

Chapter 12

Business impacts

12 Business impacts

This chapter provides an assessment of the potential impact on business as a result of this proposal, and identifies mitigation measures to minimise these impacts.

12.1 Overview

Overall, the nature of the businesses across the local business study areas and the existing environment suggests most of the businesses would be resilient to potential construction impacts. Opportunities for businesses during construction of the proposal include an increase in passing trade and potential redistribution of trade. Employment centres across Greater Sydney, including Pyrmont and the Sydney CBD, have been and continue to be impacted by the COVID-19 pandemic public health orders and restrictions of 2020 and 2021 and the associated remote/ flexible working arrangements. In addition, the decline in visitors to the Sydney CBD during outbreaks of COVID-19 in 2020 and 2021 is likely to have impacted local hospitality and entertainment businesses who may rely on CBD workers for customers. This trend is reflected by lower commercial occupation rates in the Sydney CBD in 2021 compared with 2019 (Property Council of Australia, 2021). While the magnitude of the impact and long-term consequences of the global pandemic are yet to be fully understood, the pandemic is likely to have an impact across a range of industries.

Potential temporary business impacts associated with the proposal would generally be managed through appropriate mitigation of other aspects, such as noise, traffic, visual and air quality. The Overarching Community Communications Strategy (Appendix B) contains the strategy for stakeholder and community involvement that has been developed for the project. The strategy outlines the approach for proactive consultation with affected businesses and the community.

Once operational (subject to future planning approval processes), Sydney Metro West is anticipated to have positive local and regional economic and employment impacts. Sydney Metro West will facilitate the transformation of The Bays into a future employment precinct, while metro stations at Pyrmont and Hunter Street (Sydney CBD) will further enhance these localities by improving business accessibility to customers and broadening access to Sydney's labour markets.

12.2 Legislative and policy context

The Secretary's Environmental Assessment Requirements relating to business impacts, and where these requirements are addressed in this Environmental Impact Statement, are outlined in Appendix A.

The business impact assessment has considered the relevant requirements for the following legislation and guidelines:

- *Environmental Planning and Assessment Act 1979* – Establishes the framework for social and economic impacts to be considered and assessed as part of the environmental planning assessment process. The assessment of business impacts carried out with regard to the aims and objectives of the relevant local environmental plans and strategic plans are described in Chapter 3 (Planning and assessment process) and Chapter 10 (Property and land use)
- *Australian Transport Assessment and Planning Guidelines (Australian Transport Council, 2018)* – Outlines the best practice for transport planning and assessment in Australia and has informed the assessment approach.

12.3 Assessment methodology

This assessment identifies and assesses potential impacts and the extent of these impacts on businesses located within or near the proposal. This includes a qualitative impact assessment of the likelihood and significance of these potential impacts on local businesses. The methodology for the assessment included:

- Definition of the local business study area
- Desktop survey of each local business study area using NearMaps
- Site visits to identify and confirm business types
- Development of a local business profile using Census 2016 data for areas near each construction site. At the time of preparing this assessment, the latest available census data is from 2016. This profiling used the 'destination zone' data associated with the Australian Bureau of Statistics 'Place of Work' dataset as relevant to each local business area. In most cases, more than one destination zone was relevant to a local business study

area. This profiling also used information gathered from the City of Sydney floorspace survey, land use and business survey, and desktop review

- Identification of the types of changes (both positive and negative) that could occur to businesses within each local business study area
- Qualitative assessment of business impacts that may occur as a result of this proposal using the Objective Impacts Table options rating levels from the Australian Transport Assessment and Planning Guidelines (Australian Transport Council, 2018)
- Identification of measures to manage and mitigate any potential impacts on local businesses as a result of this proposal.

12.3.1 Study areas

The local study area for the business impact assessment encompasses about 400 metres around each construction site (i.e. the area within an approximate five-minute walk of the construction site). This is consistent with the approach of using Transport Performance and Analytics travel zone data, which generally conforms to an area within a 400 metre radius of existing stations. The study areas for The Bays tunnel launch and support site, Pyrmont Station construction sites and Hunter Street Station (Sydney CBD) station construction sites are shown in Figure 12-1, Figure 12-2 and Figure 12-5, respectively.

A site visit was also carried out in a smaller study area encompassing about 100 metres around each construction site.

12.3.2 Types of potential business impacts

Potential impacts to local businesses would be minimised through the implementation of mitigation measures for amenity related issues (such as noise and vibration, transport and traffic, visual amenity and air quality) and mitigation measures identified in Section 12.10. Table 12-1 outlines both direct and indirect potential business impacts that could arise from this proposal.

Table 12-1 Potential types of business impacts

Potential impact	Description
Potential opportunities	
Increase in passing trade	Some businesses within the local business area may experience an increase in passing trade from construction workers on this proposal or from changes in pedestrian and vehicular travel patterns as a result of diversions around construction sites. This would depend on the location of businesses and their proximity to the construction site, the nature of surrounding businesses, and the role and function of the local business area. The types of businesses that could expect a net increase in passing trade as a result of this proposal include those that sell goods and services, and which are close to the construction site or on the travel path to the construction site.
Redistribution of trade	Redistribution of trade refers to the movement of customers and patronage to alternative businesses within the area. This is a positive impact for businesses that may receive an increase in trade as a result of a similar directly impacted business needing to close or relocate.
Potential direct impacts	
Property or land acquisition	Property acquisition would result in temporary impacts to occupying businesses through requiring businesses within the construction site to relocate. All property acquisition is managed in accordance with the Land Acquisition (Just Terms Compensation) Act 1991 and the land acquisition reforms announced by the NSW Government.
Potential indirect impacts	
Temporary traffic congestion and travel time	Construction work including road closures or diversions, and construction traffic (e.g. deliveries and spoil removal), have the potential to cause traffic congestion, potentially impacting businesses by traffic delays and increased travel times. Although construction would be planned so that direct delivery access to businesses is maintained, reduced or delayed, accessibility could potentially interrupt daily business operations and potentially increase delivery costs. This could also affect employee travel times (particularly when using a car) and may cause changes to vehicular or pedestrian travel routes. Businesses most likely to be potentially affected are those within 100 metres of a construction site or near roads subject to temporary closures.

