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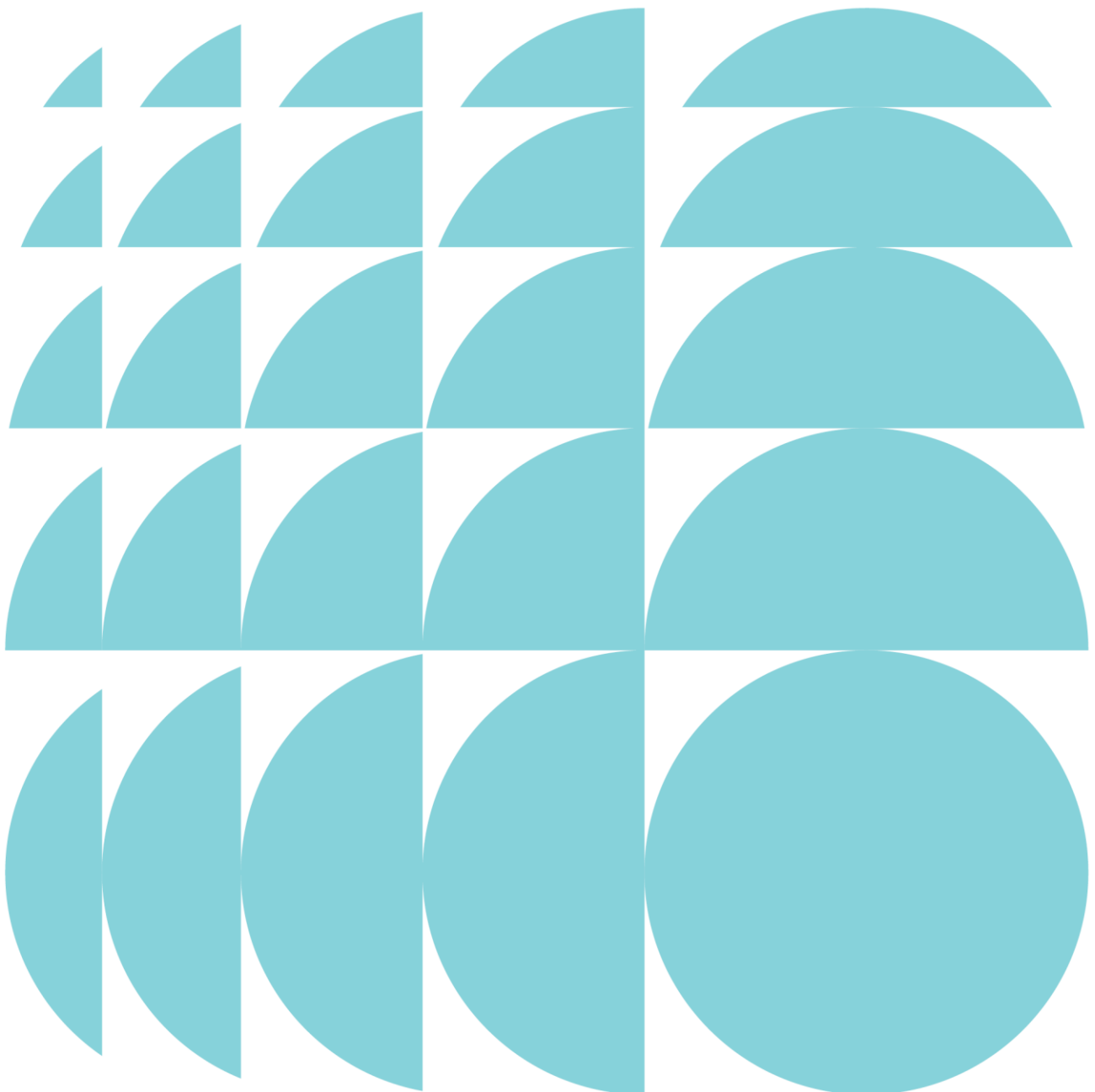
**Social and Economic Impact Assessment
SSD-8586218**

Lot 4 Skyline Crescent, Leppington
Bringelly Road Business Hub
Temperature-Controlled Warehouse Facility

Submitted to NSW Department of Planning,
Industry and Environment

For ESR Developments (Australia) Pty Ltd

13 August 2020 | 2200444



COVID-19 is an unprecedented global health crisis and economic event that is rapidly evolving. In these circumstances the short-term economic environment is extremely uncertain, especially where the forecasting of economic trends is involved. At the current time, the research and analysis of economic data – such as forecasts of economic activity, population, employment growth, and so on – reflects a return to “business as usual” scenario, while also noting the potential impacts that may be associated with the COVID-19 virus and the anticipated return to growth in economic indicators. Where required, we will be clear where a specific consideration of the implications of COVID-19 is being provided outside a business as usual scenario.

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1.0 Introduction

1.1 Purpose and scope of this report

This Social and Economic Impact Assessment statement has been prepared by Ethos Urban to support a State-Significant Development Application (SSDA) for the development of a temperature-controlled warehouse facility located on Lot 4, Skyline Avenue at Bringelly Business Hub. It has been prepared as an addendum to the Environmental Impact Statement supporting the SSDA.

This assessment has been prepared in accordance with the Secretary's Environmental Assessment Requirements (SEARS) – issued on 11 August 2020 – requiring an assessment of the social and economic impacts of the development, including benefits to the community.

