

Projected Industrial Land Demand

8.1 Industrial Land Forecasting Method

Industrial land forecasts are driven by employment forecasts. The SGS Economics and Planning employment forecasting model uses a regional Input-Output model derived using a statistical adjustment of the national Input-Output coefficients. This method is similar to that used by Queensland Treasury and various other statistical agencies.

As part of an Input-Output model, the total value of inter-regional exports for each industry is estimated. Assuming that exports grow in proportion to NSW Gross State Product levels and applying regional employment multipliers, it is possible to project the amount of employment that will be generated by a region as industry sectors change their production levels to service export demand.

The method above only takes into account the employment effects of population growth, the resultant increased consumer spending and the multiplier effect thereof. The employment effects due to consumer spending are expected to be quite substantial, especially in a developing area. Hence, the SGS Economics and Planning Employment Yield Model combines Input-Output Export Based forecasts with a population yield model to project employment forecasts.

This approach examines economic growth due to population increase by looking at the consumer spending in the region (based on population growth forecasts). This growth in consumer spending will need to be supported by the labour force (that will be earning wages/salaries). In other words, any increase in demand due to growth in consumer spending would in turn require an increase in wages (for this new population). Hence, the population in an area can be treated as an industry with both supply (wages) and demand streams (consumer spending). The effect of this pseudo industry will not only provide its own economic stimulus but also magnify the economic stimulus due to export growth.

By using an Input-Output table, it is possible to produce regional employment multipliers and predict the amount of employment generated in Coffs Harbour as industry sectors increase their production to meet export demand and population growth.

8.2 Industrial Land Forecast Results

Industrial employment, floorspace and land area demand forecasts are shown in **Table 8.1**, **8.2** and **8.3**. These forecasts should be considered optimistic given the fact that boundary changes in the 2001-2006 period have had the effect of inflating population numbers – in part, driving up the employment forecast.

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Table 8.1 Employment Forecast to 2026

JOB	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total Jobs	3,239	3,771	4,423	5,102	5,816	6,513	7,225	7,862	8,502	9,141	9,755	10,374	10,988	11,611	12,242	12,853	13,471	14,094	14,725	15,366	15,989
Additional Jobs (from 2006)		531	1,184	1,863	2,577	3,273	3,986	4,623	5,263	5,902	6,516	7,135	7,749	8,372	9,003	9,614	10,232	10,854	11,486	12,127	12,750
Total Industrial Jobs	320	367	420	476	535	593	651	706	760	814	866	918	970	1,023	1,076	1,128	1,179	1,232	1,285	1,338	1,391
Additional Industrial Jobs (2006)		47	100	156	215	273	331	386	440	494	546	598	650	703	756	808	860	912	965	1,018	1,071
Total Additional Jobs by industry																					
Agriculture, Forestry and Fishing	-33	-32	-31	-28	-26	-24	-22	-20	-18	-17	-15	-14	-13	-12	-11	-10	-9	-8	-7	-6	-5
Mining	2	2	2	3	3	3	4	4	4	4	5	5	5	6	6	6	7	7	7	8	8
Manufacturing	201	229	262	296	332	368	404	437	470	503	535	567	599	631	664	696	728	760	792	825	857
Electricity, Gas & Water Supply	9	10	12	14	17	19	22	24	26	27	29	31	33	35	37	39	41	43	45	47	49
Construction	17	20	22	24	27	29	31	34	36	38	41	43	45	48	50	52	55	57	59	62	64
Wholesale Trade	44	51	59	67	76	84	92	100	108	116	123	131	139	146	154	162	170	177	185	193	200
Retail Trade	1,081	1,240	1,444	1,654	1,875	2,094	2,317	2,510	2,705	2,899	3,087	3,277	3,463	3,652	3,844	4,030	4,220	4,409	4,601	4,796	4,987
Accommodation, Cafes & Rest.	582	681	798	919	1,046	1,166	1,290	1,404	1,520	1,637	1,747	1,859	1,970	2,084	2,200	2,311	2,423	2,536	2,651	2,768	2,881
Transport & Storage	58	67	77	89	100	112	124	135	145	156	166	177	187	197	207	217	228	238	248	259	269
Communication Services	52	60	70	82	93	105	117	128	138	149	159	170	180	190	200	210	221	231	241	252	262
Finance & Insurance	140	164	194	225	259	292	327	358	388	418	448	477	506	535	565	594	623	653	683	713	743
Property & Business Services	117	140	163	188	215	240	266	292	317	342	367	391	415	440	466	490	514	539	564	589	614
Govt. Admin. & Defence	96	110	124	139	155	169	183	198	213	228	242	256	271	286	301	315	329	344	359	374	388
Education	234	274	323	373	426	477	530	577	624	672	718	764	810	856	904	949	995	1,042	1,089	1,137	1,183
Health & Community Services	424	501	598	698	803	906	1,012	1,104	1,197	1,290	1,380	1,470	1,560	1,651	1,743	1,832	1,923	2,014	2,106	2,200	2,291
Cultural & Recreational Services	61	73	88	104	120	136	153	167	182	197	211	225	239	253	268	282	296	310	324	339	354
Personal & Other Services	155	181	217	255	295	336	377	411	446	479	512	546	578	611	644	677	710	743	777	811	845

