



City of Port Phillip Spatial Economic and Employment Framework

March 2024





City of Port Phillip

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Contents

- Overview 4
 - Purpose 4
 - Process 5
- Planning context 6
 - State and regional framework 6
 - Local framework 9
 - Port Phillip Planning Scheme 10
- Port Phillip Economy 14
 - Economic and spatial trends 14
 - Spatial drivers of change 15
 - Community and economic profile 19
 - Key sectors and industries 22
 - Key sub-sectors 23
 - Economic and employment areas 24
 - Employment precinct analysis 31
 - Major activity centre analysis 33
 - Neighbourhood and local activity centre analysis 36
 - Local industrial areas analysis 38
- Strategic Framework 39
 - Vision 39
 - Objectives 40
 - Strategic directions 40
- Strategic directions and spatial framework 41
 - Direction 1: Accommodate and optimise an expanded central city 41
 - Direction 2: Support and grow areas of specialisation, innovation, and competitive advantage . 42
 - Direction 3: Strengthen and diversify activity centre and neighbourhood economies 44
 - Direction 4: Retain local employment precincts and increase utilisation 46
 - Direction 5: Align housing, transport, and employment policy 47
 - Economic and employment spatial framework 48

Overview

The City of Port Phillip is home to a substantial business and employment base which capitalise on its proximity to the CBD and Port Phillip Bay.

The economic and employment role of the municipality has evolved from early industrial and seaside resort functions towards professional services as part of an expanded central city, and the specialisations of tourism and creative industries. The importance the traditional shopping strips has endured.

This evolution is shaped by boarder economic forces and local conditions, requiring regular updates to economic and land use policies and strategies.

Land use planning is one of the key tools available to councils to direct, facilitate and optimise economic activity. It shapes employment and economic activity through a combination of policy and controls that influence the type, intensity, and combination of uses that are permissible on land.

Purpose

The purpose of the City of Port Phillip Spatial Economic and Employment Framework (SEEF) is to provide an overview of the municipal economy, its influences and challenges and outline a series of strategic directions to support economic growth and prosperity over the coming years. It also aims to align and support other adopted Council strategies that guide decisions and investment across the municipality.

The primary goals of the SEEF are as follows:

- Understand and realise the City of Port Phillip's economic and employment growth opportunities.
- Provide a strategic basis for future decisions on employment land.
- Provide direction for employment outcomes in activity centres.
- Provide a strategic basis to update planning policy and controls in the Port Phillip Planning Scheme.

The final SEEF document summarises the key findings and strategic framework set out in the accompanying technical report, *City of Port Phillip Spatial Economic and Employment Framework City of Port Phillip, December 2023* prepared by Urban Enterprise on behalf of Council. Detailed research and analysis can be found in this technical report.

The final SEEF is also informed by extensive independent research and analysis, as well as two phases of consultation. The findings from the research and stakeholder consultation are embedded into the SEEF and the accompanying technical report, where necessary.

Process

The SEEF was developed over several years to improve Council's understanding of the local economic and employment issues and needs. The strategic directions and corresponding actions outlined in the SEEF respond to the research and consultation conducted throughout this process, summarised in Table 1.

TABLE 1. STAGES TO DEVELOP THE CITY OF PORT PHILLIP SPATIAL ECONOMIC AND EMPLOYMENT FRAMEWORK

Stages of the process
<p>Issue identification</p> <ul style="list-style-type: none"> The <i>Port Phillip Planning Scheme Review Audit Report</i> is adopted and recommends that Council undertake an employment land strategy to identify the City's employment needs and trends.
<p>Technical economic research and analysis</p> <ul style="list-style-type: none"> Strategic work is conducted to understand the contribution of employment land within Port Phillip to the wider economy and to define the City's employment needs. Current planning framework, including local, regional, and state policies, is reviewed to identify policy gaps and underpin investigations. Recent land use strategies are reviewed to identify current land use and potential economic directions. Economic land use data is collected and analysed to identify current land use patterns. Development of a demand and supply forecast for employment land. Formulation of a vision and objectives for employment land within Port Phillip. A draft technical report that details key data, trends, and considerations regarding employment land in Port Phillip is prepared to support consultation.
<p>Consultation</p> <p>Phase 1:</p> <ul style="list-style-type: none"> Targeted consultation is conducted to uncover emerging challenges and opportunities. Engagement with businesses, real estate professionals, government representatives, members of the creative sector, and the Council's Business Advisory Committee. Consultation methods include business surveys, workshops, focus groups, and direct interviews. <p>Phase 2:</p> <ul style="list-style-type: none"> Broader consultation on the draft vision, objectives, and strategic directions of the draft <i>Spatial Economic and Employment Framework, April 2023</i> and supporting draft technical report, <i>City of Port Phillip Spatial Economic and Employment Framework City of Port Phillip, September 2022</i>, prepared by Urban Enterprise on behalf of the City of Port Phillip. Engagement with residents, businesses, and Council's Business Advisory and LGBTIQA+ committees Consultation methods include an online survey on the City of Port Phillip 'Have Your Say' webpage and online focus group discussions.
<p>Final SEEF and technical report</p> <ul style="list-style-type: none"> Finalised based on additional analysis and Phase 2 consultation, the final SEEF and accompanying technical report are prepared by the City of Port Phillip and Urban Enterprise Pty. Ltd.

Planning context

State and regional framework

The SEEF implements and promotes relevant planning legislation and planning strategies:

<i>Planning and Environment Act 1987 (the Act)</i>	A key objective of planning in Victoria (amongst others) is to provide for the fair, orderly, economic, and sustainable use, and development of land.
<i>Plan Melbourne 2017-2050 (Plan Melbourne)</i>	<p>Key directions of the metropolitan planning strategy relevant to economic and employment growth in the City of Port Phillip include:</p> <ol style="list-style-type: none"> A hierarchy of employment precincts: Planning for a hierarchy of National Employment and Innovation Clusters (NEIC), urban renewal areas, activity centres and precincts. An expanded central city: Supporting the central city to become Australia’s largest commercial and residential centre by 2050. Figure 1 shows Plan Melbourne’s directions for the central city area, which covers most of the land in the City of Port Phillip. 20-minute neighbourhoods: Residents can access most everyday needs within a 20-minute walk, bike-riding, or public transport trip from a person’s home.
<i>Unlocking Enterprise in a Changing Economy 2018</i>	<p>Enterprise Precincts, typically situated near city centres and often in former industrial areas, are known for their high-amenity environments. These areas draw in talent, particularly creative workers, and create opportunities for future-focused employment, as well as attracting new businesses and investments. South Melbourne, identified as an enterprise precinct, is one of three key areas outside Melbourne’s CBD.</p> <p>Successful precincts create an ‘innovation ecosystem’ which is recognised as the interconnected relationship between people, enterprises and place that facilitates idea generation and advances commercialisation.</p>
<i>Melbourne Industrial and Commercial Land Use Plan 2020 (MICLUP)</i>	Now a background document in the Port Phillip Planning Scheme, the plan sets out a recommended planning framework for employment land across Melbourne. Commercial and industrial areas are classified as of either State, regional or local significance Figure 2 shows the location of employment land in Port Phillip and the categorisation by significance. The policy direction for each category of commercial and industrial land is summarised in Table 2.

The Fishermans Bend Framework 2018

The Framework guides the area’s transition into a connected, liveable, prosperous, inclusive, healthy, and environmentally sustainable place providing for 80,000 residents and 80,000 jobs – 34,000 of which are proposed to be in the City of Port Phillip. It comprises five precincts across two municipalities:

- The Fishermans Bend National Employment and innovation Cluster (NEIC), located in the City of Melbourne.
- The Fishermans Bend Urban Renewal Area (URA), comprising four mixed use precincts including Lorimer in the City of Melbourne, and Montague, Sandridge and Wirraway Precincts in the City of Port Phillip.

Figure 3 shows the Fishermans Bend precincts, with Table 3 showing the expected land use and employment outcomes.

FIGURE 1. PLAN MELBOURNE – KEY FEATURES IN AND AROUND MELBOURNE’S CENTRAL CITY

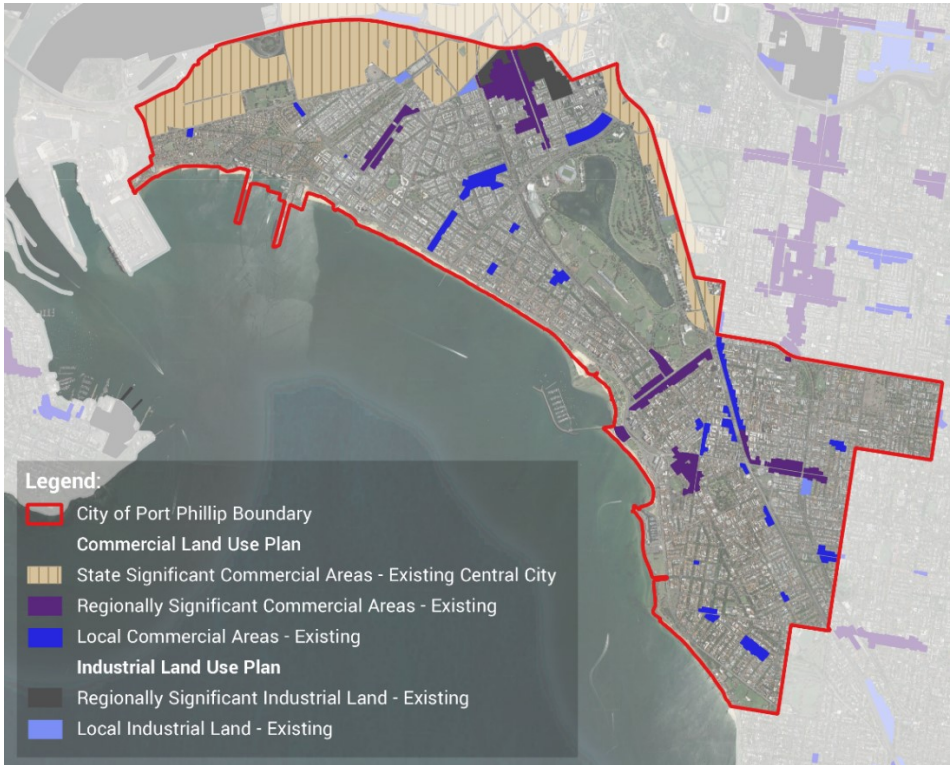


Key features in and around Melbourne’s central city

<ul style="list-style-type: none"> Central Business District National employment and innovation cluster (NEIC) Major urban renewal precinct (2015 - 2051+) Priority precinct⁽¹⁾ Other precinct Health facility Education facility 	<ul style="list-style-type: none"> Key precinct Port of Melbourne Arts precinct Sports precinct St Kilda Road precinct Landmark Public open space 	<ul style="list-style-type: none"> Metro Tunnel (rail) New station State-significant road corridor Western Distributor (potential alignment) Rail network Train station Tram network Road network Waterway Waterbody 	<p>(1) Priority precincts:</p> <ul style="list-style-type: none"> 1 Fishermans Bend (Lorimer, Montague, Sandridge, Wirraway) 2 Arden and Macaulay 3 Flinders Street Station to Richmond Station Corridor <p>Source: Department of Environment, Land, Water and Planning</p>
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Source: Plan Melbourne 2017-2050.

FIGURE 2. MELBOURNE INDUSTRIAL AND COMMERCIAL LAND USE PLAN (MICLUP) FRAMEWORK



Source: MICLUP, 2020, adapted by Urban Enterprise.

TABLE 2. FRAMEWORK FOR INDUSTRIAL AND COMMERCIAL PRECINCTS

Significance	Commercial	Industrial
State	The Central City provides for growth of knowledge-intensive and high-skilled firms while continuing to be a major area for tourism, retail, residential, entertainment, sporting, and cultural activities	(Not applicable to SEEF)
Regional	Should provide for and support access to a wide range of goods and services, including office and retail development, and provide for a wide range of employment opportunities. They are expected to deliver more intensive forms of employment uses including office and commercial activity.	To be planned for and retained either as key industrial areas or locations that can transition to a broader range of employment opportunities.
Local	Planning for these areas should create opportunities for local businesses and new jobs and deliver better access to local services and facilities.	Councils are best placed to determine how these industrial areas are to be planned for. This could include identifying when industrial land should be retained, when it could transition to other employment generating uses, or if it is no longer required, when it could transition to other uses.

Source: MICLUP, Urban Enterprise.

FIGURE 3. FISHERMANS BEND FRAMEWORK PLAN - PRECINCTS



Source: Fishermans Bend Framework Plan, 2018.

TABLE 3. FISHERMANS BEND PLANNED LAND USE, EMPLOYMENT AND RESIDENTIAL OUTCOMES

Precinct	Employment	Residents	Land use focus
Wirraway	4,000	17,600	Inner city neighbourhood
Sandridge	26,000	27,200	Office and commercial centre, balanced with diverse housing and retail
Montague	4,000	23,200	Mixed use precinct
Lorimer	6,000	12,000	Mixed use precinct
Employment (NEIC)	40,000 (+20,000 students)	0	Advanced manufacturing, engineering, and design

Source: Fishermans Bend Framework Plan, 2018.