Potential impact	Description
Temporary loss of parking	Potential loss of car parking resulting from construction work may have a flow-on effect to businesses by reducing accessibility and convenience for customers. Businesses most likely to be potentially affected by this proposal are those generally within 100 metres of a construction site.
Loss of goods and services	Some businesses within a local business area may supply goods and services to other local businesses. In areas with many businesses, the cost of sourcing alternative inputs may be minor, but in areas with fewer businesses the cost may be comparatively more. Businesses most likely affected are those in smaller local business areas.
Temporary reduced local amenity (arising from noise, vibration, dust and visual impacts)	Noise, vibration, visual impacts or dust generated at construction sites may impact businesses which are more reliant on a specific type of working environment or external environment. Businesses most likely to be impacted are those that have more sensitive uses such as local cinemas, educational establishments, health and social assistance facilities, and therapists or those that are more reliant on a quiet outside environment such as cafes and restaurants. Businesses most likely to be potentially affected are those within 100 metres of a construction site, however mitigation measures would be implemented to minimise these impacts. Amenity impacts are expected to reduce the further a business is located from the construction site.
Temporary power and utility interruptions	In the event of planned or accidental power shutdowns, surrounding businesses may be impacted. Prior notice would be given to business owners by the appropriate utility authority in the event of any planned power shutdowns.
Safety and security	Appropriate mitigation measures including signage and hoarding to divert pedestrians and traffic safely around construction sites would be implemented as necessary so that customer/visitor patronage to local business is maintained. Businesses most likely to be potentially affected are those within 100 metres of a construction site.

12.3.3 Qualitative impact assessment

Each potential impact has been assessed using a qualitative and objective based assessment matrix which evaluates impacts based on the 'likelihood' of occurrence (defined in Table 12-2), and the 'significance' of the potential impact on local businesses in the event it does occur (defined in Table 12-3).

Table 12-2 Likelihood categories

Significance category	Description ¹
Almost certain	<ul style="list-style-type: none"> An estimated greater than 90 per cent chance of occurrence as a result of the proposal; or The event is expected to occur in most circumstances.
Likely	<ul style="list-style-type: none"> An estimated 75–90 per cent chance of occurrence as a result of the proposal; or The event will probably occur in most circumstances.
Possible	<ul style="list-style-type: none"> An estimated 50–75 per cent chance of occurrence as a result of the proposal; or The event could occur.
Unlikely	<ul style="list-style-type: none"> An estimated 25–50 per cent chance of occurrence as a result of the proposal; or The event could occur but is not expected.
Rare	<ul style="list-style-type: none"> An estimated 10–25 per cent chance of occurrence as a result of the proposal; or The event may occur only in exceptional circumstances.
Almost unprecedented	<ul style="list-style-type: none"> An estimated less than 10 per cent chance of occurrence as a result of the proposal; or Not expected to ever occur during as a result of the proposal (less than once every 100 years).

Source: Australian Transport Assessment and Planning Guidelines (2018)

Table 12-3 Significance categories

Significance category	Description ¹
Large negative	Major negative impacts with serious, long-term and possibly irreversible effects leading to serious damage, degradation or deterioration of the physical, economic or social environment. Requires a major re-scope of concept, design, location and justification, or requires major commitment to extensive management strategies to mitigate the effect.
Moderate negative	Moderate negative impact. Impacts may be short, medium or long-term and impacts would most likely reduce in response to management actions.
Slight negative	Minimal negative impact, probably short-term, able to be managed or mitigated, and would not cause substantial detrimental effects. May be confined to a small area.
Neutral	Neutral - no discernible or predicted positive or negative impact.
Slight positive	Minimal positive impact, possibly only lasting over the short-term. May be confined to a limited area.
Moderate positive	Moderate positive impact, possibly of short, medium or long-term duration. Positive outcome may be in terms of new opportunities and outcomes of enhancement or improvement.
Large positive	Major positive impacts resulting in substantial and long-term improvements or enhancements of the existing environment

Source: Australian Transport Assessment and Planning Guidelines (2018)

Note 1: There is no definitive definition of short, medium and long-term, the following is an indicative guide: short 1-2 years; medium 3-5 years; long - beyond 5 years

12.4 Avoidance and minimisation of impacts

The design development of this proposal has aimed to avoid or minimise potential business impacts by limiting the amount of privately owned land needed (wherever possible) for construction sites. The design also aimed to maintain customer and vehicular delivery access for existing businesses. Specific design features to avoid or minimise impacts included:

- Minimisation of land acquisition
- Construction arrangements at Pyrmont Station and Hunter Street Station (Sydney CBD) to retain access for surrounding businesses
- Selection of tunnel boring machines to excavate the twin tunnels because they operate faster than other excavation machinery, resulting in a reduced construction timeframe and less disruption for the local community.

12.5 Potential proposal wide impacts

12.5.1 Existing environment COVID-19 pandemic

Employment centres across Greater Sydney, including Pyrmont and the Sydney CBD, have been and continue to be impacted by the COVID-19 pandemic public health orders and restrictions of 2020 and 2021 and the associated remote/flexible working arrangements. The number of workers accessing these areas daily has dropped compared to the pre-COVID-19 pandemic levels. The same localities also function as major tourism destinations - entertainment and accommodation sectors have been impacted by the interstate and international border closures. At the time of writing this report, there are no certainties about the duration of the pandemic and trends following the pandemic.

The decline in visitors to the Sydney CBD during outbreaks of COVID-19 in 2020 and 2021 is likely to have impacted local hospitality and entertainment businesses who may rely on CBD workers for customers. This trend is reflected in lower commercial occupation rates in the Sydney CBD in 2021 compared with 2019 (Property Council of Australia, 2021). COVID-19 outbreaks in 2020 and 2021 have required people to stay at home more under stay at home orders and be out in the community less. It is possible that this has meant less patronage of some small businesses such as hospitality venues. Small businesses may have also been required to close for periods of time to prevent potential spreading of COVID-19 which is likely to have impacted on these businesses, notwithstanding financial and business support programs in place.

Commercial and retail business activity continues to change in response to the impacts of the COVID-19 pandemic and this business impact assessment recognises that some businesses may have felt impacts more heavily than others. A key factor will be how much resilience businesses will have at the start of this proposal as this will be an important factor in a business' ability to withstand potential impacts and disruptions.

While the magnitude of the impact and long-term consequences of the global pandemic are yet to be fully understood, the pandemic is likely to have an impact across a range of industries. Key urban thinkers such as Richard Florida (University Professor at the University of Toronto and Distinguished Fellow at New York University) believe that the cities will continue to flourish considering the high concentration of amenity and functioning as focal points for people to meet and mingle (Gunts, 2021). Provision of amenity and quality of built environment will be the key to attract future residents, and workforce and visitors back to city areas.

12.5.2 Property acquisition

Property acquisition to facilitate the proposal would result in potential impacts to occupying businesses (or other negotiated arrangements). All property acquisition is managed in accordance with the *Land Acquisition (Just Terms Compensation) Act 1991* and the land acquisition reforms announced by the NSW Government, which can be viewed online at www.propertyacquisition.nsw.gov.au/.

Sydney Metro has appointed personal managers to offer residents and small businesses assistance and support throughout the acquisition process.