The assessment has involved the following stages of work:

- Analysis of the social and economic context for the development, including:
 - Demographic analysis of the local resident and worker population, including forecast growth and change, and changing employment profile of the LGA;
 - Analysis of applicable state and local government policies and strategies, to confirm social and economic drivers and goals for the site;
 - Identification of relevant social issues and trends relevant to the site and proposed development, and
 - Assessment of the suitability of the development within its geographic and development context.
- Social and Economic Impact Assessment: assessment of social and economic impacts on the community arising from the construction and operation of the proposed warehouse, having regard to SEARs specifications.
- Development of recommended mitigation measures in response to potential negative impacts.
- Development of recommended enhancement measures to optimise social and economic outcomes and realise benefits.

1.2 Outline of the proposed development

As outlined within the Environmental Impact Statement, the SSDA seeks consent for the construction of a temperature-controlled warehouse facility. Specifically, it is understood that the proposed SSDA will seek consent for the detailed development and construction of the following:

- A temperature-controlled warehouse facility of approximately 35,000m²
- Vehicle entry and exit, including a guardhouse
- Hardstand areas for vehicle docking and vehicle manoeuvring
- Ancillary office administration (approx. 1,000m²)
- Staff car parking (approx. 230 spaces).

1.3 Background and strategic objectives

The strategic need for the proposal has previously been established by the original Concept Plan application (2016). It is noted that a number of studies were prepared to inform the original concept plan, including a net community benefit and sequential test (MacroPlan Dimasi) as well as the Retail Demand and Economic Impact Assessment (HiIPDA).

Consistent with the original approval, this development will provide additional employment opportunities for local and regional communities as well as contributing to the growth of private business investment, to create a sustainable funding base for the Western Sydney Parklands in perpetuity.

The strategic objectives of the development remain unchanged and in the public interest, as per the original Concept Plan approval. These include:

- Utilising low value land to contribute to the long-term sustainable future of the Western Sydney Parklands;
- Generating a reliable source of income for the delivery of Western Sydney Parklands Trust projects;
- Providing for the conservation and rehabilitation of significant landscape elements, including remnant vegetation and threatened species, and
- Generating employment opportunities for Western Sydney.

This application will facilitate the delivery of the Bringelly Road Business Hub as envisioned by the modified Concept Plan approval.

2.0 Local social and economic context

2.1 Site and geographic context

The development site is located within the Bringelly Road Business Hub, situated at the south-eastern edge of Western Sydney Parklands, approximately 35km west of the Sydney CBD and approximately 2km east of the Leppington Major Centre. The site forms part of the Western Sydney Parklands and is located within the Liverpool Local Government Area (LGA). As detailed within the Environmental Impact Statement, the site is owned by the Western Sydney Parkland Trust and the application relates to Lot 4 of the approved Bringelly Road Business Hub.

2.2 Study area definition

For the purposes of this Social and Economic Impact Assessment, the Liverpool LGA has been determined to be an appropriate primary study area for the purposes of the analysis (refer **Figure 1** below).

Given the nature of the proposed development as a major cold storage warehouse likely to be used for pharmaceutical purposes, it is expected that the development will serve a large regional catchment. The Greater Sydney metropolitan area is therefore considered an appropriate secondary study area on which to base the social and economic impact assessment.

