Lockyer Valley and Somerset in Brisbane; Adelaide Hills North and balance, Alexandrina, Barossa, Light, Mallala, Mount Barker, Victor Harbor and Yankalilla in Adelaide; Mundurah and Murray in Perth; Derwent Valley part B, Kingborough part B and Sorell part B in Hobart. In Darwin the SLA data includes East Arm but it is excluded in the LGA data. In Canberra there are no local government areas, in Sydney SLA and LGA area are equal.

Sources: Demographia World Urban Areas and Population Projections, <http://www.demographia.com/db-worldua.pdf>; SLA data from ABS 2010a, and converted to LGA based estimates using the ABS SLA to LGA concordance (catalogue 1216.0).

Table C.1 Population density by LGA, cities in NSW and the ACT

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)^a</i>	<i>Density 2009</i>
Sydney					
Waverley	9	63 241	68 316	8	7 389
Sydney City	27	129 696	177 920	37	6 658
North Sydney	11	58 713	63 914	9	6 086
Leichhardt	11	50 456	54 525	8	5 167
Ashfield	8	40 521	42 541	5	5 134
Marrickville	17	76 743	78 271	2	4 736
Burwood	7	30 580	33 678	10	4 724
Woollahra	12	53 002	55 228	4	4 498
Canterbury	34	137 492	143 111	4	4 263
Canada Bay	20	62 322	75 999	22	3 819
Kogarah	16	52 463	58 137	11	3 738
Randwick	36	125 223	131 714	5	3 624
Rockdale	28	92 676	102 211	10	3 621
Hurstville	23	74 088	79 648	8	3 505
Mosman	9	27 851	28 767	3	3 325
Lane Cove	10	32 086	32 501	1	3 099
Willoughby	23	61 795	69 269	12	3 077
Manly	14	38 665	40 939	6	2 851
Parramatta	61	147 882	167 431	13	2 728
Strathfield	14	29 433	36 489	24	2 624
Ryde	40	99 151	104 955	6	2 592
Hunters Hill	6	13 382	14 467	8	2 535
Holroyd	40	89 236	100 122	12	2 491
Bankstown	77	171 994	186 108	8	2 423
Auburn	32	58 678	76 519	30	2 355
Fairfield	102	189 034	194 543	3	1 916
Botany Bay	22	37 193	39 664	7	1 828
Ku-ring-gai	85	107 655	111 400	3	1 304
Blacktown	240	264 799	299 797	13	1 249
Warringah	149	136 175	144 092	6	965
Sutherland Shire	334	213 828	219 828	3	659
Pittwater	90	56 390	58 818	4	651
Liverpool	306	159 046	182 261	15	597
Campbelltown	312	150 154	152 107	1	487
Penrith	405	177 413	184 611	4	456
The Hills Shire	401	146 045	176 487	21	441
Hornsby	462	153 200	162 216	6	351
Camden	201	45 454	55 243	22	274
Wyong	740	135 498	149 382	10	202
Gosford	940	160 760	166 626	4	177
Blue Mountains	1 432	77 021	77 784	1	54
Hawkesbury	2 776	62 814	63 552	1	23
Wollondilly	2 557	38 424	43 278	13	17
Sydney total	12 138	4 128 272	4 504 469	9	371
Sydney median	36	76 743	78 271	8	2 535

Continued

Table C.1 continued

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)^a</i>	<i>Density 2009</i>
Newcastle					
Newcastle City	187	142 101	154 777	9	828
Lake Macquarie	648	187 803	199 277	6	307
Maitland	392	56 492	69 154	22	177
Port Stephens	859	58 965	66 754	13	78
Cessnock	1 966	47 188	50 834	8	26
Newcastle total	4 052	492 549	540 796	10	133
Wollongong					
Shellharbour	147	59 862	66 905	12	454
Wollongong City	684	189 776	201 438	6	294
Kiama	258	19 959	20 641	3	80
Wollongong total	1 089	271 598	288 984	6	265
Other cities					
Queanbeyan	172	33 765	40 661	20	236
Albury	306	45 621	50 522	11	165
Tweed	1 309	74 577	88 993	19	68
ACT					
Canberra	808	318 939	351 868	10	436

^a For inner city LGAs there would not have been any vacant land built on between 2001 and 2009 and so the population increase can be taken as a reliable measure of the increase in population density.

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.2 Population density by LGA, cities in Victoria

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)</i>	<i>Density 2009</i>
Melbourne					
Port Phillip	21	80 552	96 110	19	4 645
Yarra	20	68 947	78 041	13	3 996
Stonnington	26	89 978	99 110	10	3 866
Glen Eira	39	123 105	136 354	11	3 526
Moreland	51	136 381	149 122	9	2 929
Boroondara	60	157 214	168 090	7	2 795
Darebin	53	127 855	139 608	9	2 612
Bayside	37	88 808	96 329	8	2 606
Moonee Valley	43	105 442	111 268	6	2 580
Melbourne City	37	55 742	93 105	67	2 494
Whitehorse	64	147 085	155 725	6	2 424
Maribyrnong	31	61 226	71 523	17	2 292
Monash	81	163 141	176 069	8	2 162
Banyule	63	118 696	123 521	4	1 976
Maroondah	61	100 279	106 224	6	1 731
Kingston	91	133 887	147 214	10	1 612
Brimbank	123	168 247	185 890	10	1 507
Knox	114	147 433	155 969	6	1 371
Hobsons Bay	64	83 367	87 486	5	1 362
Greater Dandenong	130	128 516	137 600	7	1 062
Manningham	113	113 893	118 544	4	1 046
Frankston	130	114 008	128 576	13	993
Casey	409	181 562	247 357	36	605
Hume	504	135 986	167 540	23	333
Whittlesea	489	118 118	146 132	24	299
Wyndham	542	87 141	143 879	65	266
Mornington Peninsula	723	132 387	148 394	12	205
Melton	527	52 830	100 000	89	190
Nillumbik	432	60 818	63 827	5	148
Yarra Ranges	2 464	142 553	148 912	4	60
Cardinia	1 281	47 010	68 641	46	54
Melbourne total	8 824	3 472 207	3 996 160	15	453
Melbourne median	81	118 118	136 354	10	1 612
Other cities					
Geelong	1 247	194 478	216 330	11	173
Wodonga	433	32 456	35 733	10	83

^a For inner city LGAs there would not have been any vacant land built on between 2001 and 2009 and so the population increase can be taken as a reliable measure of the increase in population density.

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.3 Population density by LGA, cities in Queensland

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)</i>	<i>Density 2009</i>
Brisbane					
Brisbane City	1 326	896 649	1 052 458	17	794
Logan	960	237 236	277 568	17	289
Redland	537	117 252	140 691	20	262
Moreton Bay	2 037	286 532	371 162	30	182
Ipswich	1 090	125 451	162 383	29	149
Lockyer Valley	2 272	28 668	35 633	24	16
Scenic Rim	4 254	30 464	37 419	23	9
Somerset	5 383	18 085	21 608	19	4
Brisbane total	17 859	1 740 337	2 098 922	21	118
Brisbane median	1 681	121 352	151 537	21	166
Other cities					
Gold Coast	1 334	387 102	515 157	33	386
Sunshine Coast	3 126	247 167	323 423	31	103
Townsville	3 739	144 789	181 743	26	49
Cairns	4 129	128 095	164 356	28	40
Toowoomba	12 973	137 593	159 098	16	12

^a For inner city LGAs there would not have been any vacant land built on between 2001 and 2009 and so the population increase can be taken as a reliable measure of the increase in population density.

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.4 Population density by LGA, cities in Western Australia

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)</i>	<i>Density 2009</i>
Vincent	11	27 009	30 870	14	2 711
Subiaco	7	15 605	18 625	19	2 668
East Fremantle	3	6 772	7 448	10	2 371
South Perth	20	37 521	43 776	17	2 208
Mosman Park	4	8 339	9 392	13	2 159
Cottesloe	4	7 411	8 152	10	2 113
Claremont	5	9 145	9 822	7	1 981
Melville	53	96 982	101 052	4	1 911
Stirling	105	175 808	198 803	13	1 897
Bayswater	33	56 824	61 264	8	1 868
Victoria Park	18	27 688	32 256	16	1 798
Joondalup	99	156 056	162 195	4	1 638
Peppermint Grove	1	1 649	1 741	6	1 630
Fremantle	19	25 710	28 105	9	1 477
Perth City	12	7 688	17 093	122	1 421
Canning	65	77 298	87 562	13	1 348
Cambridge	22	24 445	26 622	9	1 210
Nedlands	20	21 558	22 404	4	1 122
Belmont	40	29 851	34 466	15	868
Gosnells	127	83 474	104 022	25	817
Cockburn	168	69 202	88 702	28	528
Mandurah	174	48 877	68 269	40	392
Rockingham	257	74 018	100 231	35	390
Kwinana	120	21 757	28 044	29	234
Wanneroo	686	84 132	144 148	71	210
Kalamunda	324	48 632	54 729	13	169
Swan	1 044	85 094	110 051	29	105
Armadale	560	52 273	58 153	11	104
Mundaring	644	35 334	38 264	8	59
Serpentine-Jarrahdale	905	11 704	16 492	41	18
Murray	1 711	10 875	14 763	36	9
Perth total	7261	1 438 731	1 727 516	20	238
Perth median	53	29 851	34 466	14	1348
Other cities					
Geraldton-Greenough	1781	32 764	37 895	16	21

^a For inner city LGAs there would not have been any vacant land built on between 2001 and 2009 and so the population increase can be taken as a reliable measure of the increase in population density.

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.5 Population density by LGA, cities in South Australia

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)^a</i>	<i>Density 2009</i>
Unley	14	36620	38465	5	2 695
Prospect	8	19219	20910	9	2 683
Holdfast Bay	14	33689	35683	6	2 595
Norwood Payneham St Peters	15	33745	36128	7	2 392
Walkerville	4	7036	7338	4	2 078
Campbelltown	24	46819	49281	5	2 023
Charles Sturt	55	103505	106995	3	1 953
Burnside	28	42653	44300	4	1 610
Marion	56	79055	84142	6	1 512
West Torrens	37	52364	55620	6	1 501
Adelaide City	16	13289	19444	46	1 249
Port Adelaide Enfield	92	101972	111455	9	1 215
Tea Tree Gully	95	99710	100155	0	1 052
Mitcham	76	62379	65315	5	865
Salisbury	158	114524	130022	14	823
Gawler	41	18345	20730	13	504
Onkaparinga	518	151010	160404	6	310
Playford	345	68653	77469	13	225
Mount Barker	595	23804	29864	25	50
Adelaide Hills	794	38777	39852	3	50
Victor Harbour	385	11108	13608	23	35
Barossa	894	19497	22514	15	25
Alexandria	1 827	18166	23160	27	13
Light	1 277	10542	13658	30	11
Mallala	933	7392	8385	13	9
Yankalilla	751	3848	4577	19	6
Adelaide total	9050	1217721	1319474	8	146
Adelaide median	84	35 183	37 297	8	958
Other cities					
Mount Gambier	27	23 503	25 216	7	942

^a For inner city LGAs there would not have been any vacant land built on between 2001 and 2009 and so the population increase can be taken as a reliable measure of the increase in population density.

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.6 Population density by LGA, cities in Tasmania

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)</i>	<i>Density 2009</i>
Hobart					
Hobart City	78	47 446	49 887	5	641
Glenorchy	121	44 003	44 628	1	369
Clarence	377	49 594	52 140	5	138
Brighton	171	12 915	15 807	22	93
Kingborough	719	29 379	33 464	14	47
Sorell	583	11 004	13 127	19	23
Derwent Valley	4 102	9 373	10 036	7	2
Hobart total	6 150	203 714	219 089	8	36
Launceston					
Launceston City	1 412	62 335	65 548	5	46
West Tamar	690	20 290	22 223	10	32
Georgetown	653	6 491	6 830	5	10
Northern Midlands	5 129	11 926	12 602	6	2
Launceston total	7 883	101 042	107 203	6	14

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.7 Population density by LGA, cities in the Northern Territory

	<i>Area (km²)</i>	<i>Population 2001</i>	<i>Population 2009</i>	<i>Population Change (%)</i>	<i>Density 2009</i>
Darwin					
Darwin City	112	68 710	75 908	10	677
Palmerston	53	22 120	29 346	33	555
Litchfield	2 914	15 573	18 847	21	6
Darwin total	3 079	106 403	124 101	17	40
Other cities					
Alice Springs	328	26 520	27 877	5	85

Source: Population from ABS 2010a and area, unpublished data provided by the ABS.

Table C.8 Median house prices by LGA, 2001, 2006 and 2010^{a,b}
Cities in NSW and the ACT

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Sydney						
Lane Cove	610	950	1 310	38	115	282
Waverley	701	1 079	1 505	40	115	459
Burwood	425	606	850	40	100	349
Manly	675	1 080	1 350	25	100	531
Hunter's Hill	773	1 215	1 533	26	98	128
Ryde	440	640	865	35	97	989
North Sydney	725	1 050	1 425	36	97	480
Canada Bay	529	770	1 035	34	96	627
Strathfield	635	935	1 238	32	95	240
Marrickville	388	555	755	36	95	892
Randwick	645	927	1 237	33	92	949
Leichhardt	497	695	935	34	88	905
Willoughby	708	1 017	1 325	30	87	483
Sydney City	450	600	840	40	87	825
Canterbury	335	480	625	30	87	1 100
Camden	231	376	430	15	87	934
The Hills Shire	360	535	660	23	83	2 404
Ashfield	480	675	874	29	82	214
Kogarah	465	669	845	26	82	320
Hurstville	390	555	703	27	80	964
Wyong	183	309	327	6	79	2 405
Rockdale	415	563	740	31	78	849
Warringah	509	745	906	22	78	1 332
Pittwater	561	875	995	14	77	921
Woollahra	1 100	1 600	1 948	22	77	724
Ku-ring-gai	650	920	1 150	25	77	1 597
Campbelltown	185	300	327	9	77	1 603
Parramatta	305	435	535	23	75	1 036
Fairfield	233	350	407	16	75	1 546
Blacktown	215	340	375	10	74	3 156
Hornsby	420	580	728	25	73	1 453
Liverpool	246	380	425	12	73	2 015
Penrith	210	328	360	10	71	1 964
Sutherland Shire	420	589	720	22	71	2 229
Botany Bay	440	589	750	27	70	221
Holroyd	270	392	460	17	70	1 221
Bankstown	295	430	500	16	69	1 720
Wollondilly	195	317	330	4	69	274
Hawkesbury	220	330	370	12	68	609
Gosford	250	390	420	8	68	2 490
Blue Mountains	223	338	370	9	66	1 259
Mosman	1 270	1 900	2 088	10	64	293
Auburn	315	451	499	11	59	588
Sydney total	315	485	590	22	88	45 580

(continued)

Table C.8 continued

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Newcastle						
Cessnock	119	269	337	26	183	1 011
Maitland	85	200	233	16	174	617
Newcastle City	160	315	385	22	141	2 348
Port Stephens	165	318	370	17	124	2 395
Lake Macquarie	166	338	359	6	116	1 047
Newcastle total	150	300	355	18	137	7 418
Wollongong						
Shellharbour	175	335	373	11	113	831
Wollongong City	212	375	430	15	103	1 943
Kiama	289	480	535	11	85	308
Wollongong total	208	370	422	14	103	3 082
Other cities						
Queanbeyan	160	329	459	40	187	281
Tweed	174	381	470	23	170	781
Albury	118	248	268	8	128	598
ACT						
Canberra	208	395	545	38	162	3 881

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.9 Median house prices by LGA, 2001, 2006 and 2010^{a,b}
Cities in Victoria

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Melbourne						
Greater Dandenong	149	263	425	62	186	1 418
Monash	258	411	700	70	171	1 667
Boroondara	465	750	1 255	67	170	1 829
Whitehorse	265	419	705	68	166	1 823
Maroondah	195	328	515	57	164	1 127
Maribyrnong	214	335	565	69	164	884
Knox	185	308	470	52	154	1 823
Glen Eira	350	555	885	59	153	1 249
Mornington Peninsula	183	335	460	37	151	3 925
Frankston	148	255	369	45	149	2 082
Kingston	245	390	610	56	149	1 473
Stonnington	525	810	1 290	59	146	928
Darebin	248	380	608	60	145	1 310
Yarra Ranges	168	285	408	43	143	2 205
Bayside	498	776	1 200	55	141	1 146
Moreland	240	357	576	61	140	1 576
Hobsons Bay	218	332	515	55	137	1 144
Banyule	241	370	570	54	137	1 226
Melbourne City	380	553	893	62	135	189
Brimbank	165	255	388	52	135	3 109
Manningham	320	472	750	59	134	1 301
Yarra	350	507	819	61	134	866
Moonee Valley	290	430	677	57	133	1 500
Wyndham	145	252	338	34	133	2 832
Casey	157	260	365	40	132	4 093
Port Phillip	472	660	1 076	63	128	714
Cardinia	150	260	340	31	127	1 314
Melton	117	194	264	36	126	987
Hume	160	250	360	44	125	2 328
Whittlesea	182	282	400	42	119	2 308
Nillumbik	272	400	564	41	107	567
Melbourne total	215	340	485	43	126	50 943
Other cities						
Geelong	140	260	335	29	139	3 614
Wodonga	128	255	269	5	110	499

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.10 Median house prices by LGA, 2001, 2006 and 2010^{a,b}
Cities in Queensland

	<i>Median house prices</i>					<i>Sales</i>
	<i>2001 (\$'000)</i>	<i>2006 (\$'000)</i>	<i>2010 (\$'000)</i>	<i>Change (%) 2006 to 2010</i>	<i>Change (%) 2001 to 2010</i>	<i>2010 (no.)</i>
Brisbane						
Ipswich	85	237	322	36	279	2 316
Lockyer Valley	86	220	315	43	267	381
Somerset	115	275	375	36	226	607
Logan	117	265	374	41	219	3 014
Scenic Rim	143	340	440	29	209	1 075
Moreton Bay	136	309	420	36	209	5 870
Brisbane City	185	380	540	42	192	13 980
Redland	168	360	477	33	184	2 327
Brisbane total	156	330	460	39	195	29 570
Other cities						
Townsville	132	280	383	37	190	2 561
Sunshine Coast	175	400	489	22	179	4 599
Toowoomba	116	248	309	25	166	2 617
Cairns	146	309	375	21	157	2 028
Gold Coast	208	425	525	24	152	5 563

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.11 Median house prices by LGA, 2001, 2006 and 2010^{a,b}

Cities in Western Australia

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Perth						
Peppermint Grove	1 003	3 050	4 838	59	382	24
Kwinana	77	275	330	20	327	375
Murray	103	280	395	41	285	115
Wanneroo	118	340	450	32	281	2 416
Armadale	96	285	355	25	270	850
Victoria Park	193	460	670	46	247	203
Rockingham	115	338	395	17	243	1 584
Nedlands	600	1 545	2 050	33	242	167
Serpentine-Jarrahdale	125	240	427	78	242	176
Canning	150	385	505	31	237	1 461
Gosnells	110	297	370	25	236	963
Swan	125	328	413	26	230	1 155
Mundaring	172	420	555	32	223	299
Subiaco	387	895	1 245	39	221	155
Bayswater	170	412	540	31	218	570
Stirling	226	537	715	33	216	1 809
Cockburn	155	380	488	28	215	1 355
Mandurah	127	365	395	8	211	832
South Perth	300	720	930	29	210	357
Mosman Park	470	1 350	1 450	7	209	74
Belmont	154	360	473	31	207	457
Kalamunda	151	362	460	27	205	755
Cambridge	395	930	1 190	28	201	343
Joondalup	185	430	555	29	200	2 148
Cottesloe	685	1 795	2 025	13	196	108
Vincent	280	616	805	31	188	284
Melville	273	595	770	29	182	799
East Fremantle	374	950	1 050	11	181	57
Fremantle	290	628	810	29	179	165
Claremont	523	1 200	1 420	18	172	174
Perth City	415	720	720	0	73	34
Perth total	155	378	495	31	220	20 264
Other cities						
Geraldton-Greenough	113	254	410	61	262	437

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.12 Median house prices by LGA, 2001, 2006 and 2010^{a,b}
 Cities in South Australia

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Adelaide						
Playford	85	179	258	111	204	1 272
Port Adelaide Enfield	127	265	380	109	199	1 766
Salisbury	105	215	305	105	190	2 163
Marion	148	290	420	96	184	1 232
Mallala	86	189	240	119	179	58
Light	95	211	264	122	178	131
Alexandrina	119	264	329	123	178	533
Onkaparinga	119	235	330	97	177	2 882
Yankalilla	116	256	320	121	177	142
Campbelltown	167	335	460	101	175	802
Adelaide Hills	180	360	489	100	171	528
Prospect	199	340	540	71	171	303
Unley	265	486	718	83	171	405
Norwood Payneham						
St Peters	240	425	645	77	169	360
Mount Barker	142	270	380	90	168	550
West Torrens	180	334	475	86	164	510
Charles Sturt	175	325	460	86	163	1 378
Holdfast Bay	210	372	550	77	162	686
Gawler	125	240	327	92	162	438
Walkerville	310	555	798	79	157	114
Mitcham	200	360	500	80	150	974
Burnside	301	555	750	84	149	605
Barossa	127	258	315	103	148	335
Tea Tree Gully	145	265	355	83	145	1 412
Victor Harbor	143	300	345	109	141	465
Adelaide City	325	500	671	54	106	70
Adelaide total	149	280	380	36	155	20 114
Other cities						
Mount Gambier	114	190	240	26	111	408

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.13 Median house prices by LGA, 2001, 2006 and 2010^{a,b}

Cities in Tasmania

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Hobart						
Sorell	74	195	273	40	269	230
Glenorchy	79	205	270	32	244	586
Hobart City	146	372	485	30	232	643
Kingborough	123	299	400	34	225	465
Clarence	114	280	365	30	222	765
Derwent Valley	62	152	197	29	217	160
Brighton	87	195	235	21	170	294
Hobart total	107	260	348	34	227	3 143
Launceston						
George Town	61	162	215	33	251	103
Northern Midlands	79	203	269	33	241	191
Launceston City	86	220	277	26	223	1 164
West Tamar	95	230	292	27	207	210
Launceston total	85	215	275	28	224	1 668

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.14 Median house prices by LGA, 2001, 2006 and 2010^{a,b}

Cities in the Northern Territory

	Median house prices					Sales
	2001 (\$'000)	2006 (\$'000)	2010 (\$'000)	Change (%) 2006 to 2010	Change (%) 2001 to 2010	2010 (no.)
Darwin						
Palmerston	136	270	483	79	255	575
Litchfield	160	320	520	63	225	237
Darwin City	185	350	555	59	200	724
Darwin total	170	309	525	70	209	1 536
Other cities						
Alice Springs	156	292	424	45	172	444

^a Data is 12 months to September in each year. ^b The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan.

Source: Rpdata, unpublished.

Table C.15 Residential building approvals by LGA, 2009-10

Cities in NSW and the ACT^a

	Number of dwellings			Value of dwellings				
	Houses	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/additions (\$m)	Total (\$m)	Total (\$ per person)
Sydney								
Canada Bay	69	1 127	1 196	34	323	45	402	5 293
Mosman	22	13	35	24	4	99	127	4 428
Manly	46	97	145	35	37	46	119	2 905
Woollahra	194	35	230	111	27	19	157	2 849
Waverley	53	217	276	35	90	69	194	2 840
Ku-ring-gai	145	525	670	83	151	82	316	2 833
Pittwater	151	27	180	90	12	55	157	2 671
Auburn	302	596	899	65	117	5	187	2 450
North Sydney	74	200	289	39	66	50	155	2 427
Camden	495	26	521	119	6	5	130	2 352
Lane Cove	55	0	55	40	0	33	74	2 267
Leichhardt	21	136	198	10	38	67	115	2 114
Hunters Hill	19	11	30	12	4	15	30	2 091
Botany Bay	23	179	214	8	59	11	78	1 976
Rockdale	84	526	612	27	156	13	197	1 924
Kogarah	90	149	240	51	34	19	104	1 782
Parramatta	139	1 183	1 331	37	221	19	278	1 658
Randwick	97	393	494	50	93	67	209	1 591
Wollondilly	207	14	222	55	2	9	67	1 538
Blacktown	1 373	584	1 958	304	108	17	430	1 433
Liverpool	681	375	1 063	161	80	12	252	1 384
Willoughby	35	76	112	29	24	37	90	1 304
Ryde	134	297	435	50	61	24	135	1 287
Holroyd	245	250	496	68	49	9	125	1 253
Warringah	142	240	385	74	41	61	176	1 222
Sydney City	14	264	382	8	85	121	214	1 201
Campbelltown	259	511	771	60	96	9	165	1 084
Hornsby	221	156	377	70	45	60	175	1 082
The Hills Shire	352	193	546	129	32	27	188	1 063
Fairfield	361	474	837	92	106	9	207	1 063
Bankstown	177	647	830	52	123	17	192	1 032
Wyong	473	165	638	92	37	20	149	1 000
Blue Mountains	150	51	201	38	8	29	75	968
Hurstville	94	143	239	38	28	10	77	962
Gosford	239	178	418	78	32	44	154	927
Canterbury	77	414	493	23	89	16	128	893
Sutherland	212	273	488	80	56	57	193	877
Burwood	35	33	68	11	5	12	28	830
Penrith	335	331	670	81	51	20	152	824
Marrickville	20	66	164	6	12	42	60	767
Hawkesbury	115	30	146	30	4	12	46	726
Strathfield	40	10	50	21	2	3	26	704
Ashfield	12	0	12	4	0	21	25	583
Sydney total	8 082	11 215	19 616	2 524	2 616	1 419	6 559	1 456
Median	134	179	382	50	41	20	152	1 304

(continued)

Table C.15 continued

	Number of dwellings			Value of dwellings				
	Other Houses dwellings	Total ^b		Other Houses dwellings (\$m)	Alterations/ additions (\$m)	Total (\$m)	Total (\$ per person)	
Newcastle								
Cessnock	498	252	751	105	47	14	165	3 251
Maitland	268	183	452	73	29	8	110	1 588
Newcastle City	584	245	848	149	48	42	240	1 549
Port Stephens	290	101	391	62	19	11	93	1 387
Lake Macquarie	307	444	759	74	87	48	209	1 051
Newcastle total	1 947	1 225	3 201	464	230	123	817	1 510
Wollongong								
Shellharbour	216	130	346	54	27	5	87	1 297
Wollongong City	329	363	693	97	74	34	205	1 015
Kiama	25	15	40	7	4	4	16	753
Wollongong total	570	508	1 079	158	105	43	307	1 062
Other cities								
Albury	245	105	350	60	22	12	94	1 866
Tweed	326	99	429	87	25	16	129	1 448
Queanbeyan	36	197	233	12	36	10	57	1 410
ACT								
Canberra	2 187	2 329	4 518	565	458	101	1 124	3 194

^a The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan. The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

