

UDIA's Development Ready Pipeline - WA Pilot



For the
community
creators



February 17th 2023

Development Ready Pipeline: Project Ambition

- The UDIA Development Ready Pipeline (DRP) is seeking to provide an objective and robust assessment of the state of play of ***land availability*** and ***land readiness*** for residential development across Australia's major housing markets.
- The DRP is seeking to quantify the forward 10-year pipeline of **residential dwellings** anticipated for development (by location and annualised release/commencement timing), and **audit the status of enabling infrastructure and approvals** required to realise these yields.
- The DRP is aiming to be a **nationally consistent** and respected source of residential **land & dwelling supply**, as well as **development constraint** information, which will assist in helping improve coordination between approval and service agencies and help bring new dwellings to market quicker.

Development Ready Pipeline – Key Phases

**Phase One: GIS
Sieve Mapping**



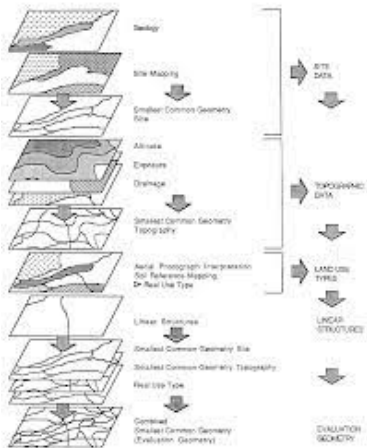
**Phase Two:
DRP Survey**



**Phase Three:
Development
Outlook Forum**



**Phase Four:
Reporting &
Advocacy**



GIS Sieve Mapping: Perth and Peel



1) Combined Undeveloped Urban/Urban Deferred and Potential Future Urban Areas



2) Unconstrained & Constrained Urban/Future Urban Areas

Phase one – GIS Sieve Mapping

| # | Layer | Constraint Category | Constraint Rank |
|----|--|--------------------------|-----------------|
| 2 | Wetlands (CCW & REW) | Environmental | |
| 3 | Creeks & Waterways | Environmental | |
| 1 | Floodways | Environmental | |
| 4 | Bush Forever | Environmental | |
| 5 | Environmental Protection Policy | Environmental | |
| 6 | Threatened Ecological Communities (TECs) | Environmental | |
| 7 | State Forest | Environmental | |
| 8 | MRS Parks & Recreation | Social Infrastructure | |
| 9 | LPS-POS | Social Infrastructure | |
| 10 | Private Recreation | Social Infrastructure | |
| 11 | School Sites | Social Infrastructure | |
| 12 | Major Roads | Transport Infrastructure | |
| 13 | Rail Corridors | Transport Infrastructure | |
| 14 | Rail Reserves | Transport Infrastructure | |
| 15 | Gas Pipeline Easements | Service Infrastructure | |
| 16 | Power Easements | Service Infrastructure | |
| 17 | Public Purpose | Other Infrastructure | |