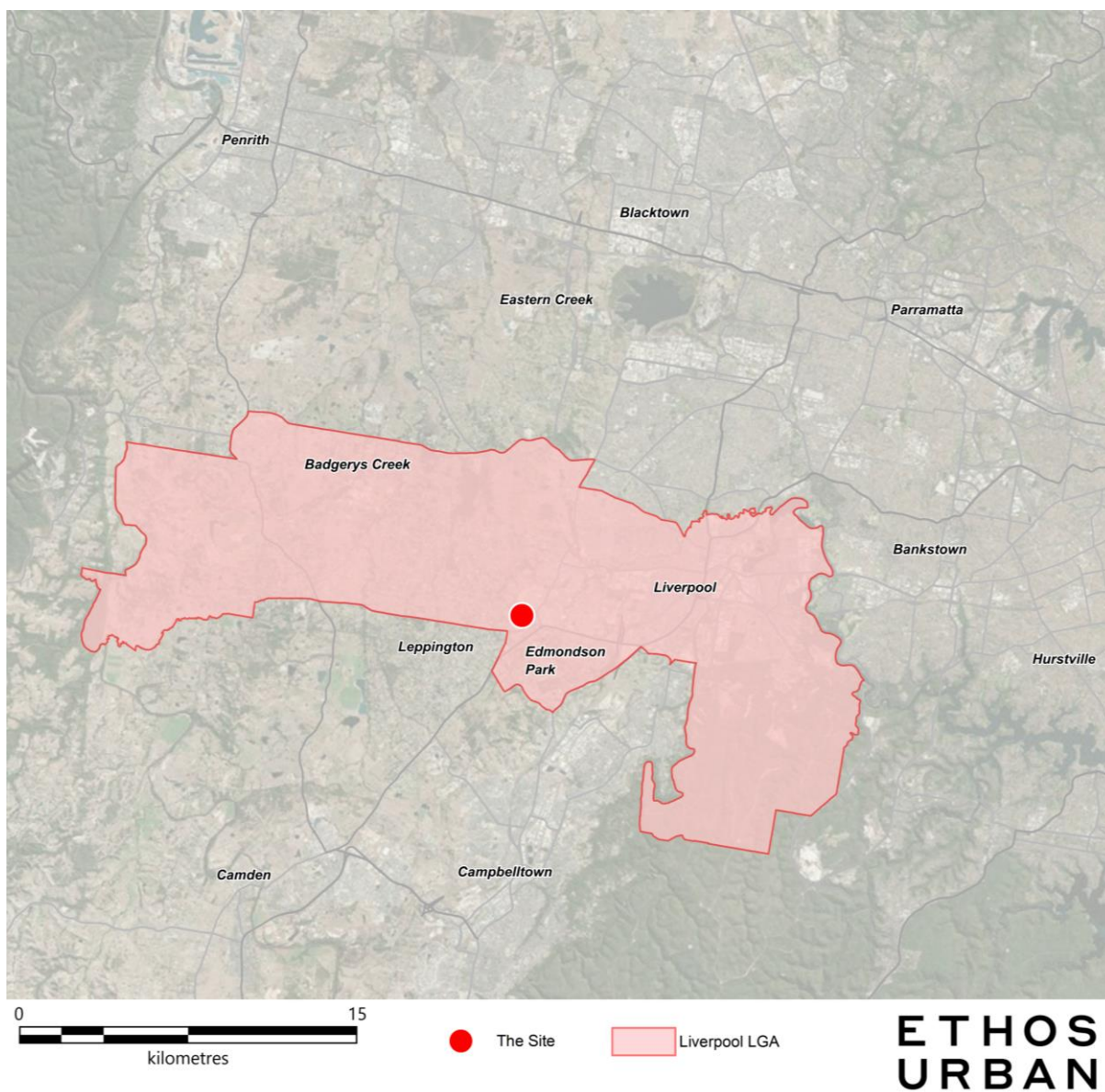


Figure 1 – Primary study area

2.3 Primary study area characteristics

Liverpool LGA is currently emerging as a major business and commercial activity region, largely due to its accessibility, land availability and proximity to Western Sydney International Airport and planned Aerotropolis. At present, this primary study area is well supported by access to major arterial roads and has a strong provision of industrial and commercial facilities within easily accessible strategic locations.

The primary study area is therefore becoming an increasingly attractive area for commercial and industrial enterprises to locate, and as such it is expected that businesses and employment growth within it will increase significantly over the long term. This is particularly true due to the investment associated with the Aerotropolis, situated west of the subject site, which will serve as a key knowledge intensive employment hub in Western Sydney. The primary study area also comprises several existing activity centres that serve retail functions and offer employment opportunities for local residents.

2.4 Social context – demographic analysis

A summary of the local resident and worker population provided within the primary study area – the Liverpool LGA – is now presented. Taking into account the nature of the proposed development, it is likely that the project will provide local job opportunities, particularly in growing industries including construction, transport, warehousing.

Residents

A detailed assessment of the key community characteristics for the primary study area (Liverpool LGA) is provided in **Appendix A** and is based on results from the 2016 ABS Census of Population and Housing, along with additional available population updates. The following key demographic characteristics of the Liverpool LGA have been benchmarked against Greater Sydney and are identified below.

- **Population:** In 2019, Liverpool LGA had an Estimated Resident Population (ERP) of 234,246, which is forecast to increase substantially to 386,646 by 2036. This represents an average annual growth rate of 3.2% compared to Greater Sydney of around 1.3% over the same period.
- **Age profile:** In 2016, residents aged 35-49 years represented the largest age cohort in the LGA, accounting for 21.3% of the total resident population. The LGA also has a large proportion of children aged 5-17 years at 19.4%. This data suggests that there is a strong presence of families with young children.
- **Household income:** LGA residents earn median annual household incomes of \$80,850, -12.3% lower than the Greater Sydney median of \$92,200.
- **Household composition:** Family households are the prominent household type in the study area (accounting for 82.6% of households), higher than the Greater Sydney benchmark of 73.7%. Of the family households within the study area, 48.9% are families with children. Lone person households account for 15.7% of all household types in the study area respectively, which is lower than the Greater Sydney average for lone person households (21.7%).
- **Dwelling types:** The study area has a higher share of separate houses (at 75.9% of all dwellings) compared to Greater Sydney (57.2%). The large share of separate dwellings reflects the context of the study area as a suburban fringe market. However, it can be expected that the proportion of flats, units and apartments will increase over the medium-long term, as population growth drives the need for higher density living, particularly around major activity centres close to transport.

Workers

An assessment of the industry breakdown within the Study Area shows that there is approximately 61,400 workers in the study area, with this workforce increasing by +5,860 since 2011. The industry data sourced from the ABS Census (refer **Table 2** over page), shows that tertiary sector services account for the largest employment industries in the study area at 78.8%. Within tertiary services, consumer services represent the prominent industries, including health care and social assistance (17.8%), retail trade (12.5%), and education and training (9.7%).

Notably, manufacturing industries of employment have a high representation at 11.4%, however it is a declining industry, with employment falling by -26.3% since 2011. This is a typical feature of the wider Australian economy, which has seen a contraction in traditional manufacturing activities over recent years. Other major declining

industries of employment include wholesale trade (-23.1%), administrative and support services (-18.0%), and electricity, gas, water and waste services (-17.8%). Between 2011 and 2016, the fastest growing industries in Liverpool LGA included construction, (28.5%), health care and social assistance (20.8%), and accommodation and food services (19.8%). The significant growth in construction industries is largely related to ongoing investment and development in south west Sydney, including major activity centres and new residential and infrastructure projects.

