July 2007

Urbecon

Priority 1: low income renters

There are three main groups affected by Australia's current housing "affordability crisis". The first group comprises those on the margins of home ownership who have just made it into this tenure, but are feeling the debt squeeze. Next, there is an emerging 'intermediate' housing sector; working households on reasonable incomes who cannot see any prospect of gaining home ownership in their preferred locations. Finally, there are low income households trapped in the private rental sector.

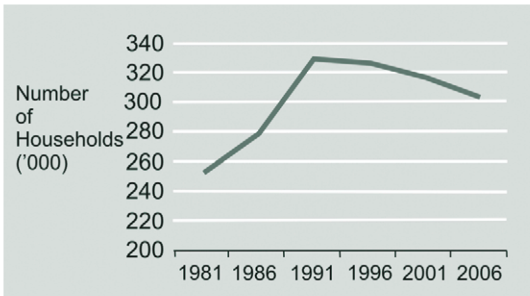
Despite current popular commentary about the plight of home buyers, research suggests that most housing stress[1] is concentrated in the third group. Low income households in the private rental sector should receive priority for public policy action, as many of them may be verging on after housing cost poverty.

What can be done to assist this group? Traditionally, the response was to build public housing. This was funded jointly by Canberra and the States under the Commonwealth-State Housing Agreement (CSHA). In the 1970s, the Whitlam Labor Government introduced a separate scheme whereby lower income tenants in the private sector would receive income supplements to offset rent payments. This scheme is known as 'Commonwealth Rent Assistance' (CRA).

Allocations of fresh capital under the CSHA have generally been tracking down, while CRA is creeping upwards. Rent assistance is now the 'senior partner' in low income housing assistance involving combined outlays of more than $3.0 billion per year. The effectiveness of CRA runs into similar 'supply inelasticity' issues as those that affect the home ownership market; simply boosting income without any tie to supply expansion will push up prices / rents.

Direct investment in public housing avoids this problem, but stock build up is painstakingly slow at $250,000 - $300,000 per unit. This, plus the progressive residualisation of public housing has seen this policy option fall out of favour. Australia wide, the stock of public housing has actually fallen since 1991, triggered by the Hawke/Keating Government's concerns regarding the stigmatisation of public housing tenants and taken further down by the current Government's view that public housing is primarily a state responsibility (Figure 1).

Figure 1. Number of households renting from a State housing authority



Unfortunately, this 'passive' policy on public housing has proven disastrous. Residualisation of this tenure has gathered pace. Innovative thinking on the development of a 'Third Sector' has been stymied. Opportunities to provide poverty relief cost-effectively have been lost.

From a government's perspective, income transfers direct to tenants (like CRA) or via landlords (leasing schemes) have the major advantage of being able to offer housing assistance to a much greater number of households – but not in the long run, as the following example shows.

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Assume that all targetted households had an annual income of $25,000 and that their affordable rent was $7,500 per annum, or 30% of income. Assume also that the purchase cost of suitable dwellings for these households is $250,000 and that the market rent, set at 6% of capital value, is $15,000 per annum. Government would therefore need to pay each household (or their landlords) $7,500 each year so that they might have access to appropriate and affordable housing.

