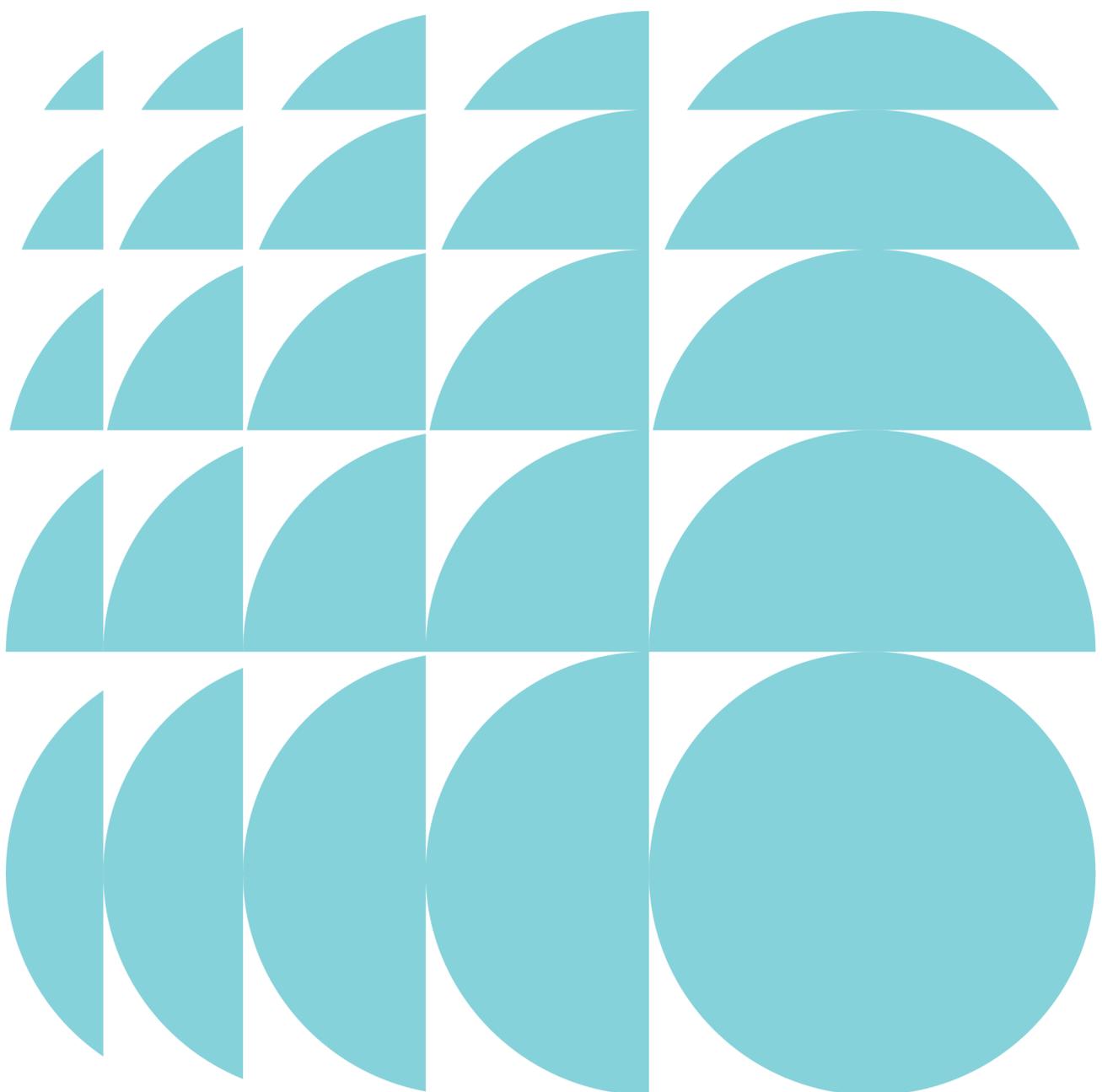


Appendix M

Social Impact Assessment





Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We acknowledge the Gadigal people, of the Eora Nation, the Traditional Custodians of the land where this document was prepared, and all peoples and nations from lands affected.

We pay our respects to their Elders past, present and emerging.

CONTACT

Allison Heller Director aheller@ethosurban.com

Reproduction of this document or any part thereof is not permitted without prior written permission of Ethos Urban Pty Ltd.

This document has been prepared by:

This document has been reviewed by:

Sasha Deshon, Chloe Brownson

24 May 2022

Allison Heller

24 May 2022

Reproduction of this document or any part thereof is not permitted without written permission of Ethos Urban Pty Ltd. Ethos Urban operates under a Quality Management System. This report has been prepared and reviewed in accordance with that system.

VERSION NO.	DATE OF ISSUE	REVISION BY	APPROVED BY
1	20/4/2022	SD, CB, MB, AH	
2	21/4/2022	SD, AH	
3	28/4/2022	SD, AH	AH
4	19/05/2022	SD	AH
Final	24/5/2022	SD,	

Ethos Urban Pty Ltd
ABN 13 615 087 931.
www.ethosurban.com
173 Sussex Street, Sydney
NSW 2000 t 61 2 9956 6952

Contents

<hr/>		
Executive Summary		4
Purpose of this report		4
The proposed development		4
Scope of this report		4
Methodology – social impact assessment		5
<hr/>		
1.0	Introduction	7
1.1	Overview of the development	7
1.2	Purpose of this Social Impact Assessment report	7
<hr/>		
2.0	Powerhouse Ultimo Renewal Project	8
2.1	Proposed development	8
2.2	Development objectives	9
2.3	Project background	9
<hr/>		
3.0	Objectives and scope of this assessment	10
3.1	Assessment framework and methodology	10
3.2	Social Impact Assessment approach	10
<hr/>		
4.0	Strategic context	13
4.1	Site location and context	13
4.2	Key site features	16
4.3	Surrounding local context	17
4.4	Strategic location and connectivity	18
<hr/>		
5.0	Strategic policy context	20
5.1	Policies and strategies reviewed	20
5.2	Strategic drivers identified	20
<hr/>		
6.0	Social baseline – local context	21
6.1	Introduction	21
6.2	Study area definition: area of social influence	21
6.3	Community profile	22
6.4	Local social infrastructure context	24
6.5	Local transport and accessibility	25
6.6	Future transport infrastructure	25
6.7	Local geographic and strategic positioning of the Powerhouse Ultimo Renewal	28
<hr/>		
7.0	Community and stakeholder perspectives	36
7.1	Project specific engagement	36
<hr/>		
8.0	Social Impact Assessment	40
8.1	Assessment framework and scope	40
8.2	Key affected communities	42
8.3	Impact assessment and responses by social factor	43
8.4	Monitoring and management framework	59
<hr/>		
9.0	Employment Assessment	60
9.1	Introduction and approach	60
9.2	Construction phase impacts	61
9.3	Operational phase impacts	61

10.0 Concluding comments 62

Appendices

Appendix A.	Information sources	65
Appendix B.	Summary of strategic policy drivers	66
Appendix C.	Resident demographic profile	70

Figures

Figure 1	Artist's Impression Powerhouse Ultimo	8
Figure 2	Geographic context of the site	14
Figure 3	Indicative site plan and key site features	15
Figure 4	Nearby development on Harris Street	17
Figure 5	Harris Street Forecourt	17
Figure 6	Light Rail Eastern edge of Powerhouse site	17
Figure 7	Harris Street, building opposite site	17
Figure 8	Study Areas	21
Figure 9	Population estimates from 2016-2036	23
Figure 10	Local social infrastructure context	26
Figure 11	Art and cultural infrastructure across Inner Sydney	27
Figure 12	Innovation Corridor, Harbour CBD, Greater Sydney Regional Plan 2018	29
Figure 13	The Goods Line civic space within the Camperdown-Ultimo Collaboration Area	30
Figure 14	Indicative area of Tech Central, shaded in blue, encompassing Darling Harbour Precinct north-east of the site	32
Figure 15	Tourism contribution (%) – City of Sydney vs NSW 2019/20	33
Figure 16	Tourism industry value added – City of Sydney	34

Tables

Table 1	SEARs specifications and report references	10
Table 2	Authors' experience	12
Table 3	Population estimates to 2036	24
Table 4	Defining magnitude levels for social impacts	41
Table 5	Defining likelihood levels of social impacts	42
Table 6	Social impact significance matrix	42
Table 7	Construction Phase Economic Benefits (\$2020/21)	61
Table 8	Operational Phase Economic Benefits (\$2020/21)	61
Table 9	Strategic policy review	66

Executive Summary

Purpose of this report

The proposed renewal of the Powerhouse Museum at 500 Harris Street, Ultimo outlined in this Social Impact Assessment represents an exciting opportunity to deliver important community wellbeing and economic benefits at a district, regional, and national scale. This Social Impact Assessment report supports a State Significant Development Application (SSDA) and EIS that seeks approval for the proposed Powerhouse Ultimo Renewal project (Concept Stage 1). The Powerhouse Ultimo Renewal is being delivered by the Department of Enterprise, Investment and Trade (Create NSW).

The purpose of report is to analyse the potential social impacts that may arise from the development, having regard to social trends and issues affecting the local and broader surrounding areas.

The proposed development

The Powerhouse Ultimo Renewal project is a transformative \$480-\$500 million investment by the NSW Government to establish a world-class museum that will significantly contribute to an important and developing part of Sydney. The renewal will see Powerhouse Ultimo deliver a programming focus on design and fashion, presenting exhibitions that showcase the Powerhouse Collection, international exclusive exhibitions and programs that support the design and fashion industries.

This application represents the first stage of the project, establishing the overall planning and assessment vision for the site. The detailed design, construction and operation of the renewed Powerhouse Ultimo will be subject to separate and future stages, including a competitive design process.

Scope of this report

This report accompanies an EIS which has been prepared on behalf of NSW Department of Enterprise, Investment and Trade¹ (Create NSW) in support of a Concept Proposal State Significant Development, Development Application made to the Department of Planning and Environment (DPE) for the renewal of Powerhouse Ultimo.

As the proposal is classified State Significant Development (SSD), Department of Planning and Environment (DPE) requires that the development application include a Social Impact Assessment (SIA) which considers social impacts of the proposal, including cumulative impacts of the development in context with other existing developments within south Sydney CBD, Ultimo and Pyrmont. The SIA must investigate any potential need for additional community or social services or other infrastructure arising from the development.

The report responds to the following assessment requirements:

2. Capital Investment Value and Employment

Provide an estimate of the retained and new jobs that would be created during the construction and operational phases of the development , including details of the methodology to determine the figures provided.

22. Social Impact

Provide a Social Impact Assessment prepared in accordance with the NSW DPE Social Impact Assessment Guidelines for State Significant Projects.

This report addresses these requirements and will explore the range of significant benefits envisaged to arise from the Powerhouse renewal project, in the context of the broader revitalisation of the Pyrmont Peninsula and context of social and economic drivers for growth and activation in the emergence from COVID-19 on the city.

¹ Note: Create NSW formerly formed part of the Department of Premier and Cabinet

Methodology – social impact assessment

This report addresses the requirement for a Social Impact Assessment (SIA) specified in the Department of Planning and Environment’s Secretary’s Environmental Assessment Requirements (SEARs) for the project – as set out in **Section 1.2**. It follows the principles set out in the *Draft Social Impact Assessment Guideline for State Significant Projects* (NSW DPE 2021).

This report includes the following components:

- Project summary and site context
- Baseline analysis of the designated area of social influence of the development, including current and forecast population profile, population health profile, and existing social infrastructure networks
- Strategic policy context, including relevant state and local government drivers
- Social issues and trends relevant to the proposed development
- Community perspectives of relevance to the proposed development
- Predicted social impacts of the proposed development at this location, along with recommended mitigation and enhancement measures.
- Employment study (SEARS)

Potential negative impacts

The Social Impact Assessment details potential negative impact during construction and resulting from the renewal project which are further detailed in **Section 10.0**, including:

- Temporary impacts to accessibility associated with changed access arrangements and visitors on site to accommodate for construction activities, potentially leading to decreased accessibility of the general public and changes in work routines.
- Potential impacts on the surroundings, amenity and community in the context of other major developments including, Tech Central and Sydney Metro West in Ultimo and Pymont which is undergoing significant redevelopment activity in the Primary Study Area (PSA).

The site’s location within the southern Sydney CBD area is likely to be accessed by a large number of sensitive receivers which may be predisposed to increased sensitivity to changes to environmental factors, accessibility and routines. This cohort may include university students, children, elderly, people with limited mobility, people experiencing illness, disability or homelessness, and others.