Table 1 Liverpool LGA Employment Breakdown, 2011 to 2016 (Source: ABS, economy.id)

Category	2011		2016		2011-2016 Change	
	No.	% Share	No.	% Share	No.	% Increase
Primary Sector						
Agriculture, Forestry & Fishing	638	1.1%	720	1.2%	82	11.4%
Mining	44	0.1%	57	0.1%	13	22.8%
Sub-Total Primary Sector	682	1.2%	777	1.3%	95	12.2%
Secondary Sector						
Manufacturing	8,865	15.8%	7,020	11.4%	-1,845	-26.3%
Construction	3,746	6.7%	5,241	8.5%	1,495	28.5%
Sub-Total Secondary Sector	12,611	22.5%	12,261	20.0%	-350	-2.9%
Tertiary Services Sector						
Producer Services						
Electricity, Gas, Water & Waste Services	675	1.2%	573	0.9%	-102	-17.8%
Transport, Postal & Warehousing	3,718	6.6%	4,220	6.9%	502	11.9%
Information Media & Telecommunications	487	0.9%	424	0.7%	-63	-14.9%
Financial and Insurance Services	799	1.4%	793	1.3%	-6	-0.8%
Rental, Hiring & Real Estate Services	875	1.6%	981	1.6%	106	10.8%
Wholesale Trade	3,415	6.1%	2,774	4.5%	-641	-23.1%
Sub-Total	9,969	17.8%	9,765	15.9%	-204	-2.1%
Consumer Services						
Retail Trade	6,401	11.4%	7,683	12.5%	1,282	16.7%
Accommodation & Food Services	2,733	4.9%	3,406	5.5%	673	19.8%
Arts & Recreation Services	544	1.0%	641	1.0%	97	15.1%
Administrative & Support Services	2,364	4.2%	2,004	3.3%	-360	-18.0%
Professional, Scientific & Technical Services	1,845	3.3%	2,245	3.7%	400	17.8%
Public Administration & Safety	5,126	9.2%	5,728	9.3%	602	10.5%
Education & Training	5,085	9.1%	5,982	9.7%	897	15.0%
Health Care and Social Assistance	8,646	15.4%	10,913	17.8%	2,267	20.8%
Sub-Total	32,744	58.5%	38,602	62.9%	5,858	15.2%
Sub-Total Tertiary Sector	42,713	76.3%	48,367	78.8%	5,654	11.7%
Total	56,006	100.0%	61,405	100.0%	5,399	8.8%

2.5 Policy context for the development

The following table highlights the key policy drivers for the site and proposed development, as expressed in applicable state and local government documents.

Table 3 State and local policy drivers

Policy theme	Key implications for impact assessment	Policy document
Industrial and urban services land management	<p>The Greater Sydney Commission's Western City District Plan is a 20-year plan to manage growth in the Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith and Wollondilly local government areas.</p> <p>The plan highlights the need to maximise and retain freight and logistic opportunities, planning and managing of industrial and urban services land as existing sites face residential rezoning pressures.</p> <p>The Western Sydney Airport and Badgerys Creek Aerotropolis will depend on the Liverpool LGA to support airport and employment activities and service the need of the Western Parkland City.</p> <p>Bringelly Road is identified to serve as one of the major gateways to the Western Sydney airport and will be expected to accommodate the development of a prominent town centre in the future. In addition, the plan highlights the unprecedented opportunity for the Western City District to provide a national freight and logistics hub.</p> <p>The following key planning priorities relevant to the site are:</p> <ul style="list-style-type: none"> • W8: Leveraging industry opportunities from the WSA and Aerotropolis • W9: Growing and strengthening the Metropolitan Cluster • W10: Maximising freight and logistics and planning and managing industrial and urban services land • W11: Growing investment, business opportunities and jobs in strategic centres 	<i>Western Parklands City District Plan (GSC 2018)</i>
Strategic investment in Western Sydney Airport and access to industrial and urban services land	<p>The Metropolis of Three Cities Plan outlines the vision for three, integrated and connected cities that will rebalance Greater Sydney – placing housing, jobs, infrastructure and services within easier reach of more residents, no matter where they live.</p> <p>The Plan sets targets for new housing, with a range of types, tenures and price points to improve affordability. New jobs will be promoted and the plan values Greater Sydney's unique landscape, natural resources and green infrastructure.</p> <p>Leppington is part of the Western Parkland City. The plan outlines the development of the Western Parkland City and the need to invest a wide variety of infrastructure and services in particular with the development of the Western Sydney Airport. The key objectives related to Bringelly and the new warehouse development include:</p> <ul style="list-style-type: none"> • Objective 16: Freight and logistics networks is competitive and efficient • Objective 20: Western Sydney Airport and Badgerys Creek Aerotropolis are economic catalysts for Western Parkland City • Objective 23: Industrial and urban service land is planned, retained and managed <p>Supporting the 30-minute city aspiration, the site forms part of the South West Sydney Growth Corridor, in which the proposed development will support the provision of jobs within an active employment district that is located close to existing homes, and emerging activity centres.</p>	<i>Greater Sydney Regional Plan – Metropolis of Three Cities (GSC 2018)</i>
Employment generation	<p>The Liverpool City Council's LSPS establishes a 20-year vision for a vibrant place for people, that is well connected, celebrates local diversity enriched with job opportunities and is inclusive for all. This is supported through four key themes of connectivity, liveability, productivity and sustainability.</p> <p>The following identified priorities are considered relevant to the site:</p> <ul style="list-style-type: none"> • Planning priority 12: Industrial and employment lands meet Liverpool's future needs • Planning priority 13: A viable 24-hour Western Sydney International Airport growing to reach its potential. <p>The plan identifies prospects for industrial and employment projects due to the close proximity to transport links and large projects of the Western Sydney Airport and Moorebank Intermodal terminal. New Industrial land area has been identified around the Western Sydney Airport to contribute to the demand in medium and long term.</p>	<i>Connected Liverpool 2040: Liverpool's Local Strategic Planning Statement (Liverpool Council 2020)</i>