Table 8.2 Floorspace Demand Forecast to 2026

FLOORSPACE																					
YEAR	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total floorspace	121,987	141,027	163,953	187,988	213,215	238,015	263,280	286,107	308,882	331,582	353,513	375,550	397,412	419,530	441,935	463,744	485,719	507,822	530,227	552,955	575,168
Additional Floorspace (from 2006)		19,040	41,966	66,002	91,228	116,028	141,293	164,120	186,896	209,595	231,527	253,563	275,425	297,543	319,948	341,757	363,732	385,836	408,240	430,968	453,182
Total Industrial Floorspace	39,090	44,995	51,724	58,838	66,260	73,592	81,011	87,936	94,765	101,576	108,181	114,783	121,355	127,981	134,683	141,233	147,801	154,405	161,085	167,851	174,488
Additional Industrial Floorspace (from 2006)		5,905	12,634	19,748	27,170	34,502	41,921	48,846	55,675	62,486	69,091	75,693	82,265	88,891	95,593	102,143	108,711	115,315	121,995	128,762	135,398
Total Additional floorspace by industry																					
Agriculture, Forestry and Fishing	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mining	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Manufacturing	14,034	16,058	18,417	20,928	23,554	26,171	28,815	31,250	33,640	36,021	38,343	40,658	42,958	45,275	47,618	49,922	52,227	54,544	56,887	59,261	61,602
Electricity, Gas & Water Supply	1,070	1,245	1,481	1,738	2,012	2,296	2,584	2,828	3,065	3,296	3,529	3,759	3,983	4,208	4,435	4,665	4,894	5,122	5,353	5,586	5,823
Construction	2,596	2,936	3,284	3,643	4,011	4,348	4,693	5,045	5,402	5,767	6,104	6,447	6,797	7,153	7,516	7,854	8,197	8,547	8,902	9,264	9,603
Wholesale Trade	9,656	11,245	12,976	14,774	16,631	18,418	20,232	21,977	23,721	25,473	27,146	28,830	30,518	32,225	33,954	35,615	37,290	38,980	40,690	42,422	44,094
Retail Trade	42,299	48,561	56,530	64,758	73,414	81,975	90,734	98,332	105,989	113,577	120,961	128,404	135,729	143,144	150,640	157,976	165,391	172,826	180,360	187,991	195,485
Accommodation, Cafes & Rest.	16,879	19,748	23,131	26,638	30,320	33,811	37,397	40,708	44,077	47,469	50,659	53,899	57,142	60,448	63,814	67,007	70,253	73,535	76,879	80,284	83,535
Transport & Storage	12,804	14,757	17,047	19,492	22,064	24,655	27,271	29,664	32,002	34,315	36,588	38,847	41,081	43,328	45,595	47,843	50,086	52,335	54,606	56,904	59,188
Communication Services	6,218	7,239	8,451	9,784	11,187	12,608	14,037	15,353	16,619	17,880	19,118	20,342	21,559	22,781	24,020	25,248	26,470	27,698	28,941	30,203	31,458
Finance & Insurance	3,500	4,108	4,840	5,635	6,477	7,312	8,163	8,942	9,702	10,459	11,190	11,921	12,649	13,383	14,128	14,855	15,586	16,322	17,068	17,827	18,571
Property & Business Services	2,933	3,490	4,072	4,709	5,372	6,004	6,642	7,288	7,920	8,562	9,167	9,770	10,384	11,006	11,641	12,245	12,851	13,466	14,092	14,730	15,341
Govt. Admin. & Defence	3,358	3,843	4,348	4,872	5,413	5,912	6,420	6,933	7,454	7,985	8,478	8,977	9,485	10,003	10,532	11,025	11,526	12,035	12,554	13,082	13,579
Education	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Health & Community Services	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Cultural & Recreational Services	2,143	2,558	3,081	3,627	4,205	4,771	5,350	5,860	6,373	6,883	7,375	7,871	8,362	8,860	9,365	9,856	10,352	10,851	11,357	11,872	12,374
Personal & Other Services	4,496	5,239	6,295	7,389	8,556	9,733	10,941	11,927	12,920	13,894	14,855	15,823	16,764	17,716	18,678	19,632	20,597	21,561	22,538	23,528	24,513