In addition, it will be necessary to acquire land below the surface of properties for construction purposes. While substratum acquisition has no impact on businesses, it limits construction in the vicinity of the tunnels on land acquired by Sydney Metro for tunnelling and requires concurrence for development that penetrates at least two metres within the rail corridor. This is not expected to limit the expansion of businesses in a commercial sense. Substratum acquisition would be carried out in accordance with the *Land Acquisition (Just Terms Compensation) Act 1991* and is further discussed in Chapter 10 (Property and land use).

12.5.3 Power supply routes

The disruption to the public footpath and roads in front of businesses would be minimal, short-term in nature and typical of the disruptions that businesses need to deal with on a regular basis in city centre locations. As such, it is considered that the impact to businesses would be minimal. The same mitigation measures would apply for businesses along power supply routes as around construction sites.

12.6 The Bays tunnel launch and support site

12.6.1 Existing environment

The *Sydney Metro West Environmental Impact Statement – Westmead to The Bays and Sydney CBD* (Sydney Metro, 2020a) assessed the impacts of The Bays Station construction site to:

- Carry out the excavation of The Bays Station
- Launch and support two tunnel boring machines for the drive west to the Sydney Olympic Park metro station construction site.

The Bays Station construction site is being established under the Sydney Metro West Concept and Stage 1 planning approval. The Bays tunnel launch and support site would be located within a part of The Bays Station construction site.

A description of the existing environment as it relates to this business impact assessment is based on the Census 2016 data and is consistent with the existing environment described in the *Sydney Metro West Environmental Impact Statement – Westmead to The Bays and Sydney CBD* (Sydney Metro, 2020a), that is:

- **Local business profile** – Business areas around The Bays are dominated by the Glebe Island and White Bay Port, but also include industrial areas adjoining the port, and retail areas along Victoria Road and Darling Street (refer to Figure 12-1). There are no businesses within The Bays tunnel launch and support site and there are between 20 and 30 businesses within the 100 metre range and within 100 to 400 metres of the construction site
- **Employment** – The local business study area comprises a mix of uses which includes the industrial and port facility areas, with a variety of service based industrial and commercial businesses

- **Travel patterns** – The Bays local business study area is highly accessible by road including via the major arterial roads of Anzac Bridge and Victoria Road. At the 2016 Census, the most preferred method of travel to work was by vehicle.



Figure 12-1 The Bays (this proposal) business study area

12.6.2 Potential impacts

The Bays tunnel launch and support site would be located entirely within the construction footprint of The Bays Station construction site, which is being established under the Concept and Stage 1 approval. This Environmental Impact Statement assesses the proposed use of the eastern and southern part of The Bays Station construction site to launch and support two tunnel boring machines for the drive east to the proposed Hunter Street Station (Sydney CBD) construction sites.

Impacts to local businesses associated with the proposal are summarised in Table 12-4. It is important to note that the likelihood and significance of these potential impacts have not changed from those assessed as part of the *Sydney Metro West Environmental Impact Statement - Westmead to The Bays and Sydney CBD* (Sydney Metro, 2020a). Potential impacts to local businesses would be minimised through the implementation of mitigation measures for amenity related issues (such as noise, traffic, visual and air quality) and mitigation measures identified in Section 12.10. Potential cumulative impacts arising during the overlap of this proposal and the approved major civil work for Westmead to The Bays are considered in Section 12.9.

Table 12-4 The Bays – local business impacts

Potential impact	Risk assessment	
	Likelihood	Significance
Potential opportunities		
<p>Increase in passing trade</p> <p>Businesses within The Bays local business area are unlikely to benefit from construction workers at the site, except for nearby food and beverage outlets.</p>	Unlikely	Slight positive
Potential indirect impacts		
<p>Continued temporary traffic congestion and increased travel times</p> <p>Traffic impacts are assessed in Chapter 6 (Transport and traffic).</p> <p>Potential temporary impacts to businesses associated with construction traffic would continue to be minimised through measures such as reducing movements in network peak periods.</p> <p>Temporary increases in traffic congestion and travel times around the study area could continue to affect workers journey times to work.</p> <p>Road networks around the port are highly constrained, so temporary increases in traffic congestion and travel times could also continue to impact the ability of businesses to efficiently receive deliveries and service vehicles.</p> <p>It is also expected that a high proportion of customers would access businesses within the study area by car, meaning temporary increases in traffic congestion and travel times could also continue to impact businesses trade.</p>	Unlikely	Slight negative
<p>Temporary reduced local amenity</p> <p>Temporary reduced amenity from noise, vibration, dust and visual impacts from construction work is still unlikely to result in lower customer experience for surrounding businesses.</p> <p>Nearby businesses are primarily industrial in nature and already experience comparatively lower amenity levels from surrounding industrial premises and port related activities.</p> <p>These impacts are assessed in Chapter 7 (Noise and vibration) and Chapter 11 (Landscape and visual amenity).</p>	Unlikely	Slight negative
<p>Temporary power and utility interruptions</p> <p>Unplanned power and utility interruptions could continue to result in temporary impacts during interruptions.</p>	Unlikely	Slight negative

12.7 Pyrmont Station construction sites

12.7.1 Existing environment

Local business profile

The Pyrmont local business study area is characterised as a local business centre, as well as a major tourist, cultural and entertainment destination. There are a range of businesses catering towards the local residential and worker population with a mix of retail, cafes and restaurants, health, recreation and fitness, and offices. The local business study area also provides a range of tourist, cultural and entertainment facilities, including a casino and museums. There are a range of accommodation services, while the local business study area also provides a range of night-time economy services including bars and night clubs.

The main business areas are focused along Harris Street to the west, northwest of the construction sites, and towards Pyrmont Bay / Darling Harbour to the east and north-east. Figure 12-2 shows the key business areas within the Pyrmont local business study area.