GIS Sieve Mapping: Constrained / Unconstrained Land



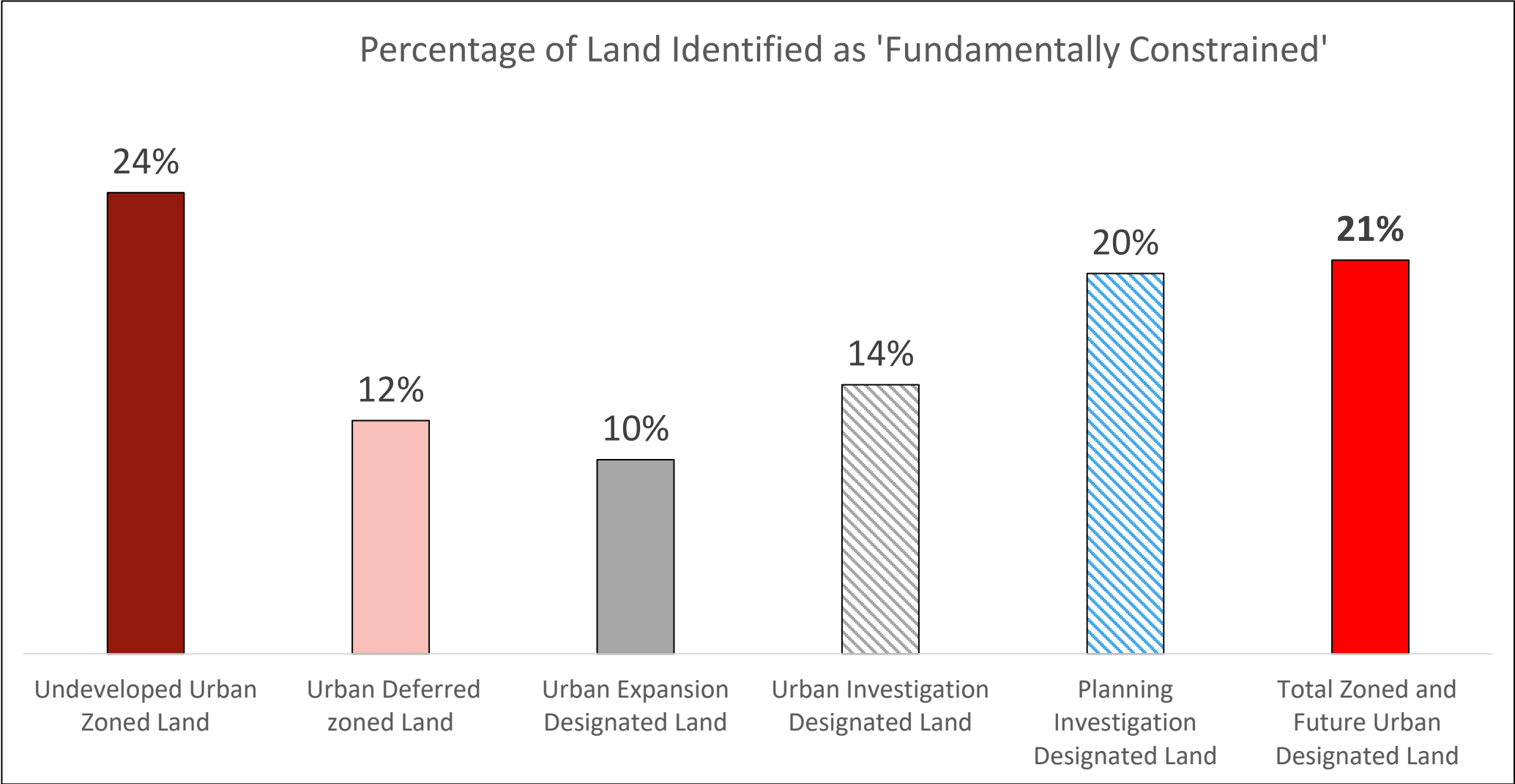
Fundamentally
Constrained



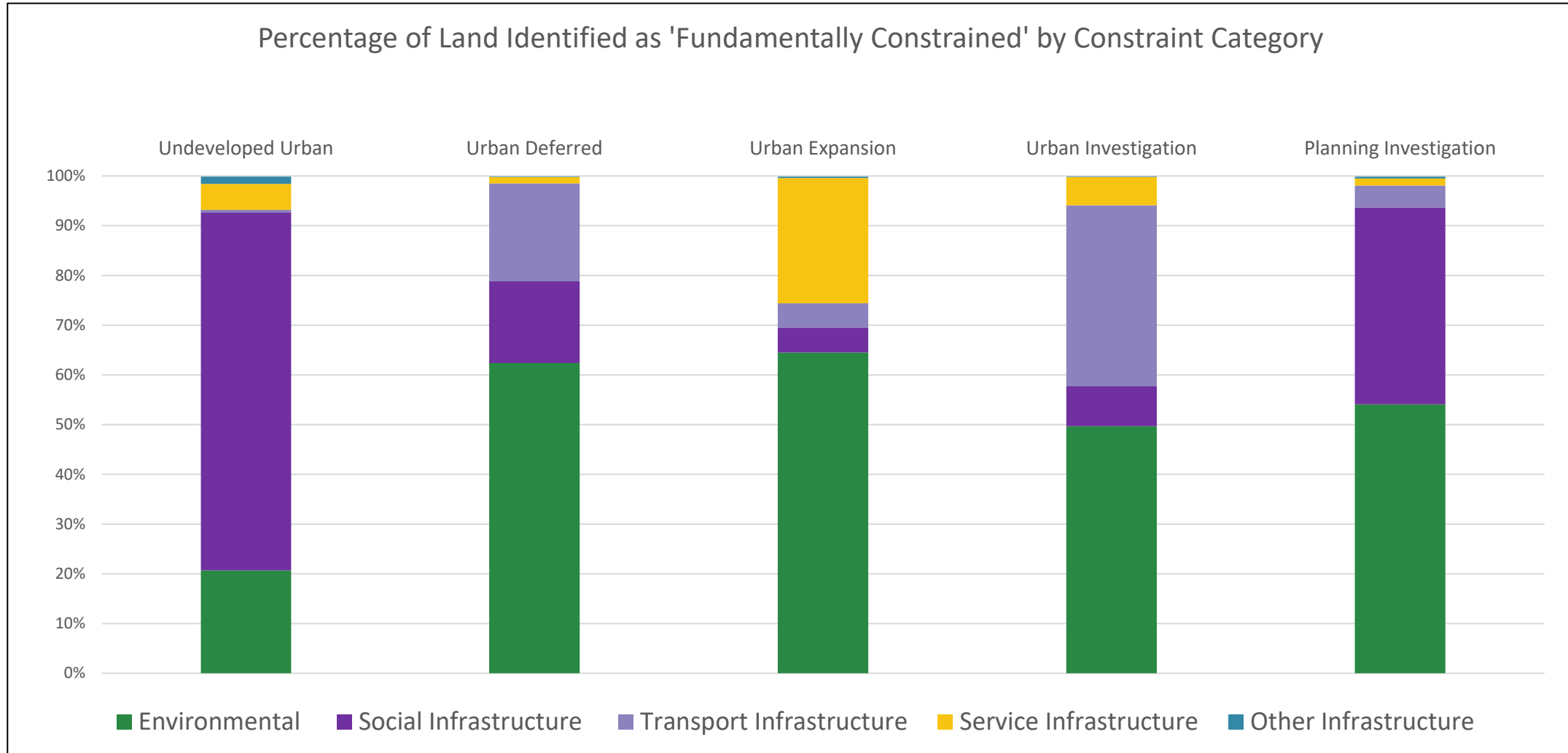
Unconstrained

Unconstrained & Constrained Urban/Future Urban Areas (sample)

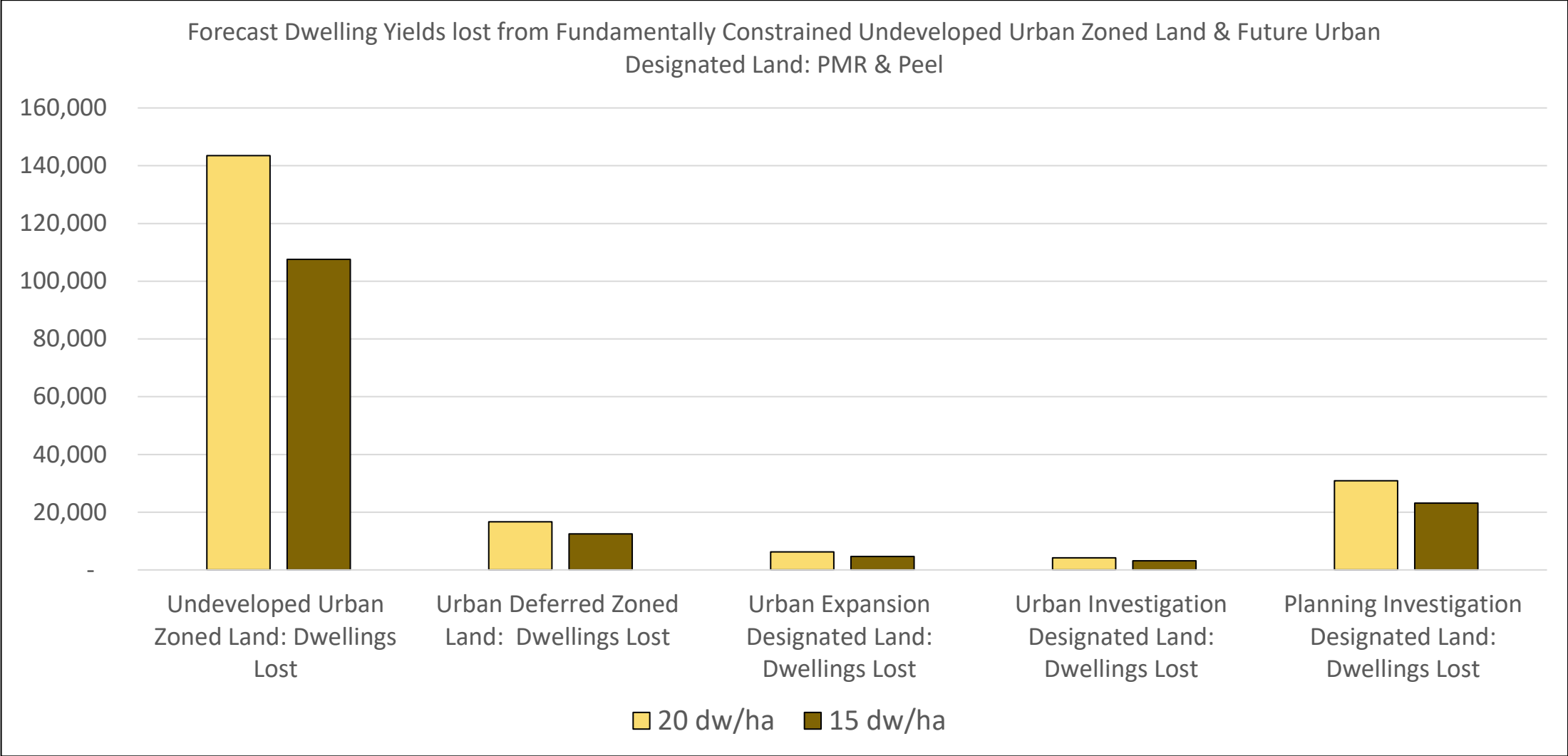
GIS Sieve Mapping: PMR & Peel Aggregate Results (Preliminary)



GIS Sieve Mapping: PMR & Peel Aggregate Results (Preliminary)



GIS Sieve Mapping: PMR & Peel Aggregate Results (Preliminary)



DRP Survey



Welcome to the UDIA Development Ready Pipeline Survey



UDIA's Development Ready Pipeline (DRP) Project is aiming to curate a development industry assessment of the short and medium-term pipeline of land supply for forward residential development across each of Australia's capital cities.