Table 8.3 (Baseline) Land Demand Forecast to 2026

LAND																					
YEAR	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Total land	261,065	301,454	349,806	400,519	453,697	506,104	559,433	607,725	655,815	703,711	750,084	796,630	842,792	889,456	936,693	982,767	1,029,149	1,075,777	1,123,011	1,170,901	1,217,790
Additional Floorspace (from 2006)		40,389	88,741	139,454	192,632	245,039	298,368	346,660	394,750	442,646	489,019	535,565	581,727	628,391	675,628	721,702	768,084	814,712	861,946	909,836	956,725
Total Industrial Land	115,260	132,759	152,593	173,549	195,396	216,957	238,770	259,191	279,335	299,432	318,909	338,377	357,768	377,316	397,087	416,400	435,763	455,239	474,933	494,878	514,432
Additional Industrial Land (2006)		17,498	37,333	58,289	80,136	101,697	123,510	143,931	164,075	184,172	203,649	223,117	242,508	262,056	281,827	301,140	320,503	339,978	359,673	379,618	399,171
Agriculture, Forestry and Fishing																					
Mining																					
Manufacturing	36102	41232	47088	53306	59786	66198	72676	78724	84673	90617	96386	102144	107881	113665	119519	125245	130979	136749	142587	148502	154308
Electricity, Gas & Water Supply	3568	4151	4938	5792	6706	7654	8613	9428	10216	10988	11763	12530	13276	14026	14783	15549	16312	17073	17842	18622	19411
Construction	4326	4893	5473	6072	6685	7247	7822	8408	9004	9612	10173	10745	11328	11922	12526	13089	13662	14245	14837	15440	16005
Wholesale Trade	32171	37467	43234	49226	55411	61366	67409	73225	79035	84871	90444	96055	101682	107369	113127	118663	124245	129874	135571	141342	146914
Retail Trade	81059	93037	108336	124083	140651	157015	173774	188265	202906	217412	231519	245753	259757	273937	288271	302287	316468	330686	345093	359687	374007
Accommodation, Cafes & Rest.	25027	29282	34297	39498	44957	50134	55451	60361	65356	70385	75115	79918	84728	89629	94621	99356	104168	109035	113993	119041	123862
Transport & Storage	42661	49167	56797	64945	73514	82145	90864	98834	106624	114331	121906	129432	136876	144360	151915	159403	166878	174370	181938	189595	197205
Communication Services	15546	18096	21126	24459	27968	31520	35093	38383	41548	44700	47795	50856	53896	56953	60049	63121	66174	69246	72354	75507	78644
Finance & Insurance	3500	4108	4840	5635	6477	7312	8163	8942	9702	10459	11190	11921	12649	13383	14128	14855	15586	16322	17068	17827	18571
Property & Business Services	2933	3490	4072	4709	5372	6004	6642	7288	7920	8562	9167	9770	10384	11006	11641	12245	12851	13466	14092	14730	15341
Govt. Admin. & Defence	3358	3843	4348	4872	5413	5912	6420	6933	7454	7985	8478	8977	9485	10003	10532	11025	11526	12035	12554	13082	13579
Education																					
Health & Community Services																					
Cultural & Recreational Services	3062	3654	4401	5182	6007	6816	7643	8371	9104	9833	10536	11245	11946	12657	13379	14080	14788	15501	16225	16960	17678