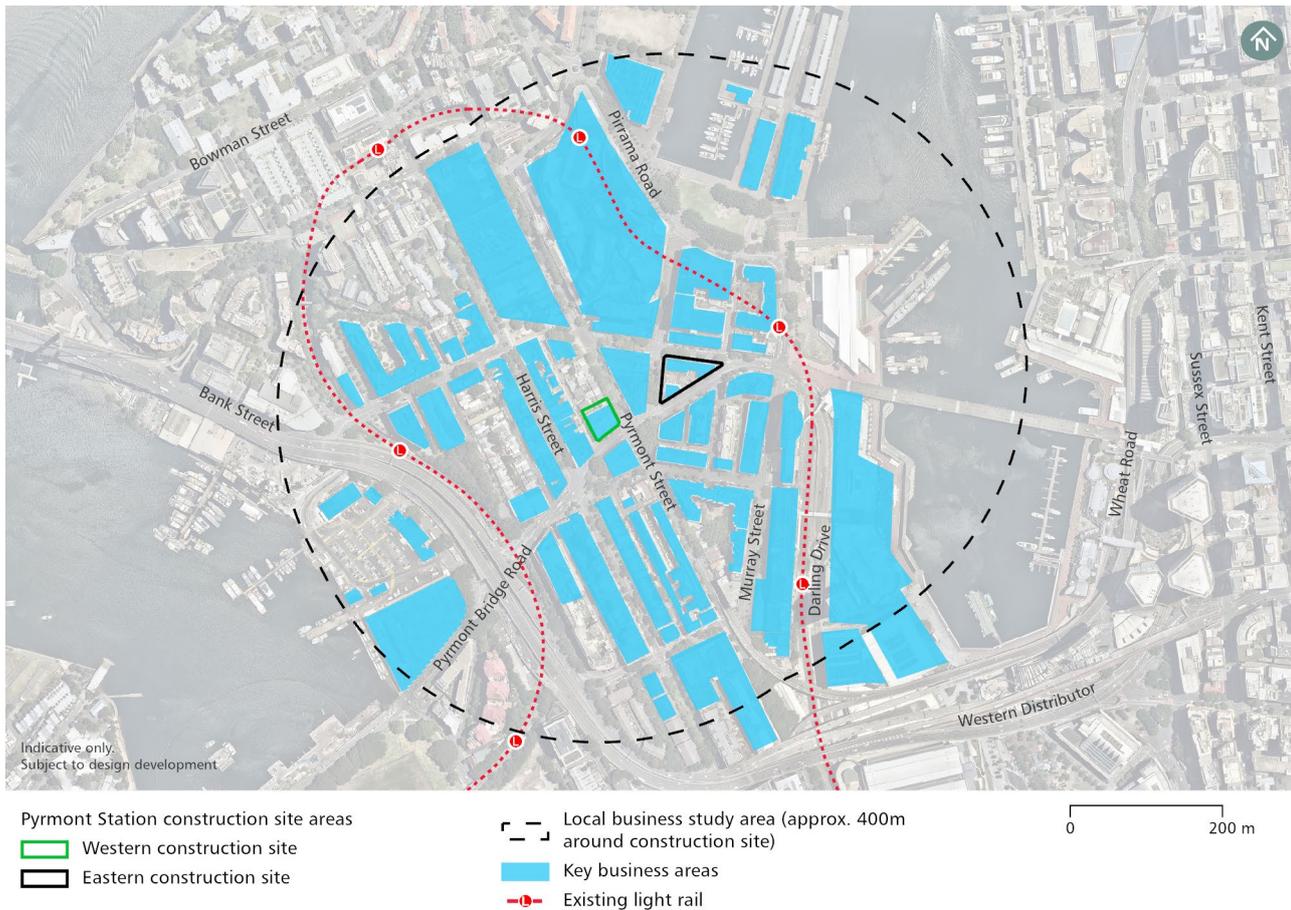


Figure 12-2 Pyrmont business study area

The business environment of the study area is characterised largely by retail, and cafes and restaurants. Hotels, rental apartments, and office buildings are also present within the vicinity of the Pyrmont Station construction sites. A shopping mall is located immediately to the north of the Pyrmont Station eastern construction site.

The local business study area is also a major tourist, cultural and entertainment destination. The Star Sydney is in the north of the study area, while several cultural and entertainment facilities are located to the east, including the Australian National Maritime Museum and the International Convention Centre Sydney (ICC Sydney). The Sydney Fish Market, a major tourist destination, is located to the west.

Within the construction sites, there are a range of businesses; primarily commercial, and health and fitness. Businesses within the local business study area enjoy a high degree of passing pedestrian traffic along Union Street, Pyrmont Bridge Road and Harris Street, while the tourist, cultural and entertainment facilities and local amenities attract a high number of visitors.

Table 12-5 highlights the existing types of businesses within the Pyrmont local business study area, identifying those that would be directly affected by the proposed construction work, and those near the construction sites.

Table 12-5 Businesses within Pyrmont local business study area

Impact area	Types of businesses	Approximate number of businesses
Within construction sites	Commercial, health care, catering, fitness, education	10 to 20
Within 100 metres of the construction sites	Commercial, accommodation, food outlets, pubs, clubs and bars, cafes and restaurants, education and training, financial and insurance services, health care, retail trading, convenience stores, entertainment facilities, fitness and recreation, apparel stores, other retail goods and service providers, tourist and cultural facilities, entertainment facilities	300 to 500

Impact area	Types of businesses	Approximate number of businesses
Between 100 and 400 metres of the construction sites	Commercial, accommodation, food outlets, pubs and clubs, cafes and restaurants, education and training, financial and insurance services, health care, retail trading, convenience stores, entertainment facilities, fitness and recreation, apparel stores, other retail goods and service providers, tourist and cultural facilities, entertainment facilities	700 to 800

Employment

The local business study area comprises a mix of uses which includes local residential and worker services as well as retail, entertainment and commercial uses.

At the 2016 census, about 21,900 jobs were located within the destination zones relevant to the Pymont business study area. As shown in Figure 12-3, a breakdown of employment by broad industry category reveals that a significant number of workers are employed within knowledge worker (about 9,290 jobs) and population serving (about 8,310) industries. Other broad industry categories such as health and education, traditional office, and industrial had much lower representation of jobs within the local business study area, together accounting for less than 20 per cent of all jobs.

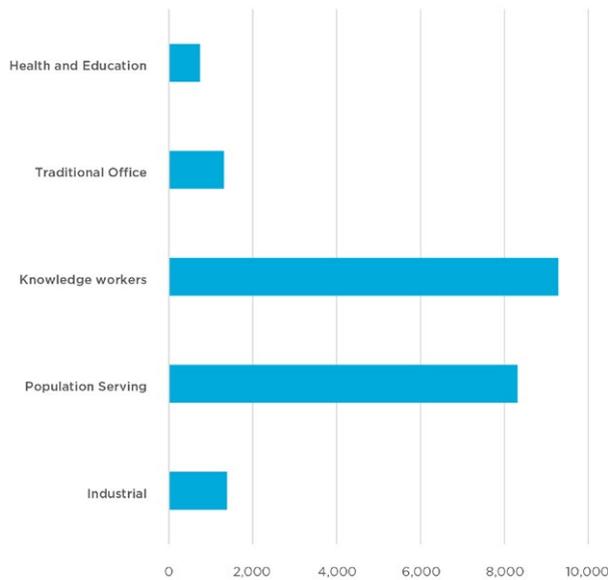


Figure 12-3 Employment by Sector - Pymont Local Business Study Area

Source: ABS, 2016; Ethos Urban

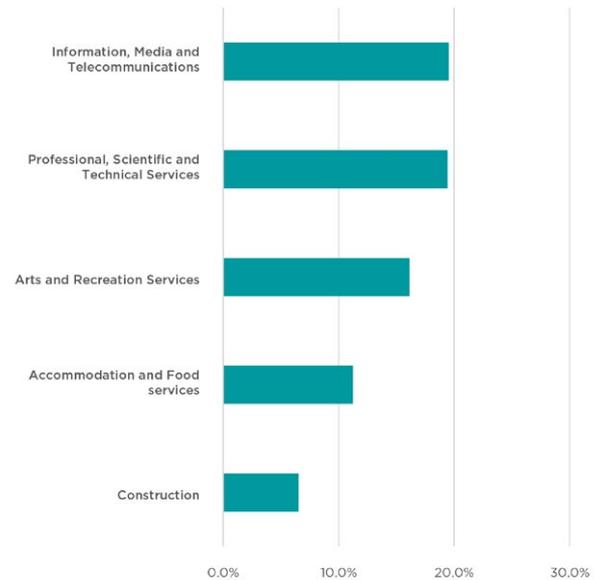


Figure 12-4 Top Five Industries - Pymont Local Business Study Area

Source: ABS, 2016; Ethos Urban

As shown in Figure 12-4, jobs in information, media and telecommunications; professional, scientific and technical services; and arts and recreation services accounted for over half of all jobs within the local business study area. The remaining industries all had a share of employment below 15 per cent.