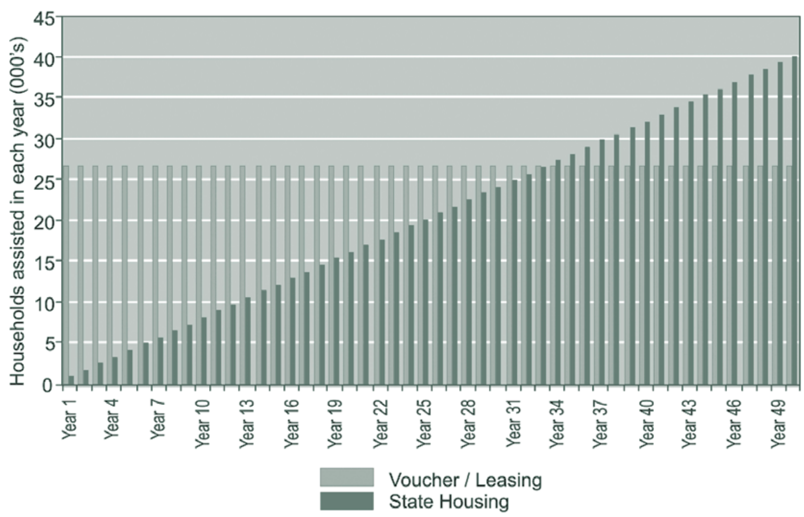
If the government's global housing assistance budget were limited to, say $200 million each year, it would be able to provide effective assistance to 26,666 households in the first and all subsequent years (see Figure 2). If the government were to dedicate its $200 million to a capital purchase program instead, it would only be able to offer assistance to a little over 800 households in the first year, assuming there is no operating surplus on the letting of these dwellings at affordable rents. Thus, by opting for vouchers or leasing schemes, the government could deliver effective housing assistance to around 30 times more households than it could by building or purchasing housing itself.

However, because State housing will continue to deliver affordable accommodation indefinitely if properly maintained and managed, the number of households which governments can assist will be greater under this strategy, given sufficient time. This can be illustrated using the same hypothetical example outlined above.

As noted, an annual budget of $200 million will initially 'buy' 800 State housing places. With its fresh budget allocation of $200 million in year 2, the government's public housing agency will be able to assist a further 800 households, but will have the benefit of the stock purchased in the previous year, so that 1,600 households will be provided with affordable housing in total.

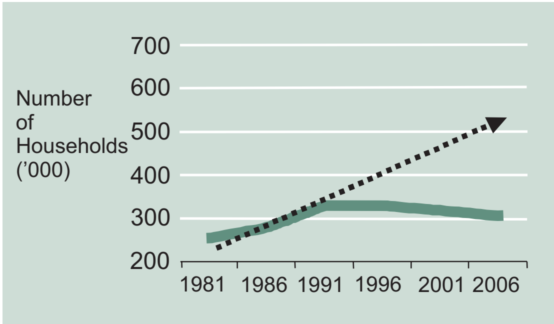
Given this accumulation of stock, the government will eventually be in position where it can offer assistance to a greater number of households by adhering to a stock acquisition as opposed to income top up programs. In this hypothetical example, this occurs at year 34. The 'cross-over' point is sensitive to each of the key variables set out in the hypothetical above – dwelling cost, rental yield, and household income.

Figure 2. Investing eventually beats leasing for social housing



This analysis ignores private rent escalation, or the potential for land value harvesting from public housing investment, so the cross over point is likely to be much sooner, perhaps within 20 years. This raises the interesting question of what might have been the outcome had the Australian Government continued to invest in social housing at the same rate as it had been in the decade up to 1991. It would have produced a stock of public housing of more than 500,000 units, that is, about the same number as the number of households in stress within the private rental sector today.

Figure 3. What if we had continued to invest in social housing?



Against this background there is a pressing need to re-invent social housing – to create a 'Third Sector'. The Third Sector comprises not for dividend corporations which have a charter to provide housing for lower income groups, some of which would be provided 'on contract' from Governments. Third Sector entities are non-Government organisations. Large and professionally run, they typically have more than 5,000 units under management. In Europe they are commonplace (their common name in the UK is 'Housing Associations'.)

It is possible to conceive of all public housing being delivered through these Third Sector organisations. The advantages of this include:

- Competition by comparison;
- Leveraging of assets;
- Avoidance of bureaucratic capture; and
- Ability to generate additional resources through property development and various community partnerships.

Importantly, the Third Sector can also play a crucial role in the 'intermediate housing sector', providing affordable rental housing, and home ownership products to middle income groups.

Unlike Europe, Australia has lagged in the development of a Third Sector, partly because of the policy dominance of the public housing movement. This served the country exceptionally well during the early post war period, but then fell foul of bureaucratic capture, where the organisation focus shifted to an engineering or construction agenda (factory housing, large homogeneous estates), rather than the changing needs of clients.