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8.3 Analysis of Results

Industrial employment, floorspace and land area forecasting prepared by SGS Economics and Planning suggest demand for an additional:

- 135,398 sqm of industrial floorspace in the period 2006-2026, or
- 39.9 ha of gross industrial land area in the period 2006-2026

This is driven by a forecast increase in industrial employment of 1,071 jobs in the 2006-2026 period. The most significant contributing sectors to this *underlying* demand are Manufacturing (857 jobs) and Transport & Storage (269 jobs).

If the forecast period is extended out to 2031, so that it is consistent with the Mid-North Coast Regional Strategy, the projected area of industrial land needed is increased to 50 ha. This represents 60% of the minimum industrial land requirements stated in the Mid-North Coast Strategy for the Coffs Coast sub-region.

These figures, however, embody a number of assumptions which need to be highlighted.

- **ANZSIC split by zone.** The 1 digit ANZSIC sectors of Manufacturing, Construction, Wholesale Trade and Transport & Storage have been summed as industrial sectors. However, in practice, jobs in these sectors will be split to some degree by land use zones. For example, the office component of some operations may be in commercial zones while the factory floor function will be located in industrial zones.
- **Floorspace & Land Area Ratios.** To generate floorspace and land area figures from the employment numbers standard floorspace per job and land area per job ratios have been applied. These have been gathered from previous industrial land audits. These are provided in **Table 8.4**.
- **Changing nature of land consumption.** The land forecasts presented here should be considered a 'baseline' forecast. In practice, as land becomes scarce and the price of land increases, two broad processes become more evident: (i) intensification; and, (ii) rationalisation. Intensification simply means the process of firms using their existing sites more intensively, thus generating higher on site job yields (and lower floorspace per job ratios). Where firms are unable to do this, rationalisation of land uses occurs with lower density users (e.g. open storage) being pushed out to areas with lower land prices.

Table 8.4 Standard Floor space and Land Area per Job Ratios

	Land Area / job (m ²)	Floor Space / job (m ²)
Agriculture, Forestry and Fishing	146	146
Mining	487	146
Manufacturing	180	70
Electricity, Gas & Water Supply	400	120
Construction	250	150
Wholesale Trade	733	220
Retail Trade	75	40
Accommodation, Cafes & Rest.	43	29
Transport & Storage	733	220
Communication Services	300	120

	Land Area / job (m ²)	Floor Space / job (m ²)
Finance & Insurance	25	25
Property & Business Services	25	25
Govt. Admin. & Defence	35	35
Education	71	35
Health & Community Services	50	35
Cultural & Recreational Services	50	35
Personal & Other Services	50	29

The figures from the SGS Economics and Planning modelling represent *underlying* demand. The way that this is translated into observed demand or industrial land take-up depends on a range of other market factors (such as interest rates, construction costs, etc) and principally the nature of land supply. At the simplest level, this means having sufficient land volumes to correspond with the demand volume. More subtly, it means having suitably positioned and configured land to respond to the nature of demand. For example, most transport and storage functions and many manufacturing operations will require large lots. A great number of these industries will also seek out land that is positioned close to major transport networks. The fact that many commentators suggest an acute lack of larger industrial land parcels may be cause for concern here, especially given the strong growth forecasts in these low density employment sectors. Aligning both the character and the volume of land with the character and volume of industrial demand is important for the attraction of industry targets.