Policy theme	Key implications for impact assessment	Policy document
	<p>The LSPS outlines that a 70% of employed persons in Liverpool work outside of the LGA, and a key priority is to provide local jobs for local people.</p> <p>Liverpool City Council has a jobs target of up to 2,500 new jobs each year until 2029.</p> <p>It is noted that the proposed development will support this goal by accommodating 153 jobs in construction activities and 187 on an ongoing basis once the development is complete and fully occupied, in transport, storage and warehousing-related industries for local residents.</p>	
Industrial development growth and employment lands	<p>This draft strategy identifies the basis for the strategic planning of industrial and employment lands for Liverpool up to 2036. The strategy outlines the need to support the growing need and demand of industrial land in the future.</p> <p>The following actions are relating to the proposed warehouse are:</p> <ul style="list-style-type: none"> Action 4: Facilitate industrial development to support the operation of the Western Sydney International Airport and Western Sydney Aerotropolis Action 5: Increase industrial development density, efficient and colocation. 	<i>Draft Liverpool Industrial and Employment lands strategy</i> (Liverpool City Council 2020)
Strategic economic growth and investment	<p>The Liverpool Community plan expresses the community's aspirations and priorities focused on promoting Liverpool as a place rich in nature and opportunity for the community to share and grow over the next 10 years.</p> <p>The plan outlines a number of goals and strategies to achieve the community's vision which was informed by extensive community engagement and consultation process. This plan is guided through four key directions:</p> <ul style="list-style-type: none"> Creating connection – Social Strengthening and protecting our environment – Environment Generating opportunity – Environment Leading through collaboration – Civic leadership <p>Council priorities the status of Liverpool as a strategic commercial centre of South West Sydney, attracting a range of industrial activity. Direction 3 'generating opportunity' underlines the need for council to support economic growth, including employment and investment options.</p>	<i>Our home: Liverpool 2027 Community Strategic Plan</i> (Liverpool Council 2017)
Sustainability of the Western Sydney Parklands	<p>The Western Sydney Parklands Plan of Management Plan sets the vision for Western Sydney to be a place for people of all backgrounds, to meet, celebrate, learn, play and appreciate the environment.</p> <p>The plan identifies Bringelly road (precinct 16), which forms the southern boundary of the Parklands, as a gateway site suitable for large format retail, bulky good premises, warehouse storage and distribution premises. This is given its exposure to the regional road network, limited ecological impacts and proximity to the Austral and Leppington North Precincts of the South West Growth Centre.</p>	<i>Western Sydney Parklands Plan of Management 2030 Supplement</i> (Western Sydney Parklands Trust 2018)

2.6 Local social issues and trends

Community views

Community and stakeholder engagement was undertaken to inform the original Concept Plan approval in 2015.

Submissions informing the Bringelly Road Business Hub Concept Plan raised issues from agencies and local councils, specifically in relation to transport and access, the impact of the proposal on the riparian corridor, the biodiversity offset strategy and species impact assessment, Aboriginal Heritage Impact and flood risk management.

It is noted that Liverpool City Council indicated the design of future buildings may raise security and safety concerns that would require management and mitigation at the DA stage for future uses on the site.

These issues are addressed through the Environmental Impact Statement for the development application.

No concerns were raised from any members of the public in relation to the Concept Plan approval.

3.0 Social Impact Assessment

3.1 Introduction

This assessment has been prepared in accordance with the Secretary’s Environmental Assessment Requirements (SEARs) issued on 11 August 2020, requiring the preparation of a social impact assessment to support this SSDA, which identifies and analyses the potential social impacts of the development.

In accordance with the requirements of the SEARs, the detailed assessment provided in **Table 4** over page provides an analysis of the social impacts of the development, including comment on potential benefits to the local community.

3.2 Key findings and recommendations

As outlined in the table below there are no significant or detrimental social impacts anticipated to arise as a result of the development.

The proposed development will result in significant positive social benefits for the local and broader community, noting additional employment opportunities will be created along with growth in private business investment to create a sustainable funding base for the Western Sydney Parklands in perpetuity.

The location of the proposed development is suitable, being within the Bringelly Road Business Hub and having good access to the M5 and M7, with visibility to Bringelly Road. In addition, the site will be physically separated from the main body of the Western Sydney Parklands.

The development of this site for warehousing purposes will provide significant benefits to the region given the proximity to the future Western Sydney Airport.

Overall, it is considered there are positive benefits to arise from the development, specifically in relation to the provision of additional employment opportunities for the local and regional communities.

The proposal is consistent with the original concept approval, facilitating the development of the business hub and creation of employment generating land uses. In addition, the development will provide ongoing support for the Western Sydney Parklands, with revenue assisting the Western Sydney Parkland Trust for development and maintenance of the Parklands for the benefit of current and future communities.

3.3 Social impacts and responses

The following table sets out envisaged social impacts associated with the development, and proposed mitigation and enhancement measures.