To grow the Third Sector, several building blocks need to be put into place, principally

- A national prudential supervision framework, to facilitate institutional investment;
- Standard investment products, like Affordable Housing Bonds, to similarly stimulate institutional investment; and
- An ongoing capital commitment on the part of Government, proportionate with the allocations made under the CSHA during the late 80's.

Supplementary funding sources like Inclusionary Zoning, also have an important part to play, as 'Section 106 contributions' do in the UK. This is because there is now a sustainability as well as income redistribution dimension to housing policy. It is important to achieve a healthy social mix right across the metropolis for health, social cohesion and efficiency (labour market) reasons. ■

Footnotes

1. Based on NATSEM research and defining housing stress as households in the bottom two quintiles of the income distribution paying more than 30% of their income on housing.

This article is an edited extract from a seminar paper "Housing Affordability: What are the drivers and how do we fix the problem?', downloadable from the SGS Website at www.sgsep.com.au

Innovative approaches to parking provision

Parking policy is arguably an undervalued topic in urban planning. Managing parking is a key tool for influencing travel demand. Individual parking policy approaches can be understood as demand side or supply side interventions. Demand side solutions include policies that directly or indirectly reduce parking demand - pricing, taxation of parking, and improving transport alternatives to driving.

Supply side approaches include interventions that aim to utilise existing supply more efficiently, such as parking brokerage services, shared parking and overflow parking plans. They also include solutions that increase the parking supply in a non-conventional way, such as off site parking supply and redesign of existing facilities. Some of these supply side approaches are described below.

Centralised parking facilities

Centralised parking facilities are an alternative to developers providing on-site parking spaces. These are typically operated by local government who, in return for a cash contribution, provide centralised, offsite parking that is available for use by tenants, customers, workers and visitors (depending on the development type).

In Victoria, Parking Precinct Plans (PPPs) are a parking management tool available to local government under the Victorian Planning Provisions. PPPs allow Council to manage parking in a precinct rather than on a site-by-site basis. Plans measure the parking characteristics of their precinct and provide procedures for evaluating the number of car spaces required. Within the precinct, Council can specify car parking rates that incorporate efficiencies achievable with a precinct-wide approach (such as requiring shared provision). PPPs also provide justification for financial measures such as special rate charges, cash-in-lieu contribution schemes or shared parking provision.

Centralised parking facilities have the potential to reduce construction costs if off site parking provision is cheaper than on site provision, and this saving is passed on to the developer and consumer via the level of the parking charge. Redevelopment projects involving historic buildings can avoid constructing parking that would compromise the heritage value of the building, or prevent the reuse of the building altogether because parking provision on site is not possible. Better urban design outcomes may also be achieved, by avoiding the interruption of street frontages with numerous fragmented parking lots or garage entrances.

On the other hand, the lack of onsite parking may negatively affect development feasibility if the off site parking is not conveniently located and reduced sales/rental income arising from parking restrictions is not offset by lower development costs. Cash in-lieu schemes should not be used to address historic parking shortages by charging new development as this is inequitable. It may be more appropriate to apply a special rates scheme that charges all businesses (existing and new) for off site parking provision on an equitable basis. Councils may also struggle to develop parking in a timely manner to cater for new parking demand as it comes on stream. This could be overcome through upfront financing of new parking facilities by local government.

Shared parking

Different types of land uses attract customers, workers, and visitors during different times of the day. Mixed use development provides opportunities for shared parking as demand for different uses varies across time. For example, an office that has peak parking demand during weekdays can share the same pool of parking spaces with a restaurant whose demand peaks in the evening. Shared parking also reduces overall development costs.

Shared parking is usually implemented by local government policy that allows and encourages it, with the actual sharing arrangements made between individual facility developers and managers. It can also be encouraged by establishing parking sharing brokerage services to match potential sharing partners.

Allowing for and encouraging shared parking decreases the total number of spaces required for mixed-use developments or single use developments in mixed-use areas. Shared parking also encourages the use of large centralised parking facilities and discourages the development of many small facilities. This results in more efficient traffic flow because there are fewer kerb cuts.

Shared parking generally requires additional administration and enforcement activities and users accustomed to assigned spaces may object. There may also be inadequate capacity during extraordinary peak demand periods.