Local framework

The SEEF responds to, and aligns with, Council's strategic directions:

Council Plan 2021-2031

The plan includes the following relevant Strategic Directions:

- **Liveable:** A City that is a great place to live, where our community has access to high quality public spaces, development and growth are well-managed, and it is safer and easy to connect and travel within
- **Sustainable:** A City that has a sustainable future, where our environmentally aware and active community benefits from living in a bayside city that is greener, cooler, cleaner and climate resilient
- **Vibrant:** A City that has a flourishing economy, where our community and local businesses thrive, and we maintain and enhance our reputation as one of Melbourne’s cultural and creative hubs.

<i>Creative and Prosperous City Strategy 2023-2026</i>	The strategy provides a series of objectives to support economic development, particularly acknowledging the role of creative industries including through supporting key places and precincts, being a prosperous city, connecting and growing business and through focusing on the role of arts, culture, and creative industries.
<i>Live Music Action Plan 2021-24</i>	The action plan recognises the vital role that live music plays in the everyday life of people in the City of Port Phillip, being central to its communities, its identity and its past, present, and future.
<i>Act and Adapt Sustainable Environment Strategy 2023-28</i>	Outlines the City of Port Phillip’s commitment to environmental sustainability for the organisation and the wider community. It establishes a pathway that will help transition the City to a greener, cooler more liveable City where everyone is reducing their impact on the environment and are more resilient to the impacts of climate change.
<i>Move, Connect, Live: Integrated Transport Strategy 2018-28 (ITS)</i>	Along-term plan to ensuring that the community can adapt to the increasing number of trips and the challenges associated with increased congestion, while creating travel choices, prioritising effective and equitable access to transport options, and ensuring the liveability and safety of streets.
<i>Places for People Public Space Strategy 2022-32</i>	Sets the vision and blueprint for the future of public spaces in the City of Port Phillip.

Port Phillip Planning Scheme

The SEEF meets and supports existing relevant provisions within the Port Phillip Planning Scheme:

<i>Municipal Planning Strategy</i>	<p>Figure 4 identifies significant local areas in the municipality as shown in the Context Plan within the planning scheme.</p> <p>Key policies relevant to the economy, employment, locations of growth and priorities across the municipality are summarised below:</p> <ul style="list-style-type: none"> • Clause 02.02 Vision: Port Phillip aims to be a creative and prosperous city with a dynamic economy, vibrant activity centres, and easily accessible 10-minute neighbourhoods that integrate arts and culture into daily life. • Clause 02.03 Strategic Directions: This clause highlights the existing activity centre hierarchy and supports diverse, economically viable centres. It identifies key employment areas, emphasizing the need to retain land in vital precincts for growing job sectors, especially in the knowledge economy. The clause also recognises challenges related to residential
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development pressure on office space and stresses the importance of supporting existing creative industry clusters. Additionally, it acknowledges the significance of the tourism industry and arts and cultural activities.

- **Clause 02-03-7 Transport:** This clause promotes walking, cycling, and public transport as preferred modes to reduce car-based travel. It supports the creation of 10-minute walkable neighbourhoods by integrating land use and transport planning to direct housing and employment growth near quality pedestrian routes and public transport services.

Planning policy framework – State and regional policy

Relevant State Policies within the Planning Policy Framework (PPF) include:

- **Clause 11.03-1S and 11.03-1R Activity Centres – Metropolitan Melbourne:** These clauses define the role, function, and direction for land within activity centres.
- **Clause 13.01-2S Coastal Inundation and Erosion:** This clause addresses the imperative to plan for and manage coastal hazard risk and climate change impacts. Notably, it outlines a strategy to plan for a sea level rise of at least 0.8 meters by 2100.
- **Clause 13.07-1S Land Use Compatibility:** This clause aims to safeguard commercial, industrial, and other employment-generating uses from encroachment that might compromise their safe and effective functionality.
- **Clause 17.01-1R Diversified Economy - Metropolitan Melbourne:** This clause supports diverse employment-generating uses, including offices, innovation, and creative industries in identified areas within regionally significant industrial precincts. It emphasises compatibility with adjacent uses and connectivity to transport networks. It also mandates consideration of how proposed land use changes can respond to local and regional employment demand or be accommodated elsewhere.
- **Clause 17.01-1R Diversified Economy - Metropolitan Melbourne - Inner Metro Region:** This clause directs to "retain and encourage the development of areas in and around Collingwood, Cremorne, and South Melbourne for creative industries."
- **17.02-1S Business:** This clause encourages development that meets the community's needs for retail, entertainment, office, and other commercial services.
- **Clause 17.03-1S Industrial Land Supply:** This clause focuses on preserving locally significant industrial land for industrial or employment-generating uses unless long-term demand can be demonstrably met elsewhere.
- **Clause 17.03-2S Sustainable Industry:** This clause supports retaining small-scale industries that service established urban areas through appropriate zoning.
- **Clause 17.04-1S Facilitating tourism:** This clause encourages tourism development to maximise the economic, social, and cultural benefits of

developing the state as a competitive domestic and international tourist destination.

- **Clause 17.04-2S Coastal and maritime tourism and recreation:** This Clause encourage a diverse range of coastal and maritime tourism and recreational opportunities that strengthen people's connection with the marine and coastal environment.

Planning policy framework – local policy

The following local policy of most relevance in the PPF includes:

- **Clause 11.03-1L-05 – South Melbourne Central Major Activity Centre**
- **Clause 15.01-1L-02 Urban Design**
- **Clause 17.02-1L Mixed Use and office areas**
- **Clause 17.03-2L Sustainable industry**
- **Clause 17.04-1L Tourism and the arts**
- **Clause 18.01-3L-01 Sustainable and safe transport in Port Phillip**
- **Clause 18.02-3L Public transport**
- **Clause 19.02-4L Community facilities**
- **Clause 19.02-6L Public open space and foreshore**

Zones

Zones are the primary planning tool used to control land and development in Victoria. Employment land is defined as land in zones where the main purpose is to accommodate business activities. In the City of Port Phillip, this includes:

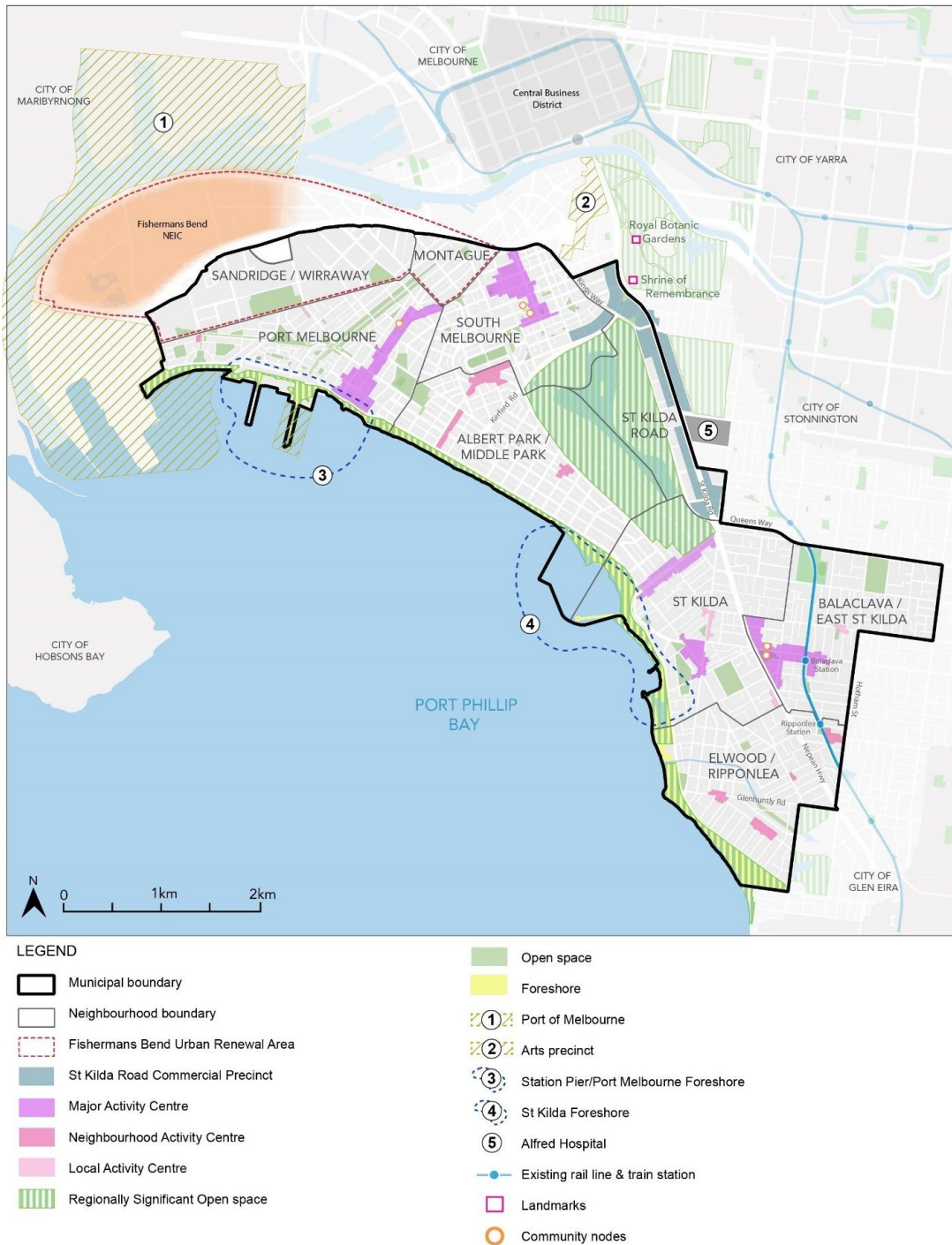
- Commercial 1 Zone (C1Z)
- Commercial 2 Zone (C2Z)
- Industrial 1 Zone (IN1Z)
- Capital City Zone (CCZ)

Although categorised in the Victorian Planning Provisions as a residential zone, the Mixed Use Zone (MUZ), it also permits a range of employment land uses.

Certain other zones also provide for business activity in particular locations, such as the Comprehensive Development Zone (CDZ) and the Special Use Zone (SUZ).

The zoning profile of the municipality is shown in Figure 8 and Table 7. For each defined activity centre or precinct, a code has been allocated as shown in Figure 8 and listed in Table 6.

FIGURE 4. CITY OF PORT PHILLIP CONTEXT PLAN



Source: Clause 02.01 of the Port Phillip Planning Scheme.

Port Phillip Economy

This section provides a snapshot of the City of Port Phillip's economy: key trends, spatial drivers for change and economic profile. Detailed research and analysis are provided in the accompanying technical report.

Economic and spatial trends

Structural Change	<p>Over the past generation, Melbourne's economy has shifted from an industrial focus to a services-oriented one, particularly in knowledge-based services. This transformation is evident in the changing employment landscape, where industrial jobs have been replaced by office-based services, health, and education positions.</p> <p>A similar trend is observed in Port Phillip, where former industrial areas are now being repurposed for professional services and creative industries. This change is ongoing, and there is an opportunity for Port Phillip to maximise its economic strengths and specialisations, particularly in the knowledge-based services, health, and education industries.</p>
Global manufacturing trends	<p>Australia faces a comparative disadvantage in producing mass produced and labour-intensive goods. However, research and development operations provide a promising avenue for Australia's highly skilled workforce.</p> <p>At the local level, the economic importance of inner urban industrial and mixed-use precincts which drive innovation and accommodate smaller industrial and related business types (such as micro-manufacturers, maker spaces and co-working) is growing. In Port Phillip, optimising remaining industrial land for innovation and collaboration is essential given the dense urban environment and competing land uses.</p>
Retail sector changes	<p>Retail spending growth has slowed over the last 10 years due to stagnant wages and low consumer confidence, with online retail, especially from overseas like Amazon, gaining more market share and affecting various traditional retail sectors. The COVID pandemic has further accelerated online retail growth.</p> <p>In the City of Port Phillip, retail primarily comprises outdoor strip shopping centres (activity centres) with independent retailers and hospitality businesses, making them vulnerable to these retail changes. To address these challenges, activity centres heavily dependent on retail must diversify land uses for greater competitiveness. There is an opportunity to create unique, in-person experiences that cannot be replicated online.</p>

Pandemic recovery

Despite global economic uncertainty fuelled by the pandemic and related disruptions, **the Australian economy has rebounded strongly in 2021 and 2022 and is projected to return to stable economic growth by 2024.**

Victoria's recovery from the pandemic has been quicker than expected, with employment levels back to normal and projected steady economic growth. Short-term challenges include high inflation and rising interest rates.

Full economic recovery needs several approaches, including boosting productivity through innovation and technology, especially in the services sector. It's also crucial to offer different spaces and employment opportunities for new businesses in various sectors. Specifically, areas concentrating on hospitality, tourism, and events require robust policy and investment support for lasting recovery.

Ageing population and health sector growth

Like the rest of the country, the population in Victoria and the City of Port Phillip is expected to get older. Projections indicate that from 2021 to 2036, Port Phillip will see a net increase of 10,836 residents aged over 65, making up 16% of the population by 2036, up from 13% in 2021.

Demand for health services will require suitable premises in locations accessible to residents such as activity centres as well as locations where health-related activities can capitalise on major health institutions.