Public benefits for Powerhouse Ultimo renewal

The renewal of Powerhouse Ultimo will deliver important community wellbeing and economic benefits at a district, regional and national scale including:

- The establishment of a world class museum that will provide significant public access to Powerhouse Collections and present international exhibitions and programs accessible to local, national, and international audiences.
- Delivering a highly operational precinct that contributes to delivery of strategic State and Local Government directives for activation of visitor and night-time economies, while creating publicly accessible and open spaces to encourage the local community to engage with the precinct.
- The activation of enhanced spaces for the creative industries, research and education programs, providing opportunities to collaborate with schools, universities, and industry, assisting in improvements of life-long education outcomes for students, supporting long term social and economic wellbeing.
- Supporting the sustainability and transformation of Ultimo, Tech Central and Darling Harbour and surrounding CBD areas as an internationally renowned creative and cultural destination, by adaptively renewing the existing Powerhouse buildings.

- Enhancing the cultural significance and characteristics of the south-eastern CBD through its design, provision of public open space, and improvements to streetscape and pedestrian amenity and wayfinding.
- The project will strengthen key academic relationships with knowledge institutions including; UTS, Sydney University, Sydney Institute of Technology TAFE bringing about a range of opportunities including for creative industries, research, innovation and enterprise development in meeting NSW Government objectives in delivery of the Pyrmont Peninsula Place Strategy, NSW Government's Connecting with the Camperdown-Ultimo Collaboration Area and Sydney's Innovation and Technology Precinct.
- The proposal will support significant economic benefits through jobs and economic activity. The proposal will support an estimated 1,710 (direct and indirect) job-years during the construction phase of the project and an estimated total direct value-add to the economy of \$225.2 million. In addition, the ongoing phase of the project will support an estimated 200 direct and 140 indirect FTE jobs, generating approximately \$34.4 million in value-add to the local and regional economy annually. The estimated 400 FTE direct ongoing workers across the Powerhouse sites will generate a direct value-add to the economy of \$37.1 million per annum. When considering the multiplier effect, total ongoing employment is estimated at 670 FTE jobs (direct and indirect), including a total value add to the economy of \$68.8 million per annum.

Overall, it is considered that the potential negative amenity and way of life impacts arising from the future construction and operation of the facility in the immediate locality can be well managed and mitigated through a robust Construction Management Plan and/or Operational Plan of Management, and the ongoing planned consultation with the local community and relevant stakeholders.

This assessment is subject to further revision as part of the Stage 2 Development Application, when the final design, operational parameters and construction impacts are known.

1.0 Introduction

1.1 Overview of the development

This Social Impact Assessment has been prepared on behalf of the NSW Department of Enterprise, Investment and Trade (Create NSW) to support a State Significant Development (SSD) Development Application (DA) Concept Proposal for alterations and additions to Powerhouse Ultimo (the Powerhouse Ultimo Renewal project) at 500 Harris Street, Ultimo.

The delivery of the new Creative Industries Precinct for Powerhouse Ultimo will occur in stages, comprising the following:

- **Stage 1** – Concept DA establishing the planning, design, and assessment framework for the Powerhouse Ultimo Renewal Project including the indicative land uses, maximum building envelopes, general parameters for the future layout of the site, and strategies to guide the subsequent detailed design phases of the project including Urban Design Guidelines and Design Excellence Strategy.
- **Architectural Design Competition** – A competitive design process to critically analyse and provide design alternatives for the Powerhouse Ultimo Renewal project in accordance with the planning and development framework established for the site under the Concept DA. A winning design will be selected by a jury and will inform the subsequent detailed design and assessment phase (Stage 2) of the project.
- **Stage 2** – A Detailed DA confirming the ultimate architectural design and operation of Powerhouse Ultimo and assessing any associated planning and environmental impacts. This Detailed DA will seek consent for the detailed design, construction and operation of the proposed development and follows the same planning assessment and determination process as the Concept DA (Stage 1).

1.2 Purpose of this Social Impact Assessment report

The purpose of this report is to analyse the potential social impacts that may arise from the development, having regard to social trends and issues affecting the local and broader surrounding areas.

This report includes the following components:

- Project summary and site context.
- Baseline analysis of the designated area of social influence of the development, including current and forecast population profile, and existing social infrastructure networks.
- Strategic policy context, including relevant state and local government drivers.
- Social issues and trends relevant to the proposed development.
- Assessment of employment creation through phases of the proposed redevelopment in addressing the SEARS
- Community and stakeholder consultation to date and perspectives of relevance to the proposed development.
- Predicted social impacts of the proposed development at this location, along with recommended mitigation and enhancement measures.
- A suggested social impact monitoring and measurement plan has also been provided.

2.0 Powerhouse Ultimo Renewal Project

2.1 Proposed development

NSW Government is undertaking a redevelopment and expansion of the existing Powerhouse Ultimo Museum (located at 500 Harris Street, Ultimo). Planning approval is sought for a Concept Proposal as part of the SSDA application which will establish the planning and development framework for the site including land uses, built form envelope and other broad parameters.

This Social Impact Assessment (SIA) is submitted to the Department of Planning and Environment pursuant to Part 4 of the *Environmental Planning and Assessment Act 1979* (EP&A Act) in support of an application for State Significant Development (SSD). This application comprises a Concept Proposal for the Powerhouse Ultimo Renewal and is made pursuant to Section 4.22 of the EP&A Act, and to fulfil the requirement of Clause 7.20 of the *Sydney Local Environmental Plan 2012*.

The retention and renewal of Powerhouse Ultimo will deliver an international standard museum with new and refurbished spaces for museum operations, exhibitions, programs and associated industry and creative uses that will activate and engage audiences. It will deliver a programming focus on design and fashion, presenting exhibitions that showcase the Powerhouse Collection, international exclusive exhibitions and programs that support the design and fashion industries and creative industries precinct.

The project seeks to enhance the cultural experience of the south Sydney CBD. An indicative image of the future development is shown in **Figure 1** below.



Figure 1 Artist's Impression Powerhouse Ultimo

Source: Mogamma

2.2 Development objectives

- Deliver an international standard museum that contributes to the ecology of the Powerhouse Museum including Powerhouse Parramatta, Powerhouse Castle Hill, and Sydney Observatory.
- Provide new and refurbished international standard spaces for museum operations, exhibitions, programs and associated industry and creative uses that will activate and engage audiences.
- Facilitate a design excellence process that encourages a wide range of creative and innovative architectural responses to the site and functional brief.
- Integrate a vibrant creative industries precinct that connects with its surrounds, responds to the changed urban environment, and provides concurrent original and distinctive contemporary cultural experiences.
- Enable and support the development of the NSW creative industries and improve productivity through sustainable, flexible, and affordable infrastructure that supports colocation and collaboration.
- Deliver a highly operational precinct that contributes to the NSW visitor and night-time economies.
- Ensure effective and efficient coordination with other government initiatives and represent value for money.
- Provide a connected and integrated interface with surrounding precinct, including the Ultimo Goods Line, Harwood Building, Darling Square and Tech Central.

2.3 Project background

The Powerhouse is Australia's contemporary museum for excellence and innovation in applied arts and sciences. On 4 July 2020 the NSW Government announced that Powerhouse Ultimo would be retained and renewed. Alongside the renewal, a Creative Industries Precinct will be created that will be integrated into the operations of the Powerhouse Museum. The renewal of Powerhouse Ultimo will complement the museum flagship Powerhouse Parramatta, Powerhouse Castle Hill, and Sydney Observatory.

The Ultimo precinct is undergoing significant redevelopment as part of the Innovation Corridor, Tech Central and Sydney International Convention, Exhibition and Entertainment Precinct (SICEEP) including Darling Square and the IMAX renewal and W Hotel.

There are further state significant redevelopments proposed which are adjacent to this site, including the proposed Harbourside and Sydney Metro West transport redevelopments within the Darling Harbour entertainment precinct. More broadly, the western edge of the Sydney CBD has been subject to significant change.

3.0 Objectives and scope of this assessment

3.1 Assessment framework and methodology

The Department of Planning and Environment (DPE) issued Secretary's Environmental Assessment Requirements (SEARs) for preparation of an Environmental Impact Statement for the proposed development, which includes requirement for a Social Impact Assessment (SIA) with employment estimate in addressing SEARs criteria (see **Table 1**). The report has regard to the SEARs, as per below.

Table 1 SEARs specifications and report references

SEARs	Where addressed in this report
<p>2. Capital Investment Value and Employment <i>Provide an estimate of the retained and new jobs that would be created during the construction and operational phases of the development , including details of the methodology to determine the figures provided.</i></p>	Section 9.0
<p>22. Social Impact <i>Provide a Social Impact Assessment prepared in accordance with the NSW DPE Social Impact Assessment Guidelines for State Significant Projects.</i></p>	This report

3.2 Social Impact Assessment approach

Social Impact Assessment (SIA) involves the analysis of social changes and impacts on communities that are likely to occur as a result of a particular development, planning scheme, or government policy decision. The purpose of Social Impact Assessment is to assess the impacts of the development, both positive and negative, for all stages of the project lifecycle for key stakeholders and the broader affected community.

The assessment of social impacts in this report has been based on the Social Impact Assessment Guideline (SIA Guideline) prepared by the NSW Department of Planning and Environment in July 2021.² The Guideline provides a consistent framework and approach to the assessment of social impacts associated with all state-significant projects and developments in NSW, and is specified through the SEARs.

As outlined in the SIA Guideline, social impacts vary in their nature and can be positive or negative, tangible or intangible, physically observable, or psychological (fears and aspirations). Social impacts can be quantifiable, partly quantifiable, or qualitative. They can also be experienced or perceived differently by different people and groups within a community, or over time.

The assessment involves a number of steps, including a baseline analysis of the existing socio-economic environment of a defined study area or areas; identifying list of stakeholders and considering their views; scoping of relevant issues; identification and assessment of potential impacts against the specified suite of factors set out in the SIA Guideline; determination of the significance of the impacts, and identification of measures to manage or mitigate the project's potential negative impacts and enhance potential benefits.

The methodology employed in preparing this SIA is designed to ensure that the social environment of communities potentially impacted by a project is properly accounted for and recorded, and anticipated impacts are adequately considered and assessed.

² The final *Social Impact Assessment Guideline* was released by DPE in July 2021. Given this project commenced while the draft Guideline was still in place, the draft guideline has been used for this SIA.

3.2.1 Social factors for assessment

The SIA Guideline classifies social impacts in the following way, which forms the core basis of this assessment:

The assessment has been prepared to support the Environmental Impact Statement (EIS) for the Project. The comprehensive assessment of social impacts provides an assessment and identifies the significance of the potential impacts, both positive and negative, during construction and upon operation of Powerhouse Ultimo. Matters for consideration have included:

Mitigation options for the potential social impacts and enhancement measures for the positive social benefits have been discussed, along with the identification of proposed methods for monitoring the social impacts over time.

- **Way of life:** *how people live, get around, work, play and interact with one another on a day-to-day basis,*
- **Community:** *its composition, cohesion, character, how it functions, and sense of place,*
- **Accessibility:** *how people access and use infrastructure, services and facilities,*
- **Culture:** *people's shared beliefs, customs, values and stories, and connections to Country, land, water, places, and buildings,*
- **Health and wellbeing:** *people's physical, mental, social and spiritual wellbeing,*
- **Surroundings:** *access to and use of natural and built environment, including ecosystem services, public safety and security, as well as aesthetic value and amenity,*
- **Livelihoods:** *including impacts on employment or business, experience of personal breach or disadvantage, and the distributive equity of impacts and benefits,*
- **Decision-making systems:** *the extent to which people are able to participate in decisions that affect their lives, procedural fairness, and the resources provided for this purpose.*

Each of these categories should be assessed based both on the tangible observable impacts, as well as considering fears and aspirations of communities impacted.