Parking freezes / maximum limits

The amount of parking required can be directly reduced through parking freezes that cap the total number of parking spaces in a particular metropolitan area. Freezes have been implemented in the United States in response to non-attainment of environmental standards, traffic congestion, or other urban planning considerations. Parking freezes need to be implemented in conjunction with viable public transportation options. Areas with successful parking freezes generally require strong economies. These areas can attract businesses and residents because the benefits of the location offset the limitations on parking, and because public transport offers a viable alternative to driving.

Unbundling parking

Unpriced parking is often 'bundled' with building costs. A set number of spaces are automatically included upon building purchase or lease. Unbundling parking means that parking is sold or rented separately. For example, rather than renting an apartment for $1,500 per month with two parking spaces included, the apartment could be rented for $1,200 per month, plus $150 per month for each parking space. Tenants or owners only pay for the parking spaces they actually need, which is more efficient and fair as users save money when they reduce parking demand, are not forced to pay for parking they do not use, and can adjust their parking supply as their needs change.

For this to function efficiently, building owners must be able to lease or sell excess parking spaces (such as through a parking brokerage service), and local government needs to regulate on-street parking to avoid spillover problems that could result if residents use on-street parking to avoid paying for parking spaces. ■

SGS prepared a paper on Parking and Urban Development for the SGS and Marrickville Council Parking and Urban Development Seminar 9th May 2007. The full paper is at http://www.sgsep.com.au/News/ParkingPaper.html

Strong foundations : sound principles in planning for economic development

Read any economic development strategy today, whether it be a local Council-led strategy, a strategy to underpin the strategic intent of a major property developer or a regional strategy 'owned' by a multitude of public and private sector stakeholders, and you will no doubt be impressed by a well articulated 'vision' backed by a series of statements on strategic intent and a multitude of recommended actions designed to advance the economic prosperity of the town, city or region concerned. What many strategies miss however is a statement about the underlying principles upon which future growth and development should be built.

This is important, particularly for high growth regions which are under constant pressure to respond to ad hoc development opportunities that might not fit neatly into the set of strategies or actions written into the local economic development plan. For any region or locale, the economic development vision, and the implementation strategies which are designed to make that vision a reality, should be informed by the region's unique set of economic development planning principles, or platforms upon which future directions can be taken.

While the objectives of economic development facilitation are essentially the same for any region or locale - encouraging high levels of investment and expenditure capture, a diverse, export-oriented and robust industry base, sustainable and meaningful employment for local residents and a high quality of life - no two locations are completely alike. Economic development outcomes that may well suit one town or region will not necessarily reflect the aspirations of businesses, governments and communities in another. For this reason it is necessary to base plans and actions on a set of economic development planning principles.

These planning principles should be particular to the area concerned. But they should also be based on more general principles that respond to broader economic trends and influences, which acknowledge the various economic stakeholders and which reflect an understanding of what really drives local economic development.

With this in mind, the general principles set out below offer some guidance as to the sorts of considerations that should inform planning for economic development in Australia's regions and locales.These principles are not mutually exclusive but are interrelated and they should be treated holistically in the determination of strategies and actions to fulfil the local vision for economic prosperity.

This notion applies equally to local Councils, regional organisations of Councils, regional development agencies and other agents of change charged with the task of promoting greater local economic prosperity. Activities designed to nurture and support a conducive business (and people) environment are critical to any economic development strategy and one of the most effective ways for practitioners to effect positive change is through good strategic planning. With sound principles in place, good strategic planning should follow. When good plans are implemented, the likelihood of a prosperous and sustainable economic future is commensurately greater. ■