Spatial drivers of change

Competition between residential & non-residential development

Balancing residential and non-residential development is a planning challenge in areas with flexible land use zoning. In Melbourne, there's a growing trend where in zones originally designated for businesses and employment are increasingly being utilised for residential purposes, Recent building approvals heavily favour residential projects, especially in St Kilda, South Melbourne, and Albert Park. In Port Phillip, major residential projects between 2016 and 2020 show a substantial number of dwellings in commercial and mixed use zones (refer to Table 4).

In Port Phillip, there's a need to proactively protect office spaces from residential competition, particularly in key employment zones like St Kilda Road North.

Office property market conditions

Melbourne's office property market is rebounding from the impact of the COVID-19 pandemic, with a notable shift in demand and dynamics.

Businesses are adapting by embracing coworking spaces, flexible setups, and remote work technology. The inner metro area has become a viable alternative to the CBD for various businesses, reflecting substantial investment, robust rental growth, and a changing landscape driven by the

preferences of the new generation workforce and the appeal of non-conventional buildings.

In Port Phillip, South Melbourne has experienced increased rents and office development. However, traditional office locations like St Kilda Road have experienced a net reduction in office space. **New economic policy should carefully address and navigate the consequences of this shift from traditional business preferences to mixed-use and high-amenity areas.**

Melbourne Metro tunnel project

Significant investment is currently underway to improve the public transport system in Melbourne, including in and around the City of Port Phillip. The Melbourne Metro Tunnel, set to finish in 2025, will bring five new rail stations at Arden, Parkville, State Library, Town Hall, and Anzac. **It is expected that ANZAC Station will facilitate public transport access within 30 minutes to approximately 814,000 additional residents,** broadening the labour catchment for businesses in St Kilda Road North and South Melbourne.

The City of Port Phillip planning framework has a key role to play in ensuring that the potential economic benefits of this project are realised, particularly in accommodating employment growth in an expanded central city.

Central city expansion and urban renewal

The rezoning of precincts around the CBD, primarily Fishermans Bend and Arden, is expanding the footprint of Melbourne central city. **The gradual spatial shift west of the CBD will create opportunities for Port Melbourne and South Melbourne.**

Fishermans Bend catalyst land uses

The development of the Fishermans Bend National Employment and Innovation Cluster (FBNEIC) and Urban Renewal Areas (FBURA) will transform the area. Some parts will have commercial spaces, while others will mix employment with housing. NEIC aims to be a global hub for innovation, attracting businesses and students due to good transport links.

The transformation of Fishermans Bend has already commenced with the completion of a full line Woolworths store and accompanying Dan Murphy’s liquor retailer. Substantial funding has also been dedicated to the development of the upcoming University of Melbourne engineering and design campus and the revitalisation of the General Motors Holden site.

Melbourne arts precinct

Adjacent to the northern boundary of the City of Port Phillip is the Melbourne Arts Precinct, which includes the National Gallery of Victoria, Australian Centre for Contemporary Art, Melbourne Theatre Company, and Victorian College of the Arts. **This precinct is the subject of a transformation project which represents significant government investment near the**

City of Port Phillip, and which is well aligned to the economic and cultural strengths of the city.

Alfred Hospital The Alfred Hospital, a major hospital, is one of Australia’s busiest emergency and trauma centres. **Its location to the immediate east of the municipal boundary means that proximity to the hospital is excellent for related businesses in industries such as accommodation, medical and professional services.** The lack of employment land to the east of the hospital means the City of Port Phillip section of employment land to the west is the most strategically located land to accommodate this growth.

Port Phillip Bay assets The City of Port Phillip’s waterfront assets and precincts present economic opportunities for the local areas, the city and Melbourne’s visitor economy:

- **Station Pier** is Victoria’s main cruise ship port and attracting visitors to the City of Port Phillip as part of Melbourne cruise visitation is a key economic opportunity.
- Redevelopment of the **St Kilda Marina** will create new opportunity for business attraction and drive additional visitation and employment at the St Kilda foreshore.
- **The St Kilda Triangle precinct**, as one of the last bayside renewal sites, offers a unique chance to establish new public spaces, cultural attractions, and/or tourism facilities.

Location of key spatial drivers of change Figure 5 illustrates the spatial locations of key drivers of change, with the following implications:

- The northern part of the municipality is undergoing significant public transport investment and land use change, offering opportunities for business attraction and employment growth.
- The Melbourne Metro project will transform St Kilda Road North into a highly accessible extension of the central city.
- Major investments in health, education, and cultural institutions are proposed near the City of Port Phillip boundaries, necessitating a precinct-based planning approach for economic opportunities in these areas.
- The FBURA plays a crucial role in accommodating businesses seeking proximity to both the FBNEIC and existing businesses and creative activities in South Melbourne.

TABLE 4. SUBURB AND ZONE OF DWELLINGS IN MAJOR RESIDENTIAL DEVELOPMENTS, 2016 - 2020

Suburb	C1Z	CCZ1	MUZ	RGZ1	GRZ	NRZ	Total	%
Albert Park	0	0	0	0	27	0	27	0%
Balaclava	39	0	0	16	60	0	115	2%
Elwood	0	0	0	85	129	65	279	5%
Melbourne (St Kilda Road)	1568	0	0	159	0	0	1727	28%
Middle Park	0	0	0	0	16	0	16	0%
Port Melbourne	0	743	171	0	14	0	928	15%
Ripponlea	0	0	0	0	38	0	38	1%
South Melbourne	1161	216	15	0	0	0	1392	22%
St Kilda	416	0	761	0	283	26	1486	24%
St Kilda East	0	0	0	0	57	42	99	2%
Windsor	0	0	0	91	0	0	91	1%
Total	3184	959	947	351	624	133	6198	100%
%	51%	15%	15%	6%	10%	2%	100%	

Source: Urban Development Program 2021; Urban Enterprise. Green shading highlights higher values.

FIGURE 5. LOCATION OF SPATIAL DRIVERS OF CHANGE



Source: Urban Enterprise.

Community and economic profile

Who lives in the City of Port Phillip?

The community continues to be characterised by small households, above average incomes, and highly educated resident base.

The Estimated Resident Population (ERP) for 2022, is approximal 104,000 making up 16% of the population of inner Melbourne. Other key socio-economic indicators for the municipality (from the 2021 Census) are summarised as follows:

- The median household income in Port Phillip is higher than both inner Melbourne and Greater Melbourne, reflecting the skilled workforce and high concentrations of employment in professional sectors.
- The average household size of 1.9 persons per dwelling is the second lowest of any municipality in Melbourne (only the City of Melbourne is lower at 1.8). This is coupled with a high incidence of rented housing.
- Lone person households are the most common household type (41%), followed by couples without children (25%).
- 49% of Port Phillip residents over 15 years of age were university qualified in 2021 (Bachelors degree or higher), substantially higher than the Greater Melbourne proportion of 33%. The corresponding proportion in 2006 in Port Phillip was 35%, demonstrating that the local labour force is increasingly professionally qualified.
- Port Phillip has a SEIFA index of 1,106, meaning the community is relatively advantaged in terms of access to material and social resources and ability to participate in society. This is the fifth highest index value for local government areas in Victoria (behind Boroondara, Bayside, Stonnington and Yarra).

Local resident labour force

The local labour force increased steadily in the pre-pandemic period but has since reduced to approximately 68,000 employed residents. The current unemployment rate in Port Phillip is very low at approximately 3%.

The most common location (municipality) of employment for Port Phillip residents in 2021 were:

- City of Melbourne (35%)
- Port Phillip (25%)
- Other inner Melbourne LGAS including Yarra and Stonnington (11% combined)
- Other middle-ring eastern and south-eastern municipalities including Glen Eira, Bayside, Kingston, Boroondara and Monash (13% combined).

The local labour force is heavily weighted to managers and, a characteristic which supports professional businesses within the municipality. 71% of employed Port Phillip residents worked in inner Melbourne, 47% of whom

worked in ‘office’ based industries such as professional services, finance and information media and telecommunications.

Number of jobs/workers within the city of Port Phillip

There were approximately 88,000 people employed in the City of Port Phillip in 2022. Employment increased at 1.64% per annum over the pre-pandemic period from 2015 – 2019, a higher rate than the population growth rate of 1.25% over the same period.

Port Phillip’s overall employment levels decreased from 2019 to 2022 at a similar rate to the overall resident population. The ratio between workers and population, however, has remained steady over the period at between 0.82 and 0.87 workers per resident.

These workers mainly travelled to the City of Port Phillip from the inner and inner south-eastern parts of metropolitan Melbourne. Nearly half of all workers (48%) reside in inner Melbourne and the inner south-east, including areas like Glen Eira, Bayside, and Kingston.

Economic performance

In 2022, Port Phillip's economic output (Gross Regional Product) was \$13.82 billion, making up 2.8% of Victoria's total (Gross State Product). Professional services contribute significantly, accounting for 22%, which is almost twice the Victorian average of 11%. The professional services sector also saw the highest growth in value from 2017 to 2022, followed by health care and social assistance. Figure 6 summarises headline economic indicators.

Business sizes and entries

In 2020, there were approximately 21,000 businesses registered in Port Phillip, most of which were non-employing (62%/13,000). Of employing businesses, 91% had less than 19 staff and are considered Small and Medium Enterprises (SME). It is noted that not all businesses registered in the City of Port Phillip are necessarily operating within the municipality. Over the period 2019 to 2021, despite the impacts of the global pandemic, 555 net additional businesses were registered in the municipality (i.e. after both business entries and exits are accounted for), more than half of which were in the Professional Services sector.

Employment distribution

Employment is concentrated in the northern areas of St Kilda Road North, South Melbourne, and Fishermans Bend (refer to Figure 7).

Employment in the City of Port Phillip is primarily concentrated in the northern section of the municipality. In 2021, the areas of St Kilda Road North, Domain, South Melbourne and Fishermans Bend collectively accounted for 69% of all jobs.

The St Kilda activity centres, St Kilda foreshore and immediate surrounds, St Kilda Road South and Port Melbourne contribute a further 17% combined, meaning that the contribution of the balance areas to the overall municipal

employment is relatively limited (14%), primarily due to lack of land in employment zones in established residential areas such as Albert Park, Middle Park, St Kilda West, St Kilda East and Elwood.

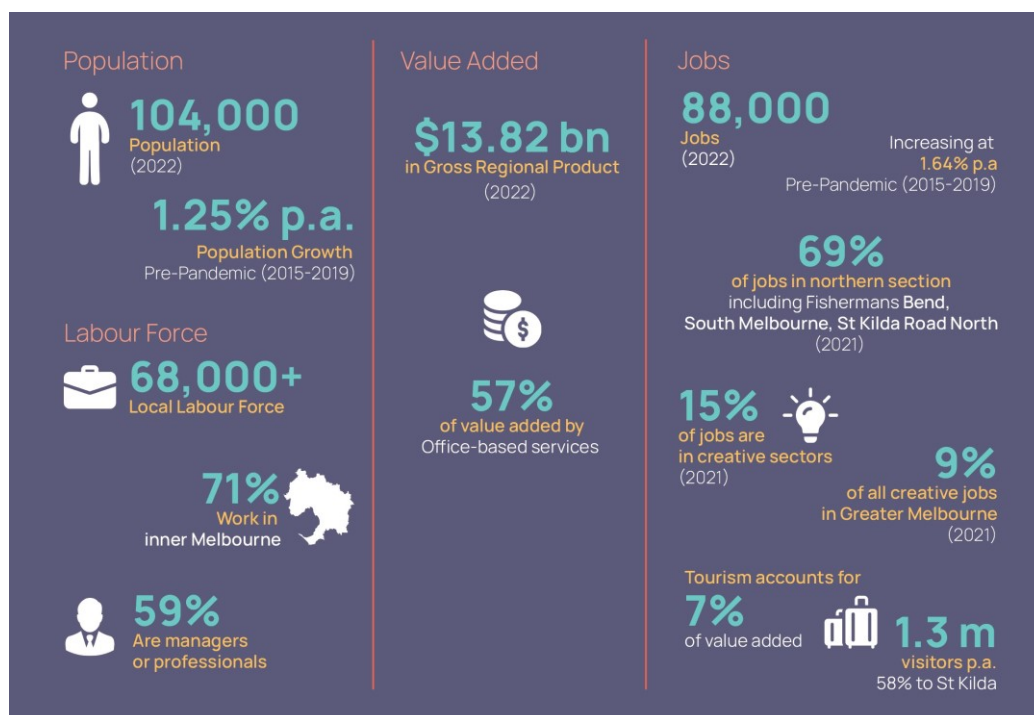
Employment growth

Projections prepared for this study show that employment in **the City of Port Phillip is projected to increase by between 22,000 and 43,000 jobs over the period to 2041, equating to average growth rates of 1.2% - 2.1% annum.**

The greatest increases in employment are expected to occur in the northern part of the municipality including South Melbourne, St Kilda Road, and Fishermans Bend, while St Kilda is also projected to experience significant employment growth. The location of projected employment increase is driven by the locations of existing concentrations of businesses and employment land, existing and proposed transport infrastructure and public realm which support businesses, and projections for most of the municipal population growth to occur in South Melbourne (Domain), St Kilda Road North, St Kilda, and Fishermans Bend.