Table C.16 Residential building approvals by LGA, 2009-10

Cities in Victoria^a

	Number of dwellings			Value of dwellings				
	Other Houses dwellings	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/additions (\$m)	Total (\$m)	Total (\$ per person)
Melbourne								
Wyndham	5 285	420	5 706	1 138	61	14	1 214	8 435
Melbourne City	93	1 882	2 000	25	484	62	571	6 138
Whittlesea	3 531	303	3 841	759	57	10	826	5 654
Cardinia	1 621	197	1 821	318	32	10	361	5 252
Melton	2 124	280	2 406	462	41	7	510	5 100
Stonnington	145	1 020	1 179	138	252	107	498	5 021
Yarra	77	917	1 023	28	232	87	347	4 441
Boroondara	459	752	1 219	273	187	177	637	3 791
Maribyrnong	260	811	1 077	65	177	21	263	3 682
Bayside	249	273	526	150	100	86	336	3 492
Port Phillip	62	752	827	33	183	100	316	3 290
Mornington Penin.	882	316	1 213	279	57	101	437	2 946
Casey	2 664	148	2 813	576	26	23	625	2 528
Hume	1 611	334	1 950	352	53	16	421	2 514
Glen Eira	265	500	782	112	129	83	324	2 376
Moonee Valley	345	438	786	111	95	54	259	2 331
Monash	511	750	1 287	163	155	47	365	2 072
Darebin	275	808	1 089	72	157	54	283	2 027
Moreland	364	960	1 339	80	174	43	298	1 995
Manningham	233	474	708	88	100	31	220	1 859
Brimbank	1 205	288	1 494	260	41	13	314	1 687
Frankston	727	240	969	155	40	19	214	1 665
Yarra Ranges	551	344	900	134	70	40	245	1 642
Hobsons Bay	237	246	486	65	50	26	141	1 615
Maroondah	375	307	685	90	54	25	169	1 588
Nillumbik	198	25	223	68	5	27	100	1 574
Banyule	284	250	536	86	59	46	191	1 543
Kingston	382	397	785	110	78	40	227	1 541
Whitehorse	347	393	743	106	76	53	235	1 510
Greater Dandenong	421	434	857	98	68	10	176	1 279
Knox	278	238	517	65	52	29	147	943
Melbourne total	26 061	15 497	41 787	6 462	3 347	1 461	11 270	2 820
Melbourne median	364	393	1 023	111	70	40	314	2 331
Other cities								
Wodonga	463	70	533	100	12	5	118	3 309
Geelong	1 784	360	2 151	405	62	60	527	2 438

^a The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan. The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

Table C.17 Residential building approvals by LGA, 2009-10

Cities in Queensland^a

	Number of dwellings			Value of dwellings				
	Houses	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/additions (\$m)	Total (\$m)	Total (\$ per person)
Brisbane								
Somerset	309	11	320	65	1	7	74	3 413
Ipswich	1 702	277	1 981	380	44	27	451	2 779
Moreton Bay	2 742	1 250	4 002	609	236	60	904	2 437
Brisbane City	3 128	4 680	7 823	1 017	958	557	2 533	2 406
Redland	799	339	1 142	198	62	33	292	2 075
Scenic Rim	261	17	280	62	3	6	72	1 919
Lockyer Valley	276	5	281	58	1	7	66	1 839
Logan	727	209	936	142	34	19	195	704
Brisbane total	9 944	6 788	16 765	2 532	1 339	716	4 587	2 185
Brisbane median	763	243	1 039	170	39	23	244	2 241
Other cities								
Townsville	1 361	436	1 797	361	96	51	508	2 795
Sunshine Coast	2 168	648	2 826	607	138	122	867	2 681
Gold Coast	2 318	1 263	3 585	735	283	116	1 134	2 202
Toowoomba	933	266	1 199	225	44	39	308	1 933
Cairns	767	269	1 038	211	59	41	311	1 891

^a The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan. The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

Table C.18 Residential building approvals by LGA, 2009-10,
Cities in Western Australia^a

	Number of dwellings			Value of dwellings				
	Houses	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/ additions (\$m)	Total (\$m)	Total (\$ per person)
Perth								
Perth City	4	514	518	3	140	10	154	9 008
Peppermint Grove	11	0	11	14	0	2	15	8 768
Cottesloe	84	2	88	64	2	5	71	8 656
Fremantle	142	144	287	50	122	13	185	6 593
Mosman Park	37	0	37	42	0	8	50	5 303
Serpentine-Jarrahdale	404	0	405	82	0	5	87	5 274
Armadale	1 355	61	1 416	274	9	8	291	5 011
Wanneroo	2 941	437	3 378	577	77	20	674	4 674
Mandurah	1 016	357	1 373	225	74	7	306	4 486
Cambridge	116	13	129	82	7	29	117	4 409
Murray	222	54	278	49	9	4	63	4 258
Cockburn	829	282	1 112	191	57	104	352	3 971
Kwinana	554	45	599	96	7	4	107	3 812
Claremont	32	4	36	24	4	8	35	3 572
Rockingham	1 559	67	1 626	322	17	14	353	3 523
Nedlands	66	0	66	50	0	19	69	3 063
Stirling	1 076	877	1 953	332	180	72	584	2 938
Vincent	47	164	216	22	43	24	90	2 900
Swan	1 147	214	1 361	237	42	20	299	2 718
Victoria Park	133	137	270	40	35	9	84	2 611
South Perth	130	35	165	73	22	11	106	2 420
Belmont	236	75	311	57	14	5	76	2 214
Kalamunda	403	62	470	87	10	23	119	2 181
Gosnells	1 086	124	1 210	197	21	7	225	2 159
Bayswater	328	53	381	87	13	16	116	1 892
Canning	507	135	644	117	22	17	156	1 786
Subiaco	71	0	77	29	0	2	32	1 714
East Fremantle	14	2	16	7	1	5	12	1 654
Mundaring	180	4	186	48	1	14	63	1 639
Joondalup	404	58	465	145	14	46	206	1 267
Melville	202	13	215	96	3	28	127	1 254
Perth total	15 336	3 933	19 299	3 719	947	558	5 224	3 024
Perth median	222	58	311	82	13	11	116	3 063
Other cities								
Geraldton-Greenough	436	78	516	118	18	9	145	3 827

^a The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan. The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

Table C.19 Residential building approvals by LGA, 2009-10

Cities in South Australia^a

	Number of dwellings			Value of dwellings				
	Houses	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/additions (\$m)	Total (\$m)	Total (\$ per person)
Adelaide								
Mount Barker	387	170	557	74	27	9	110	3 692
Victor Harbor	183	10	193	39	1	6	47	3 443
Alexandrina	348	4	352	69	1	8	78	3 361
Playford	1 418	38	1 456	227	6	3	236	3 045
Light	178	0	178	32	0	3	36	2 629
Norwood Payneham								
St Peters	94	62	156	28	19	29	77	2 121
Port Adelaide Enfield	1 018	367	1 385	162	54	14	231	2 070
Mallala	87	0	87	15	0	1	16	1 965
Barossa	190	2	192	34	0	6	40	1 799
Marion	376	363	739	76	55	16	147	1 745
Walkerville	19	9	28	8	2	3	12	1 693
Charles Sturt	443	394	837	87	66	24	177	1 657
Onkaparinga	1 325	145	1 472	224	21	19	265	1 650
Gawler	162	29	191	27	4	2	34	1 632
Mitcham	163	146	310	48	28	28	103	1 582
Holdfast Bay	91	69	161	27	17	11	55	1 553
Burnside	65	31	96	35	8	24	67	1 518
Campbelltown	236	65	302	50	10	9	69	1 395
Adelaide Hills	115	4	119	32	1	21	54	1 343
Salisbury	611	322	934	105	53	10	168	1 290
Prospect	57	12	69	14	2	10	26	1 241
Unley	36	75	114	12	10	22	44	1 146
Adelaide City	10	41	52	3	11	6	21	1 095
Yankalilla	23	0	23	4	0	0	5	1 018
West Torrens	127	95	224	27	18	1	46	830
Tea Tree Gully	293	5	298	64	2	13	79	789
Adelaide total	8 055	2 458	10 525	1 525	416	302	2 243	1 700
Adelaide median	171	40	193	35	9	9	61	1 641
Other cities								
Mount Gambier	145	5	150	30	1	4	36	1 419

^a The LGAs included in each city are consistent with the areas defined by the capital city's strategic plan. The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

Table C.20 Residential building approvals by LGA, 2009-10

Cities in Tasmania^a

	Number of dwellings			Value of dwellings				
	Houses	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/additions (\$m)	Total (\$m)	Total (\$ per person)
Hobart								
Kingborough	293	14	307	64	5	13	82	2 440
Sorell	139	0	139	26	0	3	29	2 223
Clarence	343	85	428	79	15	19	112	2 156
Brighton	105	25	130	19	4	1	24	1 535
Hobart City	76	41	117	24	9	26	59	1 192
Glenorchy	126	145	273	25	21	4	50	1 110
Derwent Valley	47	4	51	8	1	1	9	923
Hobart total	1 129	314	1 445	246	53	66	366	1 669
Launceston								
West Tamar	161	35	197	38	6	5	49	2 203
Northern Midlands	90	21	113	17	3	3	23	1 814
George Town	24	19	43	5	3	1	9	1 359
Launceston City	162	84	246	41	14	19	74	1 133
Launceston total	437	159	599	101	26	29	155	1 449

^a The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

Table C.21 Residential building approvals by LGA, 2009-10

Cities in the Northern Territory^a

	Number of dwellings			Value of dwellings				
	Houses	Other dwellings	Total ^b	Houses (\$m)	Other dwellings (\$m)	Alterations/additions (\$m)	Total (\$m)	Total (\$ per person)
Darwin								
Litchfield	222	6	244	52	1	19	73	3 851
Palmerston	157	173	331	55	42	7	104	3 528
Darwin City	259	254	520	109	72	30	210	2 766
Darwin total	638	433	1 095	216	115	56	386	3 111
Other cities								
Alice Springs	57	65	124	18	16	11	45	1 602

^a The Commission has used the ABS SLA to LGA concordance (ABS catalogue 1216.0) to convert the published SLA data into LGA data. However when the cities are aggregated the LGA data does not generally equal the SLA data because of differences in the way the city boundaries have been defined. ^b includes alterations and additions to buildings.

Source: ABS 2010c.

D Land supply — processes and outcomes

This appendix provides further details of the land supply processes and outcomes discussed in chapter 4. Specifically it includes:

- flowcharts depicting the regulatory approvals and processes affecting land supply in each jurisdiction (section D.1)
- maps reflecting changes in the dwelling densities of the capital city planning areas for the period 2001 to 2006 — this is used as a proxy measure for the extent of infill development (section D.2)
- further details of some land supply outcomes for commercial and industrial land (section D.3).

D.1 Land supply approvals and processes

The flow charts in this section represent the ‘standard’ land supply processes that apply in each jurisdiction and do not consider the potential ‘fast track’ approaches such as those that may be available for state significant projects. However, some of the alternative processes available in designated growth areas are depicted including:

- the Precinct Planning Process for Sydney’s Growth Centres (figure D.1)
- the rezoning process in South Australia that applies under a Ministerial initiated Development Plan Amendment (figure D.13)

However, the flowcharts do not consider the appeals processes that may be available to those seeking redress for decisions arising from the planning processes depicted — the availability, nature and effect of appeals within the planning system more broadly are considered in chapter 3.

Table D.1 describes the starting point of the land supply process in each jurisdiction. The figures listed in table D.2 contain flowcharts that describe the subsequent steps in the land supply process of each jurisdiction.

Table D.1 Stage 1: future urban designation

For greenfield development

<i>Description of land</i>	
Syd (NSW)	Land is included in the Metropolitan Development Program as land for urban development.
Mel (Vic)	Land is within the Urban Growth Boundary as approved by Parliament.
SEQ (Qld)	Land is within the Urban Footprint in the SEQ Region Plan
Per (WA)	The land is rezoned as urban growth area in the statutory Region Scheme. Land will also be identified in the draft spatial plan and supporting sub-regional plans.
Adel (SA)	Land is within the urban boundary designated by the Greater Adelaide Plan.
Hob (Tas)	Land is within the 10 year urban growth boundary and zoned for development in the draft planning schemes.
Can (ACT)	Land is classified 'future urban area' and formally identified in Territory Plan maps.
Dar (NT)	Land is zoned future development in the Northern Territory Planning Scheme and has been released to developers by the Crown. Land is released to developers with a structure plan in place.

Source: Based on NHSC (2010).

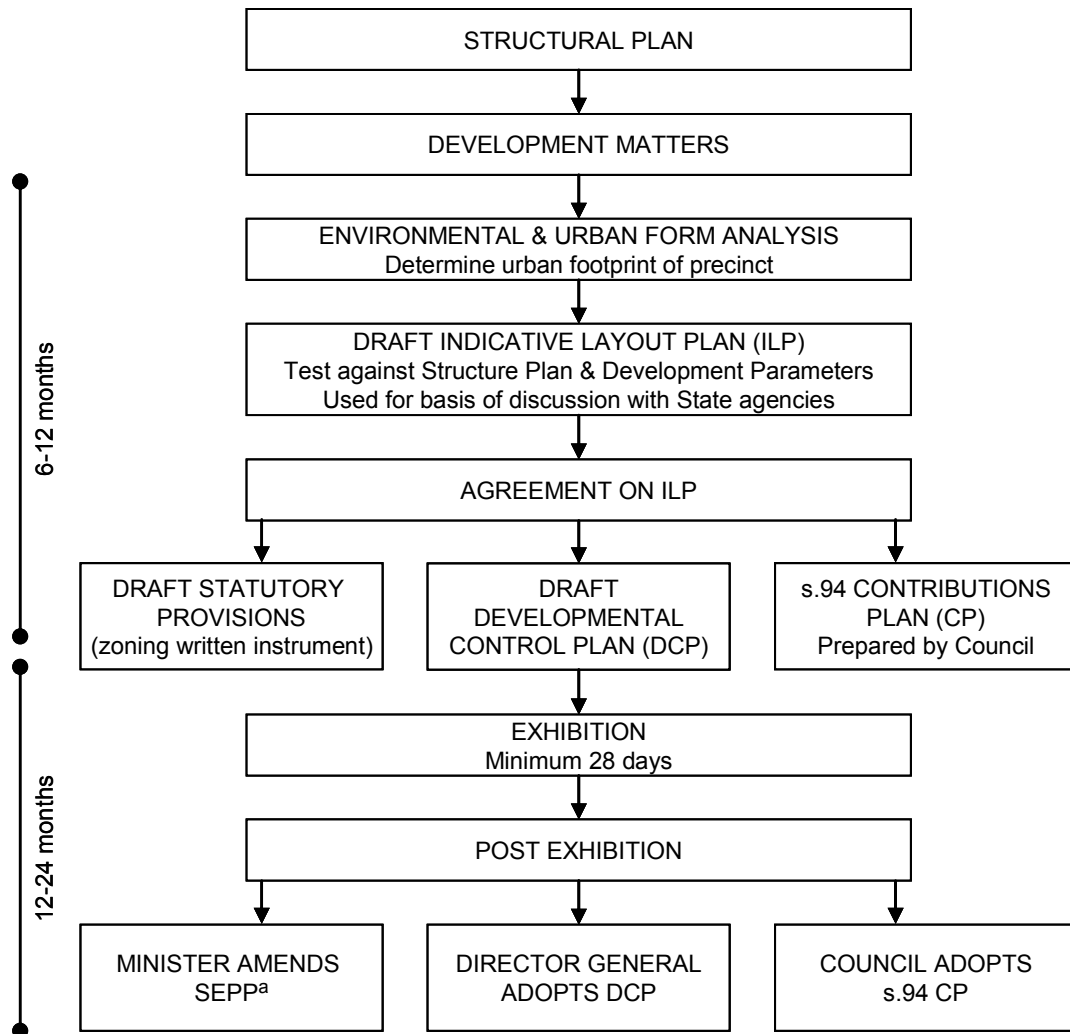
Table D.2 Key planning approval processes for land supply

<i>Approval process</i>	<i>Syd (NSW)</i>	<i>Mel (Vic)</i>	<i>SEQ (Qld)</i>	<i>Per (WA)</i>	<i>Adel (SA)</i>	<i>Hob (Tas)</i>	<i>Can (ACT)</i>	<i>Dar (NT)</i>
Land designated for future development	Table D.1							
Rezone land / plan amendment	Figs. D.2a & D.2b	Fig. D.4	n.a	Fig. D.10	Fig. D.12a & D.12.b	Figs. D.16a & D.16b	Fig. D.17	Fig. D.19
Structure planning	n.a	Fig. D.5 ^a	Fig. D.7	n.a	n.a	n.a	n.a	n.a
Master planning	n.a		Fig. D.8	n.a	n.a	n.a	n.a	n.a
Subdivision approval	Fig D.3	Fig. D.6	Fig. D.9	Fig. D.11	Fig. D.14	Fig. D.15	Fig D.18	Fig D.20

n.a not applicable (is not a mandatory process within planning legislation). **a** The Precinct Structure Planning process contains elements of both structure planning and master planning.

Figure D.1 Sydney (New South Wales) — Precinct Planning Process for Growth Centres

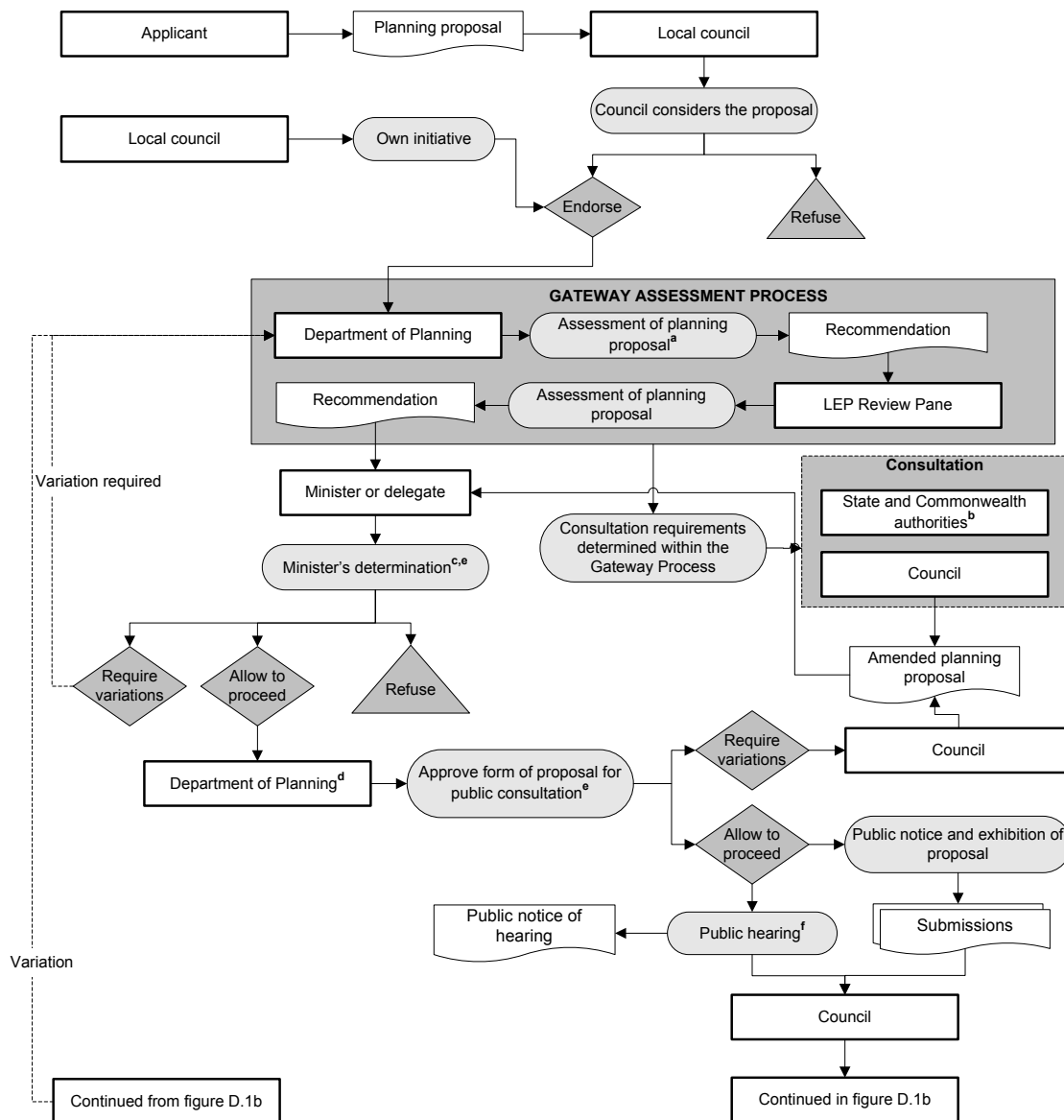
Summary



^a State Environmental Planning Policy. ^b Development Control .

Data source: Productivity Commission survey of state planning departments and agencies (2010, unpublished).

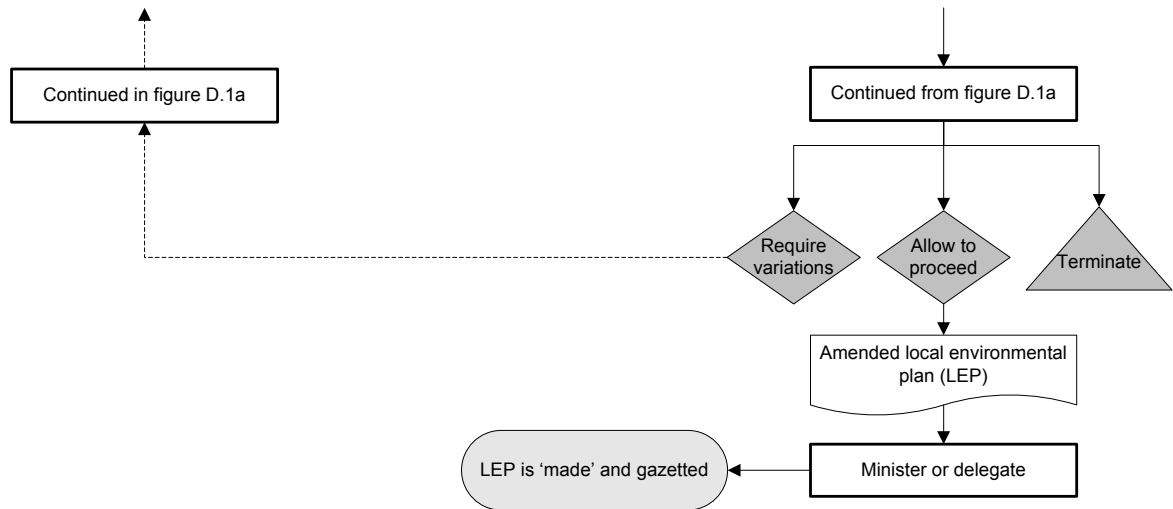
Figure D.2a Sydney (New South Wales) — rezoning



^a Part of the Department of Planning's assessment includes a consideration of the local council's Community Strategic Plan to ensure that State Government priorities have been adequately addressed, as well as to inform the Minister for Planning of any community issues identified through the community engagement strategy. ^b The appropriate authorities are determined within the Gateway assessment process. ^b Other matters the Minister's Gateway determination will indicate include: the required community consultation; whether a public hearing is required; and timeframes for various stages of the process. ^d Director General (or delegate). ^e The Minister's determination and the approval to proceed to public consultation should be taken concurrently wherever possible. ^f A public hearing maybe required by the Minister in the Gateway determination or may be sought by any person making a submission on the proposal.

Data source: *Environmental Planning and Assessment Act 1979* (NSW); Department of Planning (NSW) (2009b); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

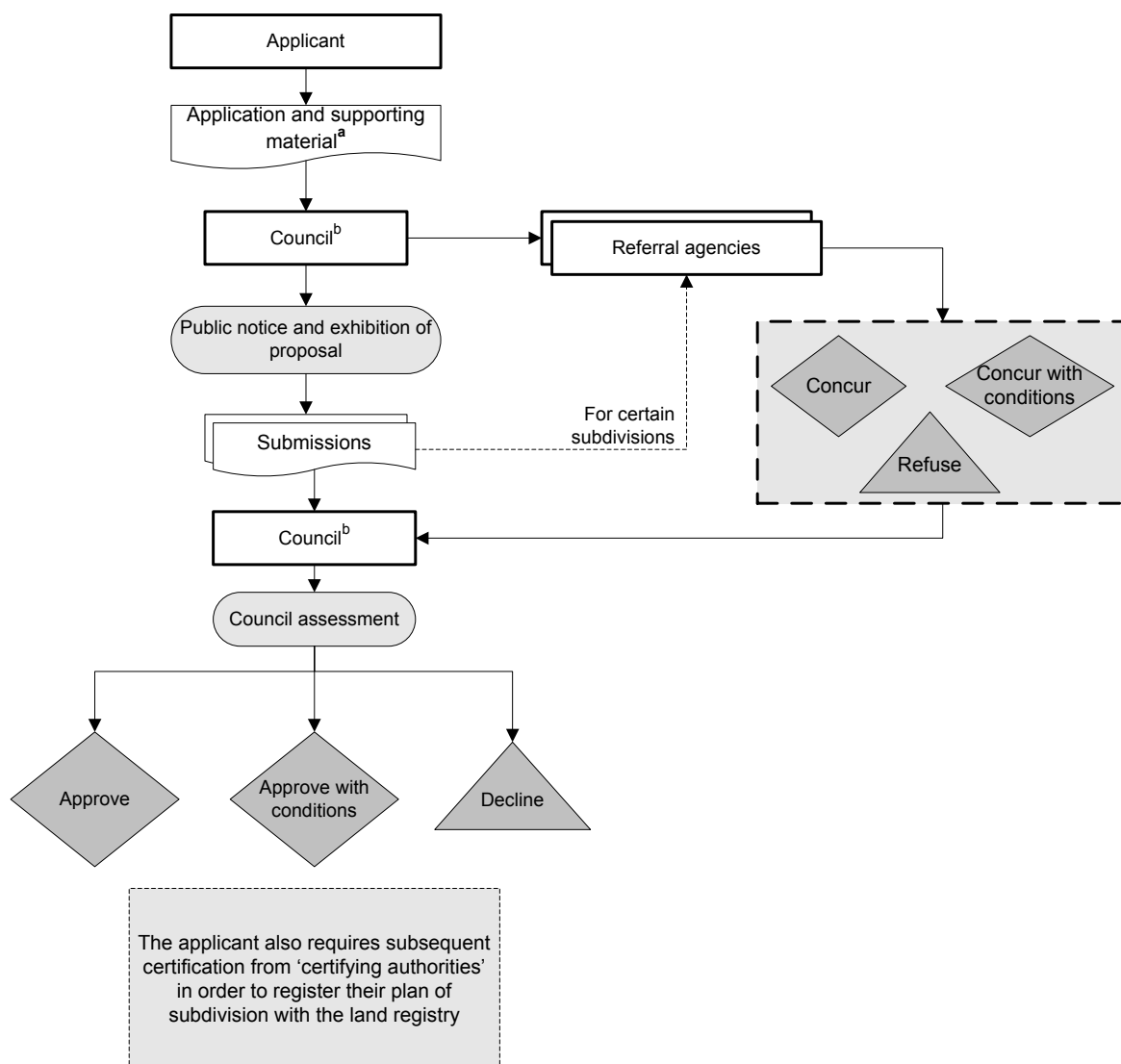
Figure D.2b **Sydney (New South Wales) — rezoning**
Continued



Data source: *Environmental Planning and Assessment Act 1979* (NSW); Department of Planning (NSW) (2009b); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.3 Sydney (New South Wales) — subdivision

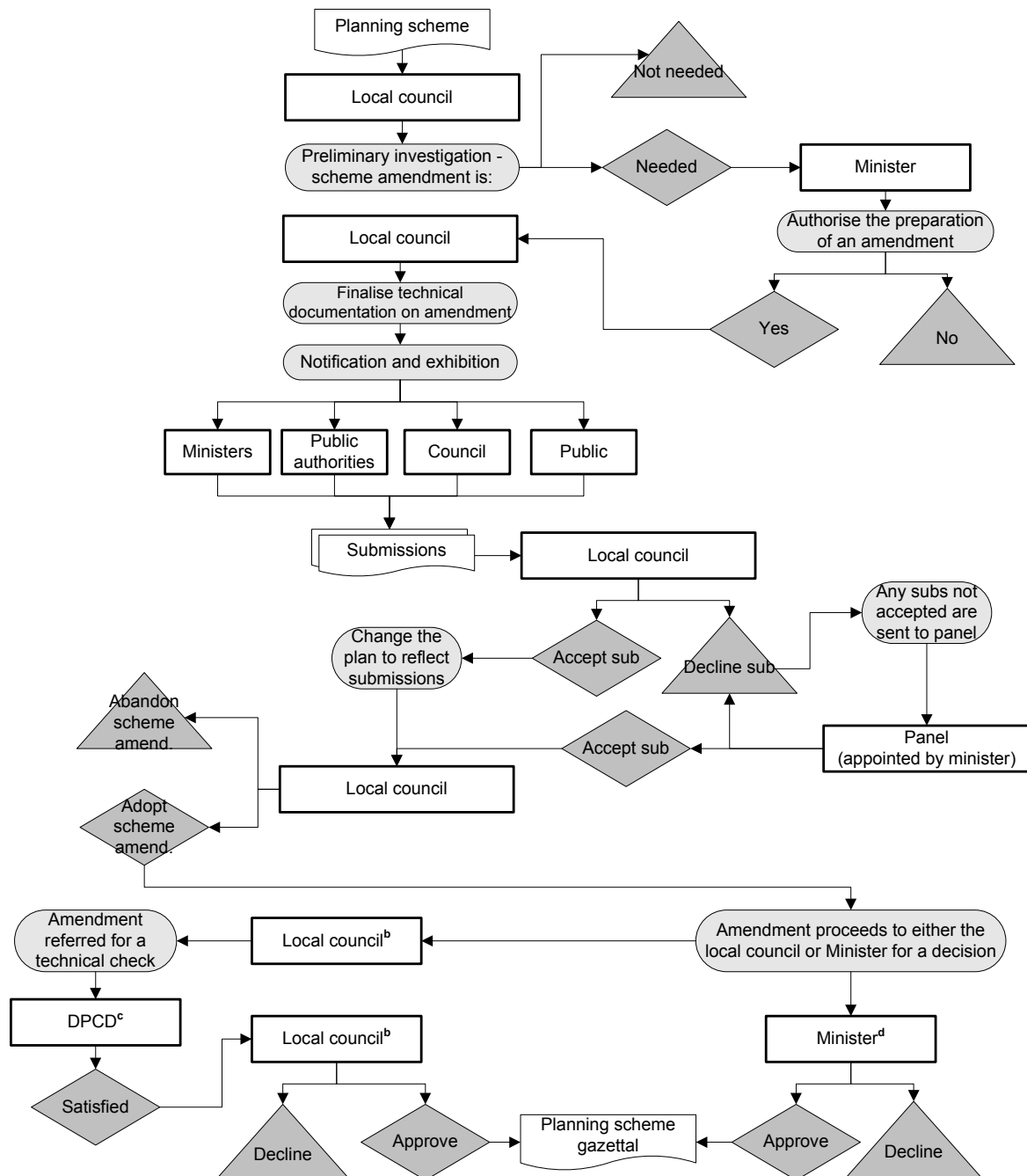
Process under Part 4 of the *Environmental Planning and Assessment Act 1979*



^a Assumes a complete application is provided. The council may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material. The application may also include request(s) for approval for any matters requiring approval under s. 68 of the *Local Government Act 1993* (NSW). ^b Application for a subdivision containing over 250 lots and certain coastal subdivisions are determined by a joint regional planning panel rather than the local council.