General economic development planning principles

Capitalise on existing strengths & capabilities	Development efforts need to focus on building on existing local strengths and capabilities - not aiming to attract or develop industries from scratch, or by subsidising uncompetitive operations that do not provide a broader public benefit.
Continual innovation is essential	Innovation is the key determinant of long-term regional economic performance. Encouraging local businesses to innovate lies at the heart of the ability to add value in the long-term.
Collaborative focus on export markets can alleviate competitive tension	Because innovation often stems from the interaction of numerous individuals, i.e. so that specific knowledge gaps can be straddled, focusing development efforts on export markets can alleviate local competitive tensions. Equally, focusing efforts on common problems can yield this result.
Quality of life and 'lifestyle' is important, as it attracts the knowledge workers	As knowledge is embodied in individuals, it is vitally important for regions to be able to attract and retain skilled workers. Achieving this ultimately relies on more than just employment opportunities or business subsidies. Quality of life and personal development opportunities need to be afforded to these sophisticated knowledge workers. A triple bottom line approach is essential.
Effective linkages with capital cities are important	Because of the critical mass of population and other synergies available in capital cities, valuable economic activity is concentrating there. For the regions, engaging effectively with capital cities is important. Often this requires specialising in complementary and niche activities, and drawing from the resources of cities as need be.
Governments should intervene where market failure is evident	Where market failure is evident, intervention is often required. Effectively intervening not only revolves around understanding the root causes of market failure and their interdependencies, it sometimes means helping those who are prepared to act to help themselves.
Harnessing private sector leadership is crucial	Government, be it local, State or Federal cannot 'drive' regional development. Private enterprise is the principal driver of prosperity and for this reason it must be embraced as a partner in the determination of local priorities and action plans.
True collaboration is essential for success	To effectively engage the private sector in steering the local economy down the desired development path, institutional collaboration is required between the three tiers of government, as well as with research and education institutions. Otherwise the actions needed to stimulate private sector development are uncoordinated and often unworkable.
Success often is only evident in the long-term	Finally, local economic development interventions are not always successful in the immediate term. Not surprisingly, given the multiplicity of factors affecting local area competitiveness, success requires a long-term commitment, ongoing monitoring and refinement of initiatives.

Sydney's CBD and fringe: factors influencing employment growth

While jobs have been decentralising to suburban centres over the last 20 years and these centres now contain more jobs than the Sydney CBD and fringe, the CBD has remained strong. Although suburbanisation of office employment is set to continue, the CBD and its fringe is also expected to continue expanding, according to projections from CBRE[1] .

What are the trends at work favouring centralisation and consolidation around the CBD? Recent research and innovation theory would suggest that a central factor is a link between the micro scale environment of 'vibey' areas such as the CBD and Surrey Hills, and the macro scale trends of business specialisation in the global economy.

Sydney as a global city

Sydney is at the 'beta' level of global cities. To the extent that Sydney is asserting a specialist and leading role in the global economy it is in services to commerce and finance, and business services, where it certainly enjoys a dominant share of jobs in the Australian context.

But it is worth making a distinction between Sydney's strength in finance and insurance and its strength in business services. These are not the same. They have different drivers.

Finance and Insurance are essentially transaction and volume driven businesses which are prone to economies of scale and centralisation. Sydney is in a highly competitive market as a global and regional location for these activities. Hong Kong and Singapore compete directly with Sydney in the Asia Pacific, and those two cities have around 2/3rds of regional multi-national headquarters compared to around 5% in Sydney.

The CBD is where Sydney needs to continue to remain competitive in the region for high value finance and insurance. This must be underpinned by continued investment in support infrastructure, education and labour force development more generally in Sydney. But these jobs will not be enough, and Sydney needs to accelerate its attractiveness to and global role in advanced business services.

Advanced Business Services, or Knowledge Intensive Business Services (KIBS) as they are sometimes referred to in the literature, are defined as: "Enterprises providing a largely customised, problem solving service to other businesses, where the services in question require application of significant intellectual effort or capital". They cover a range of activities but include services as IT consulting, financial brokering, design, business management services, and advertising.

These advanced business services jobs are concentrated in Sydney (and to a lesser extent) Melbourne The strength of Advanced Business Services in Sydney – and their presence in the CBD in particular – is revealed by analysing jobs figures for the CBD and for Sydney's other main business centres. In 2001, the CBD had substantially more jobs in Advanced Business Services (almost 71,000) than in Finance, tertiary education, property and business services (almost 59,000). Further, both types of these 'high end' service jobs were concentrated in the CBD (around 130,000) compared to Sydney's other main business centres (around 60,000)[2].