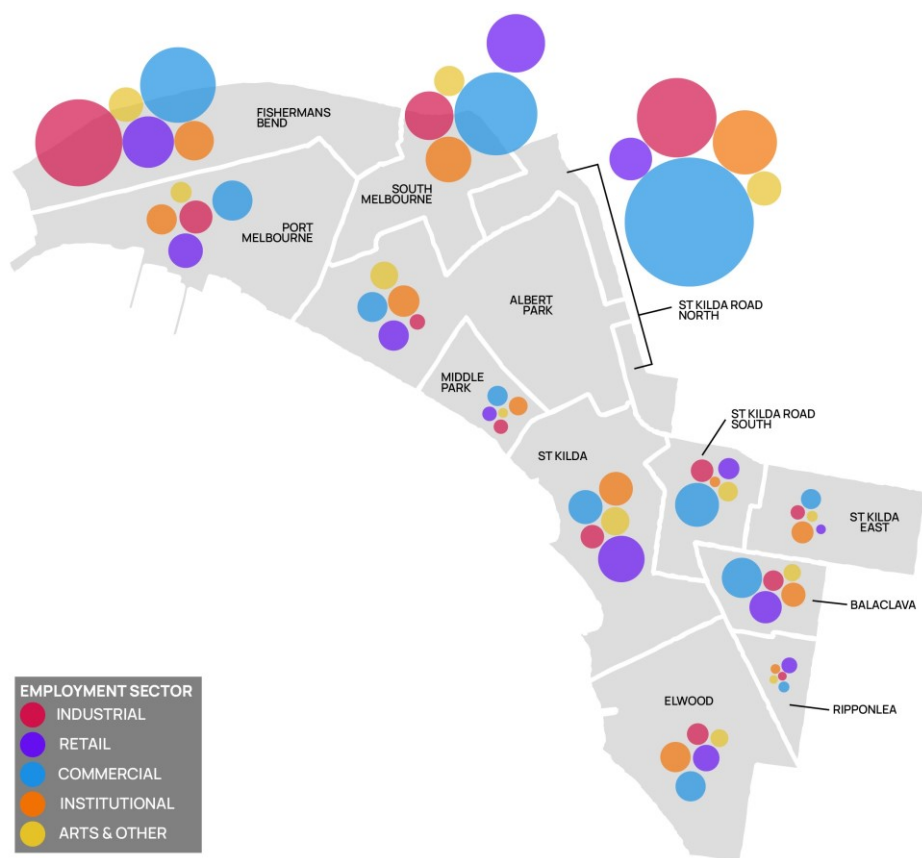
There is projected to be an overall need for an additional 562,000sqm of employment floorspace over the SEEF period (excluding Fishermans Bend).

FIGURE 6. HEADLINE ECONOMIC INDICATORS



Source: Urban Enterprise.

FIGURE 7. EMPLOYMENT BY LOCATION AND SECTOR, CITY OF PORT PHILLIP 2021



Source: ABS Census, 2021; Urban Enterprise. Circle size represents relative employment scale. Industries within these sectors are shown in Table 5.

Key sectors and industries

The greatest industry of employment in 2021 in the City of Port Phillip was professional, scientific, and technical services which accounted for 20% of all jobs, followed by health care and social assistance, construction, retail trade and accommodation and food services. This trend is expected to continue until 2041, with the most job growth projected in professional, scientific, and technical services, education, and health care.

The City of Port Phillip, when compared to Greater Melbourne, has specialisation in the following industry sectors:

- Professional, scientific, and technical services
- Rental, hiring and real estate services
- Information media and telecommunications
- Arts and recreation services
- Administrative and support services
- Mining (due to head offices)

Table 5 shows each industry and its value growth in 2021/22. Professional Services make up 22% of the municipality’s value added, almost double the Victorian total of 11%.

TABLE 5. VALUE GROWTH BY SECTORS AND INDUSTRIES IN THE CITY OF PORT PHILLIP 2021/22

Sector Group	Industries	Port Phillip %	Greater Melbourne %
Industrial	Agriculture, forestry, and fishing	0.5	0.7
	Mining	1.1	0.4
	Manufacturing	3	7.7
	Electricity, gas, water, and waste services	0.6	2.6
	Construction	6.7	8.9
	Wholesale trade	5.4	5.8
	Transport, postal and warehousing	5.2	5.6
Retail	Retail trade	5.1	5.8
	Accommodation and food services	2.3	2
Commercial	Information media and telecommunications	5.5	3.8
	Financial and insurance services	11	12.6
	Rental, hiring and real estate services	6.3	3.4
	Professional, scientific, and technical services	21.9	11.3
	Administrative and support services	9.2	4.8
	Public administration and safety	2.7	5.9
Institutional	Education and training	3.4	6.2
	Health care and social assistance	6.4	9.5
Arts and other	Arts and recreation services	1.7	1.3
	Other services	2	1.7
Total		100	100

Source: National Institute of Economy and Industry Research (2022).

Key sub-sectors

When examining broader sectors and industries, the significance of specific ‘sub-sectors’ that encompass various specialisations, can be sometimes overlooked. Two examples in the case of Port Phillip are tourism (which includes parts of the retail, accommodation, arts and recreation and transport industries) and creative industries (encompassing elements of the arts and recreation, information media and telecommunications, professional services, and manufacturing).

These sub-sectors are historically important to Port Phillip, contributing significantly to employment and will continue to play a crucial role in the municipality's prosperity. Creative activities are particularly significant for the cultural identity of Port Phillip, prominently featured in the Community Vision outlined in the current Council Plan 2021-31.

Creative industries

The City of Port Phillip's institutions, events and natural environment create strong competitive advantages for creative activities. However, challenges like decreasing housing affordability, redevelopment of older premises, the COVID pandemic, and the rise of new cultural hubs in Melbourne are impacting the local creative culture.

Clusters of creative industry in **South Melbourne (media and design)** and **St Kilda (art and music)** create some of Melbourne's most prominent creative locations and align with existing

cultural events and infrastructure. Research conducted in 2019¹ identified 463 creative sector businesses in the City of Port Phillip (pre-pandemic), 69% of which were in the suburbs of South Melbourne and St Kilda. This demonstrates that there are two main locations of creative critical mass in the municipality which can be leveraged for ongoing competitive advantage and economic and community benefit.

In South Melbourne, creative activities thrive due to a mix of complementary businesses, spacious former industrial spaces, and a high-quality urban environment - key attributes of a successful enterprise precinct. The area's mid-rise buildings, heritage charm, and lively hospitality scene create an ideal setting for successful creative ventures.

Tourism

St Kilda is an iconic Victorian visitor destination. Before the pandemic, the City of Port Phillip attracted 1.3m visitors per annum (including over 900,000-day trips). The high level of day trip visitors reflects the area's appeal as a destination for travellers generally staying in central Melbourne. By contrast, less than 300,000 visitors stayed overnight in 2019 compared with almost 8m across inner Melbourne. The concentration of visitor attractions in the City of Port Phillip and the municipality's proximity to the CBD presents the opportunity to increase overnight visitation in the future, both as part of the expanded central city and at key tourism nodes such as St Kilda.

In terms of employment, tourism plays a significant and growing role in the City of Port Phillip. The tourism and hospitality sector accounts for 9.7% of the employment in the municipality and 7.1% of value added.

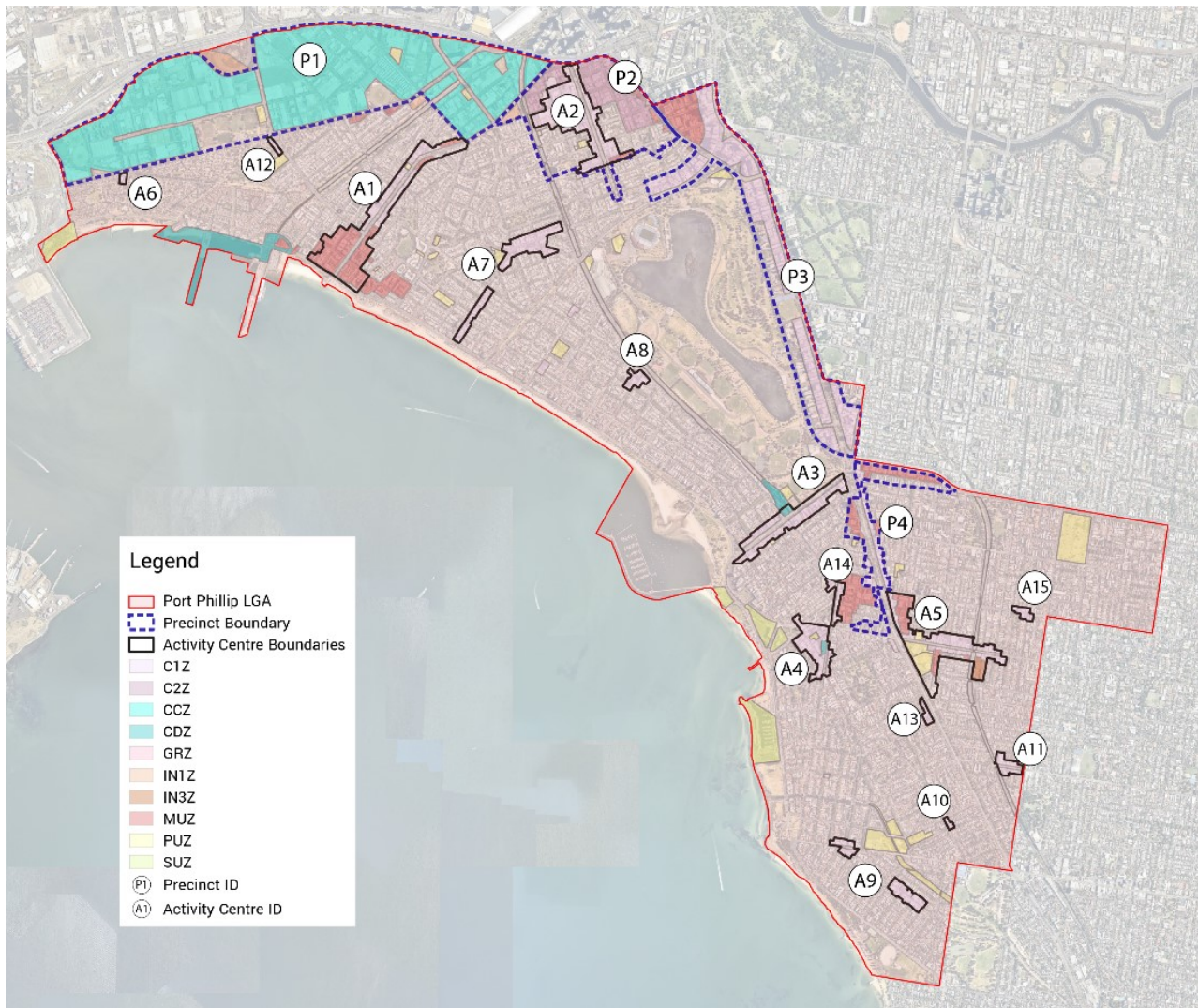
Economic and employment areas

Currently, there are 409 hectares of land in the City of Port Phillip designated for economic and employment use. Almost half of this (189 hectares, 46%) is in the CCZ in Fishermans Bend. After the CCZ, the next largest zones are the C1Z (124 hectares) and the MUZ (50 hectares).

The zoning profile of the municipality is shown in Figure 8 and Table 7. For each defined activity centre or precinct, a code has been allocated as shown in Figure 8 and listed in Table 6.

¹ Creative spaces mapping by Hodyl and Co, 2019.

FIGURE 8. LOCATION OF EMPLOYMENT LAND AND PRECINCTS



Source: Urban Enterprise

TABLE 6. EMPLOYMENT LAND PRECINCTS

Code	Name	Location	State policy categorisation	Local Policy Categorisation
Major precinct				
P1	Fishermans Bend	Port Melbourne	State significant commercial	Urban renewal area
P2	South Melbourne Enterprise Precinct ²	South Melbourne	Regional Industrial	Industrial area/ enterprise precinct
P3	St Kilda Road North / Albert Road	Melbourne / South Melbourne	State significant commercial	Primary employment node
P4	St Kilda Road South	St Kilda	Local commercial area	Secondary employment node
Activity centres				
A1	Bay Street	Port Melbourne	Major activity centre	Major activity centre
A2	South Melbourne	South Melbourne	Major activity centre	Major activity centre
A3	Fitzroy Street	St Kilda	Major activity centre	Major activity centre

² South Melbourne Enterprise Precinct is also referred to as South Melbourne Central in the technical report.

A4	Acland Street	St Kilda		
A5	Carlisle Street	Balaclava	Major activity centre	Major activity centre
A6	Centre Avenue	Port Melbourne	Local commercial area	Neighbourhood activity centre
A7	Bridport Street / Victoria Avenue	Albert Park	Local commercial area	Neighbourhood activity centre
A8	Armstrong Street	Middle Park	Local commercial area	Neighbourhood activity centre
A9	Ormond Road / Glenhuntly Road	Elwood	Local commercial area	Neighbourhood activity centre
A10	Tennyson Street	Elwood	Local commercial area	Neighbourhood activity centre
A11	Glen Eira Road	Ripponlea	Local commercial area	Neighbourhood activity centre
A12	Graham Street	Port Melbourne	Local commercial area	Local centre
A13	Brighton Road	Elwood	Local commercial area	Local centre
A14	Inkerman / Grey Streets	St Kilda	Local commercial area	Local centre
A15	Inkerman Street	Balaclava	Local commercial area	Local centre

Source: Urban Enterprise.