3.2.2 Assessment stages

Stages in the preparation of this Social Impact Assessment are as follows:

- Baseline analysis of the existing socio-economic environment, involving:
 - Study area definition, including primary and secondary geographic areas likely to be impacted (see **Section 6.0** of this report),
 - Demographic analysis, including socio-economic characteristics of current communities and population forecast (see **Section 6.0**)
 - Provide an estimate of the retained and new jobs that would be created during the construction and operational phases of the development in addressing the issued SEARS (summarised in **Section 9.3.4**)
 Review of relevant background information, along with relevant local and state policy frameworks (see **Section 5.0**).
- Stakeholder and community engagement: Findings of stakeholder and community consultation undertaken by Aurecon and Ethos Urban on behalf of the proponent have been reviewed to identify community and stakeholder aspirations and values (see **Section 7.0**). A summary of community engagement projects undertaken by the City of Sydney Council that are relevant to this SIA have also been reviewed.
- Scoping of issues: Analysis of potential impacts during and post-construction, with each of the directly affected communities and other stakeholders identified in relation to the way they may be affected. Both positive and negative potential issues are identified. A SIA Scoping Checklist has been prepared at the outset of this assessment, in line with the specifications of the SIA Guideline and provided to Create NSW representatives. The scoping exercise is designed to inform what social impacts require further assessment, and the degree of assessment that is required. The scoping process has underpinned the Social Impact Assessment in **Section 8.0**.
- Identification and evaluation of impacts as per the SIA Guideline parameters. This phase draws on the outcomes of the scoping stage. The social impact assessment ultimately appraises the significance of each

identified (positive or negative) impact based on its duration, extent and sensitivity of impact “receivers.” This results in a social risk rating for impacts, as per the social impact significance matrix shown in **Section 8.0**.

- Identification of mitigation strategies to manage impacts and enhance benefits of the development.

3.2.3 Information sources and assumptions

The key data sources and policy documents used to prepare this SIA have been outlined at **Appendix A**.

Assumptions applied to complete this SIA include:

- The key findings of the background studies and technical reports are accurate.
- Socio-economic data for each study area accurately reflects the community demographic profile.
- Outcomes of the community consultation and engagement undertaken to date accurately reflect community views.
- All potential social impacts to the local community and special interest groups that can reasonable be identified have been included in this report.

3.2.4 SIA author qualifications and experience

The report authors meet the qualifications and experience criteria outlined in the SIA Guideline – i.e., have qualifications in relevant social science disciplines and/ or proven experience over multiple years and competence in social science research methods and SIA practices. Table 2 summarise the experience of the report authors.

Table 2 Authors' experience

<p>Allison Heller <i>BTP (Hons 1)</i> <i>PGDipHistArch</i> <i>MPIA</i></p> <p>Director, Social Strategy & Engagement</p>	<p>Project Director</p> <p>Allison has more than 20 years' experience in urban and social planning/ policy across the private and public sectors. With expertise in social impact analysis, social infrastructure planning, housing strategies and broad-based social sustainability strategies, she brings a deep understanding of the complexities of urban development and the growing need for organisations to demonstrate social value to governments and communities. Allison is a leading SIA practitioner. She has led SIAs for major government and private sector projects, including a range of state significant health, education, transport and cultural infrastructure projects. She is adept at applying the NSW DPE's new SIA Guideline 2021. Allison brings deep expertise in leading Social Strategy and multidisciplinary teams to work constructively with clients in identifying, analysing, and advising on social impacts, with a view to optimising social outcomes.</p>
<p>Sasha Deshon <i>GradCertSocImp</i> <i>GradCertProjMgmt</i> <i>B.Soc.Sc.</i></p> <p>Principal, Social Strategy & Engagement</p>	<p>Project Manager</p> <p>Sasha has over 20 years' experience working in, and advising, government, business, and NGOs. She is a leading social innovation strategist, dedicated to helping organisations jointly achieve greater social impact. With expertise in organisational capacity building and stakeholder engagement, Sasha has created innovative place-based solutions to achieve significant social and economic shifts. Her specialities include strategic collaboration, collective impact, impact strategy and measurement, placemaking, commercial sustainability, social enterprise and procurement, philanthropy, and impact investment. Sasha has worked across urban, regional, and rural contexts developing and implementing socially innovative strategies which have resulted in social impact approvals for major infrastructure projects. Her experience spans ASX 200 listed clients, State and local governments and grass-roots non-profit organisations where she has helped achieve positive community change.</p>
<p>Chloe Brownson <i>BComms DipLang</i></p> <p>Urbanist, Social Strategy</p>	<p>Project Analyst</p> <p>Chloe is an Urbanist – a graduate of the University of Technology, Sydney, having completed a Bachelor of Communications with a major in Social and Political Sciences. During her time at Ethos Urban she has gained experience in a number of government and private projects, and a comprehensive understanding of how the urban environment influences social wellbeing. Chloe is skilled in social research and analysis, on issues such as policy drivers for new development, identifying social sustainability outcomes and opportunities, and social impacts of new infrastructure.</p>

4.0 Strategic context

4.1 Site location and context

Powerhouse Ultimo is situated upon the lands of the Gadigal people of the Eora Nation. The site is located at the interface between the suburbs of Ultimo, Pyrmont, Haymarket, and Darling Harbour, and this is reflected in its strategic positioning in relationship to the local pedestrian, active transport, public transport, and road network. It is located at the northern terminus of The Goods Line from Central Station and close to the southern end of Tumbalong Boulevard. Macarthur Street serves as a pedestrian-friendly east-west connection between Ultimo and the southern CBD. The proximity to the site, and bus stops at Harris Street provide access to Central as well as centres including Ryde and Parramatta via Victoria Road.

The site is owned by the Museum of Applied Arts and Sciences Trust and is known as 500 Harris Street, Ultimo, comprising six lots across approximately 2.4 hectares of land. The focus of the Social Impact Assessment is on the portion of the site including and to the north of Macarthur Street, which runs east-west through the site connecting Ultimo and Haymarket. The site includes the Ultimo Power House buildings (Boiler Hall, Turbine Hall and Switch House) and former Ultimo Post Office buildings (both listed on the NSW State Heritage Register), along with the 1988 Harris St extension, Harris Street forecourt and south-eastern entrance.

No substantive works or changes in use are proposed to the Harwood Building located between Macarthur Street and Mary Ann Street. The project will include works to the existing heritage listed items to facilitate their ongoing adaptive reuse for the Powerhouse Museum and will also include new built form that is compatible with existing heritage items across the site.

The urban context of the site is characterised by a wide array of land uses, development typologies and architectural styles. There is no consistent street wall height along Harris Street or intersecting local streets, with 2-storey historic terraces sitting in close proximity to more modern 6-8 storey commercial and mixed-use buildings. The recent urban renewal of Darling Square provides a rapid transition in density and building heights immediately to the east of the site, with a range of 20+ storey buildings within a modern setting.

The site area is approximately 2.4 hectares within the southwestern portion of the Pyrmont Peninsula precinct on Harris Street, Ultimo, in between Central Station and the Pyrmont Peninsula. The site is rectangular in shape, comprising a mix of industrial heritage buildings and modern structures at 500 Harris Street, Ultimo within the City of Sydney LGA. Development and access context is detailed in **Section 7.5**.

Figure 2 and **Figure 3** over the following pages assists to identify the indicative boundaries of the Powerhouse Ultimo site, within its geographic context.



Figure 2 Geographic context of the site
 Source: Pyrmont Place Strategy, annotated by Ethos Urban



Figure 3 Indicative site plan and key site features

Source: Ethos Urban

4.2 Key site features

4.2.1 Existing development and post-colonial heritage

The site contains two heritage-listed buildings, being the 'Ultimo Power House' (c.1899-1905) and the 'Former Ultimo Post Office including interior' (c.1901), both of which are listed on the State Heritage Register under the Heritage Act 1997. An existing Conservation Management Plan (Architectural Projects, 2003) is in place, and a Draft Conservation Management Plan has been prepared by Curio Projects (2022) and has been submitted as part of the Concept SSDA.

The existing Powerhouse Museum opened at 500 Harris Street in March 1988 and was widely acknowledged for the adaptive reuse of the original Powerhouse buildings, for the addition of new related spaces, and for the opening exhibitions which crossed applied arts and sciences. Significantly, the museum was acknowledged internationally for its adaptive reuse, and the project won awards, notably the Sir John Sulman Award for public buildings.

Other development within the site comprises the former Tram Shed (Harwood Building) and the 1988 museum building fronting Harris Street (Wran Building). A café building has been constructed immediately to the south of the Powerhouse at the northern end of The Goods Line. Located at the corner of Harris Street and Macarthur Street, the forecourt acts as the main point of public entrance to the site but provides limited activation and is disconnected from higher-quality urban spaces including the Ultimo Goods Line.

The site is located in the vicinity of a number of locally-listed heritage items identified under the Sydney LEP that would be required to be considered in any SSD Application, including the Glasgow Arms Hotel, terrace-house groups along Harris St and Macarthur St, the former Millinery House building, former National Cash Register building and the former Technological Museum/Sydney Technical College building in Harris Street.

The site is not identified as being located within a Heritage Conservation Area; however, it is adjacent to and in the vicinity of the Harris St Ultimo Conservation Area.

4.2.2 Transport and accessibility

Loading dock access to the site is provided to both the Museum and Harwood Building via Macarthur Street, with a covered bridge connecting the two buildings allowing for undercover unloading and transfer of materials between the two buildings. At-grade parking is provided for contractors at the eastern end of Macarthur Street, along the eastern edge of the Harwood Building adjacent to the Ultimo Goods Line and immediately to the south of the Harwood Building. Limited vehicular access to the site is also provided to the site from Pyrmont Street to the north, beneath the Pier Street viaduct for service and emergency purposes.

The Powerhouse Ultimo site directly abuts the light rail corridor, with no pedestrian access authorised in the light rail corridor to the north of Hay Street. Access to the Exhibition Centre light rail station is available from Pyrmont Street, however, pedestrian access from the Powerhouse to the station is only via the through-site link to the north of the Ian Thorpe Aquatic Centre, and as a result the Paddy's Market station to the west is generally more convenient for visitors.

Public bus stops are located on Harris Street immediately to the north of Macarthur Street in front of the Harris Street forecourt. These stops are serviced by the 501 Route which connects Central Station with Parramatta via Victoria Road, including stops in Drummoyne, Gladesville, and Top Ryde. Coach layover parking is located a short distance to the east of (and outside of) the site in Darling Drive to the south of Hay Street.

The site is also well serviced by a number of key walking and cycling routes, providing connections to key destinations such as Darling Harbour, the Sydney CBD, and Central Station. The Goods Line, at the rear of the site facilities a continuous connection between the site and Central Station/Railway Square, while a shared path on Darling Drive provides connectivity to Darling Harbour, the Sydney CBD and into Pyrmont.



Figure 4 Nearby development on Harris Street



Figure 5 Harris Street Forecourt

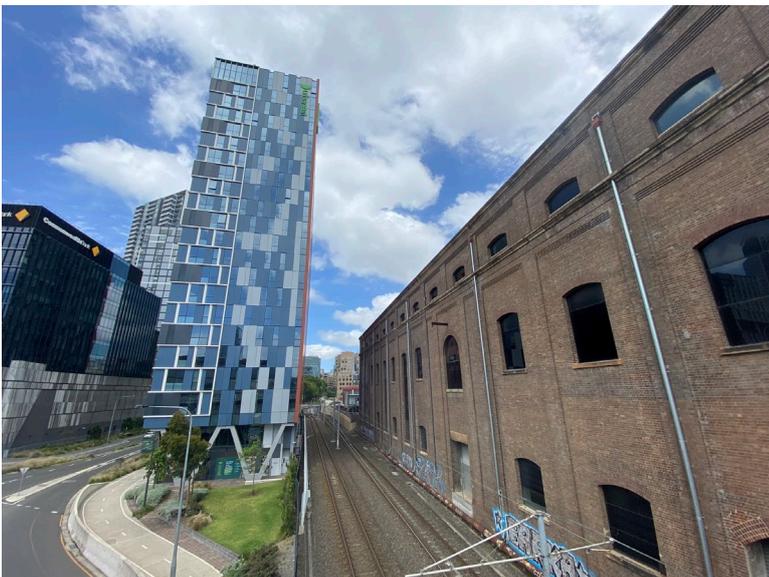


Figure 6 Light Rail Eastern edge of Powerhouse site



Figure 7 Harris Street, building opposite site

4.3 Surrounding local context

The surrounding context of the site is informed by a wide variety of land uses, building densities and architectural styles as summarised below in regard to the immediate surrounds:

- Harris St (William Henry St – Macarthur St) – Mix of 2-6 storey residential buildings, a pub/hotel and 3-8 storey commercial and educational buildings,
- Harris St (Macarthur St – Mary Ann St) – 2-3 storey commercial and residential terraces, with taller 6-8 storey commercial and educational buildings towards the Mary Ann St intersection,
- Systum St – 2-storey historic terraces in the north, modern 3-8 storey residential apartments towards the south,

- Darling Square – 20 storey student accommodation buildings directly to the east, beyond which is a dense urban precinct with a range of employment, residential and tourism uses, with Darling Harbour further north,
- Mary Ann St – University of Technology Buildings 8 (Gehry Building) and 15 with a range of educational uses,
- Ultimo Goods Line – Completed in 2012, the ‘Goods Line’ is a unique linear space which provides connection and amenity by reinterpreting the former railway and tram corridor.