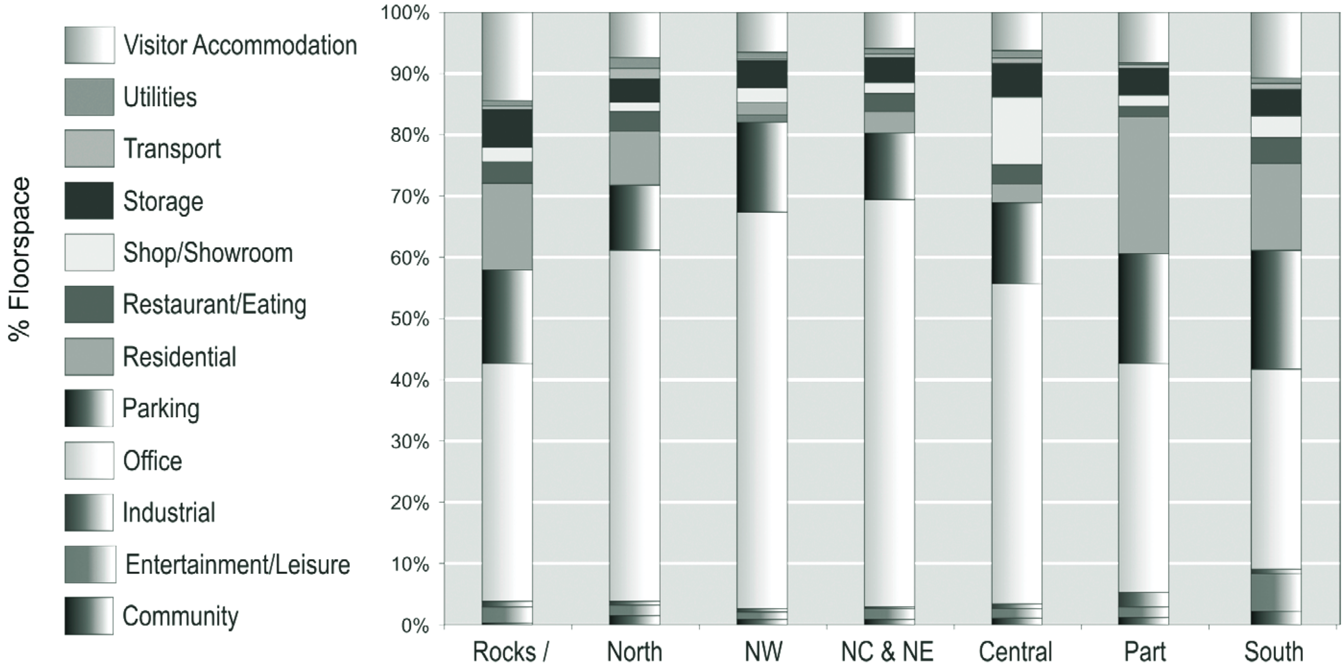
Advanced business services and the urban environment

While they are now understood as the key agents in innovation and economic success, Advanced Business Services operate via relatively 'primitive' business models. These models depend on trust based relationships, social networks, mastery of place specific customs and business rituals. Interactions between Advanced Business Service players are social as well as business relationships.

From this perspective the physical and urban environment is effectively a 'factor of production'. Attractive weather, lively settings, interesting spaces, a mix of activities, cultural offerings, transport access underpin Sydney's – and particularly the CBD's - competitive strengths as a hub and incubator for the activities and development of the Advanced Business Services sector. The mix of activities that can make for lively precincts and can attract and foster economic development can be seen by looking at the use mix in the CBD precincts.

Figure 2 shows the share of floorspace in different use classes by the different CBD precincts in 2001. While office space represents the majority share in each precinct the range is from just over 30 percent (in South) to less than 70 percent (in North Central and North East). Other uses have a significant share in each precinct including residential and visitor accommodation, highlighting the 'mixed use' nature of activity in a lively CBD like Sydney's. The strong presence of parking in each of the precincts is notable. Even with good public transport car access remains critical.