Land zoned for economic activity

Table 7 summarizes the total zoned employment land by suburb. The three most common employment zones (CCZ, C1Z, and MUZ) each allow dwellings at upper levels. The only zones strictly for employment are the C2Z (South Melbourne/Southbank, 20.4 hectares) and the IN1Z and IN3Z (three small areas totalling 3.5 hectares), amounting to a total of approximately 24 hectares.

TABLE 7. ZONED LAND BY SUBURB

Suburb	C1Z	C2Z	MUZ	CCZ	CDZ	IN1Z	IN3Z	SUZ	Total
St Kilda	27.1	0	15.3	0	2.6	0	0	9.0	54.0
Port Melbourne	7.6	0	20.8	140.0	5.4	0.8	0	3.9	178.4
Elwood	6.1	0	0	0	0	0	0	1.6	7.6
St Kilda East	0.6	0	0	0	0	0	0	0	0.6
Melbourne	28.6	0	0	0	0	0	0	0	28.6
South Melbourne	29.7	14.7	11.9	35.6	0	1.2	0	0	93.1
Southbank	1.4	5.6	0	11.9	0	0	0	0	18.9
Albert Park	9.9	0	0.3	0	0	0	0	0	10.3
Middle Park	2.5	0	0	0	0	0	0	0	2.5
Balaclava	5.9	0	0.9	0	0	0	1.5	0	8.3
Ripponlea	1.8	0	0	0	0	0	0	0	1.8
St Kilda West	0.1	0	0	0	0	0	0	0	0.1
South Wharf	0	0	0	1.1	0	0	0	0	1.1
Windsor	2.8	0	1.1	0	0	0	0	0	3.9
Total	124.1	20.3	50.4	188.5	8.0	2.0	1.5	14.4	409.2

Source: City of Port Phillip; Urban Enterprise. Data represents gross zoned area, not property area.

Capacity

Port Phillip is in a position where further population and employment growth can be accommodated. Figure 9 depicts the net additional capacity of employment precincts and major activity centres in gross floorspace terms. The St Kilda Road North precinct has the greatest capacity for additional floorspace, owing mostly to the substantial height limits in many parts of the precinct, lack of heritage controls and presence of large sized lots.

At the municipal level, estimated additional employment land capacity (excluding Fishermans Bend) is 1.71 million sqm, exceeding the projected demand of 562,000 sqm until 2041³.

The extent to which development capacity is realised however is difficult to predict given the prevalence of flexible zoning – i.e., a zone that allows for residential and employment uses. It is subject to the ultimate balance of employment and residential floorspace.

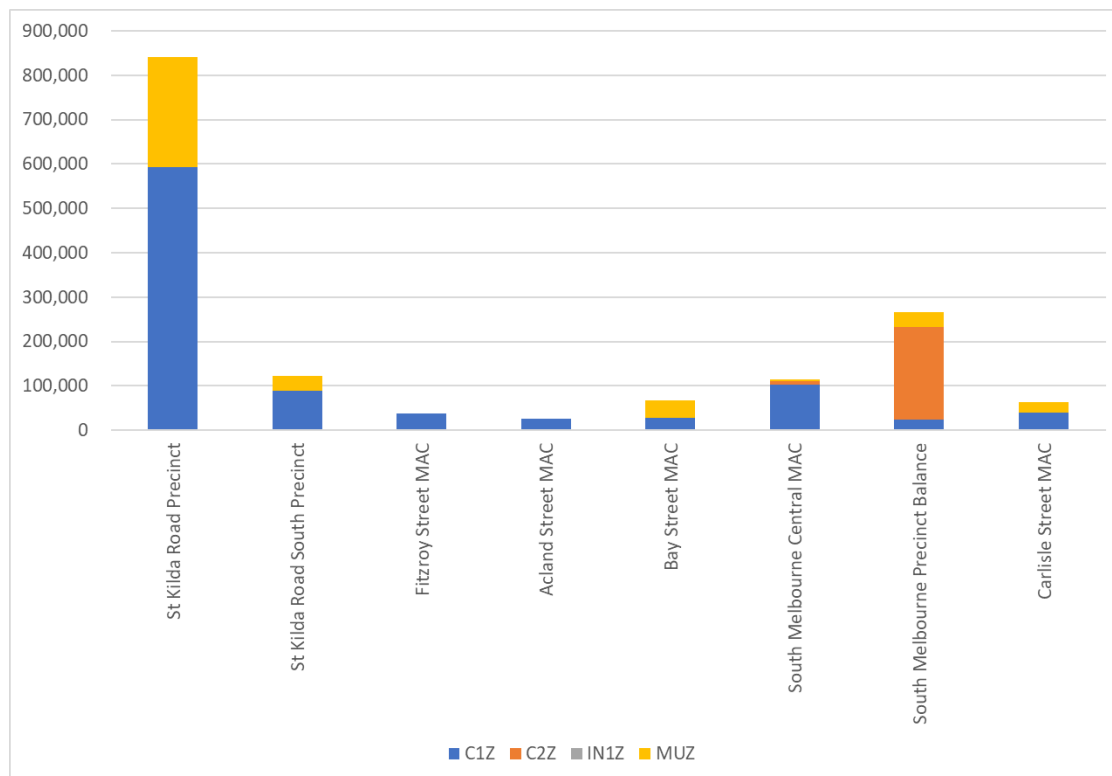
The actual delivery of this total floor space could be significantly lower if many existing commercial properties convert to mixed-use developments, mainly residential. Table 7 summarises the two development scenarios based on land use capacity. It illustrates the broad range of outcomes in areas allowing both residential and employment uses.

When potential land use and development outcomes are considered, the potential for residential development in most areas diminishes the employment floorspace that may be realised within the overall capacity to around **520,000 sqm (Scenario 2)**. Alternatively, the net additional employment floorspace might drop to as low as **181,000 sqm (Scenario 1)** if all developable sites in employment zones were developed with a land use mix weighted towards residential.

Table 8 shows how crucial employment-only zones, like the Commercial 2 Zone in South Melbourne, are for protecting land for employment amid fierce competition from residential alternatives in inner urban areas.

³ This an indication of the theoretical scale of additional floorspace that could be delivered based on current planning controls and property circumstances for the purposes of strategic planning, a capacity which is acknowledged as unlikely to be realised over the 20 year period of the SEEF.

FIGURE 9. NET ADDITIONAL FLOORSPACE CAPACITY, EMPLOYMENT PRECINCTS AND MAJOR ACTIVITY CENTRES



Source: Urban Enterprise.

TABLE 8. POTENTIAL EMPLOYMENT FLOORSPACE OUTCOMES

Precinct	Net Additional GFA	Potential Employment Floorspace outcomes (sqm)	
		Scenario 1	Scenario 2
St Kilda Road Precinct	842,000	-40,000	173,000
St Kilda Road South Precinct	122,000	4,000	25,000
South Melbourne Central MAC	114,000	7,000	34,000
South Melbourne Precinct Balance	266,000	206,000	218,000
Fitzroy Street MAC	37,000	4,000	9,000
Acland Street MAC	27,000	2,000	7,000
Carlisle Street MAC	63,000	-3,000	12,000
Bay Street MAC	67,000	-3,000	11,000
Neighbourhood activity centres	50,000	3,000	12,000
Local activity centres	29,000	3,000	7,000
Suburb balance	98,000	-4,000	11,000
Sub-total	1,714,000	181,000	520,000
Fishermans Bend		1,054,000	1,054,000
Total		1,235,000	1,574,000

Source: Urban Enterprise. Note: potential employment floorspace outcomes are indicative based on scenarios of land use mix and do not represent a floorspace 'limit'.

Transport infrastructure

Public transport improvements

The importance of transportation infrastructure in supporting economic activity, connecting people to jobs, and fostering growth is emphasised in the City of Port Phillip's adopted *Move, Connect, Live: Integrated Transport Strategy 2018* (MCL). Local commitments include partnering with the Victorian Government to enhance tram and bus services - ensuring increased frequency and more direct routes - improved public transport links and facilitating connections within Elwood and from Port Melbourne to St Kilda.

The northern part of the City of Port Phillip is the subject of major public transport investment and land use change which presents opportunities for business attraction and employment growth. This public transport investment is essential to catalyse the development of economic activity and employment spaces in Fishermans Bend, with particular emphasis on Sandridge, where the highest concentration of employment opportunities is anticipated.

The Melbourne Metro tunnel project is expected to be completed in 2025 and includes the construction of five new rail stations at Arden, Parkville, State Library, Town Hall, and Anzac station. The ANZAC Station will fundamentally change the accessibility of surrounding land to the broader rail network. ANZAC Station will serve as a gateway to the south of the city and will provide access to 33,000 existing jobs and 17,000 residents (within 800 metres of the station). The station will function as a destination for workers travelling to jobs along St Kilda Road. It will be used by almost 40,000 people each day in 2031, making it about as busy as Flagstaff Station is today.

The Melbourne Metro project will re-position St Kilda Road North as part of a highly accessible extension of the central city. St Kilda Road is an important employment precinct, and the new station will serve as a gateway to the tram network with connections to the Alfred Medical precinct and through South Melbourne and Southbank. The new station will reduce travel times from many parts of Victoria and provide a substantial increase in public transport travel to the precinct. The project will result in 814,000 more people within 30 minutes of public transport travel time of the ANZAC station precinct.

Industries that will benefit most from the Melbourne Metro project will be professional, scientific, and technical services and health care and social assistance.

FIGURE 10. PUBLIC TRANSPORT INFRASTRUCTURE



Source: Urban Enterprise. Proposed routes based on Fishermans Bend Framework Plan and Victorian Government Melbourne Metro material.

West Gate Freeway

The West Gate Freeway is the major traffic conduit enabling traffic from the western suburbs of Melbourne and Geelong entry into the Melbourne CBD and eastern suburbs. The MICLUP identifies the West Gate Freeway as part of the Principal Freight Network. The West Gate Freeway has several on and off ramps as it traverses through the Port Phillip. Daily traffic volumes on the Port Phillip segments of the Westgate freeway range from 87,000 to approximately 120,000 vehicles per day.

The West Gate Freeway acts as a vital artery connecting Port Phillip with the broader economic landscape, fostering growth, and supporting local businesses through increased accessibility, visibility, customer base, logistical support, employment opportunities, and infrastructure development.

Employment precinct analysis

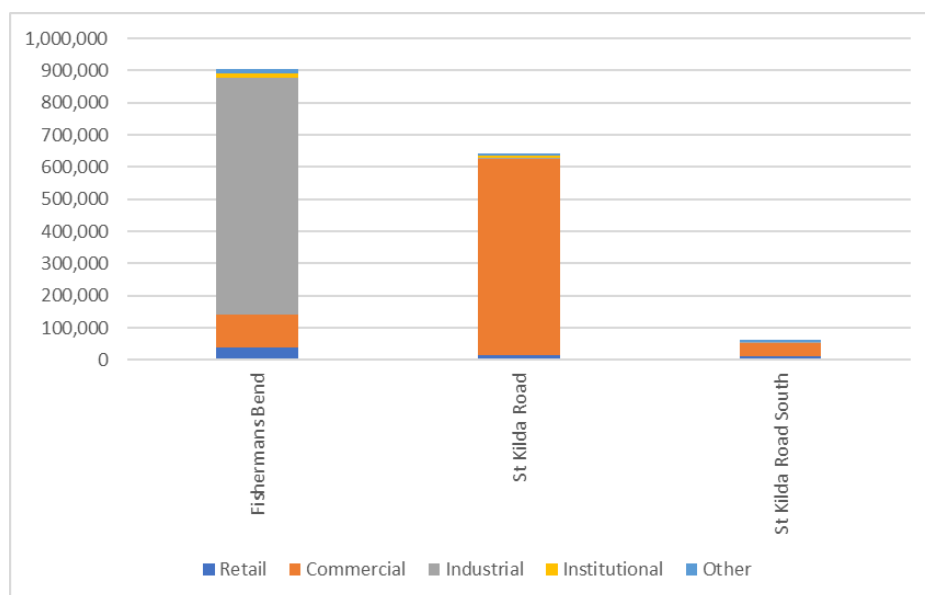
There are 4 major employment precincts in the City of Port Phillip:

- **St Kilda Road North/ Albert Road, Melbourne/South Melbourne** - 37.1ha and 32% of the city’s employment (2021)
- **St Kilda Road South, St Kilda** - 9.3ha and 4% of the city’s employment (2021)
- **Fishermans Bend (Port Phillip section)** - 151.70ha and 20% of the city’s employment (2021)
- **South Melbourne Enterprise Precinct** – 11.8ha and 17%⁴ of the city’s employment (2021).

Figure 11 shows that Fishermans Bend comprises a substantial supply of industrial floorspace, while St Kilda Road North accommodates a major concentration of office / commercial floorspace.

St Kilda Road South has less employment floorspace when compared with the other dedicated employment precincts, primarily due to the low-rise profile of most premises in the Commercial 1 Zone throughout the precinct.

FIGURE 11. EXISTING FLOORSPACE IN EMPLOYMENT PRECINCTS



Source: Urban Enterprise, based on City of Port Phillip Property Database, 2020.