Data source: Environmental Planning and Assessment Act 1979 (NSW); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.4 Melbourne (Victoria) — rezoning^a

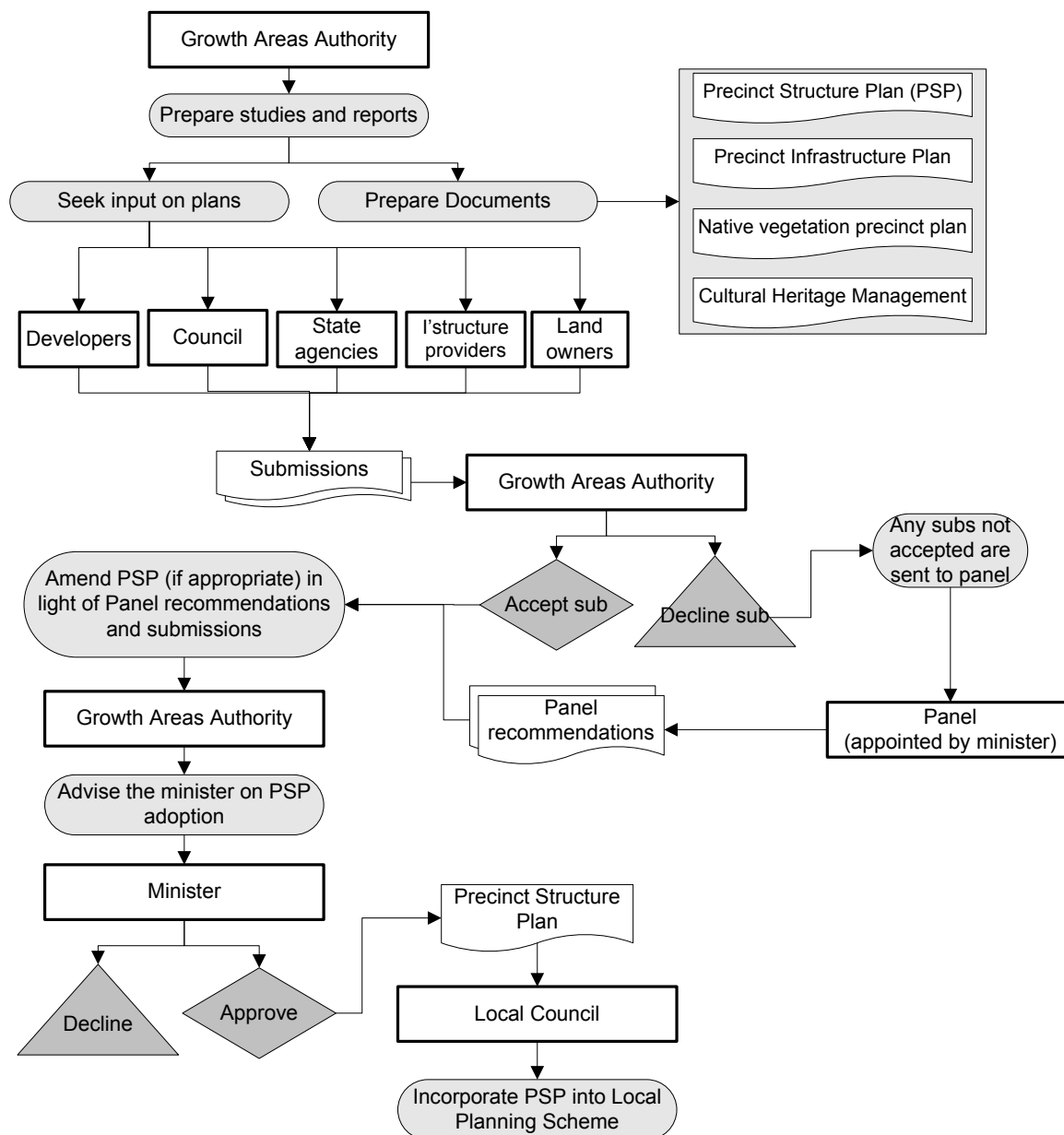


^a Completed concurrent with structure planning (figure D.5). ^b Where the Council has delegated authority. ^c Department of Planning and Community Development. ^d Where the Council does not have delegated authority.

Data source: Growth Areas Authority (2009); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.5 Melbourne (Victoria) — structure planning^a

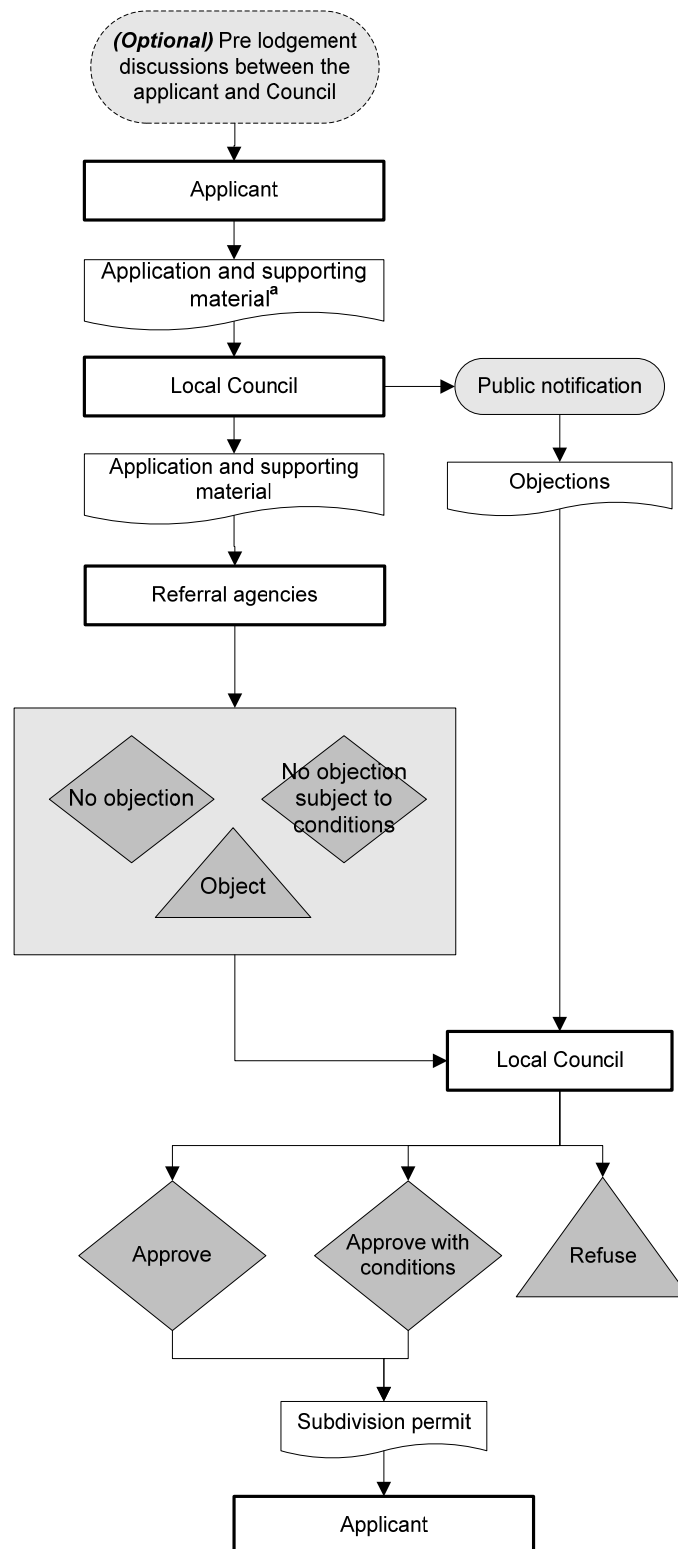
Growth areas (Casey-Cardinia, Hume, Melton-Caroline Springs, Whittlesea, Wyndham and Mitchell)



^a Completed concurrent with rezoning (figure D.4).

Data source: Growth Areas Authority (2009); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

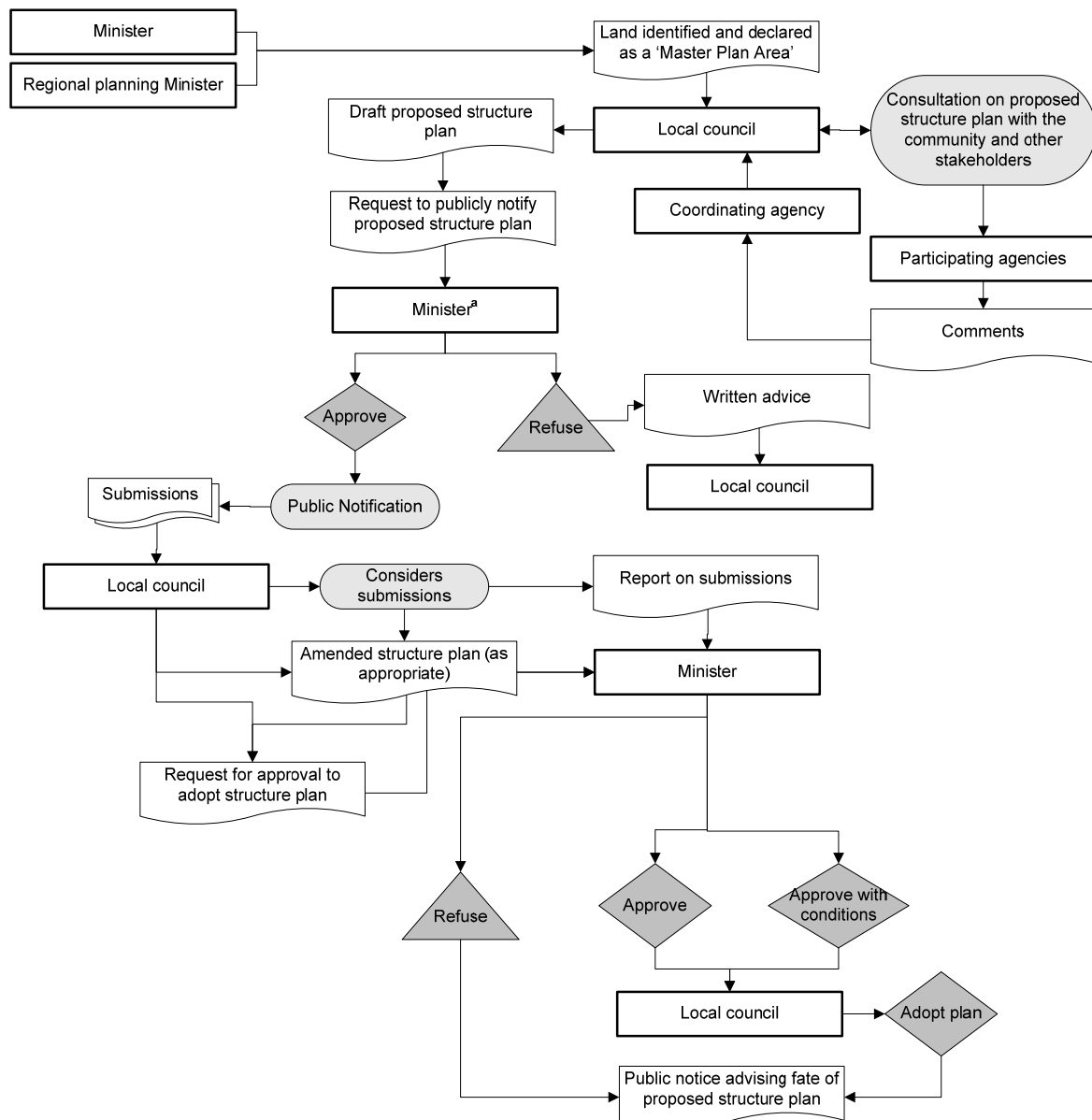
Figure D.6 **Melbourne (Victoria) — subdivision**



^a Assumes a complete application is provided. The council or a referral agency may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material.

Data source: Department of Planning and Community Development (Vic) (2010a); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

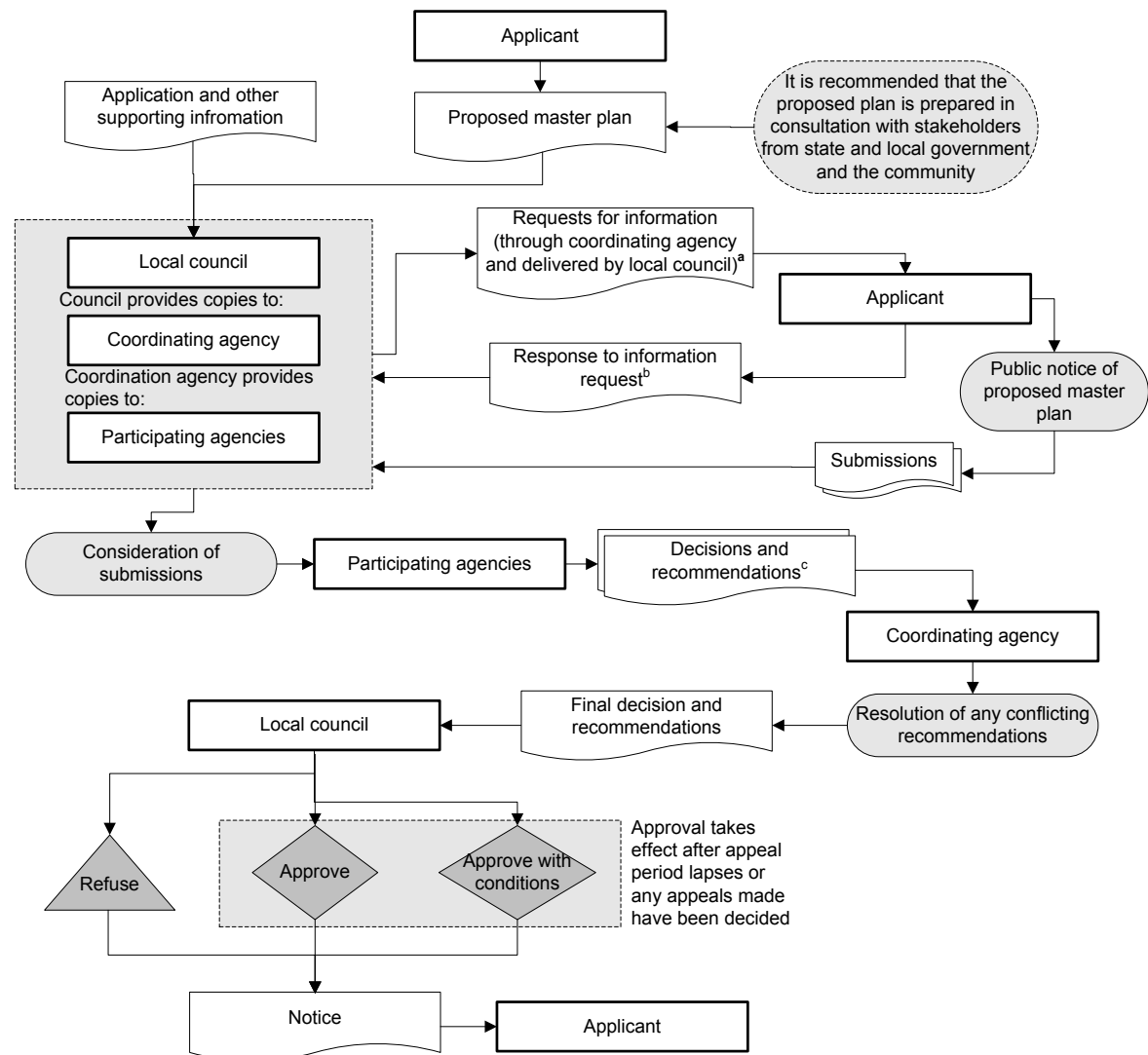
Figure D.7 South East Queensland (Queensland) — structure planning



^a The Minister may seek advice from within Government. If the Minister does so, responses to the Minister must be provided within 40 business days of receiving the proposed structure plan. If a party does not respond to the Minister within 40 business days, the party's issues will be taken to have been appropriately addressed in the proposed structure plan. The Minister may extend the timeframe if appropriate. The Minister may also seek advice from outside Government.

Data source: Sustainable Planning Act 2009 (Qld); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

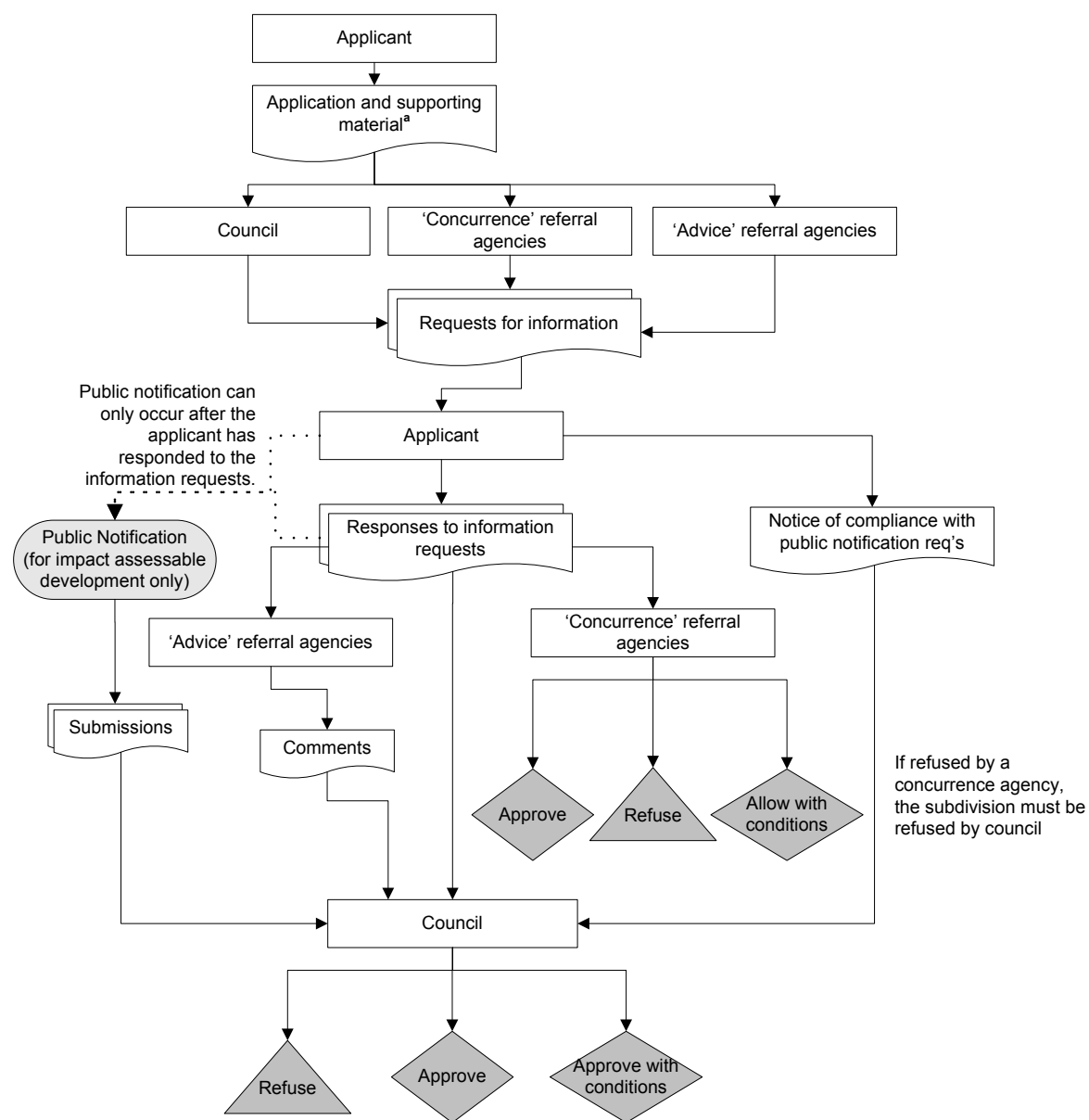
Figure D.8 South East Queensland (Queensland) — Master planning



^a s.162 of Act prescribes varying time periods for requests for information. At most, agencies have 40 days to make their requests for information. The coordinating agency mediates any issues raised by participating agencies (including points of difference between agencies) in order to provide a cohesive and complete information request to the applicant. ^b Application lapses if applicant does not respond within 6 months. ^c Recommendation must be made within 60 days of receiving information sought or the day of receiving the master plan (if no information was sought). Recommendations can be: refuse, allow (no conditions) and allow with conditions (depending upon the agency's powers and jurisdiction)

Data source: Sustainable Planning Act 2009 (Qld); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

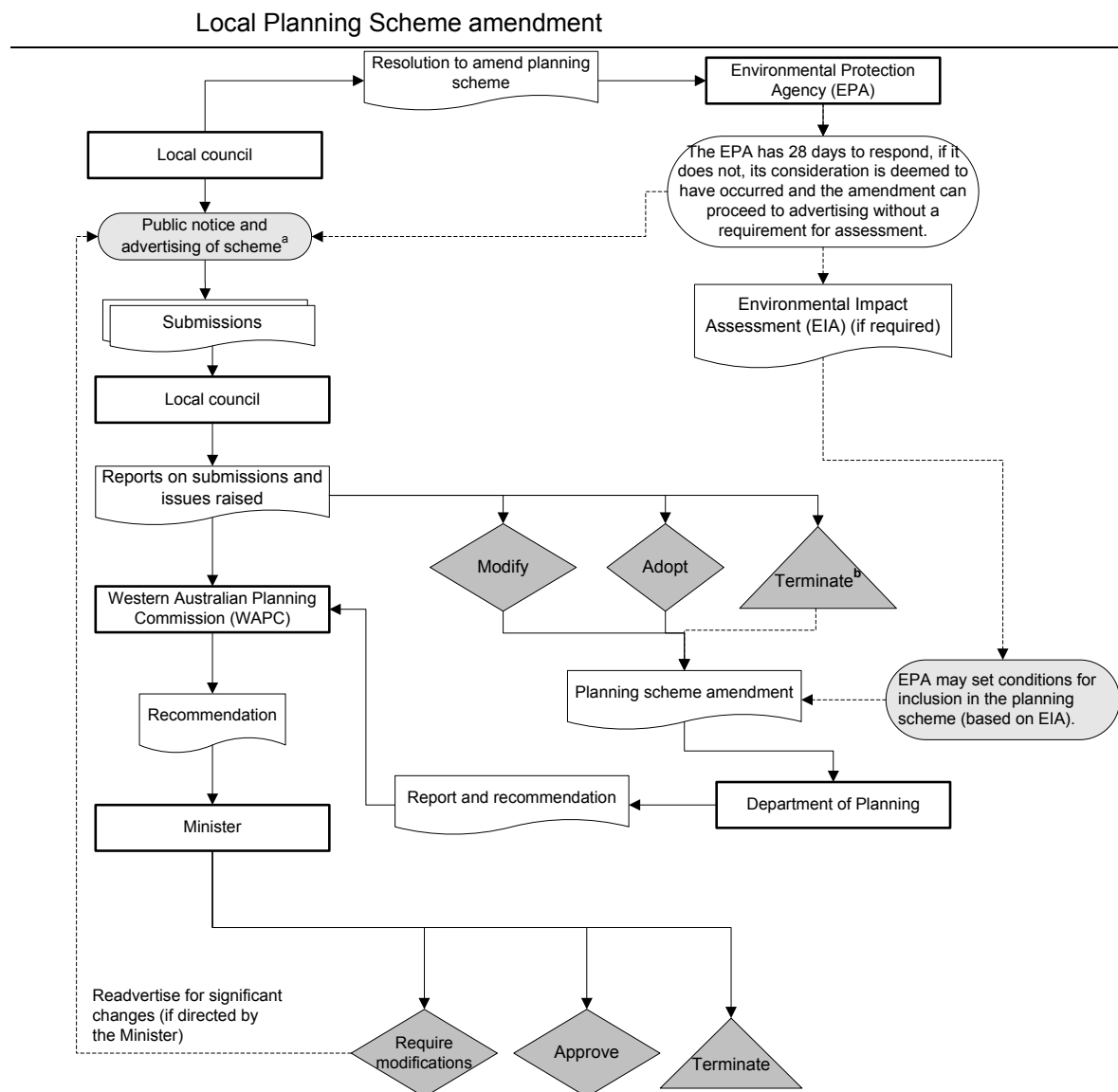
Figure D.9 South East Queensland (Queensland) — subdivision



^a Assumes a complete application is provided. The council may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material.