Table 4 Social Impact Assessment

Potential social impact	Type ¹	Proposed mitigation/ enhancement measure
Population change, including numbers and characteristics		
<p>The following social demographic indicators are of note in the consideration of impact to population number and characteristics:</p> <ul style="list-style-type: none"> The Liverpool LGA is forecast to increase substantially to from 234,246 to 386,646 persons by 2036. Manufacturing industries of employment have seen a decline since 2011, however fastest growing industries in Liverpool LGA have included construction (28.5% between 2011 – 2016), related to investment and development in the south west Sydney region. <p>The proposal will contribute to a rise in employment opportunities for the study area.</p> <p>There are no significant impacts anticipated for the composition of the existing community as a result of the proposed development.</p> <p>There may be an adjustment to the construction workforce within the local and broader communities however, this is unlikely to alter the population characteristics of the local area.</p>	Neutral	Impacts to the local community as a result of the project (during both construction and operation) are considered minor. However, it is recommended a communication program be developed for the development project, providing updates and reducing any potential uncertainty as to the timing and impact on the local community.
Cultural, economic and community health and wellbeing		
<p>Established through the original Concept Plan application (2016), the development will provide a net community benefit through additional employment opportunities (during both construction and operation), as well as contributing to private business investment growth.</p> <p>The development will support the ongoing sustainability of the Western Sydney Parklands – the largest urban parkland in Australia, which provides significant open space for the western Sydney region.</p> <p>The provision of significant bushland, recreation and tourism facilities as well as urban farming, requires significant investment, to which the proposed development will provide an important ongoing funding base.</p> <p>Positive public benefits relate to:</p> <ul style="list-style-type: none"> Utilising low value land to contribute to the long term future of the Parklands; Generating a reliable source of income for the delivery of WSPT projects; 	Positive	The positive benefits of the proposed development on social, cultural and economic health and wellbeing at this location could be enhanced by ensuring that study area community is well-linked to employment opportunities at the site.

¹ Positive, neutral, negative

Potential social impact	Type ¹	Proposed mitigation/ enhancement measure
<ul style="list-style-type: none"> Providing for the conservation and rehabilitation of significant landscape elements, including remnant vegetation and threatened species; and Generating employment opportunities for Western Sydney. <p>The development will provide significant landscaping, including canopy tree planting throughout, including along Bringelly Road and adjoining the nearby Bunnings Warehouse.</p> <p>Noting there are existing residential buildings within 400m of the site, there are potential impacts to nearby residents in relation to noise and air quality impacts during construction and operation.</p> <p>It is noted that warehouse internal activities are expected to be minimal and not anticipated to contribute to external noise emissions.</p> <p>As outlined within the Air Quality Impact Assessment (SLR) there is a vegetative buffer between the development site and residents which will assist in screening for any air impacts. As a result, the proposal is considered to be low risk for both construction and operational (storage, handling and distribution).</p>		<p>As outlined within the Noise and Air Impact Assessments, impacts that may be experienced during construction phases are to be managed appropriately through effective engagement, monitoring and mitigation.</p>
Mobility and access		
<p>As noted in the Transport Assessment (Ason Group) traffic flow on Bringelly Road is everchanging, due to the extensive development of the surrounding areas.</p> <p>Key transport infrastructure which will support the Site has been provided for within the Western Sydney Infrastructure Plan. Bringelly Road is noted to be undergoing two stages of upgrades.</p> <p>Traffic impacts assessed with the original concept plan approval showed the traffic generation was considered acceptable and the site is well located for an industrial development. The most recent assessment (Anson Group) shows that the proposal is supportable from a traffic impact perspective.</p> <p>The site is noted to have poor access to public and active transport services, with the closest railway station (Leppington) noted to be 3.7km from the site. Bus services are outside the 400m walking distance however, a new bus stop has been constructed on Bringelly Road which can be utilised.</p> <p>The site provides a high level of pedestrian connectivity and there are plans for future provision of off-road cycling in the vicinity of the site.</p>	Neutral	<p>The site is considered well suited for industrial development.</p> <p>Future transport infrastructure will ensure the site is well connected to active transport. Construction Management Plan will ensure construction traffic and transport impacts are effectively managed.</p> <p>It is recommended that active transport to and from the site is encouraged with effective communication about active travel routes to and from the site.</p>
Construction-related amenity impacts		
<p>The construction of the proposed development may result in impacts to amenity if not appropriately managed.</p> <p>As identified above, construction impacts are most likely to be felt by nearby residents towards the north of the site.</p>	Negative	<p>Construction impacts are to be managed in line with the construction management plan for the proposed development. Specifically, in relation to traffic, air and noise management measures.</p> <p>With mitigation measures it is likely the impact will become neutral.</p>

4.0 Economic Impact Assessment

4.1 Introduction

This Economic Impact Assessment (EIA) has been prepared in order to address the SEARs for the development application, which requires an assessment of economic impacts. Accordingly, a high-level review has been undertaken to assess the likely economic impacts and benefits of the proposed temperature controlled warehouse at Bringelly Road Business Hub.

The section also provides concise comments on potential mechanisms to mitigate (where possible) the identified negative impacts and enhance the economic outcomes and value of the scheme.

4.2 Key findings and recommendations

As outlined below, there are no significant or detrimental economic impacts likely to result from the proposed development. Instead the proposed project is likely to result in significant positive economic benefits including provision of key employment opportunities at this site and benefitting from its location close to major arterial roads and activity centres, and population growth area.

Demand for the development

Continued growth in population and employment within the primary study area (Liverpool LGA) and more broadly within Greater Sydney will drive strong market demand for a range of facilities, including industrial uses.

The south west corridor of Sydney is increasingly viewed as a key industrial market in Greater Sydney, benefitting from access to land, proximity to major transport infrastructure – allowing for storage and distribution across Sydney and interstate, and close proximity to a growing residential market – providing customers but also workers in the immediate area.

Ongoing and future development and infrastructure projects including Western Sydney international Airport and Aerotropolis, Moorebank Intermodal Terminal and the future M9 and M12 motorways will further support growth and investment in this part of Sydney, including in the industrial sector.