The ultimate purpose of the DRP is to provide an objective and robust measure that can be used by Federal, State and Territory Governments that identifies how much Development Ready land is available across the capital cities along with the expected residential yields year-on-year, so Governments can incentivise boosting housing supply across the spectrum and combat accelerating affordability challenges.

This Developer/Landowner survey is a critical data input component to the overall project. We are seeking survey participants to:

1. Accurately identify your development project area/precinct boundaries.

2. Provide an update on the status of the various approvals and enabling infrastructure requirements relevant for your project area/precinct.
3. Provide a forecast of the expected lot/dwelling release schedule from your project area over the forthcoming ten year period.

UDIA will take great care to protect the confidentiality of information provided by participants to the DRP survey and will only publish aggregated survey data responses.

Thank you for your participation in the DRP survey. Don't hesitate to contact DRP Project Lead Toby Adams with any questions or queries you have about the survey and the forward use of the collected survey data.

E: tadams@udiawa.com.au

M: 0447 132 608

Select your state below to start the survey

ACT

NSW

SA

QLD

VIC

WA



AUDRC
Australian Urban Design Research Centre



Map My Say

Development Ready Pipeline Survey

1. Navigate to your development project area/precinct boundaries.

To find your land holding, click on the map to select a land holding OR enter the address of the land holding.

2. Click on the button to draw a polygon around the undeveloped land area.

Click to draw a polygon around the undeveloped land area.

3. Draw a polygon to outline the future project site area.

4. Answer the questions about the status of approvals and enabling infrastructure requirements for the future project site area.

5. Repeat these steps for each development project area/precinct boundaries.

Future Project Site Area

Is the Project Area currently zoned appropriately for development?

☐ Yes ☐ No ☐ Re-zoning pending

What is the status for the following enabling infrastructure types?

(Select all that apply)

Water

☐ Committed ☐ Not Committed ☐ Funded ☐ Not Funded ☐ Under Construction ☐ Not Yet Under Construction

☐ Construction Complete

Sewer

☐ Committed ☐ Not Committed ☐ Funded ☐ Not Funded ☐ Under Construction ☐ Not Yet Under Construction

☐ Construction Complete

Electrical

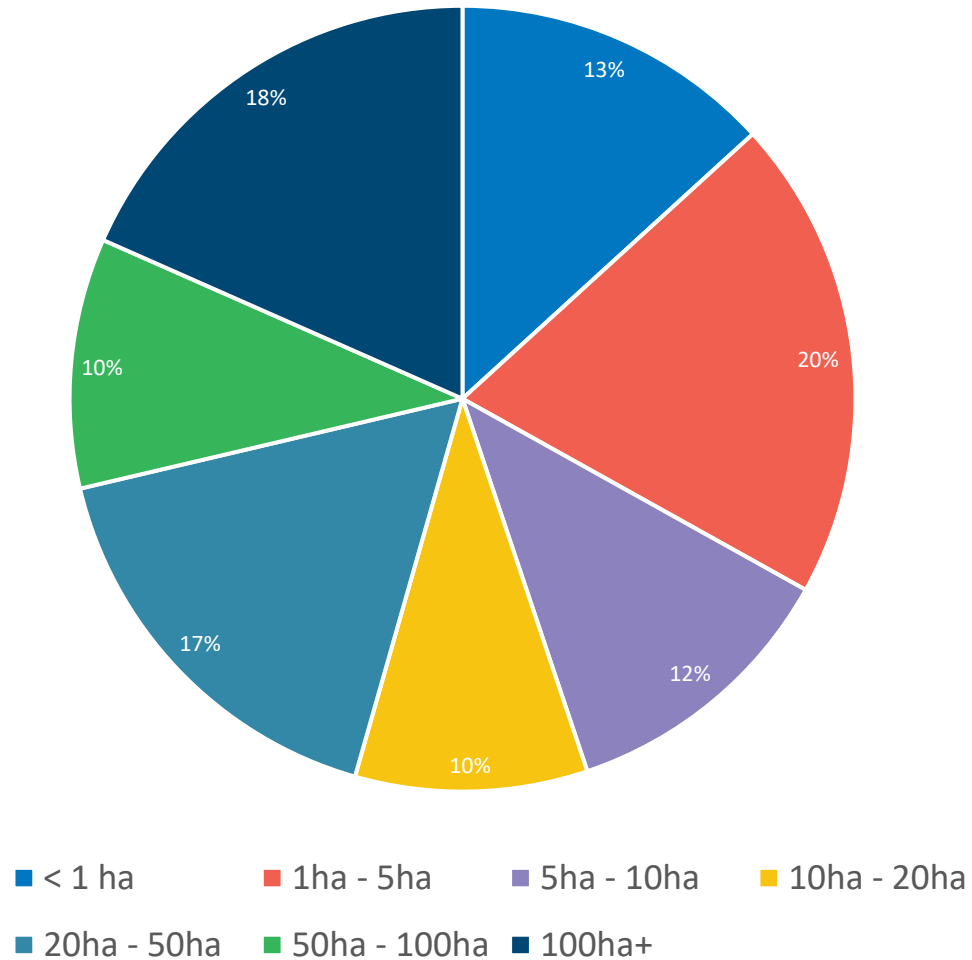
☐ Committed ☐ Not Committed ☐ Funded ☐ Not Funded ☐ Under Construction ☐ Not Yet Under Construction