Divers for change

The following sections sets out the drivers for change in these precincts. South Melbourne Enterprise Precinct is discussed with the South Melbourne major activity centre.

Drivers for future change for St Kilda Road (North)

- The completion of ANZAC Station (expected in 2025) will significantly expand the capacity and accessibility of the precinct in terms of public transport.

⁴ The percentage also includes land within the South Melbourne major activity centre.

- Alfred Hospital is a major health and research institution immediately adjacent to the St Kilda Road precinct. Ongoing expansion of the hospital is proposed, and office space already extends throughout the St Kilda Road precinct. St Kilda Road is a strategic location for businesses seeking proximity to the Hospital for both medical and office purposes, especially given the absence of commercial land at any other hospital interface.
- The Victorian Government is investing heavily into the Arts Centre precinct which will increase the breadth, quality, and attractiveness of the northern part of the precinct to visitors.
- Expected population growth in the Domain and St Kilda Road will generate demand for local retail goods and services and further increase the local labour force.
- Post-pandemic changes to office working practices and workplaces, will require a focus on improving worker amenity in the St Kilda Road Precinct to attract and retain employment.

Drivers for future change for St Kilda Road (South)

- Population growth in the catchment will generate demand for additional retail and services space in the activity centres. Attraction of more residents to the area is likely to increase demand for local business creation and small office spaces within the suburb and surrounding areas.
- St Kilda Road carries more than 30,000 vehicles per day through this section of St Kilda (VicRoads) – this level of access and exposure to passing traffic will support the ongoing attractiveness of the corridor to businesses which see this as an advantage, especially showrooms, specialist retailers and commercial recreation businesses.
- High vacancies and a lack of precinct-based amenity in St Kilda Road South could present challenges to business attraction and commercial investment.
- The availability of lower rent space for emerging retailers, larger format retailers, newer businesses and creative industries is an essential element supporting economic development.
- The large supply of traditional main street linear employment zoning and premises throughout St Kilda limits the differentiation of precincts and makes defining the employment role of St Kilda Road South difficult.
- There is no need to increase the employment capacity of land in the St Kilda Road South precinct.

Drivers for future change for Fishermans Bend

- The Fishermans Bend NEIC is projected to have 40,000 jobs once completed, representing half of the anticipated employment in the Urban Renewal Area. Notable entities like Boeing, Siemens, and a Melbourne University engineering and design campus are either currently located or expected to be in the NEIC. The upcoming launch of the University campus in 2025 will significantly impact the education scene in the northern part of the City of Port Phillip. Businesses, students, and other organizations often seek co-location near tertiary institutions, a trend likely to benefit Wirraway and Sandridge.
- Early development has primarily focused on medium and high-density housing, visitor accommodation and isolated mid-rise office space and retail development, however the Framework Plan now requires applications to respond to the non-residential floorspace requirements of the various precincts.

- Diminishing opportunities for new commercial floorspace development in the Melbourne CBD and Docklands in the medium term is expected to drive demand for office space in Fishermans Bend and other city-edge locations with development potential.
- The primary catalyst for substantial redevelopment of land in Fishermans Bend other than residential development will be the delivery of public transport infrastructure to the area along with road and public realm upgrades.
- Redevelopment of Fishermans Bend may displace various businesses and jobs, potentially affecting the diversity and certain specialisations in Port Melbourne and South Melbourne economies, particularly in creative industries. Strategic precinct plans should consider a mix of employment types, premises, and densities.
- The population of the Urban Renewal Area, especially in Montague, will increase quickly as current approvals and applications are converted to completed dwellings. This will create an increasing local labour force and demand source in the north-western section of the municipality.
- New retail centres and anchors will provide strong competition for South Melbourne and Port Melbourne retailers in the medium term. Clearer policy direction is required for future retail centres and anchors in Fishermans Bend to optimise outcomes for existing and new centres.

Major activity centre analysis

There are four major activity centres in the City of Port Phillip:

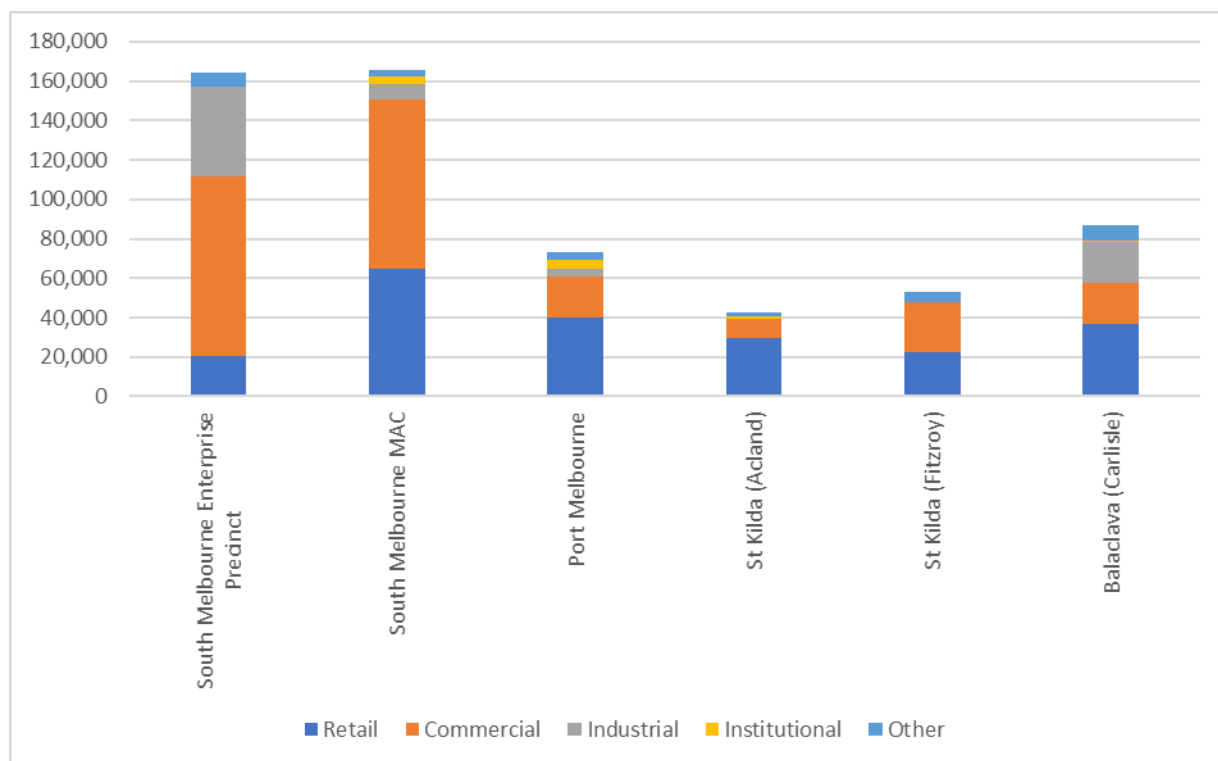
- **South Melbourne Major Activity Centre**- 15.6ha and 17%⁵ of the city's employment (2021)
- **Bay Street, Port Melbourne Major Activity Centre** - 20.49ha and 6% of the city's employment (2021)
- **St Kilda Major Activity Centre and Balaclava Major Activity Centre**⁶ - 38.1ha and 10% of the city's employment (2021).

Figure 12 displays the floorspace mix of major activity centres, including the South Melbourne Enterprise Precinct closely connected with the South Melbourne MAC. The figure indicates that the South Melbourne MAC has the highest employment floorspace among all MACs. When combined with the South Melbourne Enterprise Precinct, this area constitutes a significant portion of the employment floorspace in the City of Port Phillip, totalling 330,000 sqm. The employment zones in St Kilda's two MACs (St Kilda, covering Fitzroy Street and Acland Street, and Balaclava, covering Carlisle Street) provide a combined employment floorspace of over 180,000 sqm.

⁵ The percentage also includes land within the Enterprise Precinct.

⁶ While this area includes two major activity centres (St Kilda and Balaclava), it is defined by three distinctive activity areas which differ in terms of their role and economy, as shown by Figure 10.

FIGURE 12. EXISTING EMPLOYMENT FLOORSPACE



Source: Urban Enterprise; City of Port Phillip property database.

Drivers for change

The following sections sets out the drivers for change in the City of Port Phillip’s major activity centres.

Drivers for future change for South Melbourne – Major Activity Centre (MAC) and Enterprise Precinct

- The South Melbourne MAC is surrounded by urban renewal areas – Montague (Fishermans Bend), Domain and Southbank. Strong population growth in surrounding areas (especially Southbank and Domain) means that the retail and services role of South Melbourne will need to increase over time.
- ANZAC Station will be within walking distance of the eastern part of the area, supporting an intensification of the employment role over time. Strategic planning should facilitate employment intensification within the walkable catchment of the station.
- Competition from Fishermans Bend has the potential to diminish the overall number of businesses involved in creative and media-related activities, many of which occupy former industrial premises. Fishermans Bend will also compete with South Melbourne for investment in the development of new employment premises.
- There is a need to protect the unique attributes of South Melbourne, including mid-rise building scale, heritage values and land use mix which underpin its popularity for hospitality and commercial businesses.

- There is strong demand for office space which needs to be considered alongside the significant cluster of creative, media and design-related businesses. As the only substantial area of employment-only zoned land in the municipality, the ongoing business role of the Enterprise Precinct is of high economic importance to the city and should be protected and enhanced.

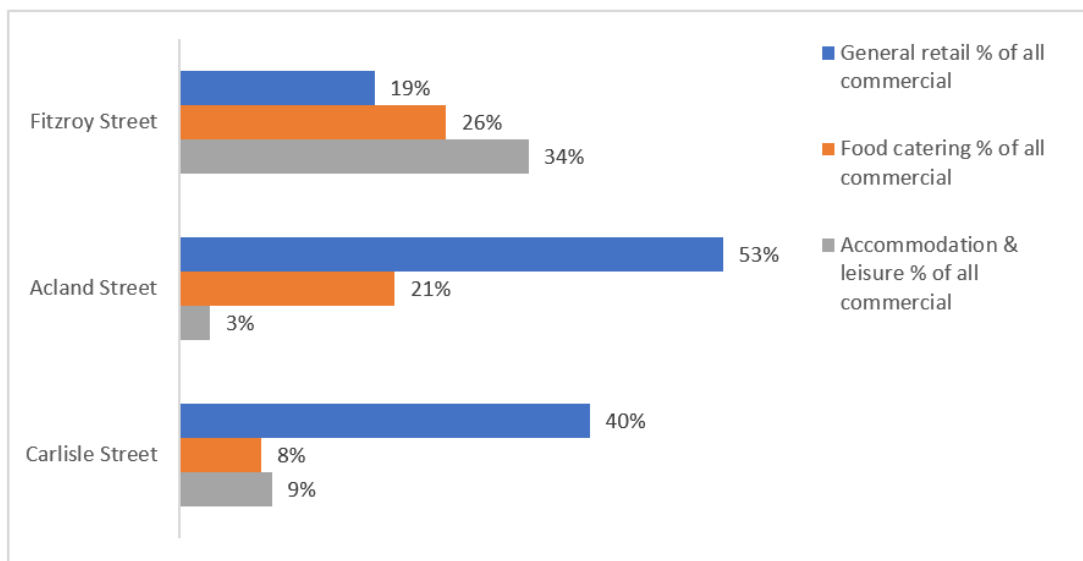
Drivers for future change for Port Melbourne

- The established areas nearby (Port Melbourne, Albert Park, and Middle Park) are not projected to see much population growth. Instead, significant investment, population growth, and business prospects are anticipated in Fishermans Bend. This will result in a notably larger labour force and demand for retail and hospitality businesses than what currently exists. As the closest beach with a notable hospitality scene, Port Melbourne has the potential to enhance and broaden its existing offerings in retail, hospitality, personal services, and commercial recreation over time.
- Potential new large core retail stores in Fishermans Bend are likely to place strong competitive pressure on the core retail role of Bay Street. This will require a strong focus on place brand, competitive advantages, and differentiation of the Bay Street offer.
- Proximity to Station Pier is a strategic opportunity that should be considered in future local area planning for the area.
- Employment land is well occupied with limited opportunities for more intensive development and very low observed shopfront vacancies.
- The centre has a limited economic role beyond retail and hospitality. Future planning should consider opportunities to diversify the economic role of the centre to accommodate greater local employment.

Drivers for future change for St Kilda and Carlisle Street (Balaclava)

- Ongoing residential development at medium and higher densities in St Kilda requires a greater focus on convenience retail and services over time.
- Currently, other than local government and private sector investment in key projects such as the St Kilda Marina and tourism accommodation / apartments, there are no broader changes or investments proposed in the St Kilda area which could materially change the accessibility or attractiveness of the area to drive employment or business growth.
- The area has been highly exposed to the impacts of the COVID pandemic due to the economic specialisations in tourism, events, music, and hospitality. Although regional visitation will be critical to ongoing performance (especially to events, live music, and recreation), revitalisation will require greater diversification of land uses and employment types, especially in Fitzroy Street.
- An overall increase in employment land is unlikely to be required in the medium term, however opportunities for development and land use transition within existing centres will be important, as well as opportunities to accommodate retail sector growth in locations convenient to concentrations of new residential development.
- Figure 13 shows that Fitzroy Street is strongly weighted towards accommodation, leisure and food catering uses, while Acland Street and Carlisle Street are more 'typical' activity centres with general retail the most common use.