Data source: Sustainable Planning Act 2009 (Qld); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

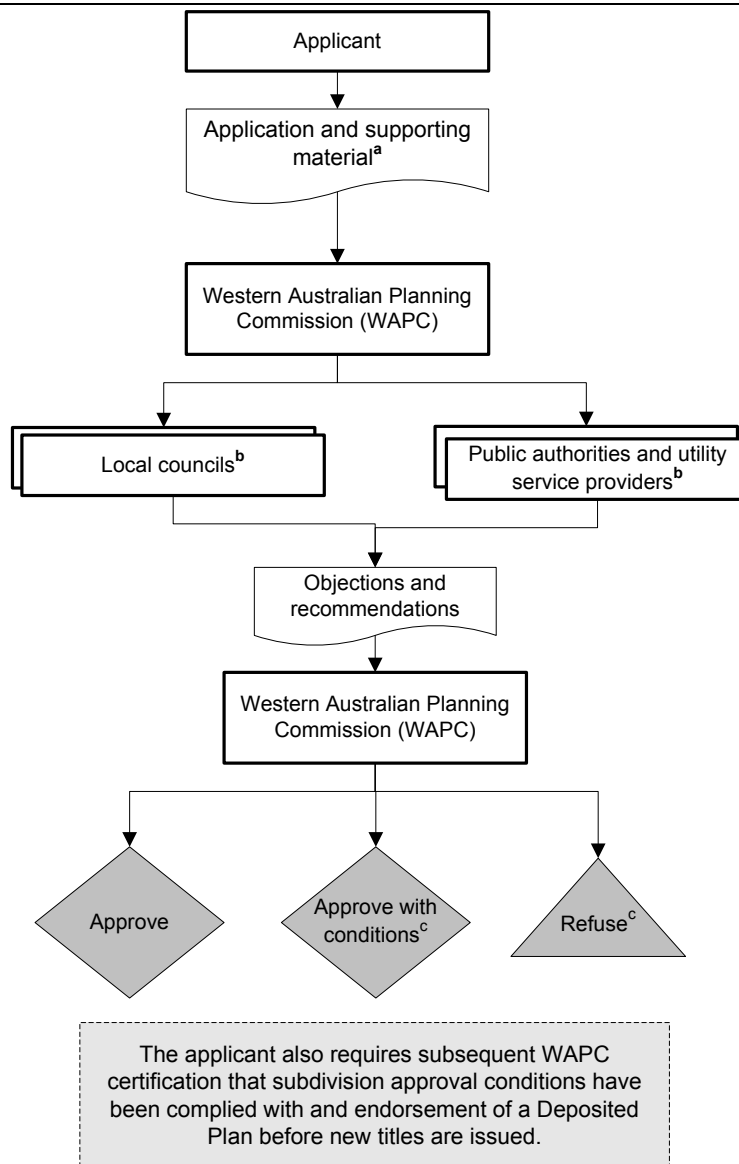
Figure D.10 **Western Australia — rezoning/ local planning scheme amendment**



^a For a small minority of amendments, those that do not conform to a region scheme (if applicable) and the relevant WAPC planning policy, the WAPC's consent to advertise a proposed amendment is required. The WAPC cannot withhold approval to advertise an amendment, only the relevant Minister can do so. ^b The final decision to 'terminate' an amendment can only be made by the Minister.

Data source: *Planning and Development Act 2005* (WA); Department for Planning and Infrastructure (WA) (2007); Department for Planning and Infrastructure (WA) (2009); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.11 Western Australia — subdivision

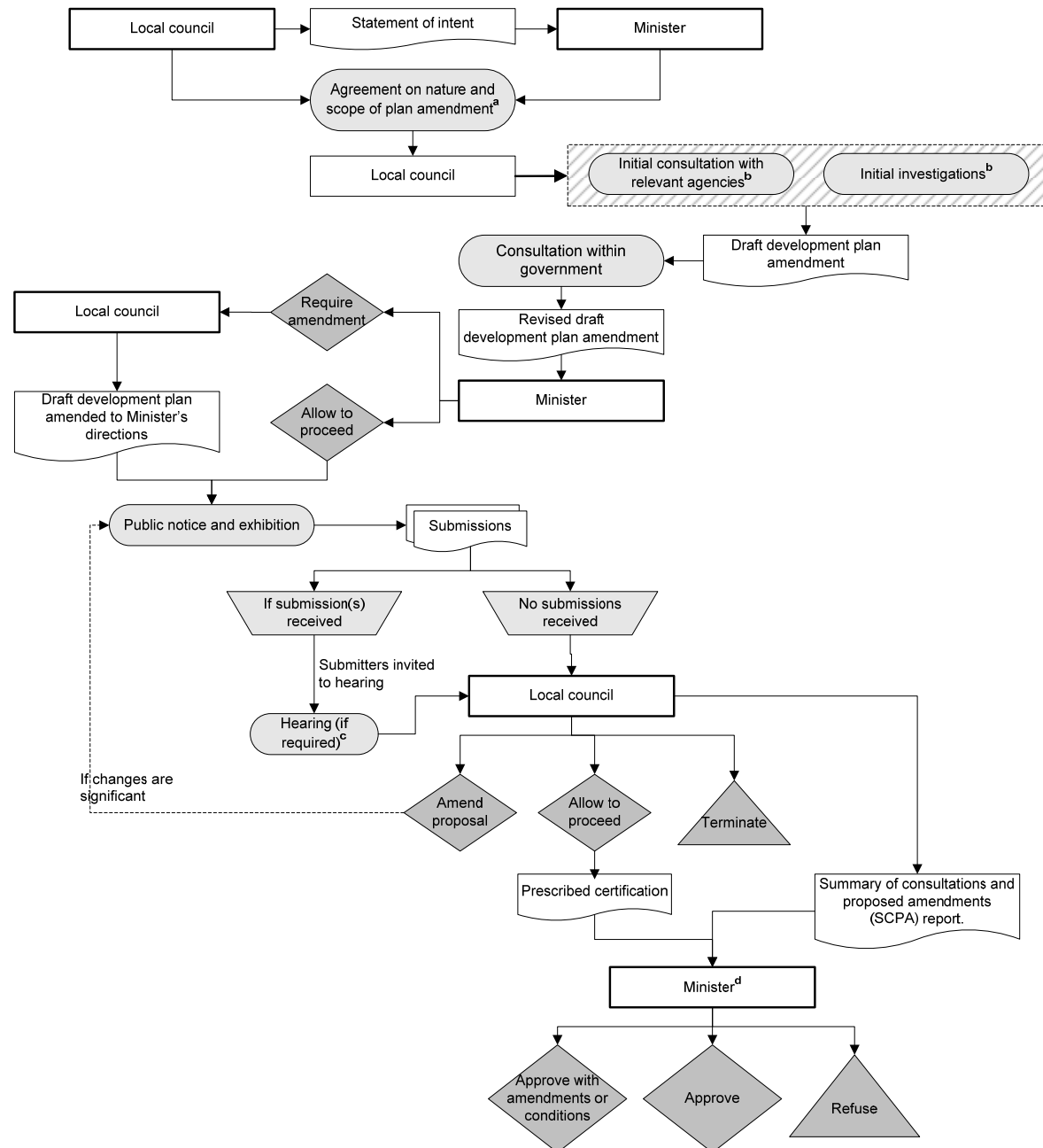


^a Assumes a complete application is provided. The WAPC may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material. ^b Where a plan of subdivision might affect the functions of a local government, a public authority or a utility services provider, the WAPC is to refer the application to them for their objections and recommendations. ^c Such decisions are: subject to reconsideration request by the applicant; and/or appealable to the State Administrative Tribunal.

Data source: Department for Planning and Infrastructure (WA) (2009); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.12a Adelaide (South Australia) — rezoning/development plan amendment

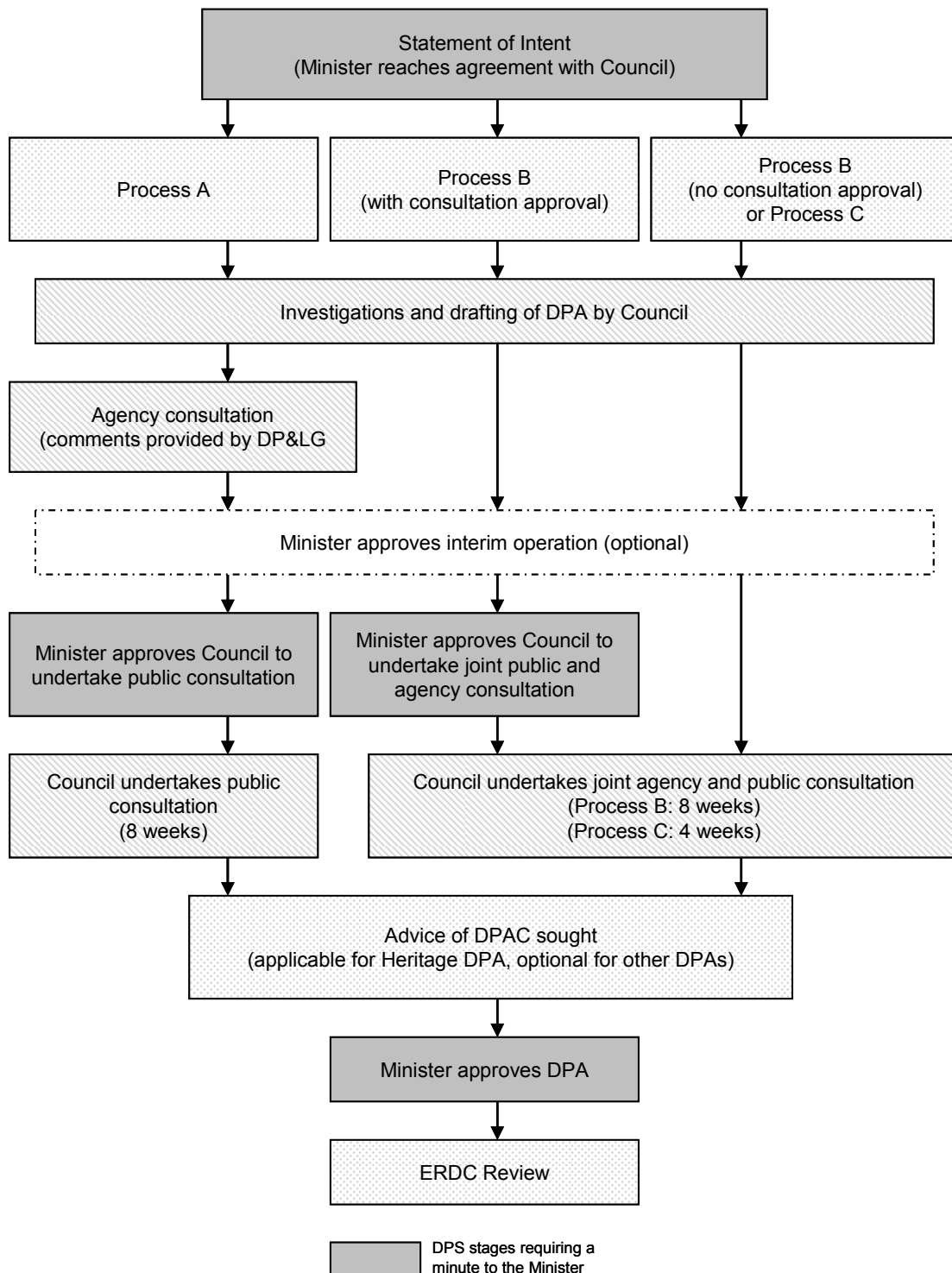
Council initiated Development Plan Amendment



^a As part of this process, the consultation approach is agreed. There are three possible consultation processes (see figure D.12b) — process A is depicted here. ^b The nature of the initial consultations and investigation will be determined by the nature of the site — for example, matters such as the potential for soil contamination and heritage concerns will be an influence on those processes. ^c If no submitter requests a hearing, a hearing need not be held. ^d Prior to the Minister's decision, the amendment needs to be reviewed by the independent Development Policy Advisory Committee (if there are inconsistencies with the Planning Strategy) and/or the independent Local Heritage Advisory Committee (if there are local heritage places to be listed).

Data source: Development Act 1993 (SA); Department of Planning and Local Government (SA) (2010a); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.12b Adelaide (South Australia) — consultation paths for rezonings/development plan amendments^a

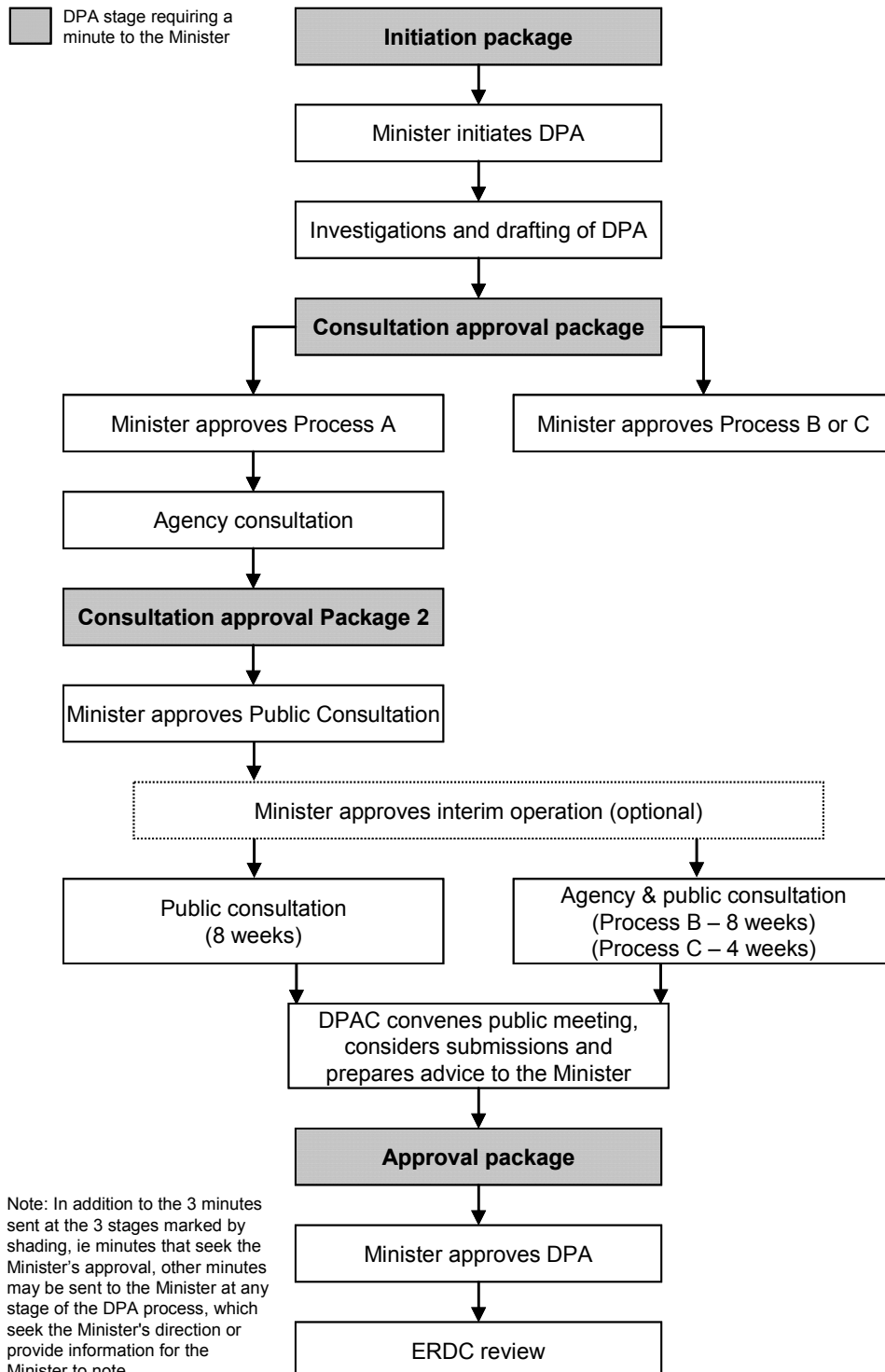


^a Figure D.12a reflects consultation 'process A'.

Data source: *Development Act 1993* (SA); Department of Planning and Local Government (SA) (2010a); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

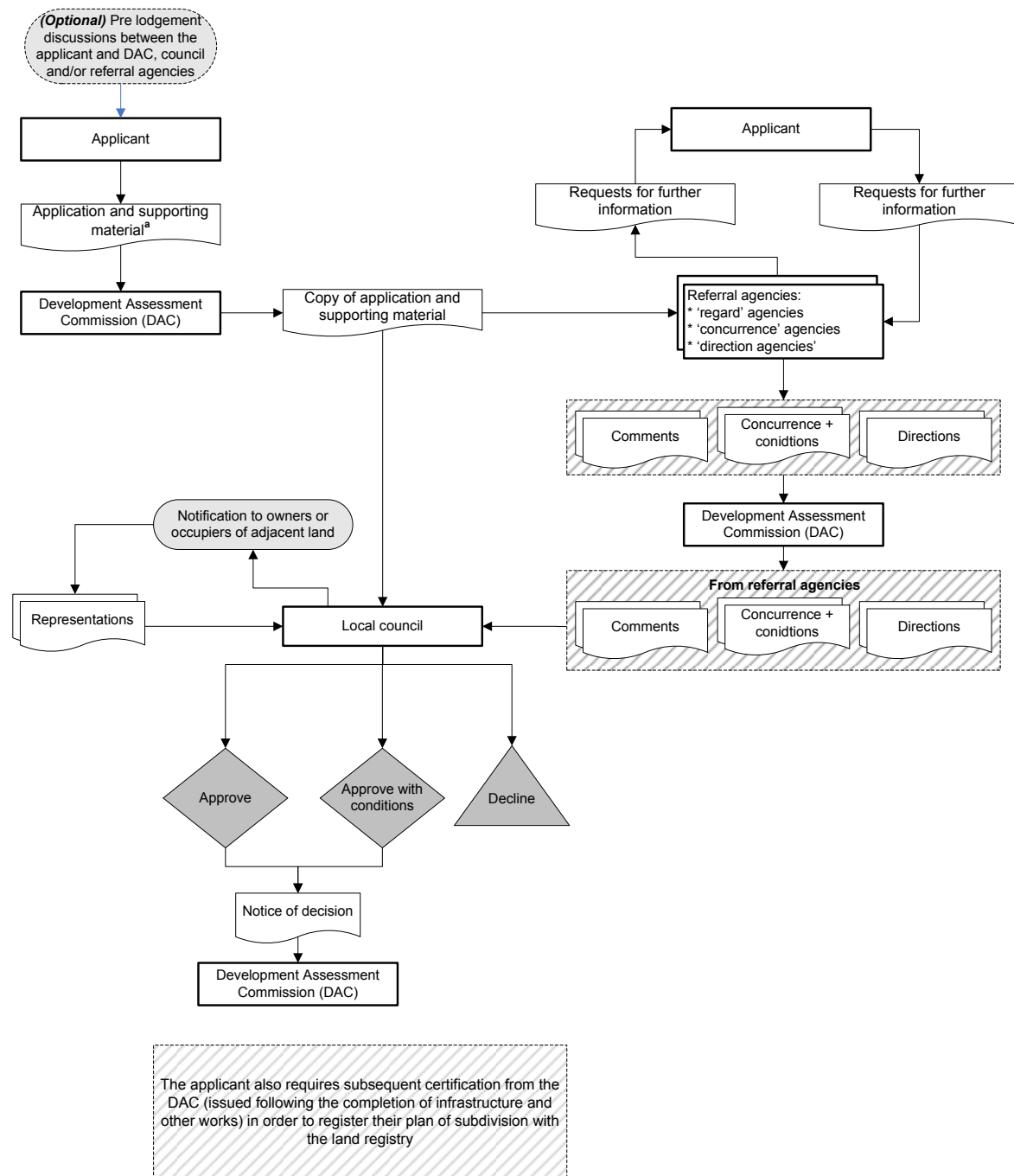
Figure D.13 Adelaide (South Australia) — rezoning

Ministerial initiated Development Plan Amendment



Data source: South Australian Government, pers. comm., 20 October 2010.

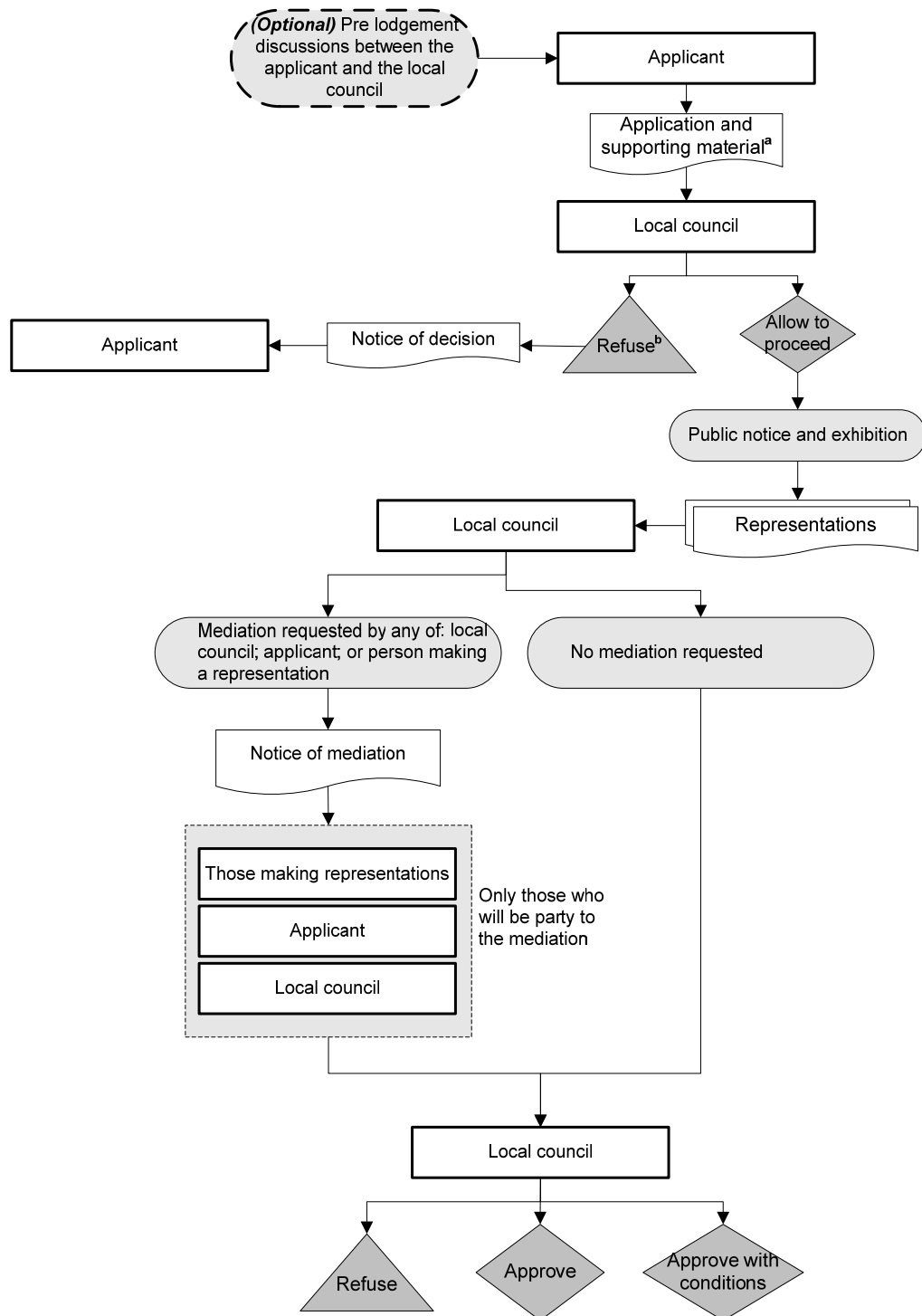
Figure D.14 Adelaide (South Australia) — subdivision



^a Assumes a complete application is provided. The DAC may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material.

Data source: Development Act 1993 (SA); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.15 Hobart (Tasmania) — subdivision

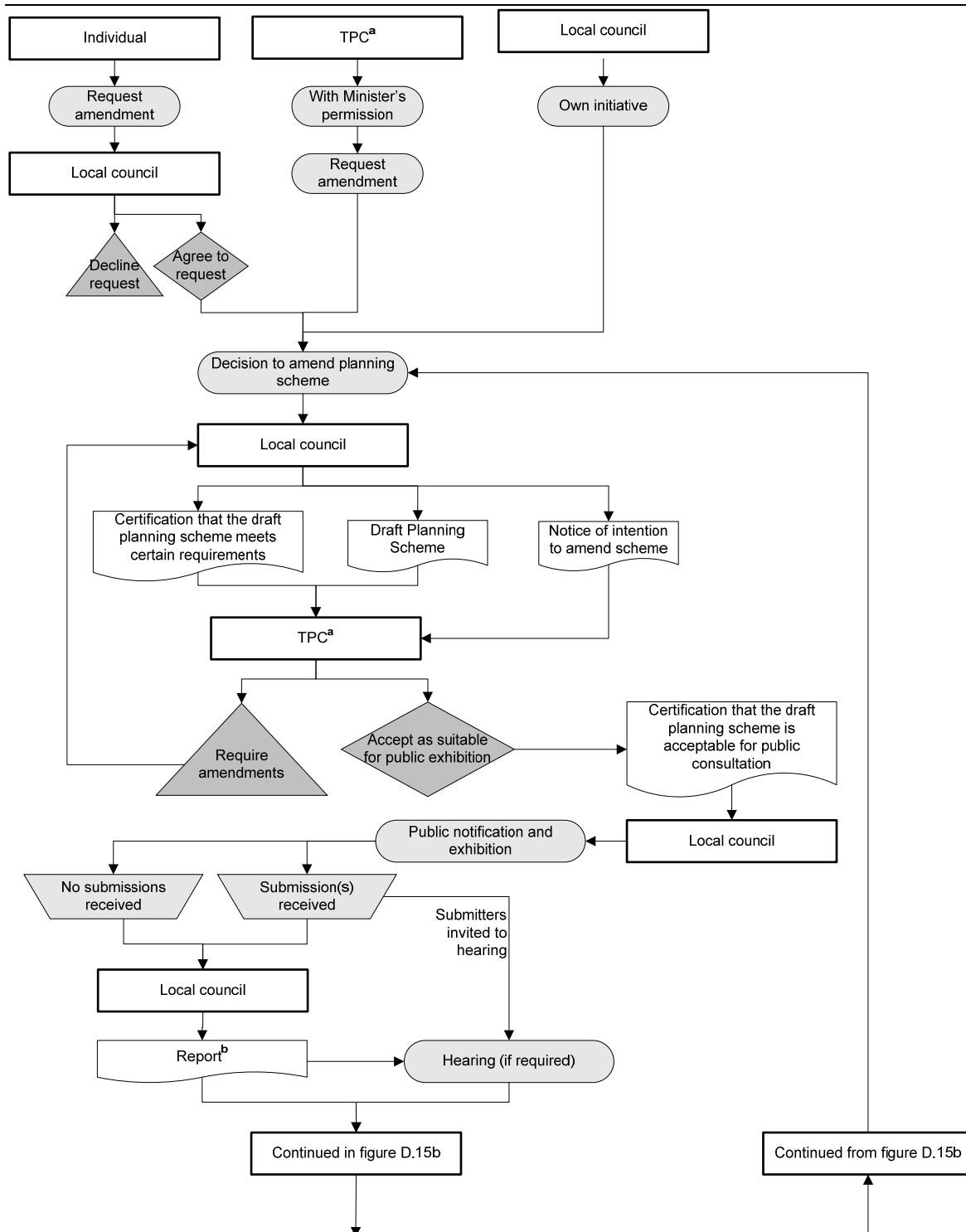


^a Assumes a complete application is provided. The council or a referral agency may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material. ^b As permits for subdivisions are 'discretionary' a local council may refuse an application upon receipt.