Figure 2. Floorspace (%) by Sydney CBD Precinct, 2001



Can the vibe spread to suburban centres?

While the conditions that attract the development of Advanced Business Services are most typically found in the CBD and surrounds, suburban centres need to consider whether they can replicate, or build on their own attributes to create the environment to attract their own 'stock' of advanced business services.

Some of the attributes and factors are:

- proximity to competitors and collaborators, and the role of 'clusters' of activities and firms of a similar type;
- a broad range of building forms and space offerings;
- mixed use precincts, including housing and community related infrastructure, education activities and '24/7' activity, with an appeal outside the '9 to 5';
- walkability and a 'village' feel;
- environmental performance; and
- excellent transport connections.

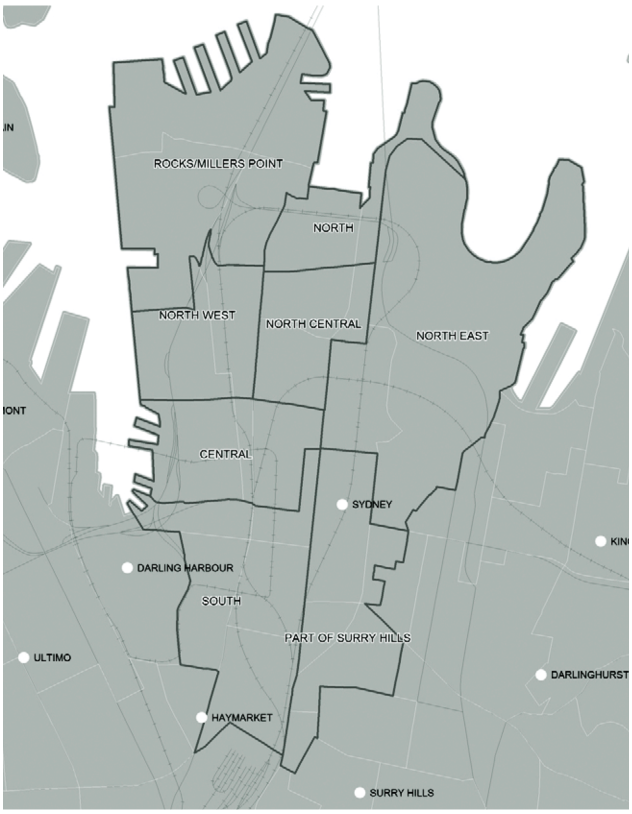
There is some evidence that suburban centres are being recognised as attractive from this perspective. Hurstville, for example, is beginning to attract a diversity of economic activities not seen in recent years. The lively retail strip, with a range of restaurants, diversity of spaces and excellent transport access to the CBD and other parts of the southern metropolitan area (rail and via the M5) are key assets. ■

Footnotes

1. Urbecon December 2006, page 6; "Office development in Sydney: Suburbanisation but not the death of the CBD"

2. Source: SGS Economics and Planning, using Transport and Population Data Centre Journey to Work data. Shown in Figure titled "Advanced Business Services and Other 'High End' Service Jobs in Sydney CBD and Competing Metropolitan Centres (2001)", page 18 of presentation athttp://www.sgsep.com.au/Downloads/hurstville_business_breakfast.pdf

Figure 3. Sydney CBD Precincts



Source: SGS Economics and Planning using City of Sydney Floorspace and Employment Survey

SGS News

SGS is pleased to announce that **Rob Lee (BSc (Urb & Reg Planning), Dip TP, Dip SSRM, PhD.)** has accepted the position of Director. Rob joined SGS in 2002. Based in the Sydney office, he has been an Associate Director since 2004. An urban and regional planner, Rob specialises in economic development, strategic planning policy and market studies. In his time with SGS, Rob has managed a wide range of studies for both public and private sectors, often involving the co-ordination of multi-disciplinary teams. They have included retail and commercial centres analysis, employment land and planning studies, development pre-feasibility and market studies, economic impact and cost benefit analyses, and housing studies.