FIGURE 13. LAND USE MIX, FITZROY STREET, ACLAND STREET, CARLISLE STREET



Source: Urban Enterprise; City of Port Phillip property database.

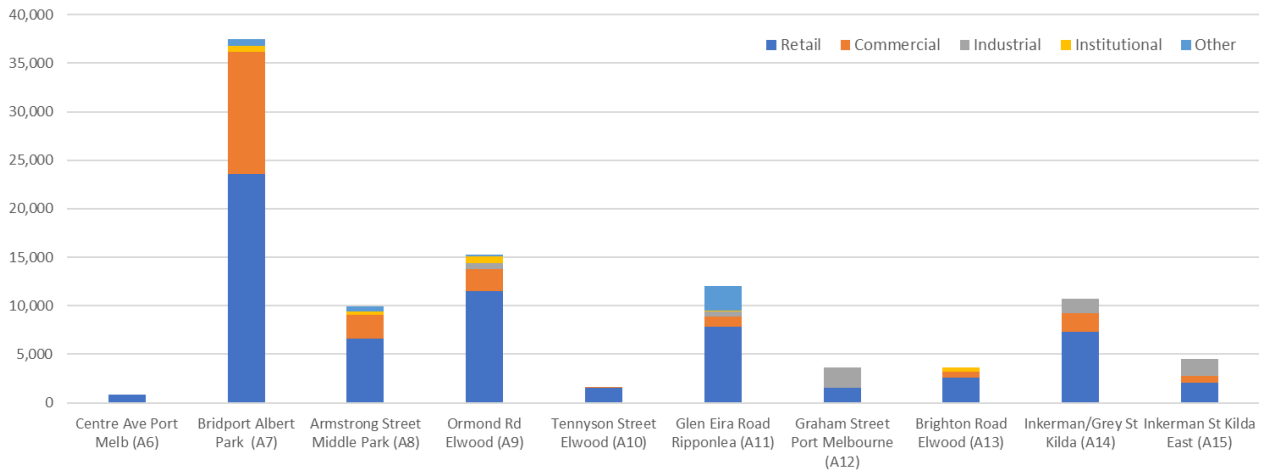
Neighbourhood and local activity centre analysis

The City of Port Phillip has a thriving network of local and neighbourhood centres, most of which can be described as ‘retail villages’. None of these centres contain a full-line supermarket, with many containing small independent supermarkets under the IGA or Foodworks brand. Most centres are occupied by independent retailers and hospitality businesses, especially retail services and cafes.

Together these centres accommodate approximately 93,000 sqm of retail, commercial and institutional floorspace in employment zones. At typical densities for these premise types of 25 - 30sqm per worker, it is estimated that the smaller centres accommodate 3,000 – 4,000 jobs in the municipality.

In total there are 10 smaller neighbourhood activity centres and local centres. Figure 14 shows the relative scale and composition of floorspace across the centres.

FIGURE 14. FLOORSPACE BY MAIN LAND USE / PREMISE TYPE



Source: Urban Enterprise; City of Port Phillip property database.

Future roles

Many smaller centres have attributes which support the planning policy aspiration of the 20 minutes neighbourhood, especially: local shopping; local public transport; walkability; and green streets and spaces.

As the municipal population and employment increases, local and especially neighbourhood centres will have a significant role to play in accommodating employment and small business growth. The following neighbourhood and local centres are well positioned to support a greater scale and diversity of employment land uses over the planning period:

- Victoria / Bridport NAC, Albert Park
- Ormond Road NAC, Elwood
- Glen Eira Road NAC, Ripponlea

This is based on the role of the centres in serving a local spatial catchment (consistent with the 20 minutes neighbourhood objective) and the existing mix of uses which will be attractive to a range of uses including health, retail and commercial.

Local industrial areas analysis

Land zoned for industrial purposes is now extremely limited (2.4ha), the characteristics of which are summarised in Table 9. Only 38% of the floorspace is used for ‘industrial’ purposes, the remainder is used for commercial or retail. In all cases these areas are small and isolated from other industrial zones.

The protection of these areas for industrial purposes is not considered a priority for the SEEF, however it is noted that the Balaclava industrial precinct does provide a diversity of premise types which benefits the local economy.

Consideration of an alternate employment zoning could be considered as part of future local planning for the areas, from an economic perspective, given proximity to public transport, activity centres and a substantial and growing skilled workforce.

TABLE 9. LOCAL INDUSTRIAL AREA PROFILES

Area		South Melbourne	Port Melbourne	Balaclava
Zone		IN1Z	IN1Z	IN3Z
Property area (ha)		0.8	0.4	1.2
Floorspace (sqm)	Retail	900	0	1,500
	Commercial	7,500	6,800	600
	Industrial	2,600	0	9,000
	Other	300	0	1,300
	Total	11,300	6,800	12,500
Land use profile		<p>Located fronting City Road adjacent to the South Melbourne Enterprise Precinct and MAC.</p> <p>Primarily accommodates offices and larger format retail premises.</p> <p>Some former industrial buildings have been converted to office space and creative studios (e.g., media, sound recording).</p>	<p>A single property fronting Williamstown Road and adjacent both the Fishermans Bend URA and the Port Melbourne Light Rail.</p> <p>Currently accommodates a combination of office space and industrial engineering activities.</p>	<p>Located adjacent Balaclava Train Station and within the Carlisle Street Major Activity Centre.</p> <p>Accommodates a mix of light industrial, warehouse, commercial recreation, office, and showroom businesses.</p>

Source: Urban Enterprise, utilising Port Phillip property database.

Strategic Framework

Vision

The vision for the City of Port Phillip's employment land has been developed to facilitate economic prosperity at the local and state levels and support the delivery of the community vision.

Port Phillip accommodates a diversity of economic activity that is significant to Melbourne and to its distinctive local communities.

Port Phillip's location advantages continue to attract both high value businesses and talent (increasingly in knowledge-based services, health and education) as well as demand for housing close to the central city. As employment land continues to transition to higher density and high value uses – continuing a long history of land use evolution in the municipality – Port Phillip's network of distinctive and vibrant neighbourhoods enable a diversity of employment locations and premise types to attract businesses and skilled workers which are responding to global economic opportunities.

Well established specialisations and advantages in creative activities, events and hospitality continue to drive a culture of innovation and creativity and attract visitors and talent.

Local employment land meets the needs of residents and provide opportunities for employment close to home, responding to the need for sustainable, resilient, and liveable communities.



Objectives

The objectives of Council to achieve the vision are as follows:

1. Accommodate demand for employment growth in **locations of advantage** due to existing agglomeration, infrastructure, and place characteristics.
2. Strategically and proactively **manage transition** of former industrial areas – particularly Fishermans Bend – to ensure that economic opportunities are maximised and consider local specialisations and opportunities.
3. Ensure that **residential land use** complements rather than displaces economic activity and employment.
4. Support the recovery, resilience, and growth of **specialised sectors** with links to cultural identity, innovation and specialisation, especially cultural and creative activities and events and hospitality.
5. Provide a land use and built form **environment** which attracts and retains a talented professional workforce.
6. Promote opportunities for business and employment growth aligned with health and **education institutions and related innovation**.
7. Promote the availability of a range of retail, service and employment types in **activity centres and villages**.



Strategic directions

Five strategic directions have been developed to achieve the vision and objectives as follows:

1. Accommodate and optimise an expanded Central City.
2. Support and grow areas of specialisation, innovation, and competitive advantage.
3. Strengthen and diversify activity centre and neighbourhood economies.
4. Retain local employment precincts and increase utilisation.
5. Align housing, transport, and employment policy.

These strategies are explained further in the next section of the SEEF.

Strategic directions and spatial framework

Direction 1: Accommodate and optimise an expanded central city

Employment land in the northern parts of the City of Port Phillip (St Kilda Road North and Fishermans Bend) are identified in policy as areas of State significance which form part of Melbourne’s ‘central city.’ This land has a key role to play in accommodating demand for employment to complement the role of the CBD and adjacent areas.

Planning for the intensification of employment and business activity in these areas will generate economic benefits of agglomeration in knowledge-based sectors. In both locations, new public transport infrastructure will strengthen the ability to leverage these economic opportunities.

In Fishermans Bend, substantial capacity exists to accommodate business and employment growth to capitalise on proximity to the CBD, the Fishermans Bend Employment Precinct and activity in South Melbourne, however the delivery of public transport infrastructure is needed to support investment. It is also important that a range of premise types are available to businesses in this area.

In St Kilda Road North, ANZAC Station will improve the accessibility of the northern areas of the precinct and generate associated employment intensification opportunities, however this comes during a period of declining demand for office space and high office vacancy rates. Facilitating investment in this precinct will enable the attraction of new businesses, workers, and visitors to this highly accessible yet underperforming corridor.

Table 10 shows the actions within this direction which have been developed.

TABLE 10. DIRECTION 1 ACTIONS

No.	Action	Type
1.1	Update local planning policy to reflect the State significant commercial roles of St Kilda Road North and Fishermans Bend and encourage large scale office, institutional and short-term accommodation developments to locate in these areas.	Policy
1.2	Advocate for the timely delivery of new tram, train and public realm infrastructure to and within Fishermans Bend to support employment intensification and growth as part of the expanded central city.	Advocacy
1.3	Ensure that Precinct Plans within the Fishermans Bend Urban Renewal Area (especially Wirraway Precinct) facilitate a variety of employment spaces within an urban environment and land use mix which aligns with contemporary business and employee expectations.	Plan
1.4	Monitor the economic performance of the St Kilda Road North Precinct in the context of the range of Council initiatives currently underway in the area and following the opening of ANZAC Station. Key performance indicators include investment attraction, employment numbers, visitation levels and vacancy rates.	Monitor

Source: Urban Enterprise; City of Port Phillip.

Direction 2: Support and grow areas of specialisation, innovation, and competitive advantage

An economic priority for Australia is to increase productivity – this requires policies at all levels which encourage innovation and business creation. Many of the city’s specialisations are linked to creative pursuits and innovation, attributes which are embedded in the cultural identity of the community.

Spatially, key areas of specialisation and innovation have been identified in South Melbourne and St Kilda, however both locations are experiencing challenging economic conditions which, if not addressed, could erode the accumulated economic and social value of these activity concentrations. These include COVID pandemic impacts, incremental and future redevelopment of industrial and lower cost business spaces, and competition from emerging creative precincts in other parts of Melbourne.

Although it is inevitable that inner urban areas will be the subject of demand from a range of land uses, retention of a variety of premise types will be important to provide opportunities for innovation and creative activities. This is particularly important in the City of Port Phillip given planning zones across most of the municipality allow and encourage redevelopment of former industrial and lower scale commercial land.

Other locations of competitive advantage, specialisation and economic opportunity include areas that are near and can directly support the Alfred Hospital, as well as several strategic tourism gateways and destinations along the Port Phillip Bay coastline at Port Melbourne and St Kilda. Growth of the health and visitor economies are strategic opportunities at the State and local levels.

The value of specialisation and innovation should be recognised in the following regionally significant employment locations where employment land should be retained and complemented by supporting uses:

- The South Melbourne Enterprise Precinct is a strategic location for ongoing commercial, creative and media activity. State policy support for the development of enterprise precincts - and specific policy to retain and encourage the development of areas in South Melbourne for creative industries - should be translated into local policy. Associated actions to retain employment land and align with innovation ecosystem principles should be reflected in any strategic planning undertaken at the local level.
- St Kilda’s concentration of cultural venues, creative activity and the night-time economy is significant, should be supported, and leveraged.
- The Alfred Hospital is a highly specialised medical institution which can be supported by accommodating uses that directly and indirectly support the function of a broader health precinct. Planning for and encouraging office, medical, accommodation and housing in this area can optimise the economic value of the precinct.

- Visitor gateways and destinations including Station Pier, St Kilda Marina and the St Kilda Triangle present the opportunity to continue to grow the City of Port Phillip’s regional and global tourism role and generate local employment and business activity.

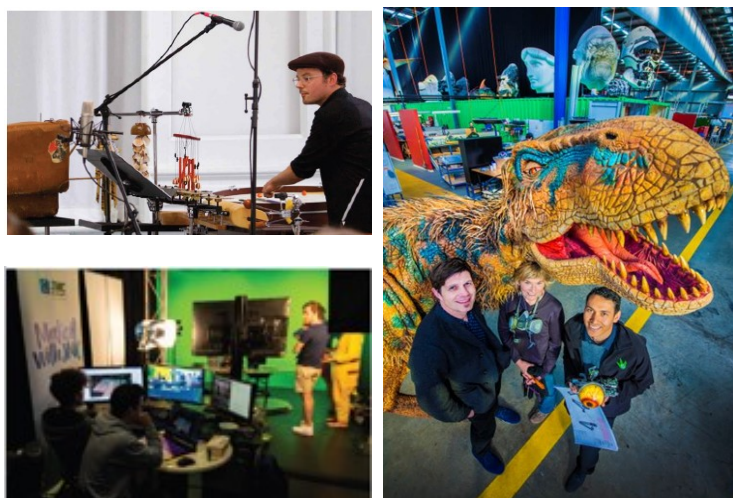
In addition to the above spatial considerations, creative industries and tourism-related businesses are strongly influenced and supported by the presence of iconic public venues, open spaces and destinations which attract visitors and talent to the municipality. Council has a key role to play in protecting and investing in these public facilities to foster complementary economic growth, specialisation, and innovation.