Data source: *Land Use Planning and Approvals Act 1993 (Tas)*; Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.16a **Hobart (Tasmania) — rezoning**

Rezoning completed through the Plan Amendment Process

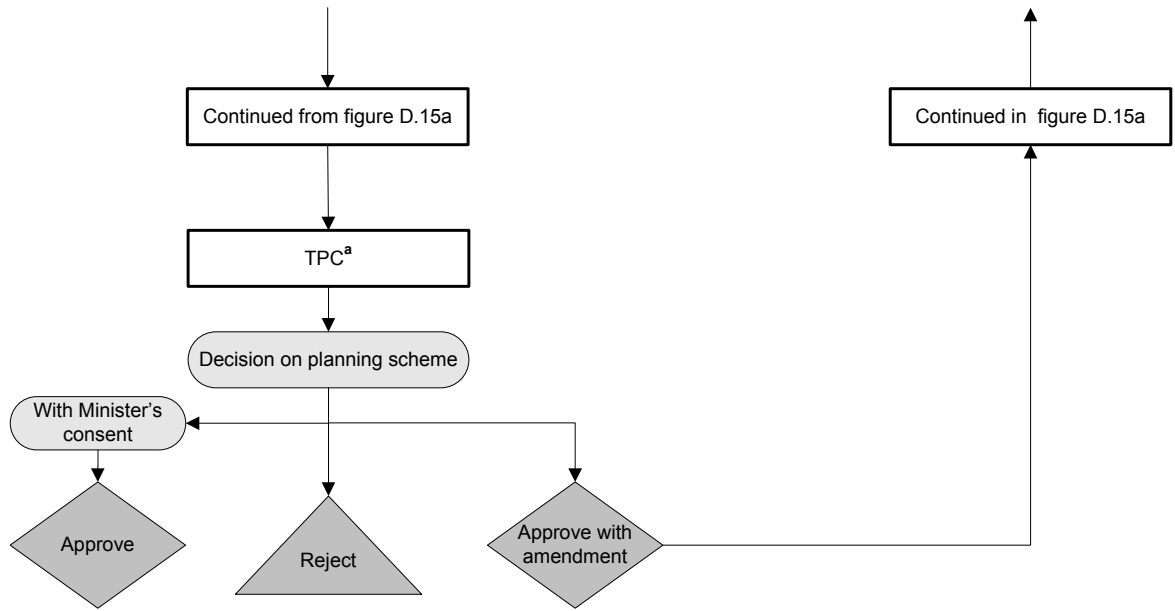


a Tasmanian Planning Commission. **b** The report is to include a copy of each representation received; a statement as to the merit of each representation; a statement on how the issues raised in each representation have been or could be addressed; and any recommendations on the draft scheme the council considers necessary.

Data source: Land Use Planning and Approvals Act 1993 (Tas); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.15b Hobart (Tasmania) — rezoning

Rezoning completed through the Plan Amendment Process
Continued

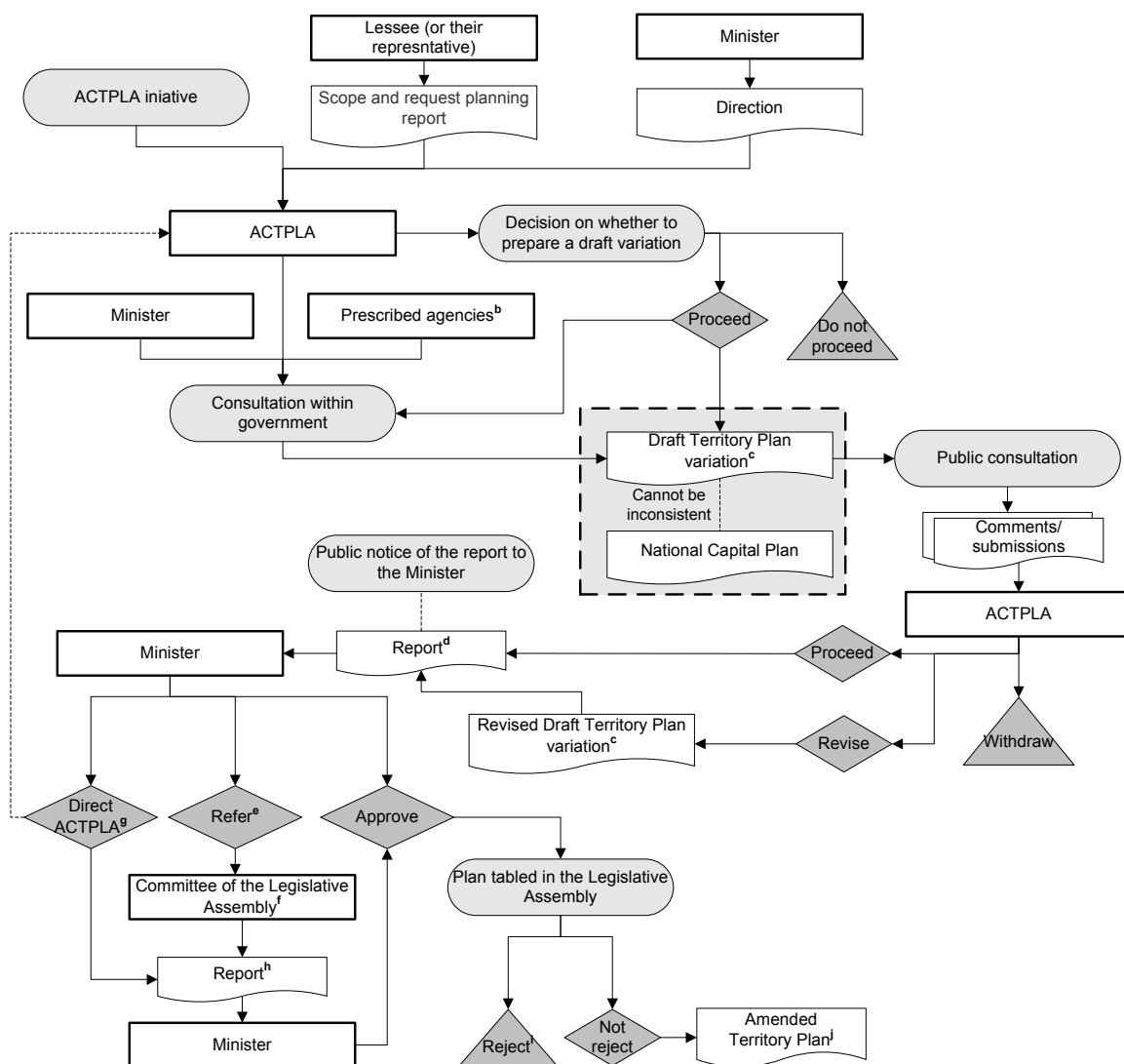


^a Tasmanian Planning Commission.

Data source: *Land Use Planning and Approvals Act 1993* (Tas).; Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.17 Canberra (ACT) — Territory Plan variations

Includes rezoning, structure planning and concept plan/precinct code planning^a



^a Structure plans are typically introduced as a Territory Plan variations; they also involve zoning changes.

^b Including: National Capital Authority (Cwlth); Conservator of Flora and Fauna; Environment Protection Authority and Heritage Council. ^c If placed on interim effect (part or whole variation), ACTPLA cannot do anything that would be inconsistent with the Draft Territory Plan after it has been released for consultation.

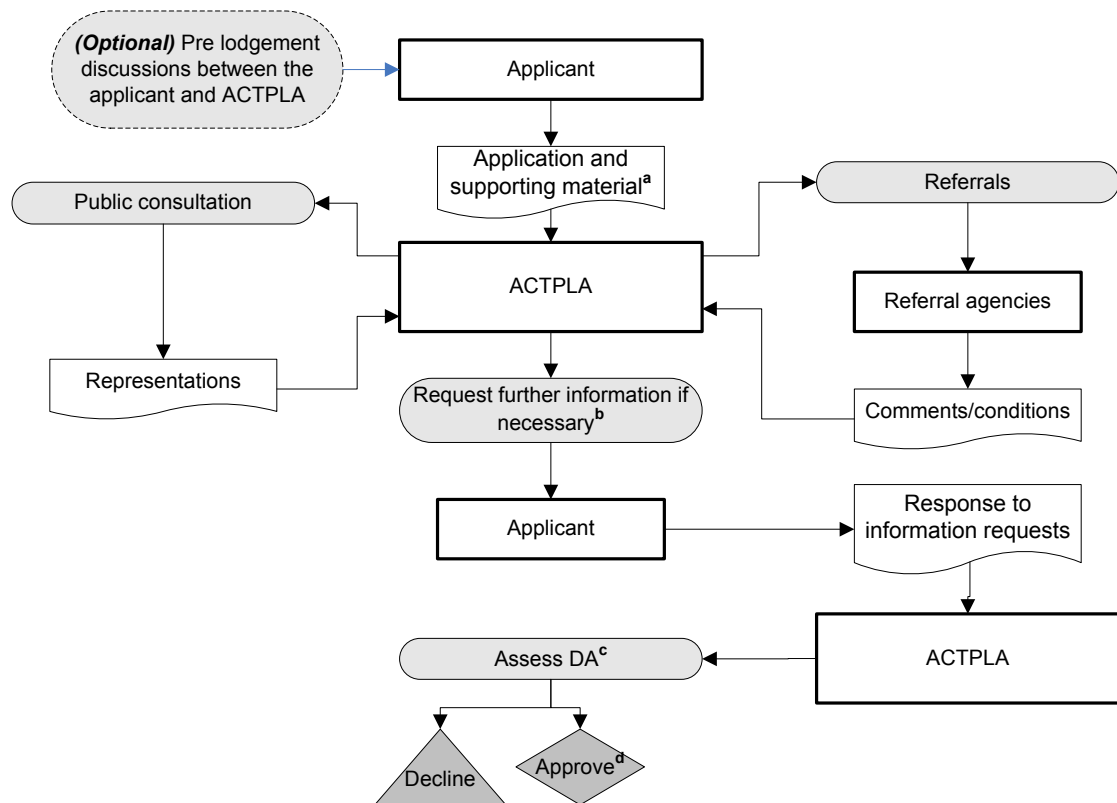
^d The report must include the background papers relating to the variation and a summary of the consultation with public and within government (including issues raised). ^e The Minister has 20 working days after receiving the Draft Plan to make the referral. ^f The Committee has 6 months in which to make its report.

^g The Draft Plan can only be returned to ACTPLA for ACTPLA to: conduct further stated consultation; consider any relevant planning report or strategic environmental assessment; consider any revision suggested by the Minister; revise the draft plan variation in a stated way; and/or withdraw the draft plan variation.

^h Includes a report on compliance with Ministerial Direction (if relevant) and a Government response to the Standing Committee Report. ⁱ If a disallowance motion is received for part of all of the variation by the Legislative Assembly, the members vote on the motion. If only part of the variation is disallowed, the remainder of the variation can commence. ^j The commencement date set for the whole or part of the variation that is not disallowed. The amended Territory Plan takes effect from that commencement date.

Data source: ACTPLA (2010); *Planning and Development Act 2007* (ACT); Productivity Commission survey of state planning departments and agencies (2010, unpublished).

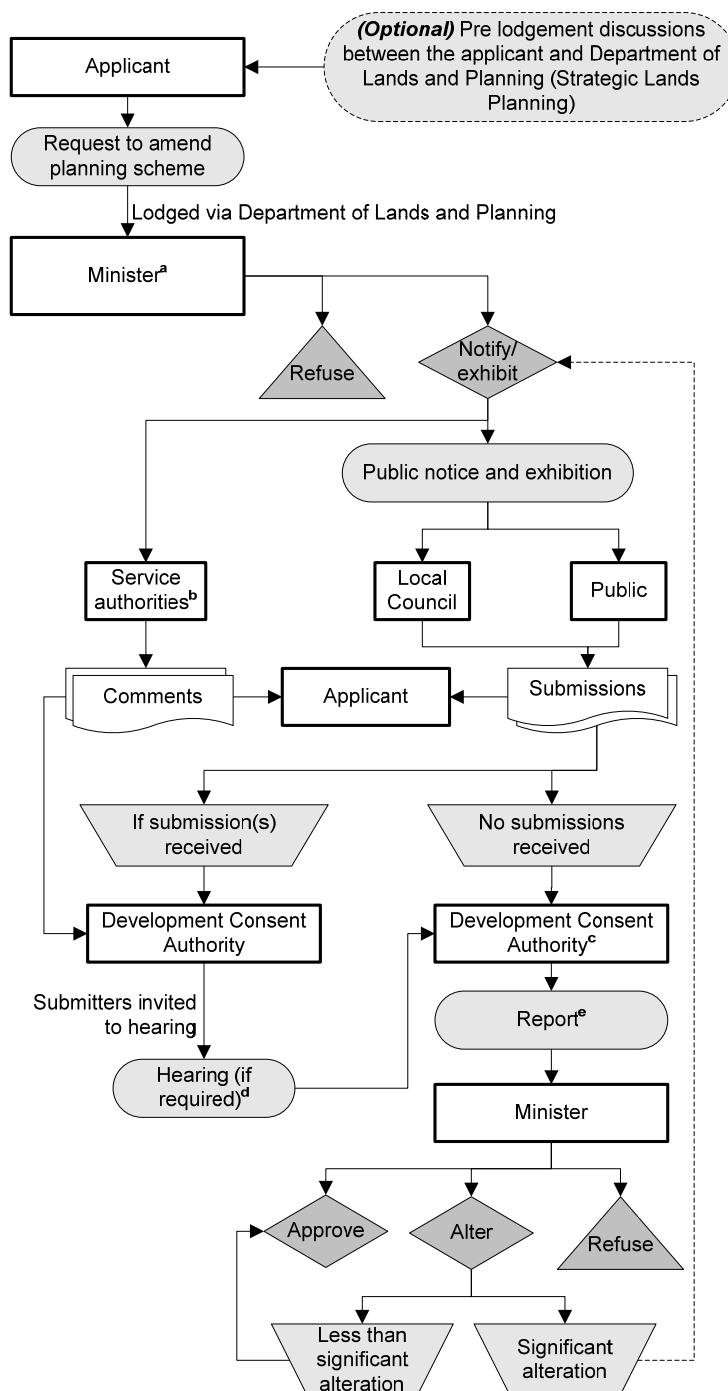
Figure D.18 Canberra (ACT) — subdivision



^a Assumes a complete application is provided. ACTPLA or a referral agency may revert to the applicant where a lodged application is incomplete or lacking the requisite supporting material. ^b Request must be made within 20 days of receiving application. ^c Decision to be made within 30 business days of lodgement if no representations are made or 45 business days after the lodgement date if representations are made. ^d Including approve with conditions.

Data source: Planning and Development Act 2007 (ACT); ACTPLA (2008).

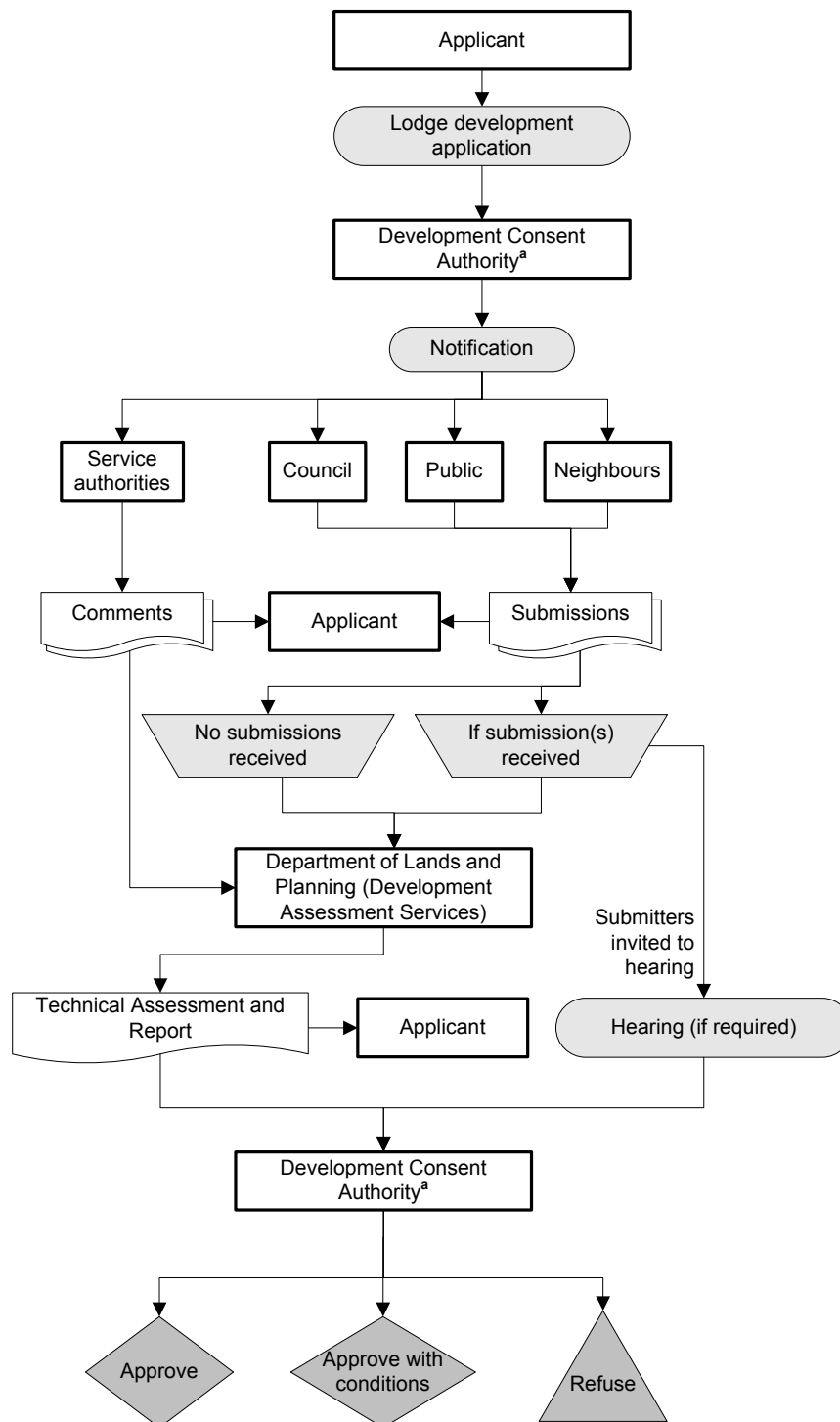
Figure D.19 Darwin (Northern Territory) — rezoning



^a Only the Minister can refuse the public notification of a planning scheme amendment, but the Minister or their delegate can approve the public notification. ^b A 'service authority' includes ministers, local authorities, the Power and Water Corporation and other prescribed statutory corporations. ^c In the role of the 'Reporting Body'. ^d If submissions are received, a hearing must be conducted. If no submissions are received, there is no need for a hearing. ^e The Report must address: issues raised in submissions; issues raised at the hearing and during any consultation; and any other matters the Development Consent Authority considers the Minister should take into account when considering the proposal.

Data source: Planning Act (NT) 2009; Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Figure D.20 Darwin (Northern Territory) — subdivision



^a Divisions of the Development Consent Authority determine development applications within their division area — currently there are 7 division areas: Alice Springs; Batchelor; Darwin; Katherine; Litchfield; Palmerston; and Tennant Creek. Outside of these areas the relevant authority is the Minister.

Data source: *Planning Act (NT)* 2009; Productivity Commission survey of state planning departments and agencies (2010, unpublished).

D.2 Changes in dwelling density 2001 to 2006

This section draws on ABS Census data to present an insight into the extent and location of infill development between 2001 and 2006. It does so via a comparison of dwelling density maps for the capital city planning areas. Those maps are based on the constituent councils for the capital city planning areas. For consistency, the local council boundaries have been defined by the Legal Local Government Area Boundaries 2001 and 2006 Editions.

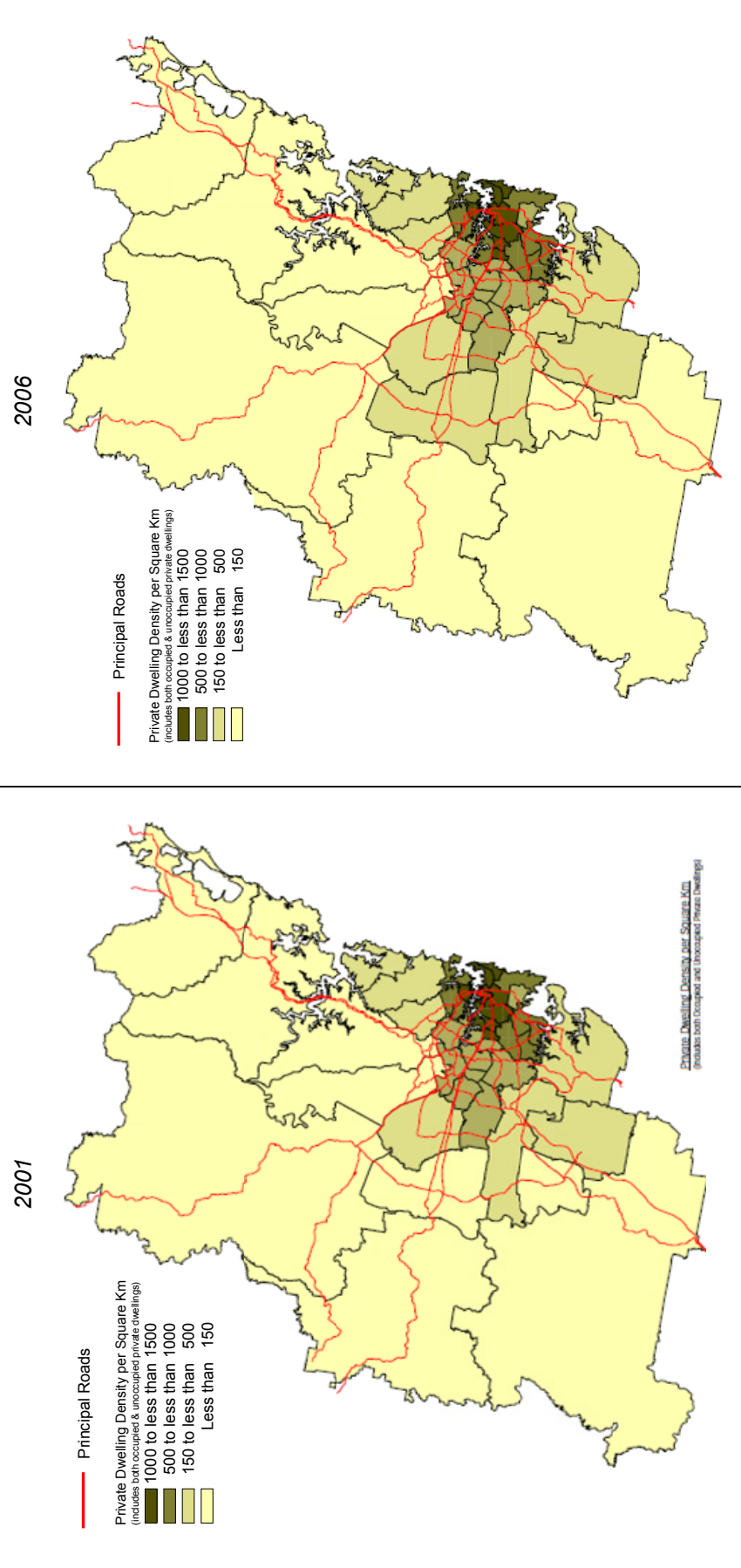
The maps reflect the dwelling density of local councils across the capital cities. The local councils have been classified into bands of:

- less than 150 private dwellings per square kilometre
- 150 to less than 500 private dwellings per square kilometre
- 500 to less than 1000 private dwellings per square kilometre
- 1000 to less than 1500 private dwellings per square kilometre.

Private dwellings have been defined to exclude ‘public accommodation’ buildings such as hotels and hospitals. The definition of private dwellings used in creating these maps includes unoccupied residential dwellings.

As outlined in chapter 4 there are 11 council areas that, while not moving between the bands above, have experienced a rise in dwelling density of over 100 dwellings per square kilometre and 22 council areas that experienced a rise in dwelling density of over 50 dwellings per square kilometre (over the period 2001 to 2006).

Figure D.21 Dwelling density: Sydney^a
Private dwellings per square kilometre

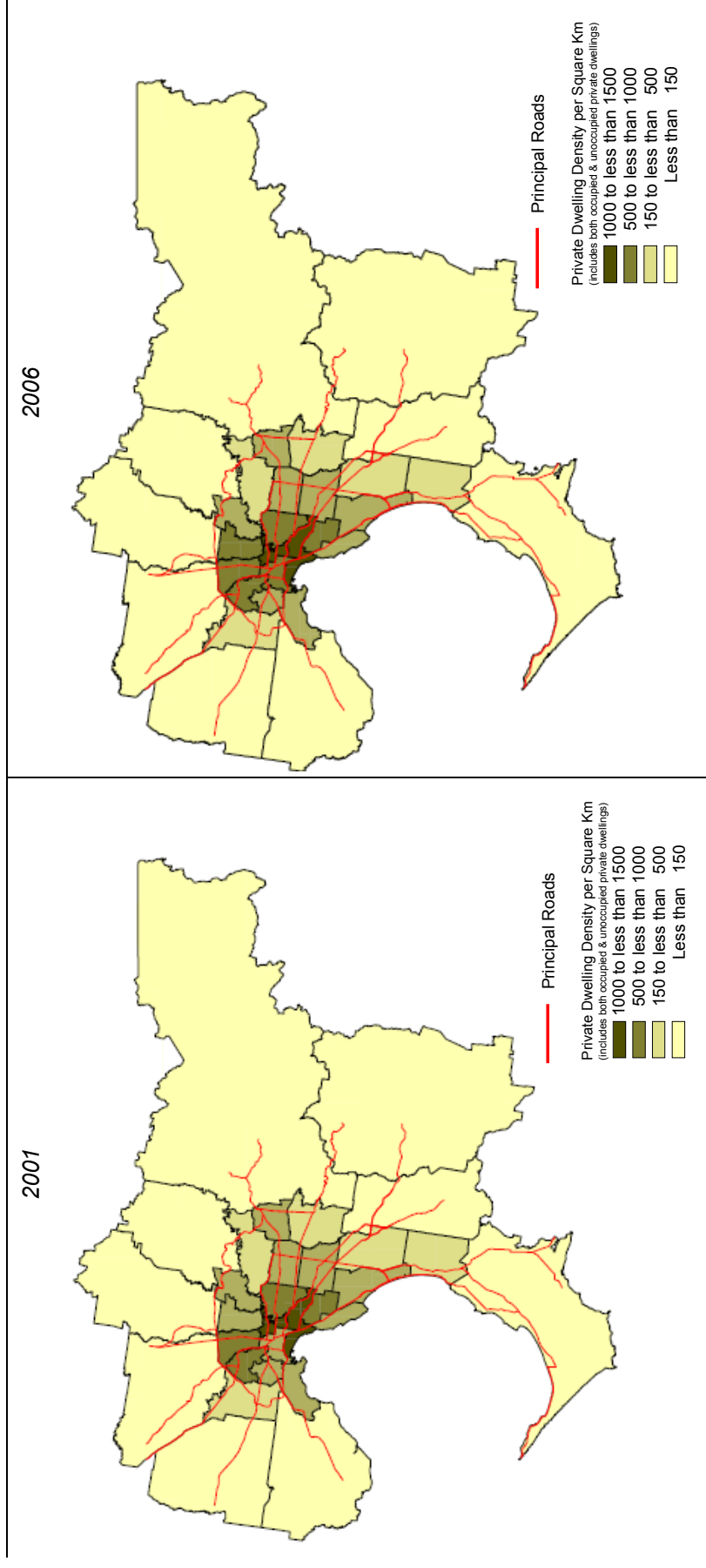


^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.

Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

Figure D.22 Dwelling density: Melbourne^a

Private dwellings per square kilometre

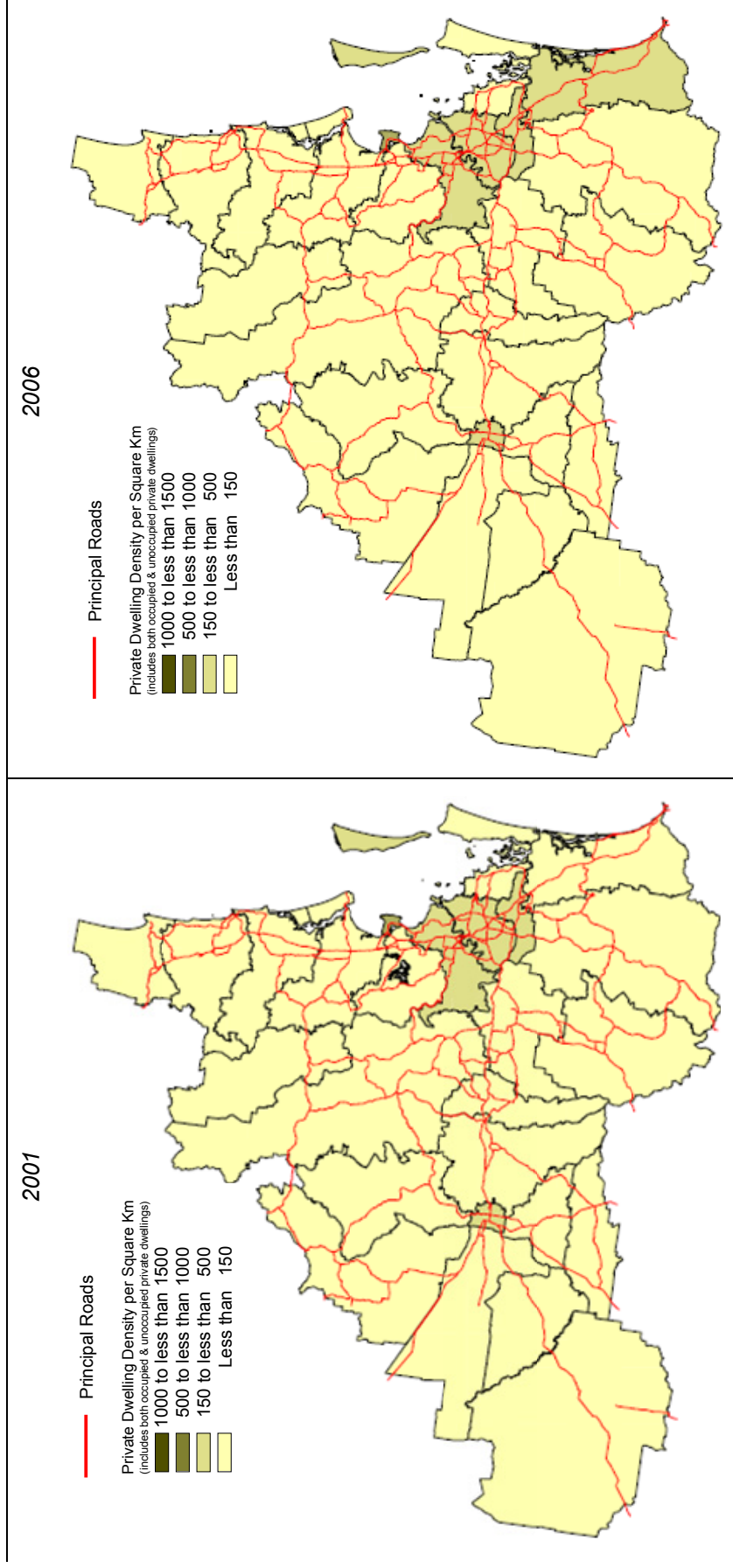


^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.

Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

Figure D.23 Dwelling density: Brisbane^a

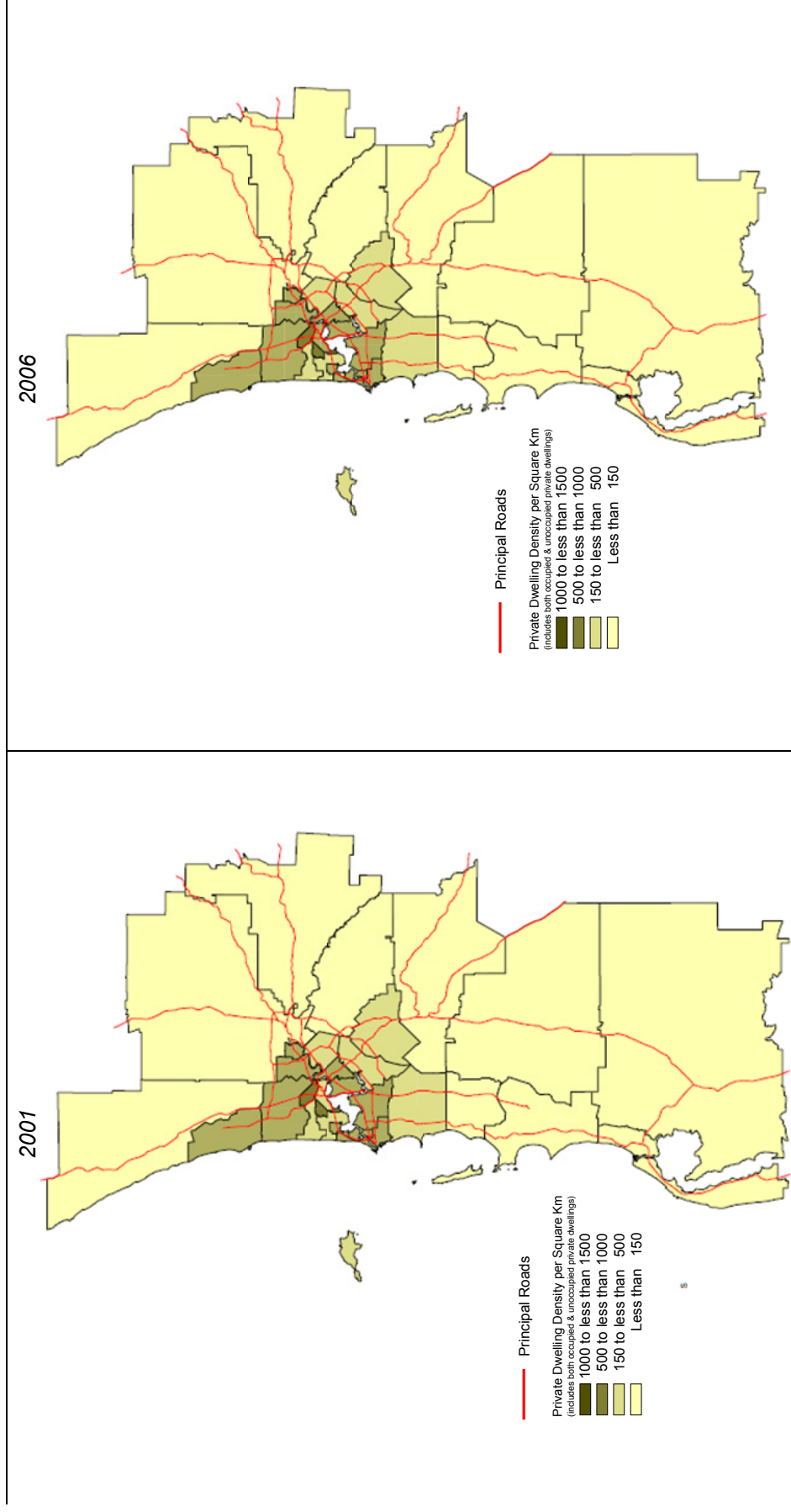
Private dwellings per square kilometre



^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.

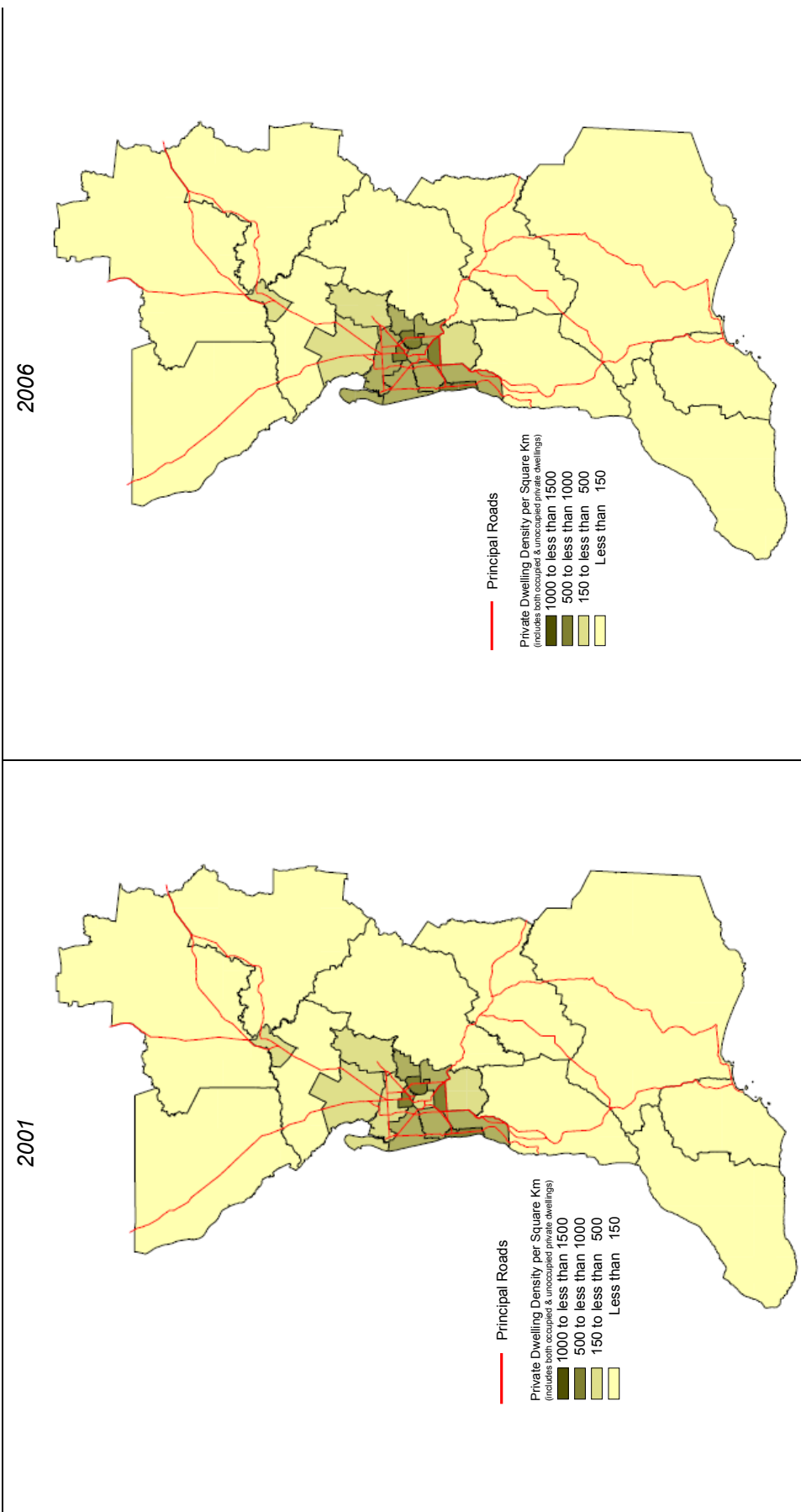
Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

Figure D.24 Dwelling density: Perth^a
Private dwellings per square kilometre



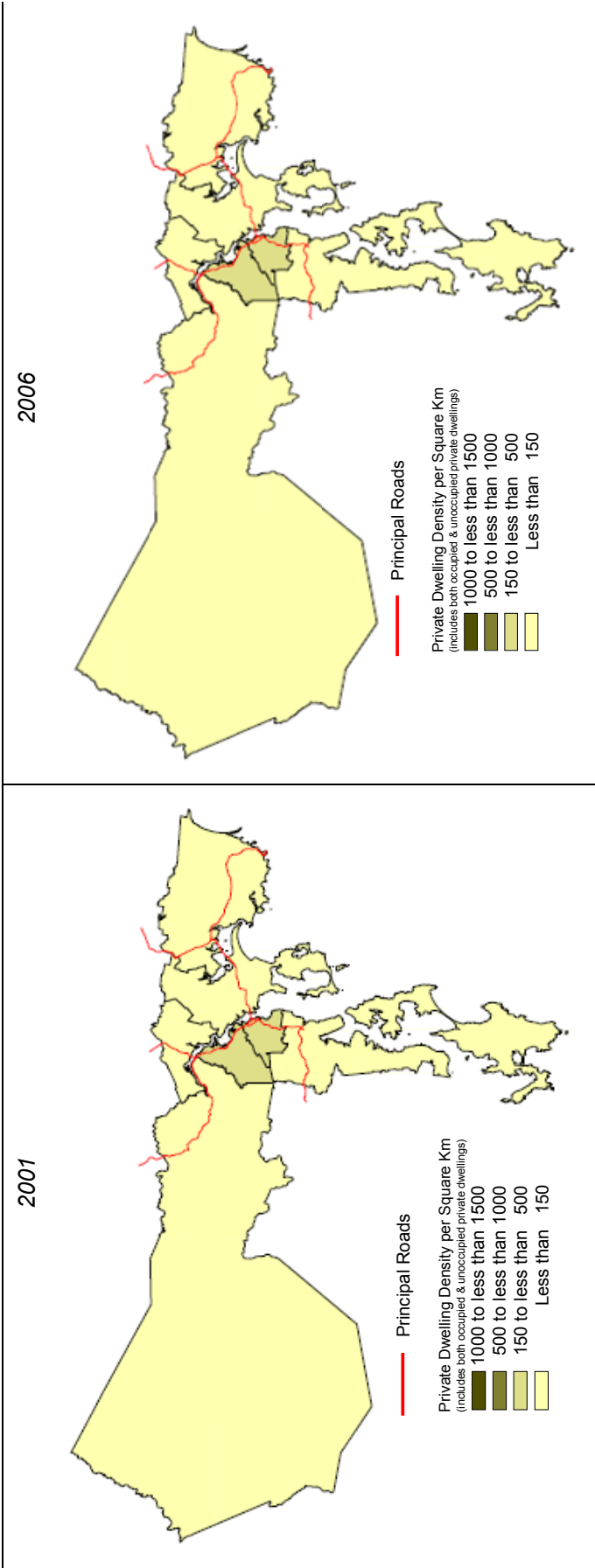
^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.
Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

Figure D.25 Dwelling density: Adelaide^a
Private dwellings per square kilometre



^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.
Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

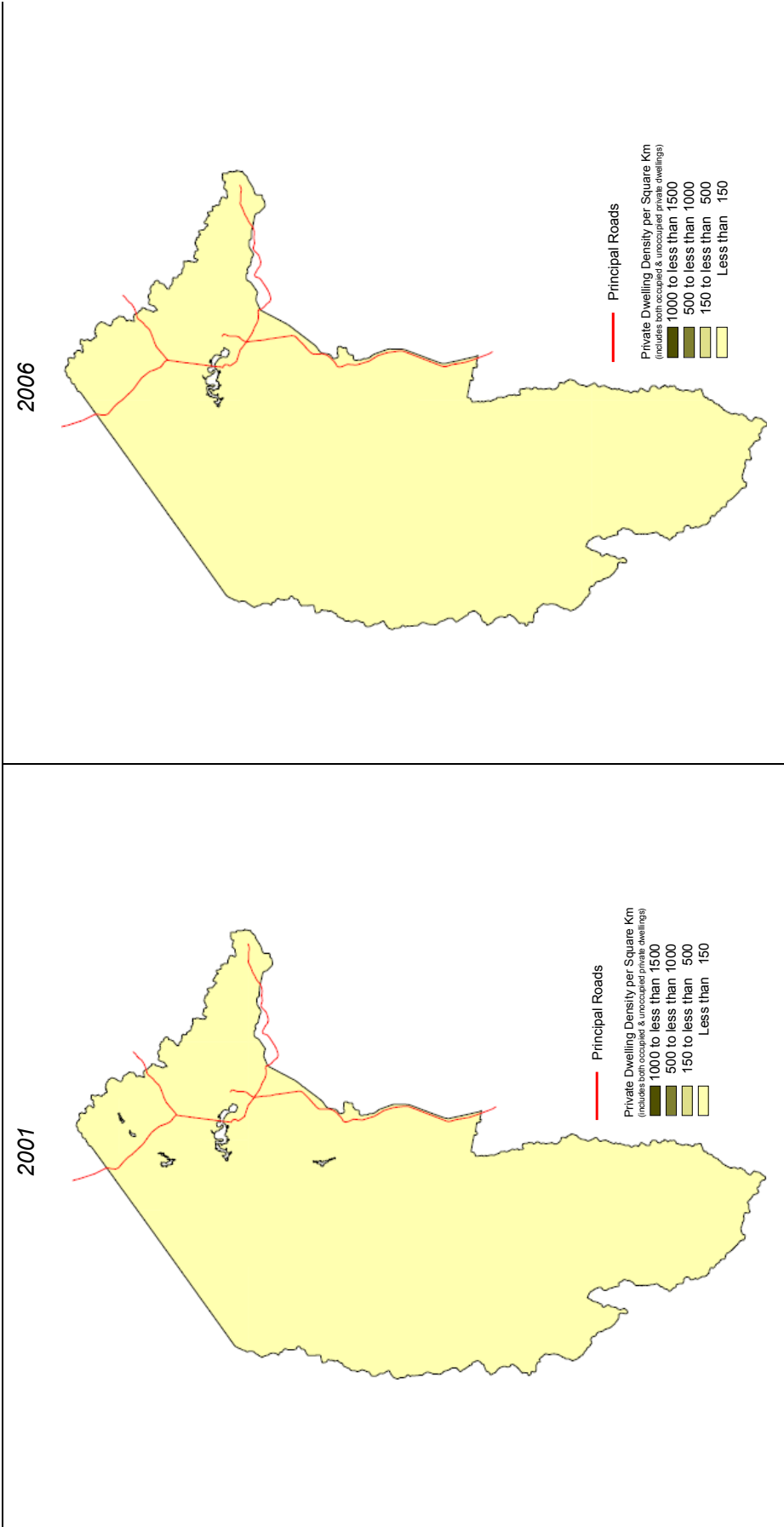
Figure D.26 Dwelling density: Hobart^a
Private dwellings per square kilometre



^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.

Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

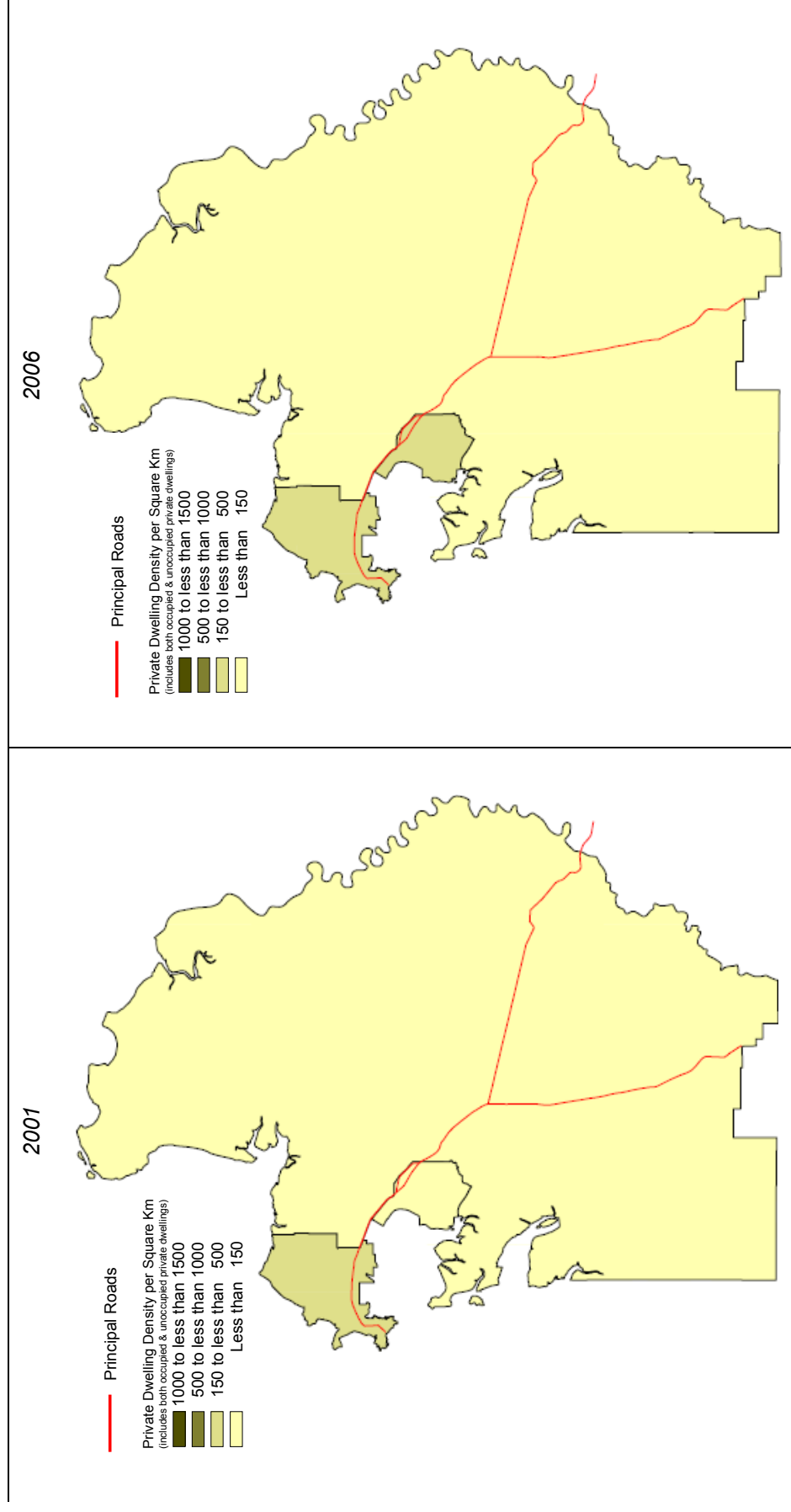
Figure D.27 Dwelling density: Canberra^a
Private dwellings per square kilometre



^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.

Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

Figure D.28 Dwelling density: Darwin^a
Private dwellings per square kilometre



^a Based on local councils in the capital city planning area and the Legal Local Government Area Boundaries 2001 and 2006 Editions.

Data source: ABS (2001 Census of Population and Housing — unpublished); ABS (2006 Census of Population and Housing — unpublished).

D.3 Further data on commercial and industrial land

This section presents the contextual data on commercial and industrial land referred to in chapter 5. The data is used as context for land supply outcomes as:

- there is incomplete and inconsistent data across the jurisdictions for the amount of vacant land on hand as at 30 June 2010 (tables D.3 and D.4) and the amount of land passing through the land supply process during the year 1 July 2009 to 30 June 2010 (tables D.5 and D.6)
- in the case of figures D.29, D.30, D.31 and D.32, it provides an insight into the interaction of demand and supply for commercial and industrial properties and the location of sales (but does not provide any meaningful insight into the extent of land supply).

Table D.3 Vacant land at different stages of the land supply processes: commercial land^a: 30 June 2010

	<i>Land designated for future development</i>	<i>Zoned land</i>	<i>Land approved for subdivision</i>
	Hectares	Hectares	Hectares
Syd (NSW)	n.e	19.5 ^b	n.e
Adel (SA)	n.e	n.e	17.0 ^c
Dar (NT)	n.e	20.2 ^d	135.6 ^e

n.e no estimates available. ^a No data was available in, or supplied for, Melbourne, SEQ, Hobart and Canberra. As a result, those cities are excluded from the table. ^b This figure only relates to one specific site in Sydney's Growth Centres, not all of Sydney. ^c 570 lots. ^d 3 lots. ^e 53 lots

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Table D.4 Vacant land at different stages of the land supply processes: industrial land^a — 30 June 2010

	<i>Land designated for future development</i>	<i>Zoned land</i>	<i>Land approved for subdivision</i>
	Hectares	Hectares	Hectares
Syd (NSW)	5 200	1 800 ^b	n.e
Mel (Vic)	3 150	2 990	n.e
Adel (SA)	663 ^c	n.e	268.4 ^d
Per (WA)	15 253	n.e	n.e
Dar (NT)	n.e	0.3 ^d	281.3 ^f

n.e no estimates available. ^a South East Queensland, Hobart and Canberra have been excluded from this table as their state planning departments were unable to provide responses to this survey question. ^b Of this land, 900 hectares are serviced by water and sewer connections. ^c As at October 2010. ^d 101 lots. ^e 1 lot. ^f 31 lots.

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished); Department of Planning and Community Development (Vic) (2010a); Department of Planning and Local Government (SA) (2010b).

Table D.5 Amount of commercial land completing different stages of the land supply processes in 2009-10^a

	<i>Land approved for subdivision</i>	<i>New lots/titles created</i>	
	Hectares	Lots	Lots
Per (WA)	n.e	380	151 ^b
Adel (SA)	17.0	303	570
Can (ACT)	3.8	7	7
Dar (NT)	135.6	31	13

n.e no estimates available. ^a No data was available in, or supplied for, Sydney, Melbourne, SEQ and Hobart. As a result, those cities are excluded from the table. ^b Number of lots given 'final approval'.

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished); Department of Planning and Community Development (Vic) (2010a).