Travel patterns

Workers within the destination zones relevant to the Pyrmont local business study area primarily rely on either public transport or vehicles to get to and from work. At the 2016 census, 45.6 per cent of workers used public transport to get to work. Modes of public transport available to workers include bus, light rail and ferry services. A number of workers also walk from nearby train stations such as Town Hall, and Central Station across Pyrmont Bridge or through Darling Harbour. The cycle lanes through the Pyrmont local business area also support cycling as a method of travel to work for workers in the Pyrmont local business area and the Sydney CBD local business area.

The Western Distributor is one of Sydney's major arterial roads that connects the Sydney CBD to Sydney's west and runs through the local business study area. It provides good access to labour markets and supports the use of car as a method of travel.

Since the 2016 Census, it is likely that the share of workers working from home in the local business study area has increased, with this trend likely to be accelerated in a post COVID-19 pandemic environment. The methods of travelling to work are shown in Table 12-6.

Table 12-6 Methods of travel to work – Pyrmont destination zones

Methods of travel to work	Number	Proportion (per cent)
Public Transport	9,990	45.6
Vehicle	7,210	32.9
Worked at home or did not go to work	2,260	10.3
Active Transport	2,160	9.9
Other Mode	90	0.4 per cent

Source: Australian Bureau of Statistics, 2016; Ethos Urban

Note: figures rounded. Proportions will not add up 100 per cent due to exclusion of 'not stated' method of travel from the table.

12.7.2 Potential impacts

An assessment of the potential impacts relevant to the Pyrmont local business study area is provided in Table 12-7. Overall, the nature of the businesses within the Pyrmont local business study area and the existing environment suggests that most of the businesses would be resilient to construction impacts.

Table 12-7 Pyrmont – Local business impacts

Potential impact	Risk assessment	
	Likelihood	Significance
Potential opportunities		
Increase in passing trade Local businesses such as retail and cafés and restaurants are the most likely to experience an increase in customers as a result of this proposal.	Likely	Slight positive
Redistribution of trade Some local customers may redistribute their trade towards similar locally serving businesses within other parts of the local business study area.	Possible	Slight positive
Potential indirect impacts		
Temporary traffic congestion and increased travel times Traffic impacts are assessed in Chapter 6 (Transport and traffic). Businesses along Pyrmont Bridge Road and Union Street generally rely on customers travelling via car and walking, making them more susceptible to local traffic congestion. However, customers accessing businesses along this corridor would be accustomed to typically large volumes of traffic and traffic congestion is typically present within Pyrmont. As such, increases in traffic congestion and travel times would not be expected to affect most customers accessing businesses within the local business study area.	Possible	Slight negative

Potential impact	Risk assessment	
	Likelihood	Significance
<p>Loss of parking</p> <p>Impacts arising from loss of parking impacts are assessed in Chapter 6 (Transport and traffic).</p> <p>Impacts would be minimal given the location and low number of lost parking spaces and the availability of parking on nearby streets. Impacts would be more pronounced for venues with patronage outside of business hours, such as weekends, that would typically rely on a segment of the customer base using a car. However, the combined loss of on-street parking spaces would have minor impacts given the availability of parking on other local roads nearby, and the permanent demolition of properties that currently generate parking demand.</p>	Possible	Slight negative
<p>Loss of goods and services</p> <p>The types of businesses that require relocation are destination businesses servicing a wider catchment and are unlikely to provide goods and services to local businesses within the study area. As such, remaining businesses within the local business study area are unlikely to need to find alternative providers of goods and services.</p>	Unlikely	Slight negative
<p>Temporary reduced local amenity</p> <p>Businesses along Union Street are most likely to be impacted by reduced amenity, whereas other businesses, particularly along Pyrmont Bridge Road would be less affected, as these businesses are already subject to reduced amenity from being located on a busy major road and would mostly be separated from the construction sites by existing roads. Most of these businesses are also generally not of a type that are dependent on urban amenity. As such, impacts to businesses from reduced amenity are unlikely.</p> <p>Noise impacts arising during construction may potentially have some impact on the amenity of nearby cafes and restaurants, pubs and bars, and entertainment facilities. In addition, construction hours over weekends could cause impact to local businesses, particularly cafes, restaurants and entertainment venues. These impacts are assessed in Chapter 7 (Noise and vibration).</p>	Unlikely	Slight negative
<p>Power and utility interruptions</p> <p>Unplanned power and utility interruptions could result in business impacts during interruptions.</p>	Unlikely	Slight negative
<p>Safety and security</p> <p>Businesses along Pyrmont Street, Edward Street and Union Street already have a relatively low level of street activation. There is potential, particularly at night time, that signage and hoarding could create a perception of reduced safety and security when travelling through the local business study area.</p> <p>Consequently, businesses operating as part of the night-time economy could experience a reduction in patronage. Businesses most likely to be potentially impacted are within 100 metres of a construction site.</p>	Possible	Slight negative

12.8 Hunter Street Station (Sydney CBD) construction sites

12.8.1 Existing environment

Local business profile

The Sydney CBD is Australia's largest commercial office centre and the primary employment centre within Australia. It is a nationally significant centre, being the location for a wide range of businesses from small businesses to larger domestic and multinational companies. The local business study area also includes the headquarters for many national and international companies. State and federal government departments and regulatory bodies are also within the Sydney CBD and within the Hunter Street Station (Sydney CBD) local business study area (refer to Figure 12-5).

Businesses within the local business study area are predominantly commercial, financial, administrative, hospital and accommodation, and retail, with many businesses providing local resident and worker services including cafes and restaurants, pubs, function centres, medical and health services and entertainment facilities.

There are several nationally significant tourist and cultural facilities located within the local business study area. In addition, Sydney CBD is home to some of the nation's most important financial market infrastructure that is critical for the functioning of Australia's financial system and economy, including the Australian Stock Exchange and the Reserve Bank Information and Transfer System.