4.4 Strategic location and connectivity

The site and its ongoing use as a museum is influenced by a range of strategic objectives, as summarised below. This section is further rationalised within **Section 7.7**.

4.4.1 Supporting Sydney’s innovation and creative economy

The Powerhouse Ultimo site is identified under the Pyrmont Peninsula Place Strategy (PPPS, 2020) as a contributor to the growth of knowledge-based jobs, innovation and creative, cultural and community uses within the locality. The renewal of Powerhouse Ultimo is strategically aligned and geographically positioned to deliver on objectives for Sydney’s Innovation and Technology Precinct (also known as the Tech Central).

Located adjacent to the site at the southern edge of the Sydney CBD, the renewed Powerhouse aims to capitalise on the existing innovation, technology, and education ecosystems in the surrounding area to realise NSW Government’s vision for Sydney to be known as a global leader in innovation and technology.

The Powerhouse renewal will contribute toward floor space targets (250,000sqm) for affordable workspace for the incubation of creative enterprises and industry networks within both Sydney’s Innovation Corridor and the Ultimo-Camperdown collaboration area to support social vibrancy and a thriving new creative economy.

4.4.2 Sydney CBD and Darling Harbour as key tourist destinations

The range of major tourist and cultural attractions in the area – including ICC convention centre, Australian National Maritime Museum, Sydney Aquarium, Australian National Maritime Museum, Sydney Chinese Garden of Friendship, Tumbalong Park, Darling Quarter Playground and cafes, and W Hotel – highlights the potential positive impacts on the tourism sector of the proposed Powerhouse Ultimo redevelopment.

The high number of tourism accommodation guests and other visitors in the Sydney LGA will drive demand for social and publicly accessible cultural infrastructure to also meet strategic Government directives for diversification of Sydney’s night-time economy.

Many businesses in Sydney CBD rely on custom from tourists, including hotels, hospitality, entertainment, tour operators and cultural infrastructure. Sydney CBD and Darling Harbour were central destinations for tourists, attracting 8 million domestic and international visitors in 2016 and revitalisation of the Powerhouse and Tech Central precinct will consolidate its future role as the city’s tourism, business and entertainment hub in post pandemic context with consideration to lessening travel restrictions, globally.

4.4.3 Social cohesion and economic vitality in the Sydney CBD post COVID-19

Sydney CBD has been significantly impacted by the Covid-19 pandemic restrictions. Increasing levels of flexible and remote working have reduced the number of workers needing or wanting to come to the city each day, which has impacted local hospitality and entertainment businesses reliant on CBD workers.

An immediate response to Sydney’s revival began in 2021 with trial of the Business Improvement District Model for the Western Harbour Precinct based on direction from the forementioned Pyrmont Peninsula Place Strategy, the Pyrmont Economic Development Strategy, the Western Harbour Alliance, the Committee for Sydney, and the Sydney Business Chamber.

This model has been proposed for the Western Harbour Precinct due to a need for coordinated oversight to enable the area's strategic potential, and to optimise its status as Sydney's 'signature shopfront'. The model seeks to recognise, align and harness the range of state and local government authorities and their jurisdictions, with the major private sector interests in the Precinct and the local community, under a common strategic vision and purpose to optimise the Precinct and its value.

5.0 Strategic policy context

5.1 Policies and strategies reviewed

A range of state and local government policies and strategies have been reviewed in the preparation of this assessment, in order to identify strategic social drivers for the project, and associated areas of impact.

These documents are listed at **Appendix A**. A comprehensive summary of strategic drivers identified for the project is provided at **Appendix B**.

5.2 Strategic drivers identified

Key considerations arising from this policy review are how the project delivers on or contributes to the following outcomes:

- Supporting Sydney's Innovation and Technology Precinct (Tech Central):** Sydney Innovation and Technology Precinct (also known as the Tech Central), is a long-term project between the NSW Government and other stakeholders to “future-proof and diversify the NSW economy.” The vision for Tech Central according to the NSW Government is as follows:

*The Sydney Innovation and Technology Precinct attracts world-leading talent to Sydney's shores. It is a place where world-class universities, ambitious start-ups, high-tech giants and the community collaborate to solve problems, socialise and spark ideas that change our world. The Precinct is underpinned by high quality physical and digital infrastructure.*³
- Boosting the visitor and night-time economy and placing Sydney as a global tourist destination and events capital:** NSW Government aims to make the state the premier visitor economy of the Asia Pacific through significant investment in world-class infrastructure, including cultural infrastructure that will host major cultural and entertainment events and attract both local and international audiences.
- Enriching the arts and cultural sector:** It is a state, regional, and local objective to create world-class cultural attractions and empower artistic and cultural industries, including Aboriginal artists and businesses. There is demand for the modernisation of existing state cultural institutions to meet contemporary standards and needs of changing communities.
- Positioning the Pyrmont Peninsula as a creative and cultural precinct:** Powerhouse Ultimo is situated within the Pyrmont Peninsula which is envisioned to become a renowned cultural and creative destination, drawing talented workforce to Ultimo's growing creative industry hub and offering recreational and cultural experiences and spaces for the local community and beyond
- Recognising the rapidly changing urban context surrounding the site:** The site is situated in a rapidly transforming urban context as part of the emerging technology and innovation corridor in the Camperdown-Ultimo collaboration area and with proximity to the Central Precinct undergoing transformative renewal.
- Supporting community health, equity, and wellbeing:** It is a state and local priority to enable an engaged, empowered, equitable, and healthy community, for example by encouraging active transport, delivering green, open and public spaces, ensuring that all places within Darling Harbour Precinct and Pyrmont Peninsula are accessible to all people.
- Revitalising and leveraging heritage assets to enhance the character of the precinct:** State government heritage policies recognise that heritage buildings represent local character and contribute strongly to sense of place. It is a priority to revitalise existing historic buildings and exhibition spaces in to contribute to the character and urban fabric of the precinct.
- Maximising connectivity and access to active and public transport, including the Pyrmont Metro Station:** Powerhouse Ultimo will have access to the new Metro West station, improving connectivity to the Pyrmont Peninsula and bringing in a pool of workers and visitors to the area. It is a state priority to realise the benefits of this Pyrmont Metro station and provide an urban environment that promotes active and public transport use to the transform the Pyrmont Peninsula as a destination.

³ NSW Government 2018, 'The Sydney Innovation and Technology Precinct: Panel Report', p. 9 <https://www.global.nsw.gov.au/sites/default/files/2021-02/FINAL%20-%20Tech%20Precinct%20Panel%20Report%20%5bAccessible%5d.pdf>

6.0 Social baseline – local context

6.1 Introduction

This section provides an overview of the site and the existing social context surrounding the site. It analyses the existing social characteristics of the community within the identified study areas to better understand the potential characteristics and context of the existing community that may be impacted by the proposed development.

6.2 Study area definition: area of social influence

For the purposes of the Social Impact Assessment, study areas have been chosen taking into consideration the need to factor in both local social impacts and those likely to occur on a broader scale. The study areas have been defined using ABS Statistical Area boundaries (SA1 or LGA boundaries) that best reflect the identified geographical areas.

The Primary Study Area (PSA) applied to this SIA is the area covered by a 400m radius surrounding the subject site. This area covers impacts likely to be experienced by those in the immediate vicinity of the site, both during construction and operation of the development.

The Secondary Study Area (SSA) applied to this SIA is the area covered by the Sydney LGA. This area covers impacts likely to be experienced by those within the site's broader locality, mostly during the development's operation, but also during construction. This ensures a strategic alignment of the assessment.

The selected Primary Study Area and Secondary Study Area for this assessment are shown in **Figure 8**.



Figure 8 Study Areas

Source: Ethos Urban

6.3 Community profile

This section provides an analysis of the existing social characteristics of the community and resident population projections within the identified study area to better understand the communities that may be impacted by the proposed development.

6.3.1 Current demographic characteristics

An overview of the demographic profile of the PSA and City of Sydney residents is compared to the Greater Sydney benchmark and is based on 2016 ABS Census of Population and Housing data. Key findings are highlighted below:

- **Primary study area residents are mostly young adults**, with a median age of 26 years, compared to 32 years for residents living in the City of Sydney. This lower median age within the study area is driven down by the large share of residents aged 18-34 years, which account for 71.4% of the population and reflect the large number of students living in the area.
- **High proportion of tertiary students in the primary study area.** Within the study area, approximately 45.0% of the residents are attending education institutions, which is almost double the rate in Greater Sydney at 25.2%. Of those attending education institutions, 63.2% are attending university or another tertiary facility, which is significantly higher compared to Greater Sydney where only 24.2% of the resident population are attending education.
- **There is a significant share of lone person (26.4%) and group households (29.4%)** within the primary study area. This compares to Greater Sydney where only 21.7% of dwellings are occupied by lone persons, while 4.6% are group households. Families are the primary household type in the study area, accounting for 44.2% of total households, which is low compared to 73.7% in Greater Sydney.
- **The majority of dwellings are flats, units, or apartments**, representing 93.0% of all dwellings in the primary study area. Of total occupied dwellings, 72.4% are rented, which is significantly higher than the share of rented dwellings in Greater Sydney at 35.1%. There is a large amount of student accommodation in the primary study area due to close proximity to UTS, Sydney University and TAFE. There is also a high level of residential transience in the area where 43.8% of residents lived in a different address as the previous year, compared to 16.0% in Greater Sydney.
- **Residents in the primary study area have lower median individual incomes** of \$22,440 per annum, which is 40.1% lower than the Greater Sydney median of \$37,460. This likely reflects the high proportion of students in the area, who would typically earn lower incomes. The median individual income per annum is \$49,520 in the secondary study area, which is significantly higher than Greater Sydney median by 32.2%.
- **The primary study area is culturally and linguistically diverse**, demonstrated by the 78.4% of residents born overseas, and the 76.4% of residents that speak languages other than English at home. These largely include Chinese born residents (29.5%), that speak Chinese languages at home (primarily Mandarin and Cantonese), as well as residents from Thailand (11.2%), and Indonesia (7.3%).

A detailed resident demographic profile is provided at **Appendix C**.

6.3.2 Resident population forecast

For the purposes of this analysis, population projections have been sourced with reference to Transport for NSW Population Projections and have been rebased to the latest ABS estimated resident population figure. **Figure 9** illustrates historical and projected population from 2016-2036.

Key findings are as follows:

- Population estimates show that there are 13,490 residents living within the PSA in 2022, an increase of +250 residents since 2016 at a rate of +2.0% per annum. The 53,650 persons in the PSA represent approximately 5% of the total City of Sydney LGA population, estimated at 253,130. Notably, the average annual population growth rate in the PSA and City of Sydney at 2.0% and 2.3% per year, between 2016 and 2021, is higher than the historical average for Greater Sydney of 1.8% per annum over the same period.
- Population forecasts for the PSA show that there will be an estimated 18,240 residents in 2036, an increase of +4,750 residents over the projected period. This level of growth represents an average annual increase of +340 residents, at a rate of 2.2% per annum. This compares to the forecast average population growth rate for Greater Sydney over the 2021-2036 period of 1.5% per annum.
- The City of Sydney LGA is forecast to accommodate an additional +53,160 residents between 2022 and 2036, with an estimated resident population of around 306,290 by 2036. The PSA is estimated to support around 5.96% of this population growth. These additional residents will drive demand for new housing, employment and other social infrastructure facilities in the precinct over the next decades.