An example of one such policy direction that can influence the required demand for industrial land is Council's attitude towards encouraging and facilitating new development. Coffs Harbour City Council actively encourages expansion of existing industry and also new industry into the LGA. This is demonstrated by its commitment to growing sustainable industries and businesses throughout the Local Government Area. In order to do this, Council has set up an Economic Development Unit which liaises with industry and businesses and all levels of Government in an effort to facilitate the establishment and growth of business opportunities within the Coffs Harbour LGA. The Economic Development Unit:

- provides a first point of contact between Council and businesses;
- provides a one stop shop for business, new and existing, within the Local Government Area;
- is successfully assisting local businesses to grow, attracting new business opportunities to the city, enhancing business development, and supporting the creation of new jobs within the Local Government Area;
- works with businesses, government agencies, and regional organisations to facilitate business and economic development;
- provides business clients with information, data and referral services; and
- promotes the city's assets to attract new investment.

Consultation with Council's Economic Development Unit indicates that its main concern with encouraging existing business to expand and attracting new industries into the Local Government Area is a lack of supply of industrial land, especially large lots for regionally significant development.

The review of existing supply of industrial land in **Section 7** of this strategy indicates that there is a significant amount of vacant industrial land that is able to be developed for industrial land uses. The investigations indicate that there are approximately 70 ha of vacant land within the existing industrial areas that can be potentially developed for industrial purposes within the Coffs Harbour LGA.

In determining the most appropriate amount of industrial land to be designated for future industrial development within this Strategy, it is important to adopt an approach that is not at risk of identifying insufficient land and thereby missing out on potential development opportunities in the future. The results of the industrial demand modelling carried out by SGS Economics and Planning indicate that an additional 50 ha will be required by 2031. This 50 ha will be above and beyond the vacant land that is already zoned for industrial development which amounts to approximately 70 ha.

It is considered that this strategy should be reviewed every five years to determine its appropriateness given economic and policy changes that may eventuate with changes of Government. It is also recommended that not all of this land be rezoned immediately but in stages so that land release can be monitored. This is discussed further in **Section 9** of this Strategy.

8.4 Demand Issues from the Preliminary Consultation

8.4.1 Nature of Industry Enquiries

Property agents have suggested that many enquiries for industrial land within Coffs Harbour originate from Sydney-based businesses. The most common enquiry is for land parcels sized around 2,000m² with prices around \$180/m². Flat, flood-free, basic rectangular blocks are the most desirable, and local agents suggest that B-Double access is frequently sought (particularly by transport and logistics companies).

Some of the main activities being drawn to Coffs Harbour include:

- **service oriented industries.** These include personal services, health and retail industries. These are allied to tourist trade in Coffs Harbour.
- **building and construction related industries.** In the building industry there has been a recent trend for bigger companies seeking out land in the Coffs Harbour area to supply local business. At the service end of this sector, bulky goods operations have also shown an increasing interest in locating in the area.
- **transport and logistics companies.** Coffs Harbour thrives on the growth of the transport industry. This is driven by vocational advantages - Coffs Harbour is positioned between Sydney and Brisbane. Coffs Harbour is also home to a working port, which is advantageous for exporting industries. It also lies on the north coast railway line. Transport industry is particularly prevalent at Isles Industrial Estate, being a new estate with good access means that B-Double trucks have easier access to the market. Warehousing and distribution functions are also attracted to Coffs Harbour because the City has 100,000-125,000 people in its immediate catchment area.

The greatest competition for Coffs Harbour comes from Nambucca Heads. This is thought to be a direct result of the lack of larger land parcels in Coffs Harbour LGA. In contrast, Nambucca has a ready supply of large blocks of land. Land is more expensive in Coffs Harbour than in Nambucca (although it is typically cheaper than land in the comparable LGA's of Ballina or Port Macquarie Hastings).