Praveen Thakur (MCom (Econ), Grad Dip (Econ), BSc (Hons)(Economics & Management)), is now an Associate Director of the firm. Praveen joined SGS in early 2003 and has been Practice Manager in the Melbourne office for the last year. An economist, Praveen specialises in economic development, economic impact analysis, feasibility analysis and econometric modelling. He has played a crucial role in developing various SGS econometric models and has also provided specialist inputs to various transit city projects in Melbourne such as Ringwood and Laverton and in growth area planning process in the areas of industry analysis, small area labour market analysis, and property economics.

Nigel Flannigan (MSc., BTRP, B.Com., Dip.Arch., FPIA) recently joined SGS as an Associate Director. Nigel was an academic in the Faculty of Architecture Building and Planning at the University of Melbourne from 1969-2005. Although formally retired, he still holds a position of Senior Fellow in the Faculty and teaches one subject. Nigel operates primarily as an urban planner but also has tertiary qualifications in architecture and economics. He brings to SGS his substantial expertise in retailing and shopping issues. His main research interests are: the relationship between economic forces and urban form, leading to prescriptive policies and programs for viable, vital and sustainable retailing systems.

Kate Morioka (M.Soc PD (Professional), B Soc Sci (International Development), BA), senior consultant, is now Practice Manager in the Brisbane office. Kate is an experienced social planner with expertise in social policy, infrastructure planning and international development.

Caroline Squires (MUrbRegPlan.(Hons), BA(Geog), MPIA), senior consultant, is now Practice Manager of the Sydney office. An urban and regional planner, Caroline specialises in strategic planning policy, economic / employment and housing studies.

SGS has welcomed several new staff members during the first half of 2007..

Fridrik Bjarnason (BSc. Geog) has joined the Brisbane team. Fridrik is a geographer with expertise in Geography Information Systems (GIS), remote sensing technology and time space mapping.

Chloe Elvy (B.LArch (Hons), M.EnvManDev) joined the Canberra office in March. Chloe is a strategic planner with specialist skills and experience in land use policy and structure planning, as well as Indigenous housing and infrastructure policy.

Elisa Stute (M.A. Pol Sci and International Law) has joined the Hobart office. Elisa is a political scientist who specialises in policy development, communication and research in the field of climate change, energy and sustainability.

Kane Boardman (BSc, MSc (Geography) (Hons)) has been with the Melbourne team since March. An economic geographer, his experience includes several years of business analysis for the New Zealand tourism and gaming industries. Kane specialises in economic development strategies, policy research and development, and transport and facility planning.

Delwar Akbar (PhD Urban Design and Regional Planning, MPS, BSc (Hon Geog Eco Stats) and MSc (Geog)), has joined the Brisbane team as a senior consultant. Delwar specializes in infrastructure planning and management, and quantitative techniques and computer applications in the planning domain.

Ross Larsen (BBE (URP) (Dist), Grad. Dip. (URP)), has joined the Brisbane office as a senior consultant. Ross is an urban and regional planner with experience in strategic and statutory planning and development advice, both in local government and consulting. He is experienced in areas including strategic land use plans, local area planning, community consultation, planning scheme preparation, community facilities planning, development advice, and environmental studies.

Urbecon

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Level 9,
269 Wickham Street
PO Box 1177
Fortitude Valley
QLD 4006
ph: +61 7 3124 9026
fax: +61 7 3124 9031
sgsqld@sgsep.com.au

Brisbane

Level 1,
119 Macquarie Street
Hobart TAS 7000
ph: +61 3 6223 6006
fax: +61 3 6224 9009
sgstas@sgsep.com.au

Hobart

5th Floor
171 Latrobe Street
Melbourne VIC 3000
ph: +61 3 8616 0331
fax: +61 3 8616 0332
sgsvic@sgsep.com.au

Melbourne

12/50 Reservoir Street
Surry Hills NSW 2010
ph: +61 2 8307 0121
fax: +61 2 8307 0126
sgsnsw@sgsep.com.au

Sydney

PO Box 788
Dickson ACT 2602
Level 1, Sparta Building
55 Woolley Street
Dickson ACT 2602
ph: +61 2 6262 7603
fax: +61 2 6262 7564
sgsact@sgsep.com.au

Canberra