Figure 12-5 shows the key business areas around the Hunter Street Station (Sydney CBD) construction sites for the local business profile.

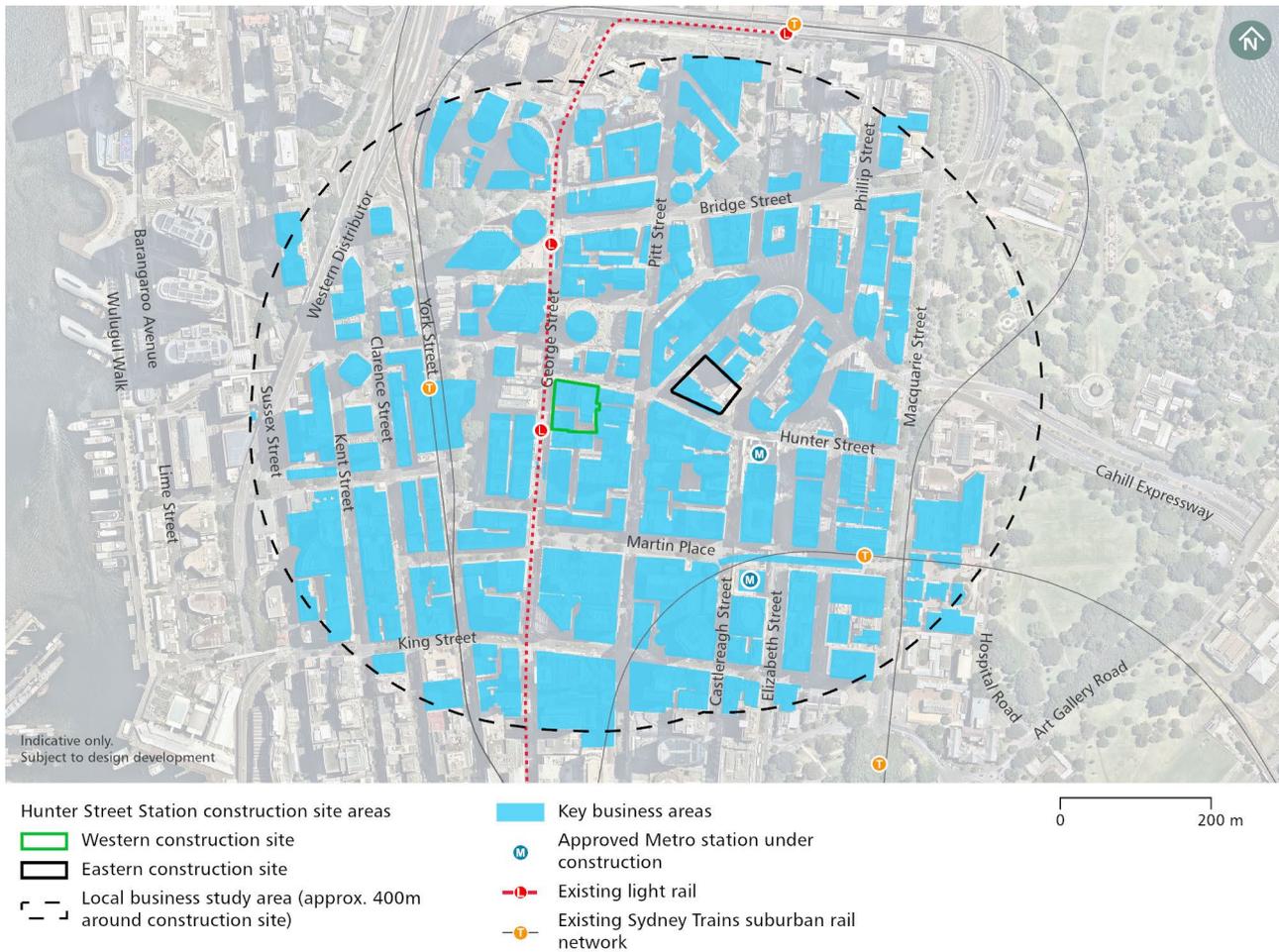


Figure 12-5 Hunter Street Station local business study area

The Hunter Street Station (Sydney CBD) business study area includes a highly developed commercial core, with a wide range of commercial, retail, health, education, community and government administration uses.

The large number and diverse range of businesses reflect Sydney CBD's status as a metropolitan centre and the nation's primary business and employment centre.

There are many businesses within the construction sites and the surrounding local business study area, with estimates of business numbers provided in Table 12-8.

Table 12-8 Businesses within Hunter Street Station (Sydney CBD) local business study area

Impact area	Types of businesses	Approximate number of businesses
Within construction sites	Commercial, food outlets, cafes and restaurants, clubs and bars, education and training, financial and insurance services, health care and social assistance, retail trading, convenience stores, entertainment facilities, fitness and recreation, apparel stores, other retail goods and service providers (such as the post office)	80 to 100

Impact area	Types of businesses	Approximate number of businesses
Within 100 metres of the construction sites	Commercial, food outlets, pubs, clubs and bars, cafes and restaurants, accommodation, education and training, financial and insurance services, health care and social assistance, retail trading, convenience stores, entertainment facilities, fitness and recreation, apparel stores, other retail goods and service providers, tourist and cultural facilities, entertainment facilities, financial market infrastructure and services, State and Federal government departments	3,000 to 4,000
Between 100 and 400 metres of the construction sites	Commercial, food outlets, cafes and restaurants, education and training, financial and insurance services, health care and social assistance, accommodation, retail trading, convenience stores, entertainment facilities, fitness and recreation, apparel stores, other retail goods and service providers, tourist and cultural facilities, entertainment facilities, financial market infrastructure and services, State and Federal government departments	6,000 to 7,000

Employment

At the 2016 Census about 172,390 people were working in the destination zones relevant to the Hunter Street Station (Sydney CBD) local business study area, making it the largest business area in the proposal and reflecting the role of Sydney CBD as a metropolitan and employment centre. As shown in Figure 12-6, most of these jobs were in knowledge worker industries, which accounted for about 106,200 jobs, with population serving industries the next largest broad industry category, which had about 25,760 jobs mostly in accommodation and food services and retail trade. Traditional office industries accounted for about 25,330 jobs in the business services sector, while the other industries all had shares of jobs below five per cent.