8.4.2 Appropriate Industry Targets

Given that Coffs Harbour is a regional business centre that services a number of other smaller surrounding communities, its location half way between Sydney and Brisbane on the Pacific Highway and the fact that it has a strong agricultural industry base, potential industry targets for the LGA might include:

- **distribution operations.** The position of Coffs Harbour LGA with respect to the Brisbane and Sydney markets makes it an ideal location for distribution operations serving the two cities. However, land availability may be an issue for this industry sector and resulting employment densities will be low. There may be scope to target 'head-office' logistics functions if tied to a local distribution facility.
- **light and higher technology or 'advanced' manufacturing.** While many manufacturing operations may have difficulty in finding suitably configured and priced land, there may be potential to target light

and high tech manufacturing. This is in line with Council's desire for Coffs Harbour to be known as a technologically friendly city, with technologically based businesses and creative industries.

- **value-adding services on agri-businesses.** Despite a fall in employment in the 2001-2006 period, there is still a lot of agricultural business within the LGA which include forestry, horticulture, grazing dairying and some cropping. However there is limited value-adding activity such as food processing, drying, etc. These higher order activities may provide a niche market in Coffs Harbour. There is a growing interest in organic foods in general, farmers are continually adopting organic processes and an organic co-operative has recently been established.
- **State and Federal Government departments.** Relocation of state and federal government departments that require administrative centres can assist in achieving critical mass of activity in commercial centres.
- **service-oriented industries.** While much service oriented industry in the LGA is seasonal, industries which capitalise on the technological paradigm shift, such as call centres, server parks, software and hi-tech industries may be appropriate. There may be opportunities here for high-tech industry spin-off from the university. There are also service industry opportunities for aged care services with Health & Community Services showing the strongest growth in job numbers (1407 jobs) in the 2001-2006 period.

8.5 Categorising the Types of Demand for Industrial Land

It is important to make an assessment on what type of industrial land uses will need to be catered for within the Coffs Harbour Local Government Area. For the purposes of determining this, it is useful to look at the different categories of industrial activities. There are generally two broad categories of industrial activities. The first category is industry that focuses on servicing local and subregional communities and businesses - for example automotive services, storage services, construction material and human services. The second category includes those operations with markets extending beyond the immediate locality or region. Businesses in this category may be more capital intensive or combine commercial, research and manufacturing operations, or be involved in significant value adding. Large scale storage/logistics centres and traditional heavy industry fall into this category. The businesses in this category rely on inter-regional sales and are grouped together with the exporting industry sector. These regionally/export focussed industries generally require larger sites located in close proximity to major transport corridors.

While some industrial land uses fall within both of these categories, it is important to differentiate between these two categories as each category has different attributes in terms of infrastructure, location and site constraints.

In terms of determining demand for industries within each of these categories, GeoLINK undertook a broad scale industrial land audit to determine how the existing industrial context of Coffs Harbour LGA is situated in terms of being locally or regionally focussed. This industrial land audit revealed that the majority of land is currently utilised by local or service focused industry. The local or service industry currently makes up about 65% of the utilised industrial land within Coffs Harbour Local Government Area with 35% being utilised for regionally or export focused industry. Other industrial lands strategies within the Mid North Coast region base their assumptions on a 50% split between regionally focused industry and local industry when planning for future industrial areas.

Given that most of the industry stakeholders within the LGA are saying that there is an insufficient supply of large lots to encourage larger industry into the Coffs Harbour LGA and that Council's Economic Development Unit is actively trying to attract larger industrial uses and larger employers into the LGA, it is considered that this 50-50 split is appropriate for planning for future industry within Coffs Harbour LGA. In identifying industrial land within the Coffs Harbour LGA, Council should therefore consider allocating 50% of the identified industrial land for local service industry and the other 50% of the future industrial land for

regional or export focused industry. This is difficult to regulate as often Councils have limited control of the types of businesses that relocate to their LGA's. With respect to the Coffs Harbour LGA, there is also limited opportunity for designation of land for large lot Industrial to cater for the regionally focussed businesses given the level of ecological and physical constraints that exist in and around Coffs Harbour. So attainment of the 50-50 split between regionally focussed and locally focussed land may prove difficult to achieve for Coffs Harbour. The split may be achieved on a sub regional basis with the adjoining LGA's of Clarence Valley and Nambucca having substantial land for large lot Industrial.

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