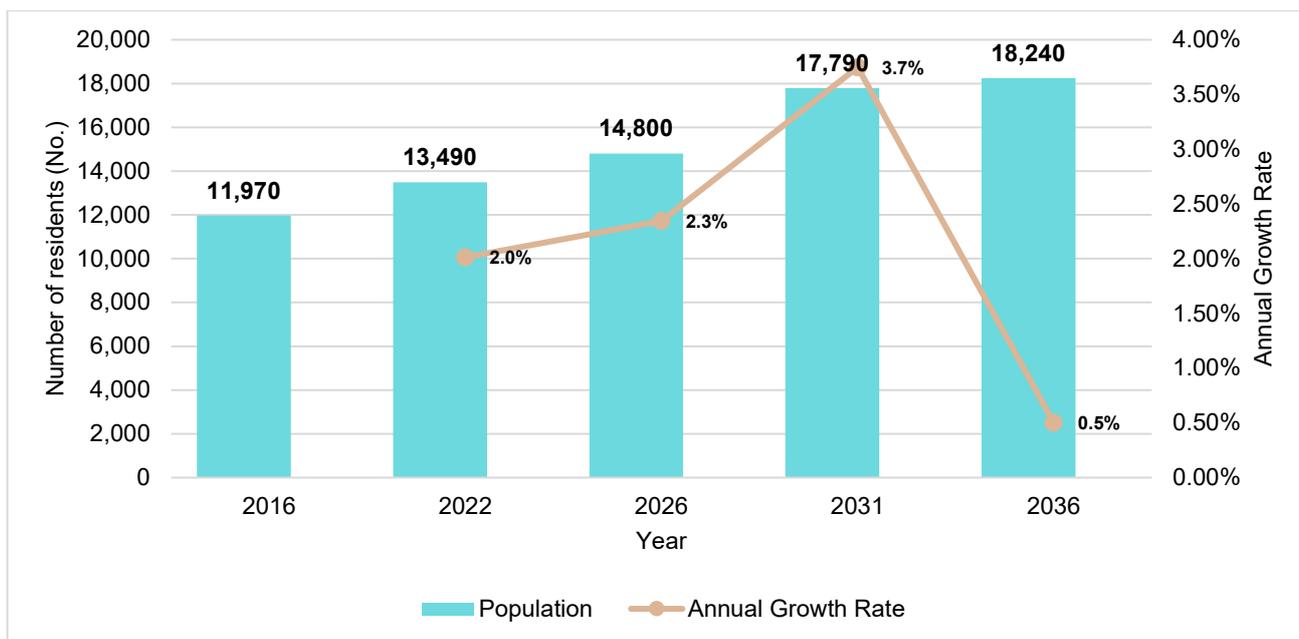


Figure 9 Population estimates from 2016-2036

Source: ABS, Transport for NSW, Ethos Urban

Table 3 Population estimates to 2036

Population	2016	2022	2026	2031	2036	2022 to 2036
PSA	11,970	13,490	14,800	17,790	18,240	+4,750
SSA	221,150	253,130	261,020	288,610	306,290	+53,160
Greater Sydney	5,024,920	5,584,500	5,992,660	6,463,600	6,923,120	+1,338,620
Annual Growth	2016-22	2022-26	2026-31	2031-36	2022-2036	
PSA	+250	+330	+600	+90	+340	
SSA	+5,330	+1,970	+5,520	+3,540	+3,800	
Greater Sydney	+93,260	+102,040	+94,190	+91,900	+95,620	
Annual Growth Rate	2016-22	2022-26	2026-31	2031-36	2022-2036	
PSA	2.0%	2.3%	3.7%	0.5%	2.2%	
SSA	2.3%	0.8%	2.0%	1.2%	1.4%	
Greater Sydney	1.8%	1.8%	1.5%	1.4%	1.5%	

Source: ABS, Transport for NSW

6.4 Local social infrastructure context

This section includes an overview of the local social infrastructure context within a 400m radius of the subject site (the Primary Study Area, or PSA), as well as a broader view of arts and cultural venues across inner Sydney which are complimentary to the service offering of the proposed development (Sydney LGA being the Secondary Study Area, or SSA). The following categories of local social infrastructure have been identified and mapped at **Figure 10**:

- **Childcare:** There are eight (8) childcare centres located within 400m of the site, including Darling Nest Child Care Centre, KU Ultimo, Ultimo Children's Program Childcare, Believe Playschool, and Magic Pudding Child Care Centre.
- **Community Facilities:** There are four (4) community facilities located within 400m of the site – Ultimo Community Centre, Ultimo Library, Darling Square Library, and Uniting Harris Community Centre.
- **Education facilities:** There are six (6) education facilities located within 400m of the site, including Ultimo Public School, TAFE NSW Ultimo, University of Technology Sydney, Rosehill College, and Abbey College Australia.
- **Health/aged care:** There are three (3) health facilities located within 400m of the site – Its Time To Care, Myhealth Darling Square, and Doctor Lun Surgery. There are no aged care facilities located within 400m of the site.
- **Open space:** There are eleven (11) open spaces located within 400m of the site, including Tumbalong Park Playground, Wentworth Park, Quarry Green, Ada Place Park, and Fig Lane Park.
- **Recreation facilities:** There are four (4) recreation facilities located within 400m of the site – Ian Thorpe Aquatic Centre, Ultimo Community Centre, Sonny Yng's Table Tennis, and an outdoor fitness station.

Inner Sydney is a nationally-significant destination for art and cultural venues. Destinations equivalent to Powerhouse Ultimo have been mapped at **Figure 11**, and include several museums, galleries, and theatres.

6.5 Local transport and accessibility

The site is highly accessible via public transport and is walkable from Central Station and several Light Rail stops, including Exhibition Centre and Paddy's Markets. These public transport stops are serviced by a wide variety of local and district, and regional routes across Sydney and beyond.

- Light rail, with stops on both the Inner West and CBD and South East light rail line within 800m of the site
- Heavy rail, with Central Station and Town Hall approximately 10 minutes' walk from the site; Sydney Central Metro serves lines T1, T2, T3, T4 & T8 lines.
- Bus, with bus stops located on Harris Street, immediately adjacent to the site. Railway Square bus terminus is also within convenient walking distance via the Goods Line, which are serviced by the following routes:
 - 501 Parramatta to Central Pitt St via Victoria Rd,
 - 501 West Ryde to Central Pitt St via Pyrmont and Ultimo.
- Coach set-down and pick-up zone on Harris Street, accommodating 4 coaches at any one time.

All of this is further enhanced by the well-connected pedestrian network in Chinatown and the new Darling Square. The site is well serviced by a number of key walking and cycling routes, providing connections to key destinations such as Darling Harbour, the Sydney CBD, and Central Station. The Goods Line, at the rear of the site facilitates a continuous connection between the site and Central Station/Railway Square, while a shared path on Darling Drive provides connectivity to Darling Harbour, the Sydney CBD and into Pyrmont.⁴

6.6 Future transport infrastructure

The site will be walkable from the planned Sydney Metro Station at Pyrmont, providing a quick and efficient connection to the Pyrmont Peninsula and its places of interest. Pyrmont Station will greatly enhance plans to revitalise this inner-city precinct by encouraging jobs, investment and economic growth. The Station will enable a new level of connectivity to the Pyrmont Peninsula and prioritise pedestrian movement around the station through activated street frontages and open public spaces⁵.

The Pyrmont Metro Station will provide a 20-minute connection to Westmead, 18-minute connection to Parramatta, and a 13-minute connection to Sydney Olympic Park.

⁴ JMT Consulting, *Transport Impact Assessment, 2020*

⁵ Sydney Metro confirmed station locations at Pyrmont and the Sydney CBD

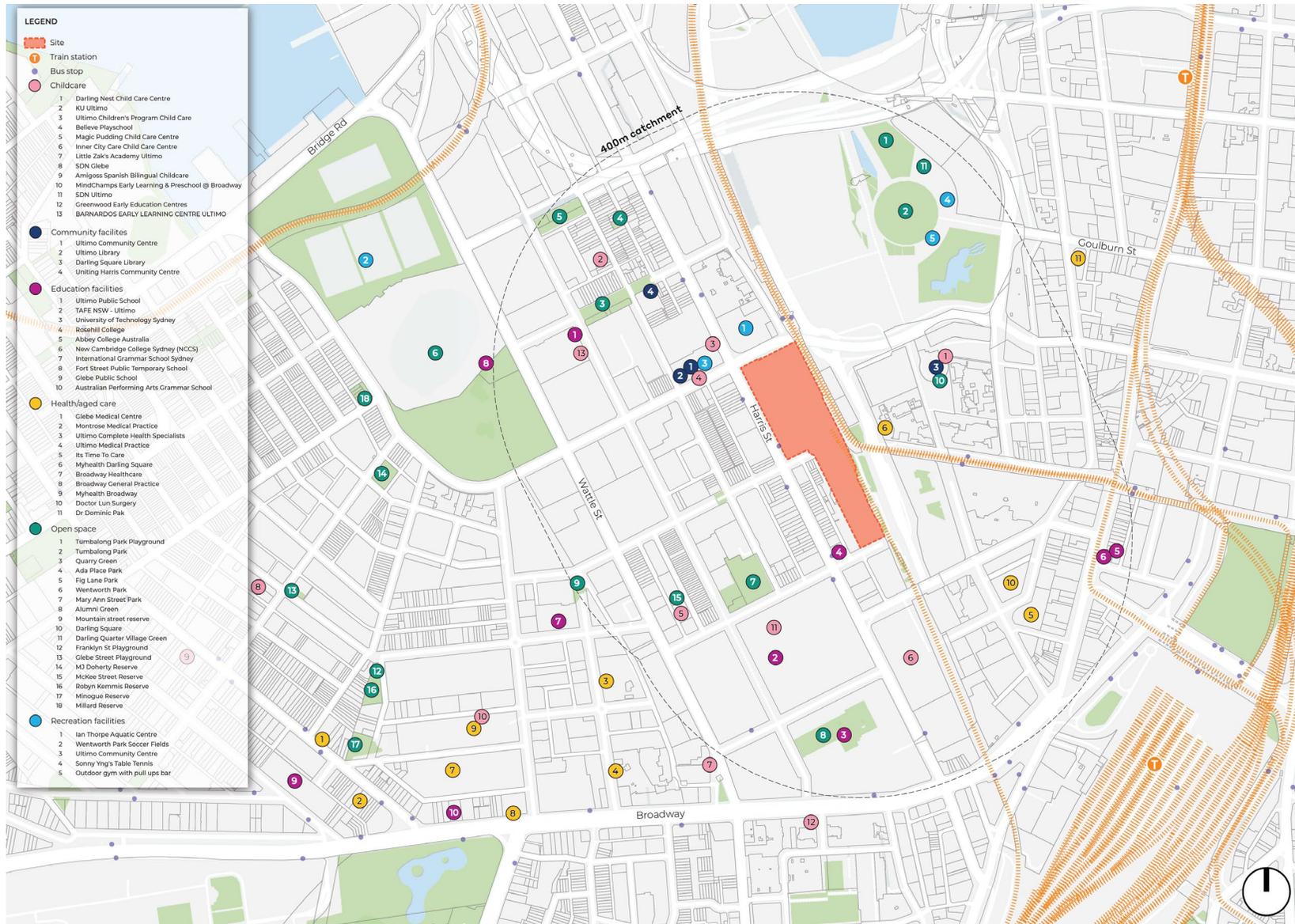


Figure 10 Local social infrastructure context

Source: Ethos Urban



Figure 11 Art and cultural infrastructure across Inner Sydney

Source: Ethos Urban

6.7 Local geographic and strategic positioning of the Powerhouse Ultimo Renewal

As previously referred to in **Section 5.3.1**, this section provides a further contextual analysis of the Powerhouse Ultimo Renewal, highlighting strategic drivers impacting the project.

- **Supporting Sydney's innovation and creative economy**
 - Delivering Sydney's Innovation and Technology Precinct (Tech Central)
 - Connecting with the Camperdown-Ultimo Collaboration Area
 - Tech start-ups, entrepreneurship and Sydney's innovation corridor
 - Space for cultural and creative industries essential to innovation precincts and delivery of Pyrmont Peninsula Place Strategy
- **Invigorating Sydney CBD and Darling Harbour as key tourist destinations**
 - Exclusive national and international exhibitions and programs
 - Tourism industry and the visitor economy in City of Sydney
 - Reactivation and diversification of Sydney's night-time and visitor economies
 - New public domain spaces for community and civic events
- **Supporting social cohesion and economic vitality in the Sydney CBD post COVID-19**
 - Uncertain futures post COVID-19

Supporting Sydney's innovation and creative economy

The area surrounding Powerhouse Ultimo is home to a growing innovation ecosystem, reflecting Sydney's burgeoning Innovation Corridor (see **Figure 12** over page). Powerhouse Ultimo is positioned within the north-eastern end of the NSW Government's Sydney Innovation and Technology Precinct (also referred to as Tech Central) and of the Greater Sydney Commission's Camperdown-Ultimo Collaboration Area. These initiatives promote the creation of job opportunities, particularly jobs of the future in innovation and technology.