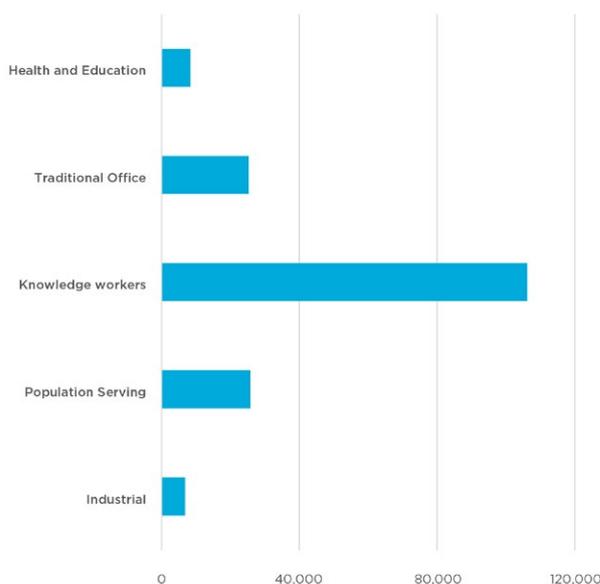


Figure 12-6 Employment by Sector – Hunter Street Station Local Business Study Area

Source: ABS, 2016; Ethos Urban

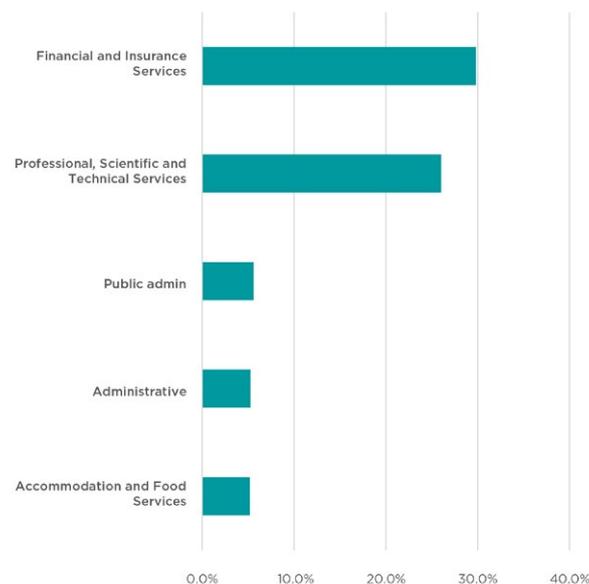


Figure 12-7 Top Five Industries – Hunter Street Station Local Business Study Area

Source: ABS, 2016; Ethos Urban

As shown in Figure 12-7, the main industries of employment at the 2016 census included financial and insurance services (29.8 per cent) and professional, scientific and technical services (26.0 per cent), which together comprises 55.8 per cent of the top five industries. The remaining industries of employment all had a share of jobs below 10 per cent.

Travel Patterns

The Sydney CBD has a high level of accessibility across a number of modes of travel, with very good access to Sydney’s public transport network (train, light rail, bus, and ferry). The methods of travelling to work are shown in Table 12-9. As at the 2016 census, workers within the Hunter Street Station (Sydney CBD) local business study area primarily use public transport to travel to and from work (73.1 per cent).

Workers using the Sydney Trains railway network would use a number of nearby stations including Wynyard Station, Martin Place Station, Circular Quay Station, St James Station and Town Hall Station.

Large volumes of traffic currently causes significant levels of congestion during peak hours making car travel to the Sydney CBD less viable for most workers, with only 12.1 per cent using a vehicle to get to and from work. The methods of travelling to work are shown in Table 12-9.

Table 12-9 Methods of travel to work – Hunter Street Station (Sydney CBD) destination zones

Methods of travel to work	Number	Proportion (per cent)
Public Transport	130,840	73.1
Vehicle	21,710	12.1
Worked at home or did not go to work	13,360	7.5
Active Transport	11,090	6.2
Other Mode	660	0.4

Source: Australian Bureau of Statistics, 2016; Ethos Urban

Note: figures rounded. Proportions will not add up 100 per cent due to exclusion of 'not stated' method of travel from the table.

12.8.2 Potential impacts

An assessment of the potential impacts relevant to the Hunter Street Station (Sydney CBD) local business study area is provided in Table 12-10. Overall, the local business study area is a diverse and dynamic area with a large number of businesses, and a high capacity to absorb and adapt to construction impacts that may change the localised trading environment around the construction sites.

Table 12-10 Hunter Street Station (Sydney CBD) – Local business impacts

Potential impact	Risk assessment	
	Likelihood	Significance
Potential opportunities		
<p>Increase in passing trade</p> <p>Businesses located around the construction sites may benefit from an increase in the number of customers as a result of construction workers buying goods and services from retail, cafes and restaurants.</p> <p>There is likely to be changes in pedestrian movements and flows as a result of construction activity and the closure of the existing underground pedestrian walkway between Wynyard Station and Pitt Street. This may result in a redistribution of trade away from some businesses towards businesses at the street level. Some businesses may ultimately see a reduction in trade, while other businesses will see an increase.</p>	Possible	Slight positive
<p>Redistribution of trade</p> <p>Some local customers could redistribute their trade towards similar locally serving businesses within other parts of the local business area or the surrounding area which would be positive for those businesses that potentially experience an increase in trade. For instance, the closure of the existing underground pedestrian walkway between Wynyard Station and Pitt Street may redirect pedestrian flows to other businesses of the local business area.</p>	Likely	Slight positive
Indirect impacts		
<p>Temporary traffic congestion and increased travel times</p> <p>Traffic impacts are assessed in Chapter 6 (Transport and traffic).</p> <p>The extent to which workers and customers would be affected by construction work would be largely dependent on their proximity to the construction sites, and whether they travel on footpaths that are nearby to the construction haul routes.</p> <p>Similarly, potential traffic and travel time impacts for servicing deliveries would be greatest for businesses immediately adjacent to the construction sites. This is a particular issue for businesses within Sydney CBD that already face restrictions in terms of time of-day access to loading docks and deliveries.</p>	Possible	Slightly negative