☐ Construction Complete

Done

DRP Survey: PMR & Peel Aggregate Results

DRP Survey: % Development Sites by Size

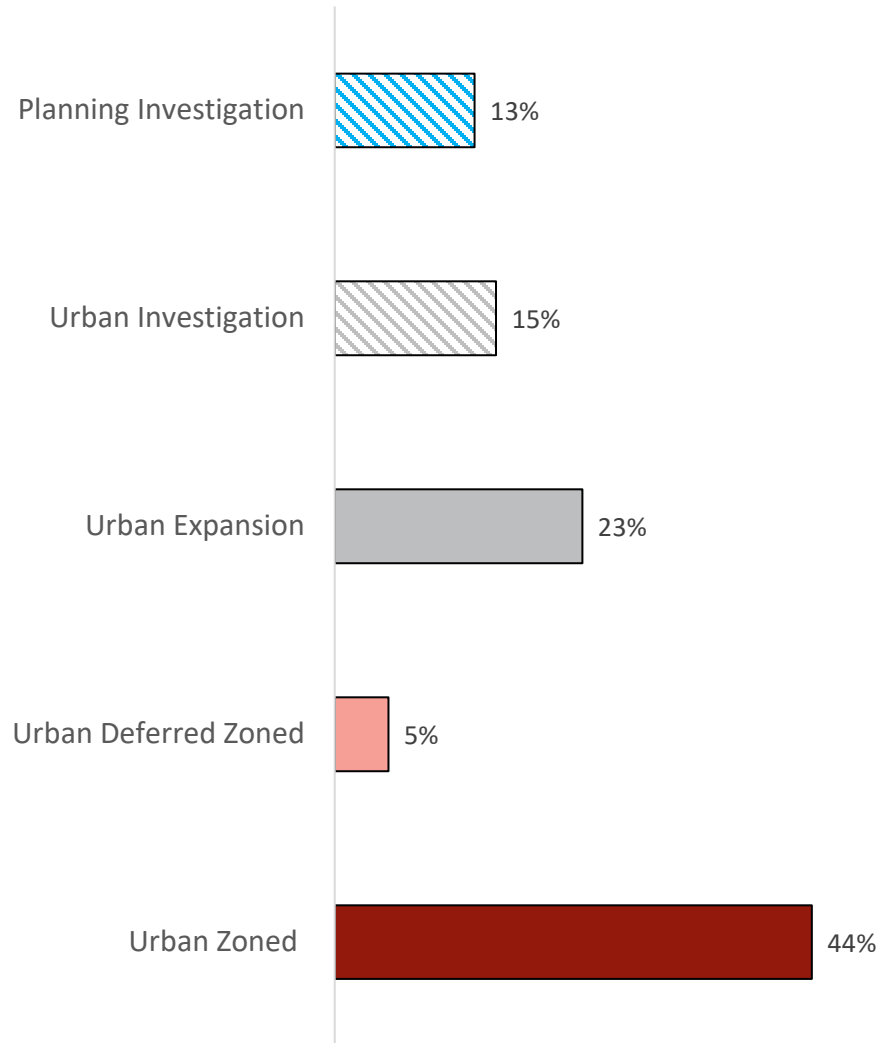


Spatial Distribution of DRP Survey Results

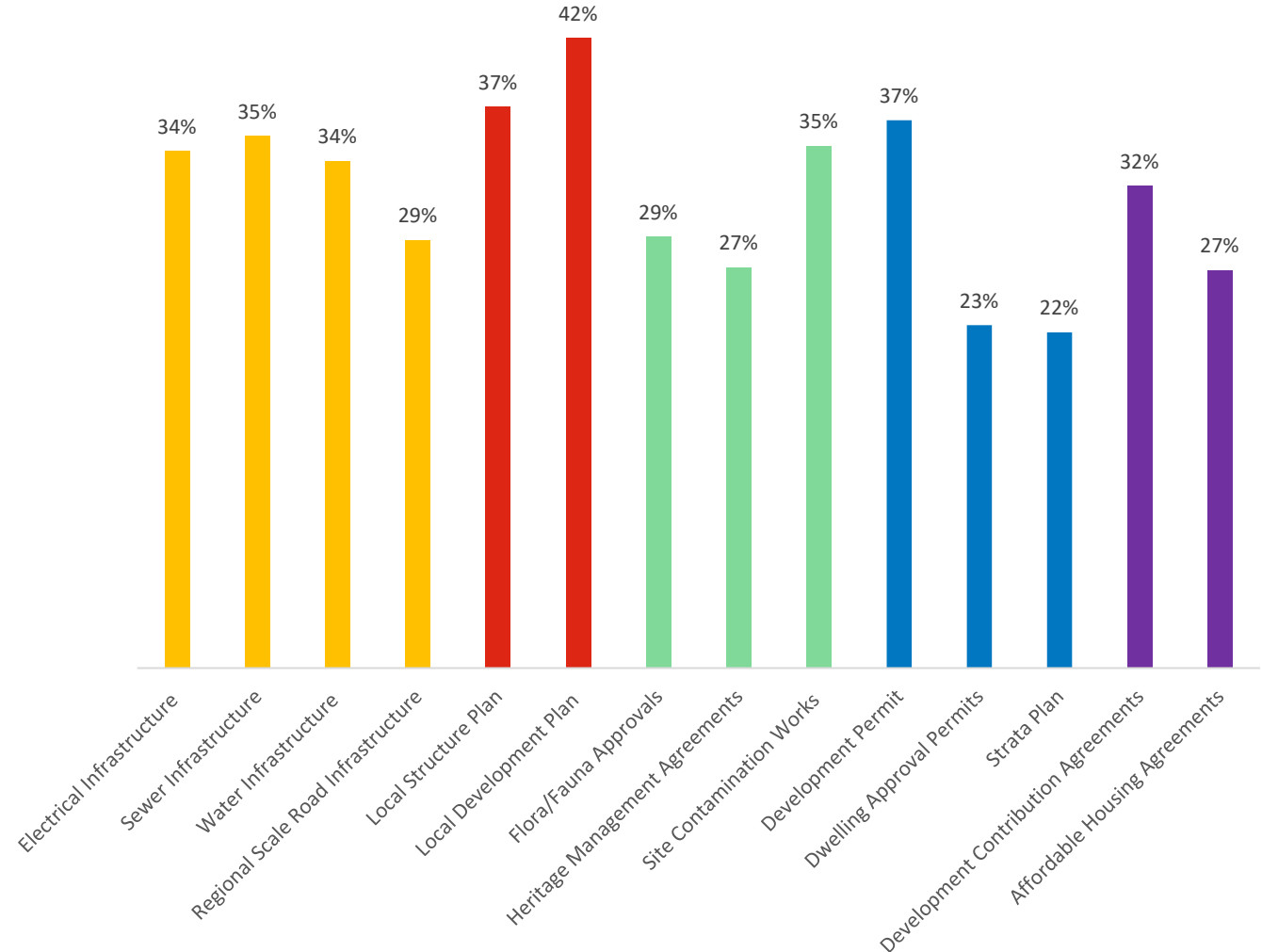


DRP Survey: PMR & Peel Aggregate Results

DRP Survey Areas by Zone/Designation



% of Total Development Yield Requiring Enabling Infrastructure Commitment/Funding/Approval by Type - PMR & Peel (February 2023)



DRP Pilot Project - Key Findings

- UDIA's **DRP Project Pilot** has proved to be a very successful exercise of industry and government working **collaboratively**.
- Approximately **one quarter (24%)** of undeveloped urban zoned land is identified as being '**fundamentally constrained**'.
- A further **18%** of all potential future urban land (eg Planning Investigation Areas and Urban Deferred) is identified as being '**fundamentally constrained**.'
- These fundamental constraints mean this land is unavailable for future development, that equates to between **150,000 to 200,000** potential new homes that cannot be realised.