Delivering Sydney's Innovation and Technology Precinct (Tech Central)

Sydney Innovation and Technology Precinct (also known as the Tech Central), is a long-term project between the NSW Government and other stakeholders to "future-proof and diversify the NSW economy." **Figure 12** is a map representing the indicative area of Tech Central, shaded in blue, encompassing Darling Harbour Precinct north-east of the site.

The Sydney Innovation and Technology Precinct is the NSW Government's vision for Sydney to be known as a global leader in innovation and technology. It is located at the southern edge of the Sydney CBD to capitalise on the existing innovation, technology and education ecosystems in surrounding. The aim of the Sydney Innovation and Technology Precinct is to create 250,000 square metres of floor space for technology companies, including affordable workspace for start-ups and early-stage companies.⁶

The vision for Tech Central according to the NSW Government is as follows:

The Sydney Innovation and Technology Precinct attracts world-leading talent to Sydney's shores. It is a place where world-class universities, ambitious start-ups, high-tech giants and the community collaborate to solve problems, socialise and spark ideas that change our world. The Precinct is underpinned by high quality physical and digital infrastructure.⁷

In order to ensure the success of the precinct, location, density of surrounding development, and proximity to key services and facilities need to be equally considered.

⁶ NSW Government 2020, 'Tech Central', <https://www.global.nsw.gov.au/sites/default/files/2020-09/NSW%20Treasury%20Tech%20Central%20Brochure%20-%20Final.pdf>

⁷ NSW Government 2018, 'The Sydney Innovation and Technology Precinct: Panel Report', <https://www.global.nsw.gov.au/sites/default/files/2021-02/FINAL%20-%20Tech%20Precinct%20Panel%20Report%20-%205bAccessible%5d.pdf>

The development of key areas within Tech Central should be accessible and encourage the flow of ideas and knowledge. Additionally, the precinct should be “porous”; it should include open space and community facilities, such as health services, schools, and childcare centres, connected by high-quality walking and cycling links. The urban amenity of Tech Central will be crucial in attracting, developing, and retaining a knowledge-intensive and globally competitive workforce.⁸



Figure 12 Innovation Corridor, Harbour CBD, Greater Sydney Regional Plan 2018

Source: Greater Sydney Commission

⁸ Ibid.

Connecting with the Camperdown-Ultimo Collaboration Area

The Camperdown-Ultimo Collaboration Area – in proximity to the site – is Australia’s capital of innovation and technology consisting of three activity nodes (Haymarket, Camperdown, and Eveleigh), and three connecting axis (Ultimo, Darlington, and Surry Hills). The area is characterised by low-carbon living, green space, high amenity, and high-quality efficient connections. The nodes are clustered around heavy rail infrastructure including Central and Redfern Stations, as well as a number of light rail connections.⁹

The Camperdown-Ultimo Collaboration Area designation is an initiative by the Greater Sydney Commission to build on the existing education, science, health, and skills institutions in the suburbs from Camperdown to Ultimo, and Darlington to Eveleigh, and largely covers the same area as ‘Tech Central.’ The potential reorientation of the Powerhouse Ultimo to the Goods Line plays an integral role in bridging the adjacent precincts and enabling collaboration.



Figure 13 The Goods Line civic space within the Camperdown-Ultimo Collaboration Area

Source: UTS

Research into the successes and challenges for the Camperdown-Ultimo Collaboration Area has identified the following areas for improvement:

- Extension of the Goods Line connection in order to provide better pedestrian access to the Eveleigh and Camperdown nodes.
- Activation of parks, public spaces, and adjacent laneways for day and night use.
- Promotion of impromptu social gathering and knowledge sharing through the creation of pedestrian priority safe zones.
- Creation of an active transport route which would provide connectivity for bikes, scooters, and skateboards.
- Investigation into opportunities for a north-south heavy rail or light rail connection.

Engagement with stakeholders within the Camperdown-Ultimo Collaboration Area also identified that opportunities for collaboration in the district are “somewhat restricted”, “fractured and lacking in cohesion, which may be limiting innovation” (pg. 52). Different industries within the Area tend to seek opportunities within their sector and not beyond, while collaboration between universities is limited by competitive tension.¹⁰ It is therefore a priority to remove obstacles of innovation and collaboration in the Area in order to continue building its strength and international competitiveness.

⁹ HillPDA Consulting 2019, ‘Camperdown-Ultimo Collaboration Precinct: Innovation & Collaboration Study’.

¹⁰ HillPDA Consulting 2019, ‘Camperdown-Ultimo Collaboration Precinct: Innovation & Collaboration Study’.

Tech start-ups, entrepreneurship and Sydney's innovation corridor

A lack of entrepreneurs in Australia has caused a shortage of start-up founders under the age of 25 compared to other comparable countries. Many early-stage enterprises face barriers in accessing the global business market due to the lack of subsidised support to provide spaces and programs to accelerate their businesses to scale-up and attract investment.

Additionally, the business start-up support ecosystem is fragmented by limited connectivity, geographic dispersion, and low desirability. The start-up density is too low in Sydney to allow for rapid knowledge sharing and effective network creation. Coupled with a lack of skilled talent, limited experienced investors, and an increasing presence from global competition in Sydney, the entrepreneurship ecosystem in Sydney is not in prime position to take on the future global economy.

The City of Sydney's Tech Start-ups Action Plan addresses these challenges. By partnering with government and industry to provide opportunities for learning and leadership development, increasing incubator programmes in subsidised co-working spaces for women, and upskilling local workers physically and digitally across Australia to enter tech or social enterprise start-ups; The City of Sydney aims to increase ecosystem density and catalyse growth in this emerging sector.

Pymont Peninsula Place Strategy: space for cultural and creative industries for innovation precincts

Spaces for local community cultural participation as defined in NSW Government's Pymont Peninsula Place Strategy provide directives for the incorporation of local cultural elements, including public art, and spaces for gathering and participation within the civic domain provided on-site, specifically catering to young people and Aboriginal cultural and maritime heritage as defined in the PPPS.

Research undertaken across 168 cities in Europe demonstrates that creative and cultural cities are more prosperous and have more human capital,¹¹ while studies in US have shown that density of creative workers is a key component of successful innovation economies.¹²

It is then outlined that over a ten-year period, there has been an overall reduction in the supply of space used for creative industries within the City of Sydney area, with an overall reduction of more than 100,000sqm occurring between 2012 and 2017.¹³ The study finds that while opportunities to access internationally renowned art and events are widely available, opportunities to produce cultural work are decreasing, and Sydney now is at a risk of losing its own culture. One of the key reasons is lack of availability and affordability of floor space in the City area and beyond.

Stakeholder interviews undertaken for Camperdown-Ultimo area Innovation & Collaboration Study (HillPDA, 2019) point to the fact that: *"Lack of available floor space was cited as a key threat to future collaboration and innovation. Researchers and start-ups rely on subsidised rent to carry out their activities, particularly in the early stages of a project...Lack of affordable, available and appropriate space is also a key issue for the creative arts industry, who are increasingly finding themselves priced out of precinct."*

With culture underpinning innovation, being one of the pillars of liveable attractive places, increasing wellbeing and give life meaning in intangible ways, it is therefore important to consider opportunities to facilitate or support cultural production when planning for urban renewal areas which highlights the significance of Powerhouse Ultimo and its position in the innovation corridor.

¹¹ Montalto V; Jorge Tacao Moura C; Langedijk S; Saisana M., 2017, The Cultural and Creative Cities Monitor

¹² Knudsen B; Florida R; Stolarick K & Gates G., 2008, Density and Creativity in U.S. Regions, Annals of the Association of American Geographers

¹³ City of Sydney, Floor Space and Employment Survey, 2017, referenced in *Making Space for Culture in Sydney*, 2020



Figure 14 Indicative area of Tech Central, shaded in blue, encompassing Darling Harbour Precinct north-east of the site

Source: NSW Government

Cultural infrastructure and heritage conservation to support social vibrancy and thriving creative industries

The City of Sydney recognises that there is limited creative and cultural expression opportunities currently, and in particular a lack affordable supportive infrastructure floorspace in the LGA¹⁴. Additionally, there are often administrative barriers and ‘red tape’ which prevent frequent cultural and creative activity in the public realm. The affordability of commercial floorspace, which has led to a reduction in cultural infrastructure space, as well as spaces for small to medium sector for rehearsal and performance, has been identified as a further contemporary barrier to innovation. City of Sydney Goals of Council’s Creative Cultural Policy are to, therefore, develop projects and partnerships that foster international cultural connections with local results and to support growth of the local visitor economy through targeted cultural initiatives. It is an objective of Council to ensure Sydney’s cultural sector and creative industries are supported and enhanced leading to greater sector sustainability, productivity gains, and innovation¹⁵.

¹⁴ City of Sydney Creative City Cultural City and Action Plan 2014-2024

¹⁵ City of Sydney 2030 plan

The City of Sydney’s vision for Sydney’s cultural life is as follows:

“Creativity in Sydney is visible. Creativity is not measured by the number and quality of our cultural venues. It is evident in the city’s street life, in expressions of creativity in the public domain (and its virtual equivalents), and in memorable precincts that offer a variety of large- and small-scale activity, interaction and experiences.”¹⁶

Invigorating Sydney CBD and Darling Harbour as key visitor and tourist destinations

A key sector impacted by the proposed Powerhouse Ultimo renewal includes tourism. Many businesses in Sydney CBD rely on custom from tourists, including hotels, hospitality, entertainment, tour operators and cultural infrastructure. While COVID-19 has prevented the majority of international travel, prior to the pandemic, Sydney CBD and Darling Harbour were central destinations for tourists, attracting 8 million domestic and international visitors in 2016¹⁷.

The area is currently undergoing urban revitalisation, upgrading older buildings to enhance the precinct and consolidate its role as the city’s tourism and entertainment hub. When the Powerhouse was established on the former Ultimo Powerhouse site in the 1980s, many other leisure/cultural projects completed within Darling Harbour were constructed during this time including the former Convention Centre, Exhibition Centre, Entertainment Centre, fish market and the IMAX, which have also recently been redeveloped – along with the reopening of Tumbalong Park, having re-activated the area.

Large-scale projects in the broader district, such as the Barangaroo precinct further north-east of the site (including the International Towers, and Crown Sydney), and Mirvac’s proposed redevelopment of the Harbourside Shopping Centre directly to the East of Darling Harbour, will further transform the precinct.

The high number of tourism accommodation guests and other visitors in this area will drive demand for social and cultural infrastructure and amenities that are publicly accessible, including spaces with free Wi-Fi and public seating.

Tourism industry and the visitor economy in City of Sydney

The tourism industry generates significant economic activity within the City of Sydney LGA. **Figure 15** shows that the economic value of tourism and hospitality in the City of Sydney is much higher than the relative contribution across New South Wales.

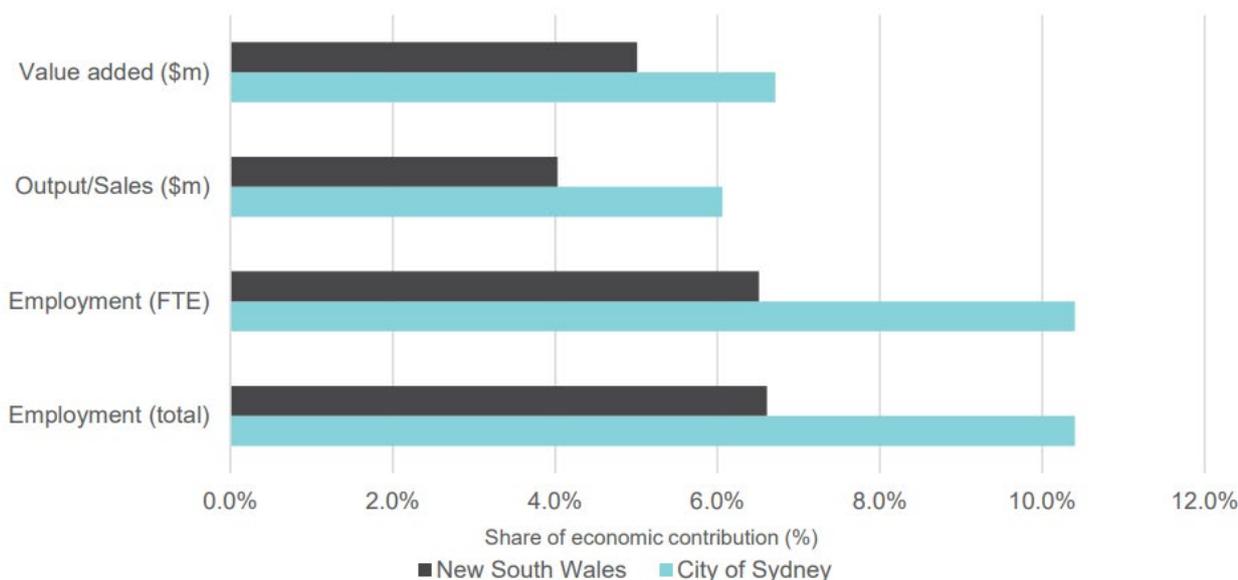


Figure 15 Tourism contribution (%) – City of Sydney vs NSW 2019/20

Source: Economy.id

¹⁶ City of Sydney 2014, ‘Cultural Policy and Action Plan 2014-2024’.