Potential impact	Risk assessment	
	Likelihood	Significance
<p>Temporary traffic congestion and increased travel times cont.</p> <p>While there is a high density of businesses within 400 metres of the construction sites, the diversity of employment types and availability of multiple access routes into and out of this area of Sydney CBD mean impacts from localised congestion should be avoidable for most businesses. It is also noted that workers within the local business study area are not car dependent, with the study area having good public transport access.</p> <p>In addition, customers accessing businesses along this corridor would be accustomed to large volumes of traffic and traffic congestion present within Sydney CBD. As such, increases in traffic congestion and travel times would not be expected to affect the numbers of customers accessing businesses within the local business study area.</p> <p>Traffic congestion could also affect business loading times. During oversize deliveries for the proposal, on-street parking spaces, loading zones, taxi zones and access to adjacent properties would be temporarily removed on Hunter Street between George Street and Bligh Street.</p>	Possible	Slightly negative
<p>Temporary loss of parking</p> <p>Impacts arising from loss of parking impacts are assessed in Chapter 6 (Transport and traffic). Although the number of lost car spaces is expected to be minimal, car parking spaces are at a premium within the local business study area, with car parking spots frequently fully occupied. In addition, small businesses tend to have a greater reliance on business loading and small deliveries throughout the day.</p>	Likely	Slight negative
<p>Temporary loss of goods and services</p> <p>Noting that a number of businesses would be directly impacted by the construction site, there are unlikely to be flow on effects to businesses throughout the local business area that rely on goods and services from some of these directly impacted businesses. Some businesses may need to find alternative businesses to provide goods and services. However, given the overall scale of the Sydney CBD, and the types of businesses within the construction sites, it is likely that substitution by other businesses capable of providing the same goods or performing the same services would be possible, minimising overall impacts.</p>	Likely	Slight negative
<p>Temporary reduced local amenity</p> <p>A range of businesses near the construction sites may be impacted by changes to amenity. Businesses potentially affected would be those located closest to the construction sites and those more reliant on a pleasant urban amenity. For instance, businesses along George Street that rely heavily on passing foot traffic may notice a reduction in traffic as a result of reduced street frontage and lower levels of amenity.</p> <p>Other amenity impacts could arise due to noise from the construction work. These noise impacts would primarily affect businesses such as commercial offices, cafes and restaurants, pubs and bars and other entertainment facilities.</p> <p>Noise impacts on Hunter Street and O’Connell Street would be largely mitigated by the construction work being carried out within an acoustic shed on the eastern construction site. Mitigation measures would be determined during design development and construction planning for the western construction site, and could include measures such as acoustic perimeter hoarding and acoustic panels. These impacts are assessed in Chapter 8 (Non-Aboriginal heritage).</p> <p>Visual impacts from hoarding and fencing have the potential to obstruct vision of a business from the street and nearby area. These impacts are assessed in Chapter 11 (Landscape and visual amenity).</p>	Likely	Slight negative
<p>Power and utility interruptions</p> <p>Given the location of the construction sites in the northern area of Sydney CBD, unplanned power and utility interruptions could result in impacts to surrounding business during interruptions.</p>	Unlikely	Moderate negative

Potential impact	Risk assessment	
	Likelihood	Significance
<p>Safety and security</p> <p>Businesses operating as part of the night-time economy could experience a reduction in patronage due to perceptions related to safety and security when travelling through the local business study area. Impacts are likely to be limited to retail, cafes, restaurants, entertainment and night-time venues located near the construction sites that would normally continue trading into the evening.</p>	Unlikely	Moderate negative

12.9 Cumulative impacts

Potential cumulative impacts were considered for assessment based on the likely interactions during the major civil construction work between The Bays and Sydney CBD with other projects that met the adopted screening criteria. Cumulative impacts from a business impact assessment standpoint considers the duration of disruptions as well as the intensity of the disruption and the flow on effects that these disruptions can affect other businesses which depend on them for their trade. The approach to assessment and the other projects considered are described further in Appendix G (Cumulative impacts assessment methodology).

Construction planning and co-ordination would aim to ensure that this proposal is scheduled and managed to minimise the potential for cumulative impacts to occur, where possible.

All of the construction sites would have some interactions with other projects. Potential cumulative impacts to businesses around this proposal as a result of other projects being carried out concurrently in the surrounding area would potentially include:

- Temporary changes and general disruption to traffic and transport services
- Potential temporary interruption of utilities
- Potential temporary increased travel times for workers
- Temporary reduction in amenity (as a result of construction noise, traffic congestion, changes to visibility, and dust)
- Increased duration of potential disruptions when project construction timeframes are overlapping or are staged to be begin after the completion of another project.

12.10 Mitigation and management measures

The Construction Environmental Management Framework (Appendix C) describes the approach to environmental management, monitoring and reporting during construction. Specifically, it lists the requirements to be addressed by the construction contractor in developing the Construction Environmental Management Plans, sub-plans, and other supporting documentation for each specific environmental aspect.

The environmental management approach for the project is detailed in Chapter 23 (Synthesis of the Environmental Impact Statement). Under these broad frameworks and as outlined within the Concept assessment, a series of performance outcomes have been developed to define the minimum environmental standards that would be achieved during construction of the proposal (refer to Section 12.10.1), and mitigation measures that would be implemented during construction to manage potential identified impacts (refer to Section 12.10.2).

12.10.1 Performance outcomes

Construction performance outcomes were developed for the proposal as part of the Concept assessment. Performance outcomes for the proposal identify measurable, performance-based standards for environmental management. Identified performance outcomes in relation to business impacts for construction of the proposal include:

- Potential impacts to businesses are minimised
- Affected businesses are communicated with in a clear and timely manner to reduce disruption and address concerns
- Access to businesses for employees and customers is maintained
- Assistance is provided to businesses that are adversely impacted.

Chapter 23 (Synthesis of the Environmental Impact Statement) describes how the proposal addresses these performance outcomes. The design development of the proposal has aimed to avoid or minimise potential business impacts by minimising the amount of privately owned land to be acquired or leases for construction sites to reduce direct impacts on businesses (where possible). Small business owner engagement would be carried out to assist small business owners adjacent to major construction sites that may be adversely impacted by construction.

12.10.2 Mitigation measures

Mitigation measures that would be implemented to address potential business impacts are listed in Table 12-11.

Table 12-11 Mitigation measures – Business

Reference	Impact	Mitigation measure	Applicable location(s)
BI1	General business impacts	Small business owner engagement would be undertaken to assist small business owners adjacent to major construction sites that are adversely impacted by construction.	All
BI2	Power and utility interruptions	Planned power and utility interruptions would be scheduled to occur before or after typical business hours where feasible and reasonable. Prior notice would be provided to all affected business owners of the interruptions. Given several businesses operate on a 24/7 basis and outside of normal business hours, these businesses would need to be consulted prior to any disruption. In addition, businesses operating financial market infrastructure will be consulted to ensure sufficient backup arrangement can be put in place to minimise any disruptions to their services.	All
BI3	Business visibility and accessibility	Hoarding and screening impacting the visibility of business would be minimised where feasible and reasonable, without compromising public safety or the effective management of construction airborne noise. Clear pathways and signage would be implemented around construction sites to maximise visibility of retained businesses, including sufficient lighting along pedestrian footpaths during the night where relevant.	All

12.10.3 Interactions between mitigation measures

Mitigation measures in other chapters that are relevant to the management of potential business impacts include:

- Chapter 6 (Transport and traffic) – All mitigation measures, in particular measures that address maintaining access to local businesses
- Chapter 7 (Noise and vibration) – All mitigation measures
- Chapter 10 (Property and land use) – All mitigation measures
- Chapter 11 (Landscape and visual amenity) – Specifically measures related to minimising landscape and visual amenity impacts
- Chapter 13 (Social impacts) – All mitigation measures
- Chapter 19 (Air quality) – All mitigation measures.

Together, these measures would minimise the potential business impacts of this proposal. A full list mitigation measures is presented in Chapter 23 (Synthesis of the Environmental Impact Statement).

This page has intentionally been left blank