Table D.6 Amount of industrial land completing different stages of the land supply processes in 2009-10^a

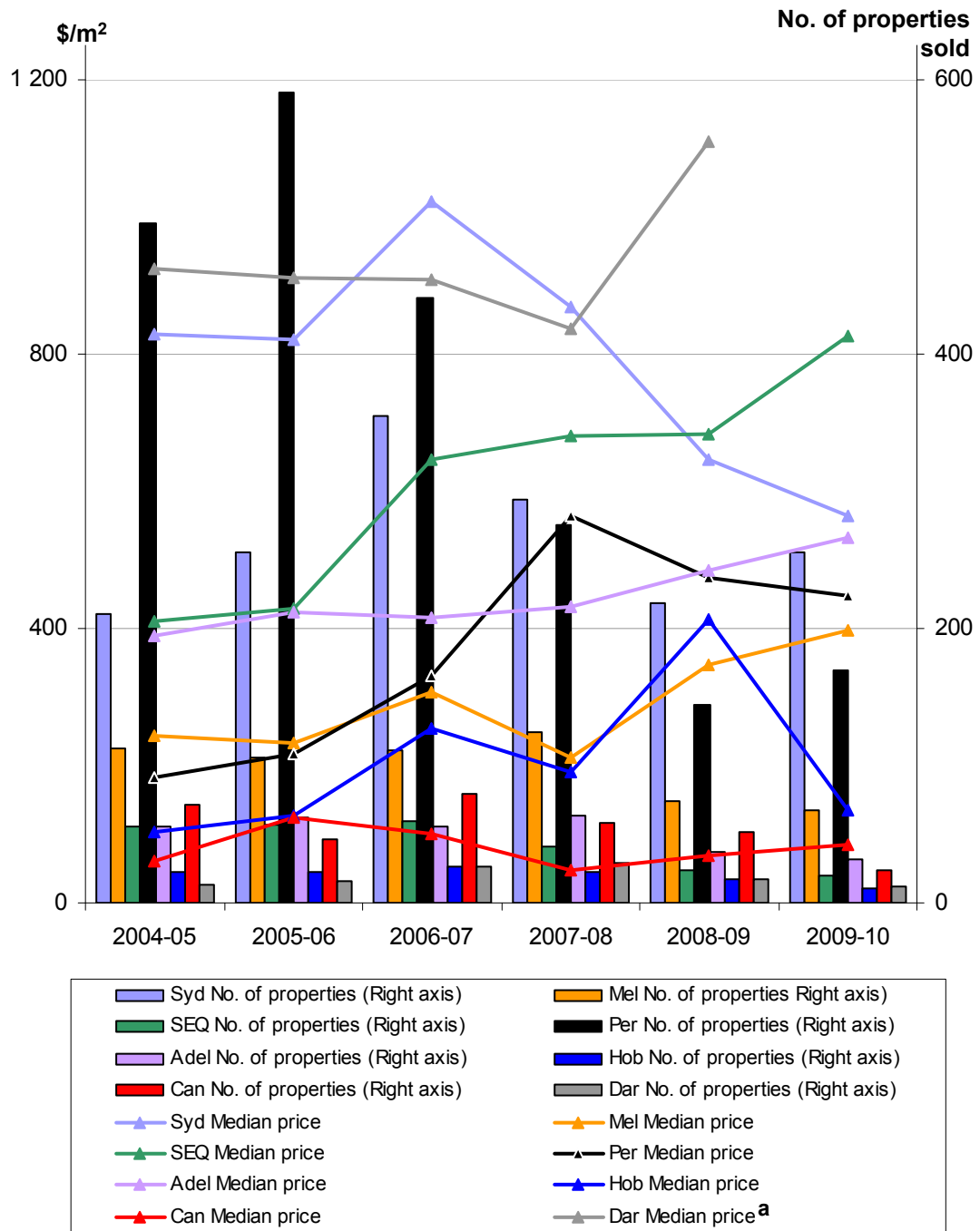
	<i>Land approved for subdivision</i>	<i>New lots/titles created</i>	
	Hectares	Lots	Lots
Adel (SA)	268.4	133	101
Per (WA)	n.e	649	331 ^b
Dar (NT)	281.3	53	30
Can (ACT)	50.8	185	185

^a Sydney, Melbourne, South East Queensland and Hobart have been excluded from this table as their state planning departments were unable to provide responses to this survey question. ^b Number of lots given 'final approval'.

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished); Department of Planning and Community Development (Vic) (2010a).

Figure D.29 **Commercial property sales: 2004-05 to 2009-10^a**

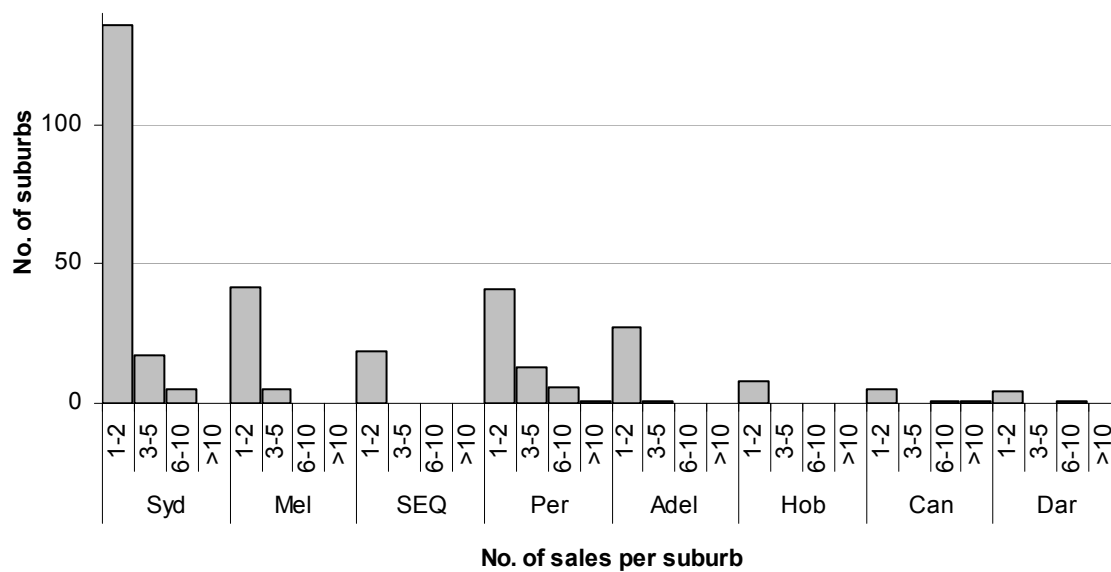
Capital city planning areas



^a Figure exclude 2009-10 median price data for Darwin — the median sales price of the 12 observations was \$2480/m².

Data source: RP Data / Rismark (2010, unpublished).

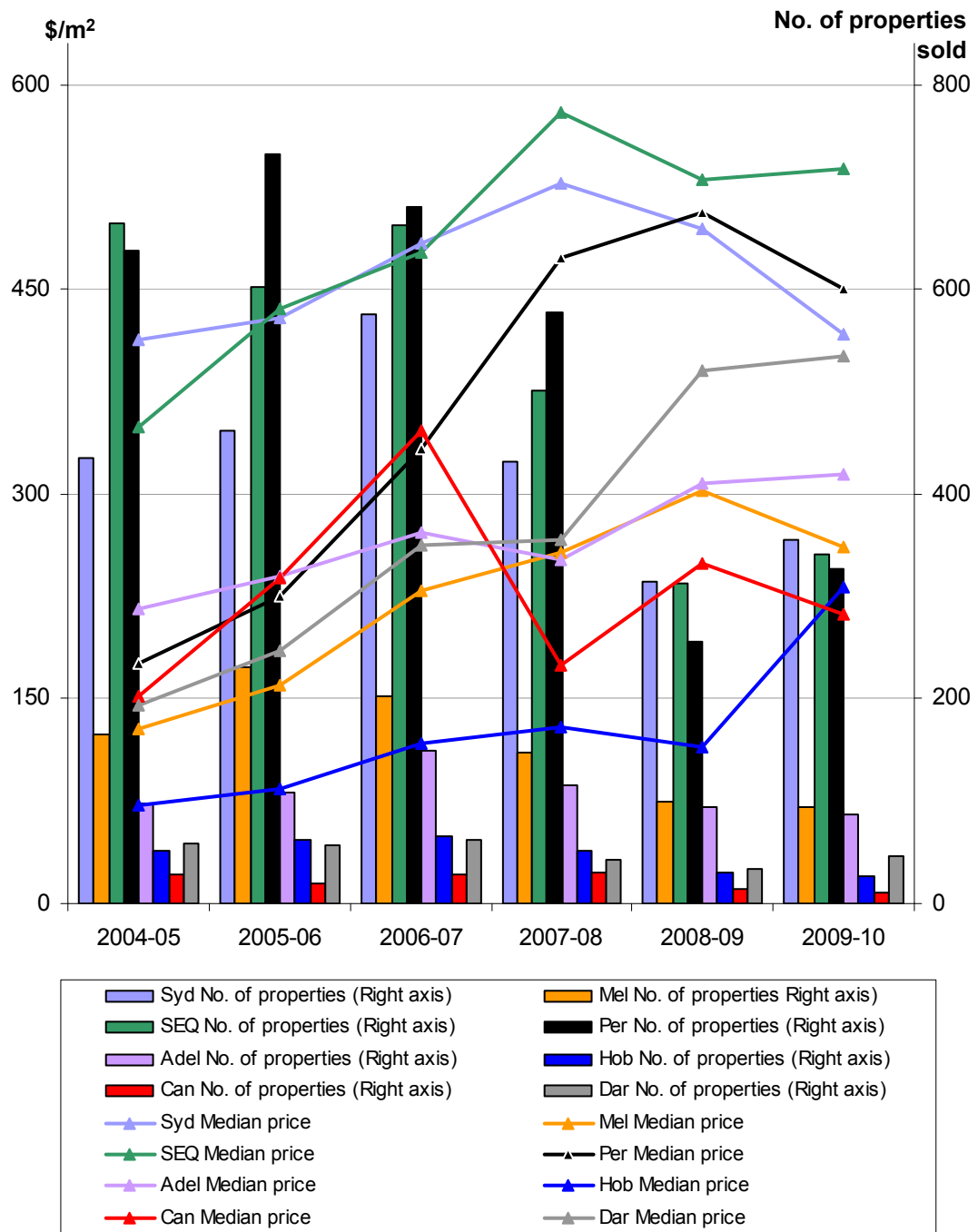
Figure D.30 Commercial land – dispersal of sales



Data source: Data source: RP Data / Rismark (2010, unpublished).

Figure D.31 **Industrial property sales: 2004-05 to 2009-10**

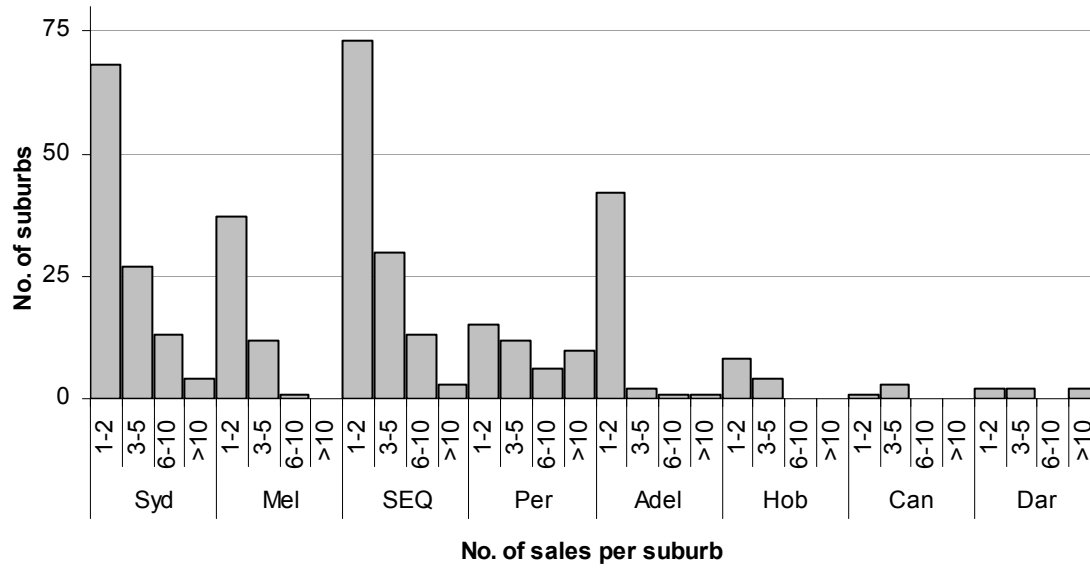
Capital city planning areas



Data source: RP Data / Rismark (2010, unpublished).

Figure D.32 Industrial land – dispersal of sales

Number of sales per suburb



Data source: RP Data / Rismark (2010, unpublished).

E Jurisdictional infrastructure contribution arrangements

New South Wales

Funding for local infrastructure provision in New South Wales is based on Section 94 Contribution Plans which assess the amount of local infrastructure required for new communities. The plans determine the contribution towards these items that are paid through the development process (as a condition of consent).¹ In 2009-10, local councils were able to fully recover the incremental costs attributable to a development for:

- local roads
- local bus infrastructure
- local parks that service a development site or precinct
- drainage and water management expenses
- land and facilities for local community infrastructure that services a development site or precinct
- land for recreation facilities and other community infrastructure (including pedestrian and cycle facilities, parks, sport facilities, child care centres and libraries) (Department of Planning (NSW) 2010c).²

Section 94 Contribution Plans are required to show the relationship between anticipated population growth and the new infrastructure to be provided. Water and sewerage authorities and the state government have historically also been able to charge developer levies. According to the Treasury (NSW) (2007), section 94 levies are set to recover 100 per cent of attributable costs.

¹ The *Environmental Planning and Assessment Act 1979* requires councils to only impose section 94 contributions that are authorised by a contributions plan and to use contributions for the purpose for which they were required and within a reasonable time.

² All other costs, such as those incurred for facilities benefiting existing communities (including council or district-wide community and recreation facilities) cannot be recovered through local infrastructure contributions.

A package of reforms aimed at improving housing affordability and accountability for development contributions included a \$20 000 per dwelling or subdivided lot cap on local government (section 94) infrastructure charges that took effect on 30 April 2009 (councils were able to apply to the NSW Minister for Planning to allow charges above the threshold).^{3,4} Excluded from the cap were fixed percentage contributions under section 94A (infill) and land ceded as an in-kind contribution. Cessation of water infrastructure charging by Sydney Water and Hunter Water was another reform component in place during 2009-10 (Department of Planning (NSW) 2009a).

In addition, the State Infrastructure Contribution (SIC) for new developments in the North West and South West Sydney growth centres covering the cost of land and/or buildings for specific regional infrastructure items was applied during the benchmarking period at a rate of \$269 649 per developable residential hectare (or 18 331 per average sized lot for residential development) and \$116 899 per developable industrial hectare.⁵ According to the Treasury (NSW) (2007), the SIC was set to recover 75 per cent of incremental costs attributable to state infrastructure in 2009-10 (the proportion was subsequently reduced to 50 per cent or \$11 000 per average sized residential lot if the monetary contribution is paid before 1 July 2011).

Victoria

In Victoria, Development Contribution Plans (DCPs) provide for the charging of development infrastructure for works, services and facilities and for certain community infrastructure items. However, infrastructure charges typically involve ‘voluntary agreements’ between developers and councils (section 173 Agreements) which are legally binding once agreement has been reached. According to Urbis (2010), this leads to site specific infrastructure charging which is inconsistent and

³ According to the Urban Taskforce Australia (sub. 59, p.7-8), nineteen local councils have been granted Ministerial approval to exceed the threshold with Pittwater Council being said to be the highest charging council with developer charges of \$62 000 per lot. The New South Wales Government announced the \$20 000 cap for infill developments would be made a ‘hard’ cap on 4 June 2010.

⁴ The cap was subsequently increased to \$30 000 for greenfield developments in September 2010. Where development in a greenfields release area was substantially underway, that release area was exempted from the requirements of the cap. The \$20 000 cap remained in place for established areas.

⁵ The North West Growth Centre is within the Local Government Area boundaries of The Hills Shire, Blacktown City and Hawkesbury City. The South West Growth Centre is within the Local Government Area boundaries of Liverpool City, Camden and Campbelltown City.

lacks transparency. In designated growth areas, DCPs have recently been introduced to implement the infrastructure requirements assessed in Precinct Structure Plans.

As well as local government charges, state based infrastructure charges for water and sewerage infrastructure are levied for both infill and greenfield areas (around \$1000 for each item). In addition to council administered DCPs, infrastructure levies for the expanded Urban Growth Boundary (covering local government areas) has been set under the Growth Areas Infrastructure Contributions charge (GAIC) at up to \$95 000 per hectare (or between \$9500 and \$7900 per lot based on 10-12 lots per hectare). It came into effect on 1 July 2010 (and so lies outside the reference period for this study).^{6,7}

The HIA questioned whether the approach to charging for infrastructure in the expanded urban growth boundary (still relevant to 2009-10 practices in Victoria and other jurisdictions) was consistent with best-practice principles (boxes 5.4 and 5.5).

The method of allocating the GAIC across Melbourne's growth areas raises issues about the nexus between the raising of revenue and the provision of infrastructure to service particular development areas. ...

Up to 50 per cent of the levy will contribute towards public transport with the remaining 50 per cent to contribute to other regional community infrastructure such as health services, libraries and sporting grounds. Once again, there is the likelihood that new residential development will be called upon to meet the cost of infrastructure that will be utilised by the broader community. (sub. 42, p. 32)

The HIA went on to note the potential consequences for residential housing development:

If the amount of development contribution exceeds the benefits receivable from the infrastructure, new home purchasers may be unwilling to pay the full price of new housing. This is more likely to be the case where local developments have to incur a disproportionate share of the cost of state and regional infrastructure upgrades and expansion and local community-based infrastructure such as child-minding centres and libraries. (sub. 42, p.33)

⁶ The Planning and Environment Amendment (Growth Area Infrastructure Contribution) Act 2010 was given royal assent on 1 June 2010 and came into operation on 1 July 2010. It will require 30 per cent of the Growth Area Infrastructure Contribution (GAIC) to be paid upfront and 70 per cent to be paid throughout the development process, in particular at the gazettal of the Precinct Structure Plan.

⁷ Six councils manage growth areas on the urban fringe - or interface between metropolitan and rural areas. They are: Cardinia, Casey, Hume, Melton, Whittlesea and Wyndham (all in the Commission's sample).

Queensland

In Queensland, Infrastructure Contributions Planning Scheme Policies and PIPs (box 5.1) allow councils to define the infrastructure needs required to service existing and future development. Infrastructure Contributions Planning Scheme Policies and PIPs also allow councils to set charges for:

- urban and rural residential water cycle management infrastructure
- transport infrastructure, including roads, vehicle lay-bys, traffic control devices, dedicated public transport corridors, public parking facilities predominantly serving a local area, cycle ways, pathways, ferry terminals and the local function, but not any other function, of state-controlled roads
- public parks infrastructure supplied by a local government, including playground equipment, playing fields, courts and picnic facilities
- land, and works that ensure the land is suitable for development, for local community facilities, including, for example community halls or centres, public recreation centres and public libraries.

These charges, based on infrastructure contribution units (ICUs), apply when a subdivision (reconfiguring a lot) or material change of use occurs or to another form of development when infrastructure charges are payable and the charge applies to building work that is assessable development or development requiring compliance assessment.⁸

Infrastructure charges vary across larger (high growth) councils and across localities within a council area.⁹ This flexibility recognises the cost of extending infrastructure to service a development depends on a wide range of local and regional factors. However, variations also arise through what is included in infrastructure assessments, the methodology used to calculate the infrastructure cost and the council's policy toward full or partial cost recovery (Urbis 2010). By way of example, the Sunshine Coast Regional Council (2010) had Infrastructure Contributions Planning Scheme Policies in place for the following land and/or works items in 2009-10: bike lanes, pathways and footpaths (in public road reserves); biting insects; council roads; car parking; open space and land for

⁸ The value of an ICU varies across councils and is adjusted annually to reflect movements in related price indexes.

⁹ The Queensland Government introduced a standard regulated infrastructure charge schedule (RICS) in 2004. The RICS is a conservative maximum amount per charge unit and may be adopted by a local government that has a Priority Infrastructure Plan. The RICS is generally more suited to smaller, slower growing councils with smaller populations but larger councils may also adopt the RICS.

community facilities and trails; public transport; stormwater; and water supply and sewerage (Sunshine Coast Council 2010).

Flexibility results in greater variability of charges in Queensland compared to other jurisdictions. As an example of that variability, a recent stylised intra-jurisdictional comparison of infrastructure charges revealed a range between \$10 000 and \$40 000 for a low density residential block, \$27 000 to \$806 000 for 1000m² retail development and \$34 000 to \$900 000 for a 5000m² industrial floor space on a one hectare site (see below) (AEC Group 2009).

Western Australia

In Western Australia, land developers are responsible for the provision of economic infrastructure including water supply, sewerage and drainage, roads and power, and certain social or community infrastructure, such as public open space (equivalent to 10 per cent of the gross subdivisible area or, alternatively, a cash in lieu contribution) and primary school sites necessary for the development. In addition, local councils can seek contributions for the capital costs of community or social infrastructure including:

- sporting and recreational facilities
- community centres
- child care and after school centres
- libraries and cultural facilities
- other services that may reasonably be requested.

Development contribution requirements can be satisfied by:

- ceding of land for roads, public open space, primary school sites, drainage and other reserves
- construction of infrastructure works which are transferred to public authorities on completion
- monetary contributions to acquire land or undertake works by or on behalf of public authorities; or
- a combination of the above.

Requirements for development contributions are imposed by way of conditions on subdivision, strata subdivision or, in areas of fragmented ownership where cost sharing arrangements are necessary, by development schemes or development

contribution arrangements under local government schemes (Western Australian Government 2009).

South Australia

The *Development Act 1993* sets mandatory developer contributions for a limited number of infrastructure items including open space, car parking, affordable housing, roads and hydraulic connections where the development qualifies (UDIA, sub. 53) but there is no legislated developer contribution for headworks outside the development site. However, developers are responsible for local roads, minor water and sewerage works as well as stormwater, gas and electricity connections within a subdivision. Developers of subdivisions are also generally required to provide up to 12.5 per cent of the subdivision as local open space. While not mandatory, the developer generally develops this open space with landscaping and some recreation equipment. The design of open space is generally negotiated with the local council.

South Australia is one of the few states where there are no formal powers for contributions towards infrastructure headworks outside of the development site by developers. Some recognition of this would assist state and local agencies to provide such services on a programmed basis (Whyalla City Council, sub. 55, p. 2).

In addition, for very large master plan suburb developments, developers will on occasion contribute to social infrastructure such as community facilities. This is often negotiated outside the legislation as part of marketing of the development and in order to create goodwill as part of ongoing project rollout. (Productivity Commission State Agency Survey 2010, unpublished)

Tasmania

Developer contributions in Tasmania cover one of the narrowest range of infrastructure items and are limited to: local roads (which may either be shared with or provided by local councils); minor water and sewerage works (for example, reticulation pipes that connect properties to the headworks); and storm water (which may either be shared with or provided by local councils).

ACT

The ACT system of land development involved a roughly equal share of public, private and joint venture development arrangements in 2009-10 with ACT Government agencies responsible for providing road (trunk and local), water (head works and minor), sewerage (head works and minor), stormwater, electricity and

gas (tables 5.8). Aside from these infrastructure items, developers are typically asked to provide items including traffic control devices, pollutant traps and ponds, streetlights, car parks, parks and urban spaces, street furniture and fibre optic telecommunications.

Northern Territory

A service authority or local authority may make a contribution plan under section 68 of the Planning Act. The contribution plan can be for the purposes of repair and maintenance of capital works, works required as a condition of a development plan, or the provision of public car parking. The contribution plan must specify the formula for calculating the contribution and the intended order in which works are to occur.

F Competitive aspects of retail markets

This appendix assesses, at a broad level, features of Australia's retail markets which provide some indication as to the level of competition which might prevail. Specifically examined are key features of competitive markets which are outlined in chapter 8 — the availability of a large number of sites for development; the potential for there to be a large number of 'players' in markets (that is, there are no barriers to entering a market); and market share of the participants. It is important to note that the competitiveness of markets is influenced by a range of factors other than planning and zoning systems, and therefore competitive features identified (or conversely, lack of competitiveness) cannot necessarily be attributed solely to aspects of the relevant planning or zoning system.

F.1 Are there a large number of sites possible for development?

The ease with which a business can find suitable premises from which to operate depends on available vacancies at possible locations. Vacancy rates for retail space vary substantially between locations and over time (table F1). The supply of, and demand for, land/floorspace for particular business activities has both a cyclical aspect and a long-term underlying aspect. A long term shortage of sites for particular business types may be indicated by persistently low vacancy rates and high prices (for either site sale or rental). Conversely, high vacancy rates and low prices may be indicative of a sufficient supply of sites for some activities, given the inflexibilities of many zoning systems to allow alternative uses on vacant sites and the high costs associated with getting some sites into a useable condition.

Retail space and vacancy rates

There is estimated to be around 45 million square metres of retail space in Australia, located outside of shopping centres in retail strips and increasingly in stand-alone premises such as bulky goods precincts (PC 2008). In the 14 years to 2005-06, the supply of shopping centre floor space increased by almost 90 per cent to 17.3 million square metres. Over the same period, non-shopping centre retail floor space

increased by 16 per cent to 27.3 million m². This growth in retail floor space has surpassed population growth with total floor space per capita increasing from around 2.4 m² per person in early 1990s to around 3.0 m² per person in 2005-06 (sub. 43, pp.12-13). Chapter 5 provided further detail on retail floorspace per person and indicated some variability across selected Australian cities. Specifically, it was noted that Hobart appeared to be undersupplied for retail space, while South East Queensland had the highest ratio of bulky goods floorspace per person.

The City of Sydney estimates that there is currently almost 3 m² of retail space per person in the city but that there is an undersupply of supermarkets based on projected population levels (sub. 15, attachment B, p.7).

Reliable data on vacancy rates in the retail sector are only publicly available for the shopping centre industry (in aggregate format) and for selected locations in the 'high street' end of the retail strip market and selected bulky goods sites. In the larger regional shopping centres, vacancies rates were estimated at around 1 per cent of total floor space in 2010 and have averaged around 0.5 to 2.5 per cent over the past five years (SCCA, sub.43). Vacancy rates tend to be marginally higher in the smaller subregional and neighbourhood centres (around 3 per cent and 5 per cent, respectively, in 2010).

Given the comparatively low vacancy rates over the past decade, the Shopping Centre Council of Australia (SCCA) concludes that there is a chronic shortage of space in the larger shopping centres. However, they attribute this shortage *not* to planning and zoning restrictions but to the limited choice of department stores in Australia with which to 'anchor' larger developments (sub. 43, p.8). Furthermore, on the basis of new supermarket developments in recent years, the SCCA conclude that this shortage of larger centres does not extend to a shortage of sites for supermarkets.

For shopping strips, vacancy rates are generally higher than in larger centres (table F1). In fact, there is a considerable amount of anecdotal evidence that vacancy rates in some 'non-prime' urban strips can be extremely high (Kennedy 2004).

Vacancy rates in bulky goods centres are highly variable between centres but a typical vacancy rate is around 8 per cent (BGRA & Deep End Services 2009, p.6).

Table F.1 Retail vacancy rates in selected cities

Indicative average ranges for mid 2005 to mid 2010 and current estimate (%)^{ab}

<i>Location</i>	<i>Prime strips</i>		<i>Bulky goods centres</i>	
	5 yr avg	2010 est.	5 yr avg	2010 est.
NSW				
Sydney CBD	0-4	1		
Sydney metro	2-6	6	3-22	0-15
Newcastle				0
Vic				
Melb CBD	0.5-3	1.5		
Melb metro	2-4	3.5		0-14
Qld				
Brisbane		5.5		0-39
Gold Coast				0-2
Sunshine Coast		1-8		0-8
WA				
Perth CBD		4		
Perth metro				0-23
SA				
Adelaide CBD		2		
Adelaide metro		2-8		0-20
Tas				
Hobart metro				8
ACT				
Canberra metro ^c				37

^a Rates represent the average vacancy rate over all sites in each category – some sites may therefore have higher or lower vacancy rates at any point in time. The estimate for mid 2010 (or as close in time as available) is reported in brackets and where it is a range, the range reflects estimates from different sites. ^b Comparable data are not available for other cities. ^c The relocation of the Commonwealth Dept of Education, Employment and Workplace Relations to a new premises contributed to a doubling in the civic vacancy rate in mid 2010.

Sources: CBRE 2010 (various pubs); BGRA & Deep End Services 2009 (directory); SCCA (sub. 43, pp.7-12).

Rent data for activity centres

Occupancy costs (per unit of lettable retail space) vary substantially between retailers according to the location of premises and retail amenity provided. On average, occupancy costs are lower outside of shopping centres, with costs only in the 'prime' retail strips approaching those in a shopping centre (PC 2008).