¹⁷ Our Greater Sydney 2056: Eastern City District Plan (Greater Sydney Commission, 2018)

In particular, the tourism and hospitality industry contributed to over 10% of total employment in the City of Sydney, and 6 per cent in economic value added activity in 2019/20, demonstrating the importance of the industry to the economy.

Value added economic activity generated by the tourism industry within the City of Sydney has increased in recent years, generally in line with the increase in visitor numbers. This includes an increase in value added from around \$6 to \$10 billion per annum. Most of this growth is attributed to an increase in value added activity directly related to the tourist industry, as compared to flow-on benefits (refer to **Figure 16**). The City of Sydney tourism industry is supported by more than 10,000 tourism businesses (City of Sydney Tourism Action Plan 2013) operating throughout the LGA, including within the Pymont Peninsula.

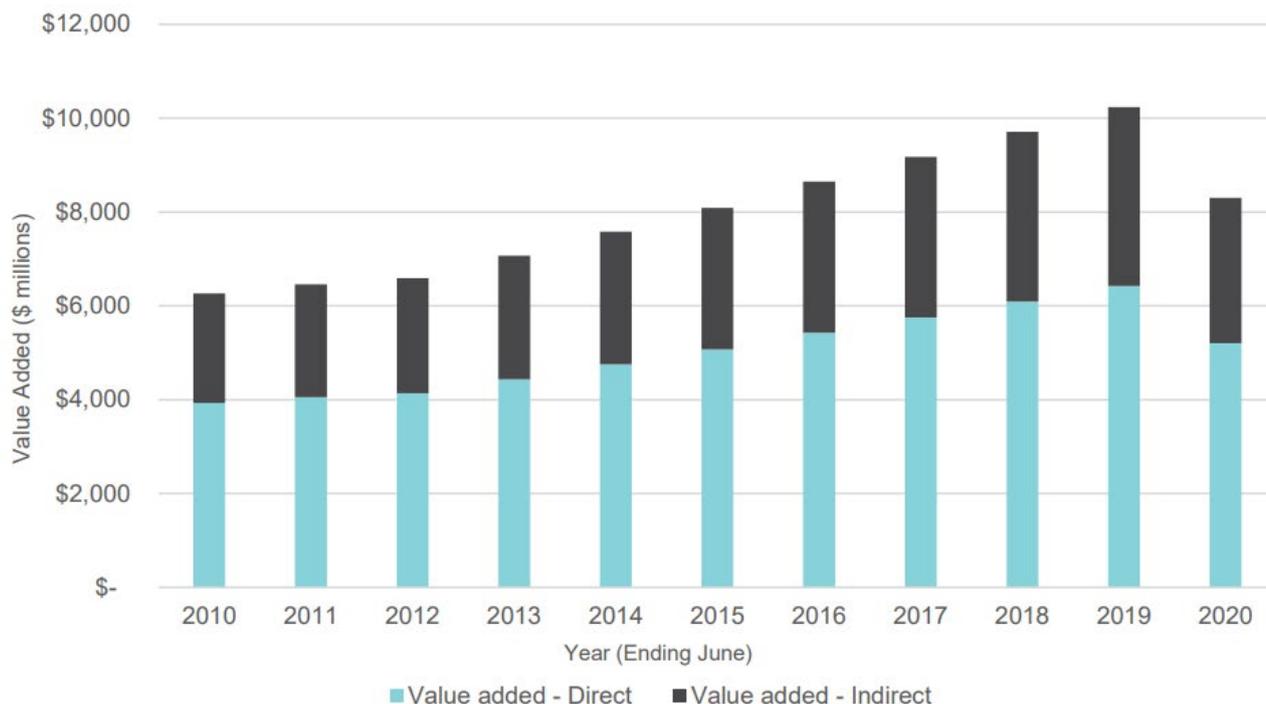


Figure 16 Tourism industry value added – City of Sydney

Source: *Economy.id*

Supporting social cohesion and economic vitality in the Sydney CBD post COVID-19

Sydney CBD has been significantly impacted by the COVID-19 pandemic-related lockdowns and consequent remote and flexible work arrangements. Coinciding with the significant impacts that the interstate and international border closures have had on the local tourism and related industries, the loss of the two key customer bases have had severe impacts on many Sydney CBD hospitality and entertainment businesses. The extended period of largely empty streets and temporary or permanent closures of various small businesses in the area have further exacerbated challenges to local cohesion and social capital in the high-density commercial area as a living and daily working environment.

An immediate response in planning for Sydney’s economic and social revival began in 2021 with trial of the Business Improvement District Model for the Western Harbour Precinct based on direction from the forementioned Pymont Peninsula Place Strategy, the Pymont Economic Development Strategy, the Western Harbour Alliance, the Committee for Sydney, and the Sydney Business Chamber.

This model has been proposed for the Western Harbour Precinct due to a need for coordinated oversight to enable the area’s strategic potential, and to optimise its status as Sydney’s ‘signature shopfront’. The model seeks to recognise, align and harness the range of state and local government authorities and their jurisdictions, with the major private sector interests in the Precinct and the local community, under a common strategic vision and purpose to optimise the Precinct and its value.

Key urban thinkers such as Richard Florida 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. Provision of amenities, cultural attractors, and a high quality of built environment will be the key to attract future residents, and workforce and visitors back to the city area. Renewal projects designed to activate the city and attract residents, workers and visitors will play a key role in Sydney's economic recovery and growth going forward.

Reactivation and diversification of Sydney's night-time economy

Across the Sydney CBD each year, large scale celebrations and festivals are planned across different venues and public spaces programmed throughout (VIVID, New Year's Eve, Lunar New Year, Christmas Carols in Martin Place, Sydney Festival etc). These events attract high numbers of visitors to the Sydney CBD, and the 24-hour economy is seen as vital in post-pandemic recovery, through economic development concentrated in night-time hubs that are vibrant, diverse, and create a feeling of community connectedness¹⁸.

At the same time, the diversity of night-time activities in the CBD area is limited, as restaurants, cafes, entertainment options and retail shops in the area close to the site tend to rely on workers for trade – and are less likely to be open after 7pm or on weekends.

City of Sydney Council has recognised the need to diversify the night-time economy within the Sydney CBD, to enhance the activation and vibrancy of the area. This policy direction is reinforced in the Eastern City District Plan, which states:

“Cultural, entertainment, arts and leisure activities must continue to be provided to build a more diverse and competitive offering in these sectors.

The Harbour CBD's attractiveness is further reinforced by night-time activities, from popular food precincts, clubs, venues and small bars to lifestyle activities like cinemas and 24-hour gyms.

Protecting and diversifying the night-time economy in appropriate locations is an essential component of the CBD's growth”

The City's aspirations for Darling Harbour as an entertainment precinct is reinforced in the OPEN Sydney: Future directions for Sydney at night policy. The combination of an end of lockout laws and the imperative of maintaining and enhancing economic prosperity in the post-COVID economy cements the precinct's pivotal role in Sydney's fast-expanding night-time economy.

Renewal of Powerhouse Ultimo has the potential to contribute to these strategic drivers for the inner city areas of Sydney through its future use and activation.

¹⁸ Sydney 24 Hour Economy Strategy (NSW Treasury, 2020)

7.0 Community and stakeholder perspectives

7.1 Project specific engagement

Powerhouse Ultimo Renewal community consultation

Approach and responses

Create NSW engaged Aurecon on behalf of the Powerhouse to consult with the community and key stakeholders on their priorities and vision for the Powerhouse Ultimo Renewal. The insights gained from the consultation have helped shape the renewal process. From Saturday 5 September until Tuesday 26 September 2020, the Powerhouse sought feedback from the community and key stakeholders.

During the consultation period, a total number of 1,084,206 people were reached, a total of 60,755 people were engaged, and a total of 23,555 insights were gathered. The results showed that 86 per cent of community members and stakeholders who either registered for a project information session and/or completed the general feedback survey were 'somewhat' or 'strongly supportive' of the project:

- Museum and cultural sector engagement
- First Nations stakeholders
- Local stakeholder group engagement
- Direct consultation with immediate neighbours
- Community information sessions
- Project website, online feedback and project information hotline

Key issues raised

Respondents supported the following ideas and development components:

- Revitalisation and refreshment of the Museum and surrounding public domain
- Increased permeability and connectivity with surrounding areas
- Improved lighting
- Increased focus on fashion and design, indigenous culture, and technology within exhibitions
- Improved accessibility for all people
- Retainment of academic focus and educational experiences
- Increased interactivity of exhibits and programs
- Night-time programming
- Increased relevancy of exhibits for a contemporary society.

Respondents were concerned about the following ideas and development components:

- Loss of original exhibits
- Concentration of attention towards Powerhouse Parramatta
- The exclusion of the Harwood building from Heritage listing
- How Ultimo will differentiate from Parramatta
- Protection of the Museum's built heritage.

In addition to the community stakeholders, Create NSW and the Powerhouse have undertaken preliminary engagement with key government stakeholders including:

- Infrastructure NSW
- City of Sydney
- NSW Government Architect's Office
- NSW Department of Planning, Industry and Environment – Key Sites Assessments
- NSW Department of Planning, Industry and Environment – Place, Design and Public Spaces
- Australian Institute of Architects
- Heritage NSW
- Treasury NSW
- Greater Sydney Commission
- Adjoining precincts including University of Technology, Tech Central and Darling Quarter.

Powerhouse Ultimo – Engagement, March 2022

Approach and responses

The Powerhouse and Create NSW consulted with the community and stakeholders to seek feedback on the renewal of Powerhouse Ultimo to inform the development of a new Draft Conservation Management Plan. The consultation period included an Open Weekend at the Powerhouse, which was held from 19 – 20 March for face-to-face consultation, and an online survey that was distributed to the public from 3 – 20 March 2022.

Stakeholders targeted for these consultation activities included local residents and Greater Sydney Metro communities, State and local government agencies, Powerhouse representatives, tertiary institutions, Aboriginal and Torres Strait Islander representatives, adjacent precincts, affiliated societies, media, and other museums and cultural institutions.

Over 1,100 people were directly engaged and more than 760 survey responses were submitted. The key outcomes of the engagement activities are:

- Strong support for the renewal of the Powerhouse Ultimo buildings and exhibitions
- Mixed views on reimagining Powerhouse Ultimo as a world-class museum
- Importance of prioritising science and technology over educational experiences, particularly for children
- Importance of ensuring a wide audience of various ages (young to old)
- Mixed views on the prominent role of decorative arts, fashion and design in future collection and exhibitions

Key issues raised

Some issues and concerns that emerged during the consultation period include:

- Retaining the original exhibitions
- Competing with the new Powerhouse Parramatta site and priority in curation of exhibitions as a consequence,
- Differentiating Powerhouse Ultimo from other Powerhouse museums, but also allowing for a holistic and complementary experiences across sites
- Lack of a clear definition of 'world-class' in renewing and reimagining Ultimo
- Relocating the entrance from Harris Street to The Goods Line
- Potential demolition of Harwood building as not all buildings are heritage-listed
- Focus on fashion and design of future exhibitions.

Some opportunities identified during the engagement include:

- Support for improving accessibility and permeability of the buildings and the exhibitions, including improving signage
- Support for moving the entry to The Goods Line
- Support for improving lighting
- Improving integration and connectivity across the precinct, including improving and activating open public spaces for children and family-friendly spaces.

Outcomes of broader LGA-wide consultation and research undertaken by other Government

This assessment draws on community perspectives expressed through a range of community engagements activities by the City of Sydney and NSW Department of Planning and Environment in recent years.