Suitability of the site from an economic perspective

The location of the site at the Bringelly Business Hub is well suited to industrial and warehousing related usages proposed as part of this development.

Importantly for the site, it is located along Bringelly Road; a major arterial road that has been earmarked for significant upgrade. Bringelly Road connects the site to important precincts and activity centres including the Liverpool CBD and the future Western Sydney Airport and Aerotropolis, which in part, has prompted the need for significant upgrades to transport infrastructure.

The high profile and easily accessible nature of the Bringelly Road site, combined with existing and approved industrial facilities within the Bringelly Road Business Hub, suggests that the site form an excellent location for industrial uses such as that proposed at the subject site.

Growing demand for sophisticated industrial facilities

The industrial sector has become increasingly sophisticated with more specialised facilities and increase in demand supported by population growth as well as infrastructure investment and technology advancement. This shift has generated an increased demand for larger, modern industrial assets, with western Sydney a popular location due to land availability, residential growth and access to transport and efficient distribution networks.

Western Sydney accounted for around 89% of employment land take-up in 2018 (State Government Employment Lands Development Monitor). Across Sydney, and in fact across the Eastern Seaboard of Australia, industrial

vacancy rates are low, estimated at below 5%, with demand remaining strong, even in the current economic climate.

The proposed development at Lot 4, Skyline Avenue will support the existing and future demand for additional industrial floorspace in this part of Sydney and will provide for an efficient, modern and specialised industrial facility.

As the industrial sector has evolved, the sector has transitioned away from more traditional primary production and manufacturing activities towards specialised, knowledge intensive industries and uses. In particular, the emergence and ongoing development in technology and automation, infrastructure investment and supply-chain logistics operations have prompted a shift to a more specialised “white-collar” workforce.

Delivering on government jobs growth targets

These highly skilled workers are increasingly required to oversee and manage modern machinery and equipment, with these workers supported by a larger proportion of sales and administration staff. This transition has implications for the types of buildings and uses required in the sector, with a need for more specialised warehouses but also increased provision of traditional commercial office space and amenities to accommodate the increasing white collar workforce.

The jobs targets outlined within the Liverpool LSPS supports the need for modern warehouse facilities in the region, given the focus on delivering more knowledge intensive jobs in the LGA.

Liverpool City Council has a jobs target of up to 2,500 new jobs each year until 2029. The proposed development will support this goal by accommodating 153 jobs in construction activities and 187 on an ongoing basis once the development is complete and fully occupied, in transport, storage and warehousing- related industries for local residents.

4.3 Economic impacts and benefits

Operational impacts in relation to industrial sector and local community

At 36,000m² the proposed development would account for a small addition to the Sydney industrial market. Further, the composition of the development planned to include a pharmaceutical warehouse facility, guardhouse, parking and docking space is in line with existing and proposed facilities in the Bringelly Road Business Hub and is well suited to support growth in this part of Sydney.

To support tenant requirements, new and/or redeveloped production and storage facilities are becoming increasingly efficient, with stricter environmental controls and standards, together with technological advancements in building materials and operations. This is leading to industrial uses and facilities that are better designed, quieter, cleaner and have a reduced impact on the surrounding area.

Given the subject site is located within a non-residential area, with adjoining industrial and non-residential uses, any impact from a modern warehouse facility as proposed is likely to be minimal.

Employment generation

The proposed warehouse development will result in additional benefits to the local community through employment generation. Jobs supported by the development will accrue through direct and indirect employment generated during both the construction phase; and ongoing employment as part of the operational phase.

The construction and operational phases of the development will generate both direct and indirect employment opportunities. The provision of these employment opportunities is particularly important in the current economic environment and will help to support the local community by stimulating economic output.

It is understood that total construction costs of the development will be in the order of an estimated \$30 million. On this basis, the project would support **59 jobs in the construction industry and support a further 94 jobs in related (supplier) industries over the development period** (refer to **Table 5** over page). Total employment generated during the construction phase is therefore estimated at 153 jobs.

Table 5 Direct and indirect jobs during construction

Metric	Value
Direct Jobs	
Construction estimate	\$30 million
Estimated direct jobs	59 FTE jobs
Indirect Jobs	
Indirect jobs per construction job	Approximately 1.6
Estimated indirect jobs	94 FTE jobs
Total FTE Construction Jobs	153 FTE jobs

Source: ABS 2015; Cordell Connect, Ethos Urban

The activities and employment supported by the project will generate significant regional economic output. Based on the job densities for employment lands outlined by the Greater Sydney Commissions Employment Lands Analysis, employment lands within the Western City records an employment ratio of one worker for every 280m². The proposed warehouse facility is planned to accommodate some 35,000m² of industrial floorspace, and therefore would generate 125 jobs on an ongoing basis once the development is complete and fully occupied (taking into account the typical employment ratio for the Western City). This estimate is considered appropriate reflecting the likely automated nature of the facility.

The proposed facility is also planned to incorporate 1,000m² of ancillary office floorspace. For the purposes of this analysis, a workspace ratio has been adopted from the City of Sydney Floor Space and Employment Survey 2017, which indicates an average provision of one worker for every 16.2m² across office uses. Accordingly, the proposed development has capacity to accommodate up to further 62 jobs associated within the office component of the development. Taking the above into account, the overall development is, therefore, estimated to support some 187 jobs on an ongoing basis once the development is complete and fully occupied.

Jobs accommodated by the development will support the strategic jobs targets of Liverpool Council and provide employment opportunities for local residents and workers. Importantly, the proposed development will support jobs in growing industries of employment, particularly in warehousing activities and knowledge intensive industries.