It is often asserted that planning and zoning controls, by limiting the supply of retail space, have led to higher rents for retailers. SCCA claim that 'If this was the case we would expect that occupancy cost ratios would have grown substantially over time. In fact, over the last decade, these have not changed much at all.' Specifically, they report that average occupancy cost ratios (including marketing levies and GST)

have hovered around 16% for regional shopping centres, 12% for sub-regional centres and 11% for neighbourhood centres. (sub. 43, p.13)

The Australian Retailers Association (ARA) however claim that occupancy costs around Australia have risen dramatically in recent years with ‘almost 40 per cent of retailers paying occupancy costs greater than 15 per cent of their turnover’ and that in the first half of 2009, ‘over 31 per cent of retailers suffered annual rent increases greater than 10 per cent when they renewed their leases. Some of these retailers have reported annual rent increases of up to 25 per cent at a time...’ (ARA 2009) These claims follow on from similar concerns raised with the Commission during its Inquiry into the Market for Retail Leases in Australia (PC 2008).

F.2 Selected market participants

Grocery retailers

In the grocery market, *Woolworths* and *Coles* are, by far, the largest retailers in Australia. At end 2009-10, Woolworths had over 823 supermarkets and Coles around 750 across the country. The majority of these stores are located in shopping centres (as opposed to stand-alone sites). The ACCC (2008) reported that Coles and Woolworths have maintained a fairly consistent share of supermarkets above 1000m² over the last 10 years, with each having just over 30 per cent of stores nationally. Consequently, Coles and Woolworths are much more significant in relation to larger stores, accounting for around 87 per cent of all supermarkets above 2000m². A typical Coles or Woolworths store has a floor area of 2000m² to 4000m², although both chains now operate smaller formats in some inner city and resort locations. The ACCC (2008) reported that Coles and Woolworths account for approximately 70 per cent of packaged grocery sales in Australia and approximately 50 per cent of fresh product sales (meat, fruit and vegetables).

Depending on economic conditions, Woolworths and Coles generally open around 20 new supermarkets each year.¹ Woolworths and Coles are not typically ‘developers’ of their sites, but have turned more to this in recent years.

Aldi is the most significant new entrant into the Australian grocery market in recent years. Since opening in Australia in January 2001, Aldi has expanded to have over 230 stores in New South Wales, ACT, Queensland and Victoria but advise that they see potential for up to 500 stores in eastern Australia (Webb 2008). Accordingly,

¹ For example, Woolworths opened 26 new stores in 2009-10 and closed 5 stores (Woolworths 2010). The majority of the new stores are located in New South Wales and Victoria.

Aldi report that they plan to open ‘at least 30 stores a year for the foreseeable future’ (Speedy 2009). Each store has an average floor area of around 850-1500m². Aldi’s preferred model is to operate on stand alone sites which it owns, but it also has some Australian stores located in small shopping centres.

The grocery retail market is also serviced by a number of smaller groups, some of which operate in only one or two states. For example:

- there are around 15 000 ‘convenience’ stores around the country (Australian Association of Convenience Stores 2010)
- over 1200 IGA stores, 120 Foodland IGA stores and 710 Foodworks (all supplied by a single wholesale provider, Metcash), (Inside Retailing Online 2010)
- Franklins² is a NSW based group with approximately 85 stores of between 1000-2000m²
- 140 retailers supported by the wholesale SPAR, which operates in Brisbane; and
- Supabarn, which operates just 7 stores in Sydney and Canberra.

In contrast to the other larger groups discussed above, these smaller groups typically occupy existing stores rather than seeking land for construction of new stores.

The ACCC (2008) found that the independent supermarkets tend to focus on convenience and service and provide little price competition for Coles and Woolworths. A key factor inhibiting price competition from the independent retailers is the wholesale prices of packaged groceries supplied by Metcash. While Coles, Woolworths, Aldi and Franklins have their own wholesale operations, nearly all other supermarkets in Australia are supplied with their packaged groceries by Metcash. Most of these stores are smaller stores, which largely compete on the basis of convenience, service and local community ties rather than on the basis of price. Almost half the stores are below 500 m² in size and only about a quarter are above 1000 m². While small independent retailers provide a competition alternative, they do not contribute significantly to price competition. The ACCC considered that the prices Metcash sets for its wholesale packaged groceries are a significant factor holding many independent retailers back from more aggressive price competition. (ACCC 2008)

² Franklins was sold to Metcash in July 2010 to become part of the IGA chain. There are now only 80 ‘Franklins’ stores.

Large format retailers and anchor stores

Apart from the grocery retailers, there are a limited number of other large format retailers in Australia. Specifically, there are only two major chains of department stores — Myer and David Jones, which typically occupy at least 12 000 m² and occasionally up to 30 000 m² — and three major chains of discount department stores — Big W, Kmart and Target, which typically occupy around 8000 m² of floor space. As these large format retailers generally locate in shopping centres, they are possibly less exposed to planning and zoning systems than would be the shopping centre developer or a stand-alone retailer.

Costco Wholesale Corporation is a recent entrant to the Australian market which has the potential to become a significant player in Australian retailing. Costco began looking for appropriate sites in Australia in early 2006 and its first store opened in the Melbourne Docklands in 2009. A second store is currently under construction in western Sydney and further stores are planned for New South Wales, Victoria, Queensland, South Australia and the ACT.

Each Costco store has, on average, about 13 000 m² of shopping area (similar in size to a major department store). Costco stores are not supermarkets under most planning definitions of a supermarket because they sell bulky goods. However, they are also not classified as a bulky goods retailer because they sell food and clothing. Costco do not have their own distribution centres but instead receive deliveries direct from manufacturers.

Bulky goods retailers

There are currently over 150 bulky goods centres operating across Australia, accounting for at least 30 per cent of all retail floor space (Harley 2009). While most of these stores are located on the periphery of the major cities and regional centres of New South Wales, Victoria and Queensland, bulky goods centres have been expanding rapidly (albeit from a low base) into the smaller states (table F2).

Bulky goods retailers have successfully differentiated themselves from other retailers to the extent that ‘bulky goods retailing’ is defined in all state and territory planning schemes and, in Australia at least, widely considered as a separate category of retailing. Bulky Goods Retailers Association (BGRA) report that there are essentially two types of definitions for bulky goods retailing contained in planning laws across Australia: ‘performance based’ definitions have been adopted in New South Wales, and in part, in other States; ‘list of specific product categories’ definitions have been adopted in Victoria, and in part in other States (sub. 37, p.18).

Table F.2 New bulky goods sites opened, under construction or in planning during 2009-10

	<i>Name/Location</i>	<i>Development status</i>	<i>Scheduled opening date</i>	<i>Size (m2)</i>
NSW	Dubbo Homemaker Centre (Stage 2) – Regional NSW	Approved	July 2011	12 693
	Fantastic Centre Wagga Wagga – Regional NSW	Approved	Mid 2010	6 797
	Harvey Norman Centre Ballina – Regional NSW	Proposed	2011	13 305
	Home HQ North Shore - Sydney	Under construction	Late 2009	22 500
	Kotara Homemaker Centre (Stage 2) - Newcastle	Approved	Late 2010	28 144
	Supa Centa Penrith (Stage 2) - Sydney	Under construction	Early 2010	5 731
	Taree Homemaker Centre (Stage 2) – Regional NSW	Approved	Late 2010	23 730
	Wagga Gate Homemaker Centre – Regional NSW	Approved	May 2010	17 500
Vic	Chadstone Lifestyle Centre - Melbourne	Under construction	Late 2010	19 800
	Geelong Gate Homemaker Centre - Geelong	Under construction	Oct 2009	16 410
	Harvey Norman Centre Springvale	Approved	2012	71 445
	Home HQ Mentone - Melbourne	Approved	n/a	40 000
	Millers Road Homemaker Centre - Melbourne	Approved	Late 2010	37 000
	South East Mega Homemaker Centre - Melbourne	Under construction	Early 2011	50 000
	South Wharf Homemaker Hub - Melbourne	Under construction	Oct 2009	17 665
Qld	Cairns Homemaker Centre - Cairns	Approved	Late 2010	23 679
	Harvey Norman Centre Mackay – Regional Qld	Proposed	2011	37 883
	Harvey Norman Centre Maroochydore – Sunshine Coast	Proposed	n/a	28 300
WA	Bunnings Centre Southern River - Perth	Approved	Late 2010	17 225
	Lifestylezone Rockingham (site B) - Perth	Approved	n/a	23 200
	Mandurah Central – regional WA	Under construction	Mid 2010	10 148

(continued next page)

Table F.2 (continued)

	<i>Name/Location</i>	<i>Development status</i>	<i>Scheduled opening date</i>	<i>Size (m2)</i>
	Mandurah (Lot 1 Pinjarra Road) – regional WA	Under construction	Mid 2010	5 200
	Military Home Depot Midland - Perth	Approved	Oct 2010	20 000
	Primewest Midland - Perth	Proposed	n/a	12 232
	South Central Jandakot (Stage 2)	Under construction	Late 2009	6 700
SA	n/a			
Tas	Launceston Homemaker Centre - Launceston	Approved	Early 2011	13 492
	North West Coast Homemaker Centre – Regional Tas	Proposed	2011	25 330
ACT	n/a			
NT	n/a			
Australia total				606 109

n/a Information not available as at end 2010.

Source: Bulky Goods Retailers Association & Deep End Services 2009.

Under this definition, bulky goods retailing is generally distinguished from other retailing by the exclusion of those businesses which sell food or clothing (unless the sale of these is ‘ancillary’ to the sale of bulky goods). BGRA also provide their own preferred definition which is a combination of these two approaches (sub. 37).

Woolworths’ home improvement stores

Woolworths announced in August 2009, its plans to develop a network of home improvement stores around Australia (Woolworths Limited 2009). The company aims to establish 150 stores over the next five years, with each store to be over 10 000 m². Initial stores, currently referred to as ‘Oxygen’, will be located in Victoria, Queensland and New South Wales.

For its Victorian stores, 11 of the 12 were bundled together as a ‘state significant project’ to be handled by an independent assessment panel reporting to the Minister. The remaining site was approved for use by Maribyrnong council. Woolworths received planning approval from the Victorian Minister for 10 sites in Victoria (9 in Melbourne and 1 near Ballarat) in September 2010 but was rejected for a store in north Geelong. As part of its planning applications in Victoria, the proposed stores’ land uses are described by Woolworths as ‘Trade Supplies, Restricted Retail, and Landscape garden supplies’ – necessitating, in some cases, a rezoning of land to ‘Business 4 zone’ (table F3).

Table F.3 Selected Woolworths homemaker stores and zoning requirements^a

<i>Store/Location</i>	<i>Planning process</i>	<i>Zoning changes required</i>	<i>Status</i>
NSW			
Maitland	Referred by Council to Joint Regional Planning Panel		Under consideration
Victoria			
Coolaroo	Minister decision based on Independent Advisory Committee report	Business 3 zone to Business 4 Zone	Approved Sep 2010; Construction to start Nov 2010
Oakleigh South	Minister decision based on Independent Advisory Committee report	Business 3 Zone to Business 1 Zone	Approved Sep 2010
Mornington	Minister decision based on Independent Advisory Committee report	Industrial 3 zone to Business 4 Zone	Approved Sep 2010
Preston	Minister decision based on Independent Advisory Committee report	Industrial 1 Zone to Business 4 Zone	Approved Sep 2010
Hawthorn East	Minister decision based on Independent Advisory Committee report	Public Use Zone to Business 4 Zone	Approved Sep 2010
Burnside	Minister decision based on Independent Advisory Committee report	Mixed Use zone to Business 4 Zone	Approved Sep 2010
Knoxfield	Minister decision based on Independent Advisory Committee report	No rezoning required	Approved Sep 2010
South Morang	Minister decision based on Independent Advisory Committee report	No rezoning required	Approved Sep 2010
Carrum Downs	Minister decision based on Independent Advisory Committee report	Industrial 1 Zone to Business 4 Zone	Approved Sep 2010
Wendouree, Ballarat	Minister decision based on Independent Advisory Committee report	Industrial 1 Zone to Business 4 Zone	Approved Oct 2010
North Geelong	Minister decision based on Independent Advisory Committee report	Public Use zone to part Business 4 Zone / part Business 3 Zone	Rejected
Bendigo	Minister decision based on Independent Advisory Committee report	Residential 1 Zone and Business 1 Zone to a Business 4 Zone	
Braybrook, Maribyrnong	Council approval		Planning permit issued Mar 2010. Construction started Aug 2010
Queensland			
Ipswich	Council approval		Approved June 2010
Tingalpa	Purchase of site with existing approval for a 'homewares centre'		Site purchase in Feb 2010 ?
Nerang			Construction started Oct 2010 ?

^a As at end 2010.

Sources: Website for Victorian Department of Planning and Community Development; Australian newspapers throughout 2010.

Woolworths has also lodged DAs with Maitland City Council (NSW), received planning approval from Ipswich City Council and is reported to have sites ready for development in Tingalpa and Nerang (Sharpe 2010).

F.3 Market concentration

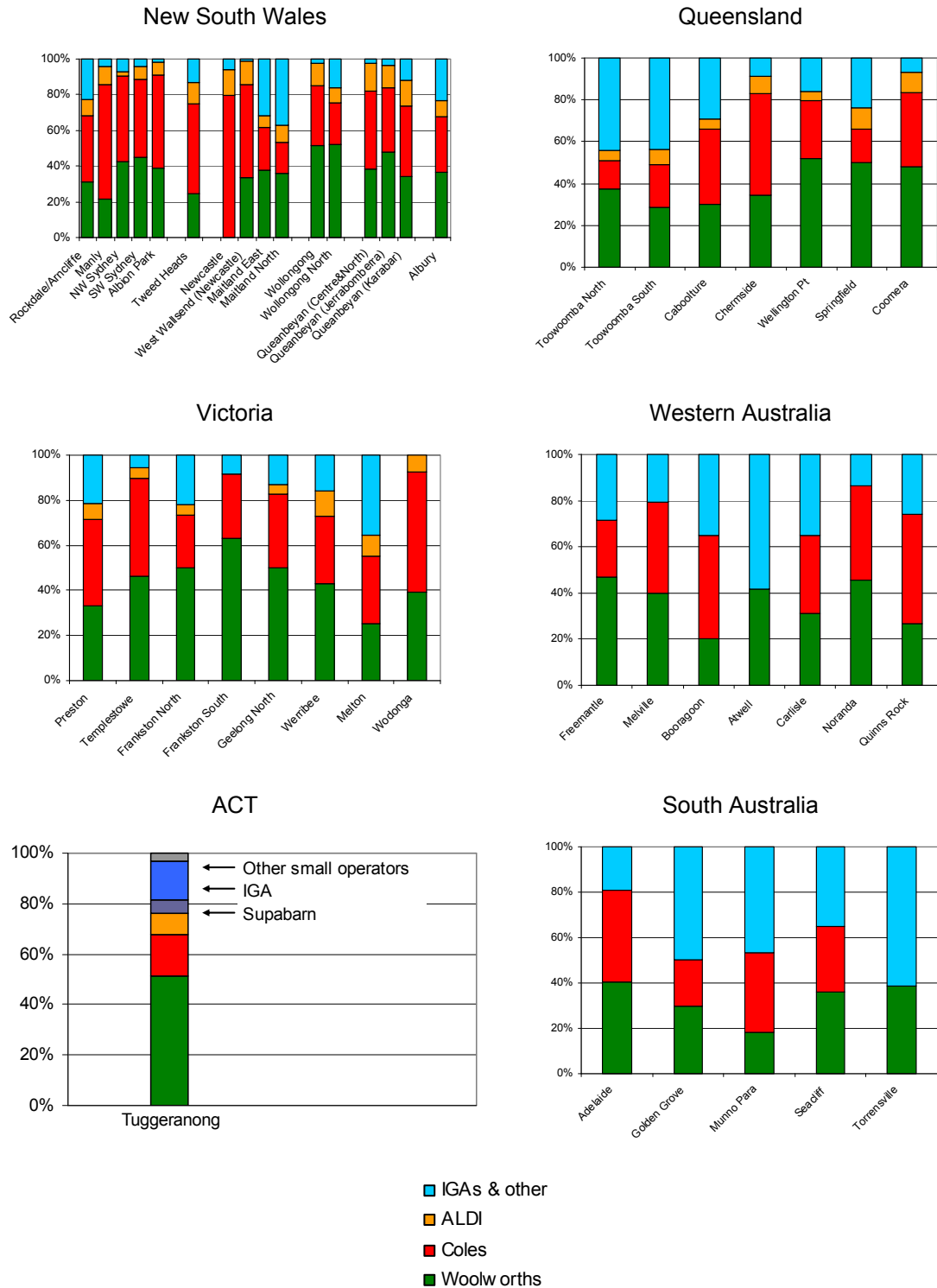
The Commission has been advised by a number of submitters to this study that concentration levels of particular operators are sufficiently high in some local markets as to present a constraint on competition (subs. 16, 21, 47, 62). For example, NARGA reported that: ‘Australia’s grocery market is the most concentrated of any such market and the majors in that market are gaining increasing shares in other retail sectors including clothing and general merchandise, petrol, hardware, liquor.’ (sub. 47, p.3)

The Independent Retailers of NSW and the ACT also noted increasing levels of domination by existing operators in many grocery retail markets around Australia. In support of this, they provided estimates of the market concentration of grocery retailers across Australia for a selection of established and high growth markets in around 20 local council areas (sub. 62). Based on this data, the Commission has noted the following outcomes for competition (figure F1):

- Woolworths and Coles have a presence in all markets analysed, but their individual market share remains under 65 per cent in each case, a level which would generally be considered to represent medium concentration levels.
- IGAs and small operators tend to have higher market shares in Western Australia and South Australia than in the other states. While this may partially reflect the absence of Aldi from these markets, the combined market share of Woolworths and Coles is also, on average, lower in Western Australia and South Australia.
- Concentration of local markets by particular retailers does not appear to be related to whether a market is high growth or established. That said, markets with a lower population tend to be better supplied with grocery floorspace than those with higher populations. This may be indicative of lags in the provision of new retail space – lags which may or may not be attributable to planning and zoning systems.

Figure F.1 Concentration in selected grocery retail markets

Per cent of store floor area held by main operator groups



^a Comparable data is not available for markets in Tasmania and Northern Territory.

Data source: Subs. 16 and 62.

However, it should also be noted that high concentration levels alone do not dictate the nature of competition in a market and there other markets internationally that are more concentrated than those presented here but which also appear to be more competitive (ACCC 2008). Furthermore, it is not apparent that planning and zoning systems are either a key factor which is contributing to existing concentration levels in local markets or that changes to these systems would necessarily bring about greater competition. The Independent Retailers of NSW and the ACT (sub.16, p.6) similarly acknowledged that while domination of existing operators is reducing scope for entry of new competitors, ‘creating more retail zoned land will not change this business reality.’

G Involvement of the state and territory environment, heritage, transport and fire fighting services in planning

Table G.1 Planning involvement of environment departments/agencies

	<i>Strategic planning — capital city plan</i>	<i>Rezoning^a</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
New South Wales					
Sydney Metropolitan Catchment Management Authority	Consult	Advis Consult	Advis Consult	Advis Consult	Consult
Department of Environment, Climate Change & Water	Consult	Advis Consult	Advis Consult	Advis Consult	Dec Oth
NSW Industry and Investment	Consult	Advis Consult	Advis Consult	Advis Consult	Advis Consult
Victoria					
Environment Protection Authority	Consult	Consult Dec Oth	Consult Dec Oth	-	Refer Dec Oth
Department of Sustainability and Environment	Consult	Consult Dec Oth	Consult Dec Oth	Refer Dec Oth	Refer Dec Oth
Department of Planning and Community Development	Dec Oth Dec Plan	Dec Oth Dec Plan	Dec Oth Dec Plan	Dec Oth Dec Plan	Dec Oth Dec Plan
Queensland					
Department of Environment and Resource Management	Advis Consult	Advis Consult	Advis Consult	Refer Dec Plan	Refer Dec Plan
Western Australia					
Department of Environment and Conservation	Consult	Refer	Refer	Refer	Dec Oth
Department of Health	Dec Oth	Refer	Refer	Refer	Refer
Department of Water	Consult	Refer	Refer	Refer	Refer
Environment Protection Authority	Consult	Refer	Refer	Refer	Dec Oth

(Continued next page)

Table G.1 (continued)

	<i>Strategic planning — capital city plan</i>	<i>Rezoning^a</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
South Australia					
Environment Protection Authority	Consult	Consult	Consult	Refer	Refer Dec Plan
Native Vegetation Authority	Consult	Consult	Consult	Dec Oth	Dec Oth
Water Department	Consult	Consult	Consult	Dec Oth	Dec Oth
Tasmania					
Department of Primary Industries, Parks, Water and Environment	Consult ^b	Dec Other	-	-	-
Environmental Protection Authority	-	-	-	-	Refer
ACT					
Territory and Municipal Services (Parks, Conservation and Lands)	Advis Consult	Advis Consult	Advis Consult Refer	Refer	Refer
Conservator of Flora and Fauna	Consult	Advis Consult Refer	Advis Refer Dec Oth	Refer Dec Oth	-
Northern Territory					
Department of Natural Resources, Environment, The Arts and Sport	Consult ^b	Consult	Consult	Consult	Consult
Environment Protection Agency	-	-	-	-	-

- no involvement. **Advis** Advisory function (statutory compulsion for the planners to at least consider the input of the agency). **Consult** Consulted. **Dec Oth** Decision maker under other legislation — for example, environmental legislation (where the decision is related to the planning/development activity in question). **Dec Plan** Decision maker under planning legislation. **Refer** Referral agency (can refuse, can require conditions, but no 'approval' function). ^a Proceed as 'plan amendments' in Queensland. ^b This relates to the strategic land use plans currently being prepared.

Source: EPA (SA) 2009; Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Table G.2 Planning involvement of heritage departments/agencies

	<i>Strategic planning — capital city plan</i>	<i>Rezoning^a</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
New South Wales					
Heritage Council of NSW	Consult	Advis Consult	Advis Consult	Advis Consult	Advis Consult
Department of Environment, Climate Change & Water	Consult	Advis Consult	Advis Consult	Advis Consult	Advis Consult
Victoria					
Heritage Victoria	Consult	Consult	Consult	Dec Oth	Dec Oth
Queensland					
Department of Environment and Resource Management	Advis Consult	Advis Consult	Advis Consult	Refer Dec Plan	Refer Dec Plan
Western Australia					
Heritage Council of Western Australia	Consult	Refer	Refer	Refer	Dec Oth
Swan River Trust	Consult	Refer	Refer	Refer	Refer
The National Trust of Australia (WA)	Dec Oth	Refer	Refer	Dec Oth	Dec Oth
South Australia					
Department of Environment and Natural Resources (Heritage SA)	Consult	Consult	Consult	Refer	Refer
Tasmania					
Department of Primary Industries, Parks, Water and Environment (Heritage Tasmania)	Consult ^b	Dec Oth	-	Dec Oth	Dec Oth
ACT					
Heritage ACT	Consult Refer	Consult Refer	Advis Consult	Refer	Refer Dec Oth
Northern Territory					
Department of Natural Resources, Environment, The Arts and Sport	Consult ^b	Consult	Consult	Consult	Consult

- no involvement. **Advis** Advisory function (statutory compulsion for the planners to at least consider the input of the agency). **Consult** Consulted. **Dec Oth** Decision maker under other legislation — for example, environmental legislation (where the decision is related to the planning/development activity in question). **Dec Plan** Decision maker under planning legislation. **Refer** Referral agency (can refuse, can require conditions, but no 'approval' function). ^a Proceed as 'plan amendments' in Queensland. ^b This relates to the strategic land use plans currently being prepared.

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished).

Table G.3 Planning involvement of transport departments/agencies

	<i>Strategic planning — capital city plan</i>	<i>Rezoning^a</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
New South Wales					
Transport NSW	Consult	Advis Consult	Advis Consult	Advis Consult	Advis Consult
Victoria					
Department of Transport ^b	Consult	Consult Dec Oth	Consult Dec Oth	Refer Dec Oth	Refer Dec Oth
VicRoads	Consult	Consult	Consult	Refer	Refer
Queensland					
Department of Transport and Main Roads	Advis Consult	Advis Consult	Advis Consult	Refer Dec Plan	Refer Dec Plan
Western Australia					
Department of Transport	Consult	Refer	Refer	Refer	Dec Oth
Public Transport Authority	Consult	Refer	Refer	Refer	Dec Oth
Main Roads Western Australia	Consult	Refer	Refer	Refer	Dec Oth
Regional Port Authorities	Consult	Refer	Refer	Refer	Dec Oth
South Australia					
Department of Transport Energy and Infrastructure	Consult	Consult	Consult	Refer Dec Oth Dec Plan	Refer Dec Oth Dec Plan
Tasmania					
Department of Infrastructure, Energy and Resources	Consult ^c	Consult	Consult	Consult	Consult
ACT					
Territory and Municipal Services	Advis Consult	Advis Consult	Advis Consult	Refer Dec Oth	Refer Dec Oth
Northern Territory					
Department of Lands and Planning	-	Consult	-	Consult	Consult

- no involvement. **Advis** Advisory function (statutory compulsion for the planners to at least consider the input of the agency). **Consult** Consulted. **Dec Oth** Decision maker under other legislation — for example, environmental legislation (where the decision is related to the planning/development activity in question). **Dec Plan** Decision maker under planning legislation. **Refer** Referral agency (can refuse, can require conditions, but no 'approval' function). ^a Proceed as 'plan amendments' in Queensland. ^b In December 2010, the integrated transport unit from the Department of Transport became part of the Department of Planning and Community Development (DPCD) — in part this was to enhance the role of strategic land use planning in setting the objectives and framework for transport planning in Victoria. ^c This relates to the strategic land use plans currently being prepared.

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished); Victorian Government, pers. comm., 19 January 2011.

Table G.4 Planning involvement of fire fighting services

	<i>Strategic planning — capital city plan</i>	<i>Rezoning^a</i>	<i>Other planning scheme amendments</i>	<i>Subdivisions</i>	<i>All other development applications</i>
New South Wales					
NSW Fire Brigades	-	Advis Consult	Advis Consult	Advis Consult	Advis Consult
Rural Fire Service	-	Advis Consult	Advis Consult	Advis Consult	Dec Oth
Victoria					
Department of Sustainability and Environment	Consult	Consult	Consult	Advis Refer	Advis Refer
Country Fire Authority	Consult	Consult	Consult	Advis Refer	Advis Refer
Metropolitan Fire Authority	-	-	-	Refer	Refer
Queensland					
Department of Community Safety	Advis Consult	Advis Consult	Advis Consult	Refer Dec Oth Dec Plan	Refer Dec Oth Dec Plan
Western Australia					
Fire and Emergency Services Authority of Western Australia	Consult	Refer	Refer	Refer	Dec Oth
South Australia					
Metropolitan Fire Service/Country Fire Service	Consult	Consult	Consult	Refer	Refer
Tasmania					
Department of Police and Emergency Management (Tasmanian Fire Service)	Consult ^b	Consult	-	Consult	Consult
ACT					
Department of Justice and Community Safety (Emergency Services Agency)	Advis Consult	Advis Consult	Advis Consult	Refer Dec Oth	Refer Dec Oth
Northern Territory					
Northern Territory Fire and Rescue Service	-	-	-	Consult	Consult
Bushfires NT	-	-	-	Consult	-

- no involvement. **Advis** Advisory function (statutory compulsion for the planners to at least consider the input of the agency). **Consult** Consulted. **Dec Oth** Decision maker under other legislation — for example, environmental legislation (where the decision is related to the planning/development activity in question). **Dec Plan** Decision maker under planning legislation. **Refer** Referral agency (can refuse, can require conditions, but no 'approval' function). ^a Proceed as 'plan amendments' in Queensland. ^b This relates to the strategic land use plans currently being prepared.

Source: Productivity Commission survey of state planning departments and agencies (2010, unpublished).

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