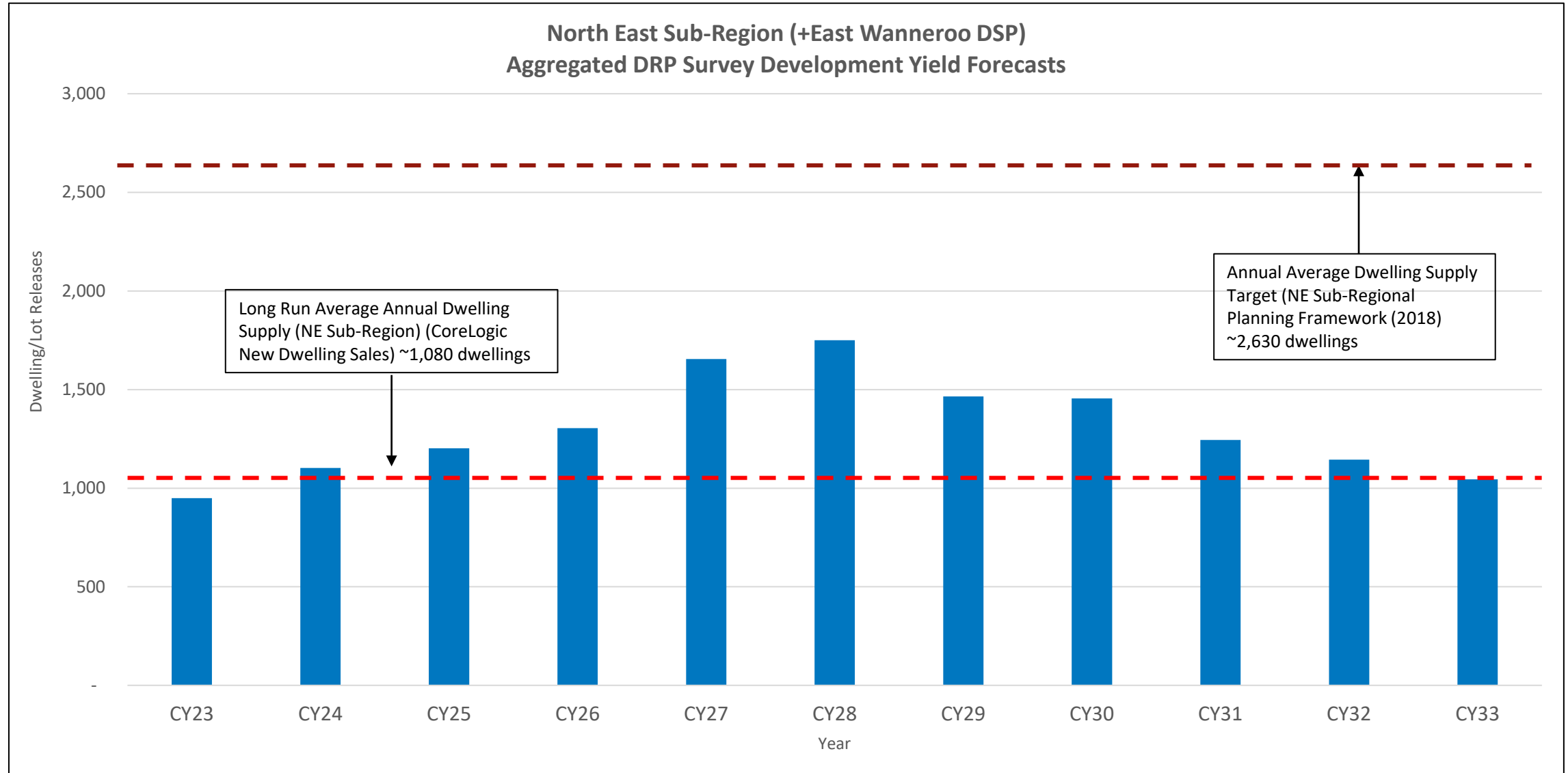
DRP Pilot Project - Key Findings Cont.

- In addition there is potentially a further **20%** of other undeveloped urban zoned and potential future urban land that has **other types of constraints** (such as Threatened Ecological Communities) which will prove challenging to deliver new homes on in a timely fashion.
- It is critically important we are able to **successfully address** (other types of constraints) in order to deliver homes in these areas.
- The DRP Survey highlighted that more than a **third of total development yield** requires **Service Agency commitment** and **funding allocation** to proceed.