Economic output

Ongoing jobs supported by the proposed development will generate additional economic output, including significant contributions from industry sectors including Transport, Postal and Warehousing services. Total output (GRP) at full occupancy is estimated at **\$53 million** per annum (2019 dollars). Gross value added by industry is an indicator of business productivity, it shows the net economic uplift by excluding the value of production inputs. Gross value added is estimated at around **\$26 million** per annum (2019 dollars) at full occupancy of the development.

Table 6 Estimated economic output at full occupancy²

Activity	Transport, Storage and Warehousing
<i>Economy.id category</i>	<i>Transport, Storage and Warehousing</i>
Employment (jobs)	187
GRP per job	\$284,482
Value added per job	\$139,878
GRP Total	\$53,120,860
Value added total	\$26,119,194

² Source: Economy.id; Ethos Urban.

The above analysis has been sourced from economy.id (based on modelling by the National Institute of Economic and Industry Research) for the Campbelltown LGA which has been adopted as a proxy for Liverpool LGA, with 'best fit' industry sectors applied to likely economic activities at the new development. The results of the analysis assume no substitution effects from outside the regional economy, rather, the activities undertaken at the new asset represent increased net demand associated with population, labour force, and industry growth.

Appendix A. Socio Economic Profile

This community profile data for Liverpool LGA has been sourced from ABS 2016 Census of Population and Housing.

Category	Liverpool LGA	Greater Sydney
<u>Income</u>	-	-
Median individual income (annual)	\$30,480	\$37,460
Variation from Greater Melbourne median	-18.6%	na
% of persons (15 years or older) earning \$1,000pw or more	28.9%	37.3%
Median household income (annual)	\$80,850	\$92,200
Variation from Greater Melbourne median	-12.3%	na
% of Households earning \$2,500pw or more	25.2%	31.8%
<u>Age Structure</u>	-	-
0 years	1.5%	1.2%
1-2 years	3.1%	2.6%
3-4 years	3.1%	2.6%
5-6 years	3.1%	2.6%
7-11 years	7.5%	6.2%
12-17 years	8.8%	6.9%
18-24 years	10.0%	9.6%
25-34 years	14.6%	16.2%
35-49 years	21.3%	21.3%
50-59 years	12.2%	12.3%
60-69 years	8.1%	9.4%
70-84 years	5.7%	7.1%
85 years and over	1.1%	1.9%
Males	49.6%	49.3%
Females	50.4%	50.7%
Total persons	204,330	4,823,900
Median Age (years)	33.0	36.4
<u>Country of Birth</u>		
Australia	55.9%	61.9%
<i>Aboriginal and Torres Strait Islanders</i>	1.5%	1.4%
Other Major English Speaking Countries	3.7%	7.6%
Other Overseas Born	40.4%	30.5%
<i>% speak English only at home</i>	44.3%	62.5%
<u>Household Composition</u>	-	-
<i>Couple family with no children</i>	17.5%	23.8%
<i>Couple family with children</i>	48.9%	37.5%
Couple family - Total	66.4%	61.3%
One parent family	14.8%	11.1%
Other families	1.4%	1.3%
Family Households - Total	82.6%	73.7%
Lone person household	15.7%	21.7%
Group Household	1.8%	4.6%
<u>Dwelling Structure (Occupied Private Dwellings)</u>	-	-

Separate house	75.9%	57.2%
Semi-detached, row or terrace house, townhouse etc.	10.5%	14.0%
Flat, unit or apartment	13.3%	28.2%
Other dwelling	0.2%	0.5%
<i>Occupancy rate</i>	<i>95.2%</i>	<i>92.3%</i>
Average household size	3.3	2.8
<u>Tenure Type (Occupied Private Dwellings)</u>	-	-
Owned outright	24.9%	30.0%
Owned with a mortgage	41.3%	34.2%
Rented	33.1%	35.1%
<i>State or territory housing authority</i>	7.3%	4.2%
Other tenure type	0.8%	0.7%
<u>Attending Education (% of those attending)</u>	-	-
Pre-school	6.4%	6.9%
Infants/Primary Total	35.6%	32.2%
<i>Government</i>	64.1%	68.4%
<i>Catholic</i>	21.3%	19.7%
<i>Other</i>	14.6%	11.9%
Secondary Total	29.5%	25.0%
<i>Government</i>	57.8%	54.8%
<i>Catholic</i>	26.3%	26.4%
<i>Other</i>	15.9%	18.9%
Technical or Further Educational Institution	7.6%	7.6%
University or other Tertiary Institution	17.4%	24.2%
Other type of educational institution	3.5%	4.0%
<i>% of total population attending education</i>	<i>26.5%</i>	<i>25.2%</i>
<u>Highest Level of Education Completed (% of population aged 15 years and over)</u>	-	-
Year 12 or equivalent	59.5%	67.5%
Year 9-11 or equivalent	30.5%	26.7%
Year 8 or below	7.0%	4.4%
Did not go to school	3.0%	1.5%
<u>Highest Level of Non-School Qualification</u>	-	-
Postgraduate degree	7.5%	13.9%
Graduate diploma or certificate	2.0%	3.4%
Bachelor degree	28.2%	36.4%
Advanced diploma or diploma	21.4%	17.7%
Certificate	41.0%	28.6%
<i>% of persons with non-school qualifications (persons 15 years and above)</i> <i>- excludes not-stated and inadequately described</i>	<i>41.9%</i>	<i>52.7%</i>
<u>Employment Status</u>	-	-
Unemployed/ looking for work	7.5%	6.0%
Labour force participation rate	61.7%	65.6%