Table 11 shows the actions within this direction which have been developed.

TABLE 11. DIRECTION 2 ACTIONS

No.	Action	Type
2.1	Ensure that local policy prioritises the retention of employment land in specialised economic precincts, such as the South Melbourne Enterprise Precinct.	Policy
2.2	Advocate for State government policy on the incentivisation of affordable workspace.	Advocate
2.3	Identify the South Melbourne Enterprise Precinct in local policy and encourage creative business and activity which builds on the existing specialisations in media, design, and technology.	Policy
2.4	Ensure strategic planning for South Melbourne seeks to create conditions that are consistent with innovation ecosystem principles.	Plan
2.5	In St Kilda, update planning policy to prioritise support for and growth of businesses and venues associated with music, tourism, events, arts, and hospitality, along with other land uses (especially residential and commercial accommodation) which increase local population and demand levels.	Policy
2.6	Implement Council’s <i>Live Music Action Plan</i> and translate the St Kilda Live Music Precinct (and any subsequent precincts) into local planning policy.	Policy
2.7	Engage with Alfred Hospital, City of Melbourne, and City of Stonnington regarding economic and land use opportunities and challenges for the Alfred Hospital precinct, identifying long term direct and indirect health sector requirements to facilitate a productive and innovative health precinct.	Engage
2.8	Update local policy to encourage use and development which complements visitor gateways and destinations including Station Pier, St Kilda Triangle and St Kilda Pier.	Policy
2.9	Ensure that existing and future Council strategies recognise the high value of the City’s public land, community facilities and institutions in supporting the City’s economic specialisations in creative activities and tourism and protect and improve assets for public and economic benefit.	Plan

Source: Urban Enterprise; City of Port Phillip.



Direction 3: Strengthen and diversify activity centre and neighbourhood economies

The City of Port Phillip's local centres and villages offer essential services and goods in pleasant surroundings. While smaller centres focus more on retail, the City of Port Phillip stands out with a strong presence of hospitality businesses.

Economic challenges, particularly during the pandemic, have shifted the focus to resilience and diversification. Despite this, some centres are thriving and can grow further. Post-pandemic, changes in work patterns may lead to increased daytime populations in residential areas, supporting local work opportunities.

Employment growth is expected in major precincts, but suburban locations like St Kilda and Elwood also project moderate growth. This strategic selection encourages employment growth and commercial development within activity centres and selected villages across the City of Port Phillip, generally appropriate to the position of each centre in the activity centre hierarchy. These centres have an increasingly important role to play in accommodating small professional spaces, allied health providers, commercial recreation, and personal services.

Council's aim for 10–15-minute neighbourhoods and Plan Melbourne's policy for 20-minute neighbourhoods align with providing office spaces in high-amenity locations. This is crucial for smaller businesses embracing co-working and smaller tenancies.

There is an opportunity to advance Plan Melbourne by selecting neighbourhood activity centres that can create 20-minute neighbourhoods. Adding more development, activity, and jobs in these centres can bring benefits like efficient transport, environmental sustainability, and economic resilience. It is crucial to weigh these advantages while preserving the unique character and valued features of these centres that contribute to their vibrancy.

Table 12 shows the actions within this direction which have been developed.

TABLE 12. DIRECTION 3 ACTIONS

No.	Action	Type
3.1	Continue to direct employment and larger scale core retail and related developments to the City's major activity centres at Port Melbourne, South Melbourne, St Kilda, and Balaclava.	Policy
3.2	Prepare a structure plan for the St Kilda Major Activity Centre, with a focus on differentiating the role of each sub-precinct / sub-activity centre, facilitating pandemic recovery, and diversifying the overall land use mix.	Plan
3.3	As part of future strategic work, which may involve the development of a new activity centre strategy, identify neighbourhood activity centres that have the potential to accommodate greater employment and commercial floorspace, including at upper levels. Potential locations include Bridport Street Albert Park, Armstrong Creek Middle Park, Ripponlea, and Ormond Road Elwood. These existing neighborhood activity centres serve catchments that are not completely within 800m of a major activity centre.	Plan
3.4	Downgrade Centre Avenue Port Melbourne and Tennyson Street Elwood from Neighbourhood Activity Centre to Local Activity Centre to reflect the current scale and role of these centres.	Policy
3.5	In all activity centres, encourage (where appropriate) the provision of co-working space and smaller office types to provide suitable premises for smaller businesses and flexible working.	Policy

Source: Urban Enterprise; City of Port Phillip.

Table 13 shows the indicative activity centre hierarchy recommended for further strategic investigation.

TABLE 13. INDICATIVE ACTIVITY CENTRE HIERARCHY

Category	Location
Major activity centre	<ul style="list-style-type: none"> • South Melbourne • Port Melbourne • St Kilda • Balaclava
Neighbourhood activity centre	<ul style="list-style-type: none"> • Bridport Street / Victoria Avenue, Albert Park* • Ormond / Glen Huntly Road, Elwood* • Glen Eira Road, Ripponlea* • Armstrong Street, Middle Park*
Local activity centre	<ul style="list-style-type: none"> • Centre Avenue, Port Melbourne^ • Tennyson Street, Elwood^ • Graham Street, Port Melbourne • Brighton Road, Elwood • Inkerman / Grey Street, St Kilda • Inkerman Street, St Kilda East
Future activity centres	<ul style="list-style-type: none"> • Fishermans Bend (based on precinct plans)

Source: Urban Enterprise. * Potential 20-minute neighbourhood opportunities. ^Proposed reclassification from neighborhood activity centres to local activity centres.



Direction 4: Retain local employment precincts and increase utilisation

In addition to the employment areas of State and regional significance considered in previous Directions, the City of Port Phillip also accommodates a wide range of economic activity in local mixed use and employment precincts.

As the overall population, employment and business base of the municipality increases over the planning period, it will be important to retain employment land and to encourage greater intensification of the use of this land given the lack of new employment land opportunities, especially in the southern parts of the municipality.

Local industrial precincts in the City of Port Phillip present logical opportunities to accommodate more intensive forms of employment where they are near public transport and activity centres in Balaclava, South Melbourne, and Port Melbourne.

Table 14 shows the actions within this direction which have been developed.

TABLE 14. DIRECTION 4 ACTIONS

No.	Action	Type
4.1	In St Kilda Road South, retain land in the Commercial 1 Zone and Mixed Use Zone to provide secondary employment space while enabling residential intensification to occur progressively.	Policy
4.22	For locally significant industrial areas in Balaclava, South Melbourne, and Port Melbourne (as shown in the spatial framework plan), consider the merits of alternative employment zones (such as the Commercial 2 Zone) on a case-by-case basis as part of local structure plans.	Plan

Source: Urban Enterprise; City of Port Phillip.

Direction 5: Align housing, transport, and employment policy

Planning for employment land is just one aspect of Council's comprehensive land use, built form and transport planning. It is crucial to align employment land policy with housing and transport strategies, creating a cohesive approach.

Council's *Move, Connect, Live: Integrated Transport Strategy 2018-28* (ITS) aims for 10-minute walking neighbourhood's by placing housing and job growth near quality pedestrian routes and frequent public transport services. Integrating SEEF findings with this strategy is an opportunity for synergy once neighbourhood locations are defined.

In the ongoing development of the new City of Port Phillip Housing Strategy, aligning economic and housing policies is vital, particularly in areas like the city with flexible zoning. The SEEF highlights the impact of housing availability, affordability, and residential development on the local economy. For instance:

- Residential development competes with employment land in city fringe areas.
- Declining housing affordability affects the creative workforce and limits businesses' ability to hire skilled staff, impacting the economy.
- Residential development in certain areas rejuvenates economic conditions in activity centres, attracting higher-income residents.
- Increasing housing and population in specific areas, like St Kilda, can contribute to economic recovery, particularly for tourism and hospitality. Housing affordability, including affordable housing, is crucial for supporting diverse job types.

Table 15 shows the actions within this direction which have been developed.

TABLE 15. DIRECTION 5 ACTIONS

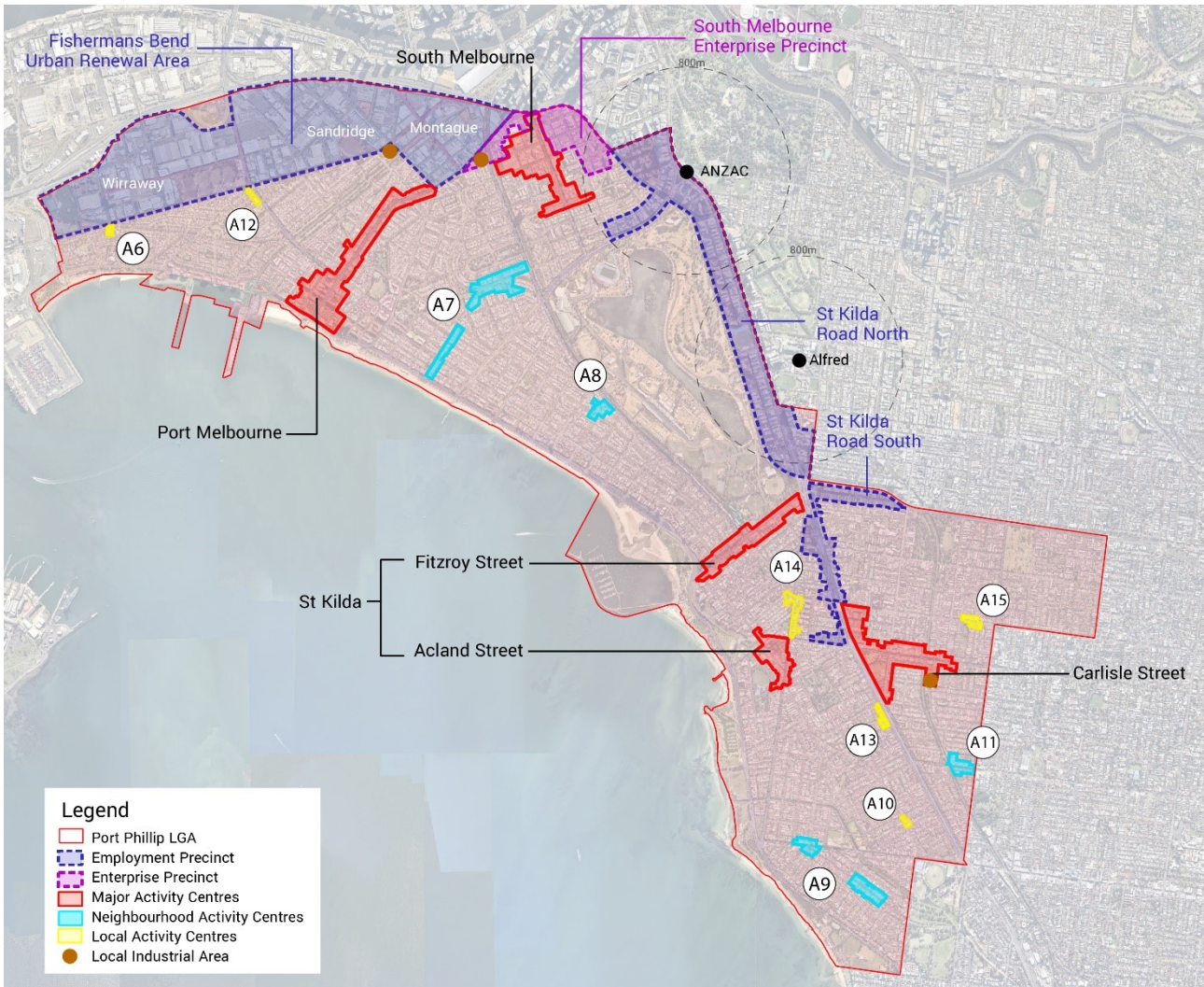
No.	Action	Type
5.1	<p>Ensure that the updated housing strategy directly considers the findings and directions of the SEEF as an input to policy directions and local recommendations for housing. Priorities are to:</p> <ul style="list-style-type: none"> • Ensure there is sufficient housing capacity and supply available across different parts of the municipality to reduce pressure to convert employment land to residential uses and zoning. • Accommodate housing and population growth in and around Major Activity Centres (in particular St Kilda) to support economic resilience (balance with other strategic considerations, and concurrent to accommodating growth in other major activity centres and growth locations) • Explore opportunities to encourage and support housing and employment growth in neighbourhood activity centres. • Address housing affordability issues impacting the ability to accommodate workers, especially those providing labour to the creative, hospitality and tourism sectors. 	Plan
5.2	<p>Align employment land strategies with Council's ITS by:</p> <ul style="list-style-type: none"> • Encouraging employment growth to occur within walking distance (10 minutes, 400m) of existing and proposed train stations. • Ensuring that implementation of the ITS into planning policy considers the SEEF objectives and locations expected to experience employment growth. 	Policy

Source: Urban Enterprise; City of Port Phillip.

Economic and employment spatial framework

Figure 15 shows a spatial framework which identifies the recommended roles of employment precincts and activity centres over the planning period.

FIGURE 15. SPATIAL FRAMEWORK



Source: Urban Enterprise.