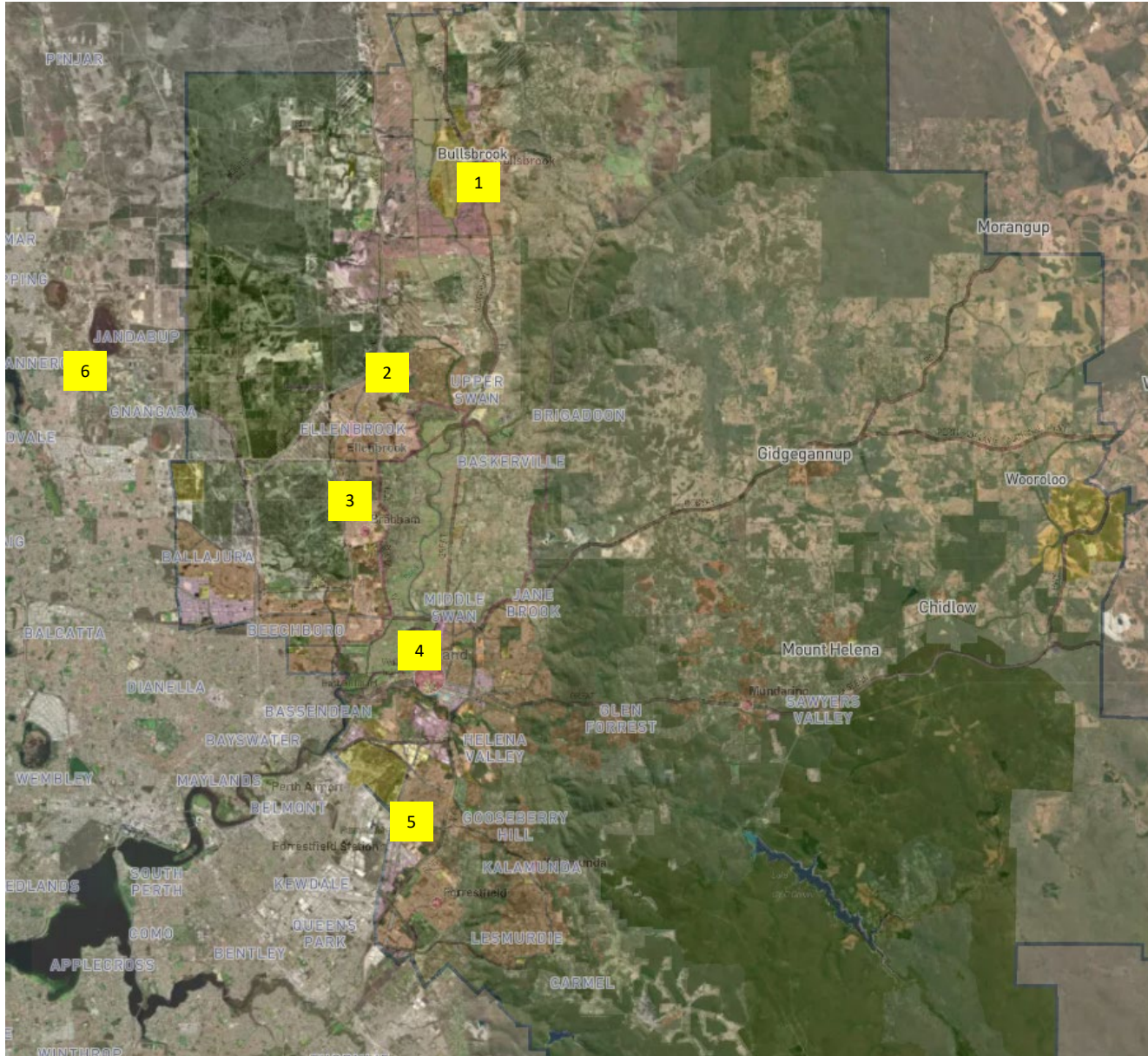
DRP Pilot Forum – North East Sub-Region



DRP Survey: NE Sub-Region Aggregate Results



DRP PILOT FORUM: Key Growth Nodes



- 1) Bullsbrook & North Bullsbrook
- 2) Ellenbrook & Upper Swan
- 3) Henley Brook & Brabham
- 4) Midland, Midvale & Stratton
- 5) Maida Vale & Forrestfield
- 6) East Wanneroo DSP

DRP Pilot Forum – North East Sub-Region: Key Issue Summary

- A **lack of strategic coordination** across and between **planning, infrastructure and environmental** approval agencies in working collaboratively to achieve Government's strategic planning targets set out in Perth & Peel @ 3.5m.
- **Lack of coordination** and forward planning for **infrastructure and utilities** to help unlock land for development.
- **Fragmented ownership** (difficulty assembling land into larger holdings) & the potential role of government in helping to address this.
- Need for **greater certainty** around **environmental** requirements and **approvals**.
- Need for **developers to work together more**, facilitated by increased **visibility of strategic infrastructure** and **staging**.

Preliminary Recommendations and Next Steps



Preliminary Recommendations

- Ensure a more collaborative and integrated approvals framework by re-establishing **Planning's leadership role** in coordinating development outcomes and in **resolving conflict** across different government agencies.
- Re-establish an **Infrastructure Coordination Committee** to better align growth servicing capital works programs with **development pipeline intentions**.
- Develop a **planning-led approach** to **environmental** decision making.
- Harness **UDIA's DRP Program** to drive **greater cohesion** between industry and government agencies and reveal the **true state of development ready** housing **supply**, forward dwelling **yields** and **development constraints & challenges**.

Next steps

- A further phase of data interrogation and localised constraints investigation is being undertaken to finalise the GIS sieve mapping across Perth and Peel.
- UDIA WA will be holding Forums for the NW, SE, SW, Central Sub-Regions and for Peel over the coming months (stay tuned for forward comms).
- Learnings and insights from the WA DRP Pilot will be released in a summary report in the coming months.
- The DRP Survey and DRP Forums will become enshrined in an annual cycle, and become a core UDIA activity



Thank you!

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