Pymont Peninsula Place Strategy engagement outcomes

Approach and responses

The *Pymont Peninsula Place Strategy* Phase 1 Engagement report (June 2020, DPE) summaries key findings from engagement activities which informed the Pymont Peninsula Place Strategy. The following engagement activities were undertaken:

- 217 online survey completions
- Social pinpoint map – 131 comments and 323 total visits
- 33 stakeholder submissions.

Key issues raised

Feedback identified key areas for enhancing local community participation and amenity. Key strengths of the peninsula for maintenance and improvement included:

- Maximising the potential of Darling Harbour as a key tourist attraction
- Facilitating local community facilities, along with free local events as a hub of all cultural events
- Connection to the working harbour history
- Maintaining a diversity of businesses and cultural institutions
- Affordable housing, including increasing the offer of social housing
- Night time activation.

Key areas for change included:

- Revitalisation of Harbourside
- Increased dining options and reduced reliance on the Casino
- More high tech and creative industries
- Additional playgrounds and parkland
- Improved link between Pymont Bridge and Union Square and beautification of the foreshore walk
- Increasing cultural and arts offerings
- Improved cycle connections and prioritising pedestrians.

Support for the 10 directions was also gauged as part of these activities. Participants were asked to give each of the 10 Directions a rating, from 'not at all important to very important. Direction 5 'a tapestry of greener public spaces and experiences', was ranked the highest in terms of the number ranked as 'very important' (64 per cent). Only 3 per cent ranked greener public spaces as not at all or of minor importance, the lowest of any direction.

City of Sydney Community Wellbeing Survey 2018

City of Sydney regularly undertakes a survey among its residents to understand community perceptions on social, cultural, and environmental factors affecting quality of life in the local government area. Wellbeing Survey data collection has been undertaken in 2011, 2015 and 2018.^{19 20}

Key issues raised

Results of the 2020 survey indicate:

- Residents have typically chosen to move to the LGA to be close to transport (78 per cent), workplace or study (70 per cent), parks and greenery (63 per cent) and places to socialise (64 per cent).
- While residents are generally active in enjoying cultural activities, 85 per cent reported barriers to community or cultural participation. Lack of time, cost and perceived shortage of suitable or interesting activities were mentioned most often.
- Social cohesion indicators point to a disconnect in aspirations and reality of the community – whilst 90 per cent of City residents appreciate a diverse society, 95% are willing to help neighbours and levels of trust are high, only half have face to face contact with other people in their area at least weekly and about as many are not confident that neighbourly help is available when required. Social isolation and barriers to participate in public life are experienced more often by people living with disability, culturally and linguistically diverse people and younger age groups.
- Cost of housing is a concern for many – while 81 per cent of the LGA residents are happy with their standard of living, around half are unsatisfied with the cost of accommodation in their neighbourhood.

Community engagement to inform the Sydney 2050 vision

Broad ranging community engagement activities have been undertaken by the City of Sydney during 2018-20 to inform the development of the Community Strategic Plan and vision for Sydney in 2050.²¹

Key issues raised

Community perspectives and priorities identified are as follows:

- A city for people. People want a city that is green with trees and plants, has quality public spaces and different types of housing that is affordable. It is a socially supportive community that is safe, and inclusive.
- A city that moves. People want to be using public transport, walking and bikes to move around. There is a reduction of cars, where streets and public spaces are easily accessible to people. The city is welcoming, and people can readily get to where they need to go.
- An environmentally responsive city. People overwhelmingly want a response to climate change. They want a city with sustainable waste management and use of resources. People want to see a reduction in emissions, greater recycling and reusing of products and changes to how we use our city to reduce our impact on the environment.
- A lively, cultural and creative city. People want a vibrant city, weaving its culture, heritage, entertainment and bold ideas through the workings of the city. The city has diverse shopping and entertainment options and a lively nightlife that includes many options. Locals and visitors gather for events and cultural experiences using public spaces.
- A city with a future focused economy. People want a city that is supported by digital infrastructure that sustains the creation of new jobs and allows businesses to respond to changing customer needs. People are optimistic about the opportunities that will be available in terms of education, jobs, innovation and the economy

¹⁹ City of Sydney website, [news.cityofsydney.nsw.gov.au/articles/majority-of-city-residents-satisfied-with-their-life-overall](https://www.cityofsydney.nsw.gov.au/articles/majority-of-city-residents-satisfied-with-their-life-overall)

²⁰ City of Sydney Community Wellbeing Indicators Report 2019 (City of Sydney Strategy and Urban Analytics Unit, 2019)

²¹ City of Sydney website, <https://www.cityofsydney.nsw.gov.au/vision-setting/planning-sydney-2050-what-we-heard>

8.0 Social Impact Assessment

8.1 Assessment framework and scope

As the proposed development is a State Significant Development, this SIA has been prepared based on the Draft SIA Guideline (NSW DPE 2021), as per the SEARs.

This assessment considers the potential impact on the community and social environment should the social impacts envisaged occur, compared to the baseline scenario of the existing use of the site and social context.

The purpose of this social impact analysis is to:

- Identify, analyse and assess any likely social impacts, whether positive or negative, that people may experience at any stage of the project lifecycle, as a result of the project
- Investigate whether any group in the community may disproportionately benefit or experience negative impacts and proposes commensurate responses consistent with socially equitable outcomes
- Develop social impact mitigation and enhancement options for any identified significant social impacts.
- Separate assessment of employment creation through phases of the proposed redevelopment in addressing the SEARs.

Ultimately, there can be two main types of social impacts that may arise as a result of the proposed development. First, direct impacts can be caused by the project which may cause changes to the existing community, as measured using social indicators, such as population, health and employment. Secondly, indirect impacts that are generally less tangible and more commonly related to matters such as community values, identity and sense of place. Both physically observable as well as psychological impacts need to be considered.

This study identifies the following key social factors relevant to the assessment of social impacts of the project:

- Way of life
- Health and wellbeing
- Accessibility
- Community
- Culture
- Surroundings
- Livelihoods.

Impacts on decision-making systems were identified as negligible as part of the SIA Concept Scoping stage and have therefore not been assessed in detail in this report.

8.2 Assessment factors

The SIA Guideline classifies social impacts in the following way, which forms the core basis of this assessment:

- **Way of life:** how people live, get around, work, play and interact with one another each day
- **Community:** its composition, cohesion, character, how it functions, resilience, and people's sense of place
- **Accessibility:** how people access and use infrastructure, services and facilities (private, public, or not-for-profit)
- **Culture:** both Aboriginal and non-Aboriginal - people's shared beliefs, customs, practices, obligations, values and stories, and connections to Country, land, waterways, places and buildings
- **Health and wellbeing:** people's physical, mental, social and spiritual wellbeing – especially for people vulnerable to social exclusion or substantial change, psychological stress (from financial or other pressures), access to open space and effects on public health

- **Surroundings:** access to and use of natural and built environment, including ecosystem services (shade, pollution control, erosion control), public safety and security, as well as aesthetic value and amenity
- **Livelihoods:** including people’s capacity to sustain themselves through employment or business
- **Decision-making systems:** the extent to which people can have a say in decisions that affect their lives, and have access to complaint, remedy and grievance mechanisms.

The evaluation includes a risk assessment of the degree of significance of risk, including the envisaged magnitude (duration, extent, severity/ sensitivity), likelihood, and potential to mitigate/enhance and likelihood of each identified impact. The social impact significance matrix provided within the SIA Guidelines has been adapted for the purposes of undertaking this social and impact assessment.

Each impact has been assessed and assigned an overall risk that considers both the likelihood of the impact occurring and the consequences should the impact occur. The assessment also sets out recommended mitigation, management, and monitoring measures for each identified matter.

Magnitude of impact generally considers the following dimensions:

- Extent - Who specifically is expected to be affected (directly, indirectly, and/or cumulatively), including any vulnerable people? Which location(s) and people are affected? (e.g., near neighbours, local, regional, future generations).
- Duration - When is the social impact expected to occur? Will it be time-limited (e.g., over particular project phases) or permanent?
- Severity or scale - What is the likely scale or degree of change? (e.g., mild, moderate, severe)
- Intensity or importance - How sensitive/vulnerable (or how adaptable/resilient) are affected people to the impact, or (for positive impacts) how important is it to them? This might depend on the value they attach to the matter; whether it is rare/unique or replaceable; the extent to which it is tied to their identity; and their capacity to cope with or adapt to change.
- Level of concern/interest - How concerned/interested are people? Sometimes, concerns may be disproportionate to findings from technical assessments of likelihood, duration and/or intensity.

Table 4 Defining magnitude levels for social impacts

Magnitude level	Meaning
Transformational	<ul style="list-style-type: none"> • Substantial change experienced in community wellbeing, livelihood, infrastructure, services, health, and/or heritage values; • permanent displacement or addition of at least 20% of a community.
Major	<ul style="list-style-type: none"> • Substantial deterioration/improvement to something that people value highly, either lasting for an indefinite time or affecting many people in a widespread area.
Moderate	<ul style="list-style-type: none"> • Noticeable deterioration/ improvement to something that people value highly, either lasting for an extensive time or affecting a group of people.
Minor	<ul style="list-style-type: none"> • Mild deterioration/ improvement, • for a reasonably short time, for a small number of people who are generally adaptable and not vulnerable.
Minimal	<ul style="list-style-type: none"> • Little noticeable change experienced by people in the locality.

Table 5 Defining likelihood levels of social impacts

Likelihood level	Meaning
Almost certain	Definite or almost definitely expected (e.g., has happened on similar projects)
Likely	High probability
Possible	Medium probability
Unlikely	Low probability
Very unlikely	Improbable or remote probability

Table 6 Social impact significance matrix

Likelihood	Magnitude				
	Minimal	Minor	Moderate	Major	Transformational
Very unlikely	Low	Low	Low	Medium	Medium
Unlikely	Low	Low	Medium	Medium	High
Possible	Low	Medium	Medium	High	High
Likely	Low	Medium	High	High	Very high
Almost certain	Low	Medium	High	Very high	Very high

Source: NSW DPE, 2021, Technical Supplement - Social Impact Assessment Guideline for State Significant Projects.

8.2 Key affected communities

This assessment covers both the PSA and City of Sydney residents, and the broader social localities of Greater Sydney which are expected to experience social impacts associated with the temporary construction activities and some of the future impacts of the Concept Design that are likely to experience the resulting benefits from the project's Concept Design. These study areas are shown in **Section 6.0**.

Key communities to experience social impacts and/ or benefits of the project can be grouped as follows:

- Local residents
- Visitors to other institutions and businesses within walking distance of the area
- Neighbouring businesses and institutions
- Temporary construction workers in the area.

8.3 Impact assessment and responses by social factor

8.3.1 Way of life

Potential impacts

During construction:

- Temporary negative impacts to way of life associated with the noise, dust and vibration caused by the construction activity across the site, which may result in disruption and associated inconvenience for local residents, local businesses, and other workers and visitors in the immediate vicinity. The impacts may disproportionately impact the following groups:
 - Visitors and current staff
 - Local workers
 - High density residential, educational institutions and office buildings in close proximity to the site.
 - Various sensitive groups (children, students, elderly, people with limited mobility, and others) likely to be accessing Sydney CBD daily – either to visit, work, or as residents.
 - Users of the surrounding transport, pedestrian footpaths and vehicular roads
- Disruption to users of the area associated with construction activities. Due to construction taking place in the museum environment there may be impacts to the usual working environment and routine of the staff of the Powerhouse and surrounding buildings (e.g., noise or vibration may be disrupting activities in the Museum buildings).
 - These impacts are likely to be felt particularly by local workers, residents, and visitors, as well as users of The Goods Line, Central Light Rail stop, Harris Street businesses and higher learning institutions and surrounding streets.
 - Disruption to users of the area associated with the potential impacts on the key cycling route for bicycle commuters accessing Sydney CBD, particularly along Harris Street, Ultimo which may result in inconvenience, frustration, and changes to daily way of life routines.
- Potential disruption to access to the existing open space at the site (Harris Street forecourt) due to noise, dust, vibration, hoardings etc may cause inconvenience and frustration and change of usual daily or weekly routines – for example reduced opportunities for local office workers to have lunch and take breaks outdoors.
- Negative way of life impacts associated with the potential disruption of active travel pathways/pedestrian/cycleway access and surrounding Goods Line promenade adjacent to the existing the Powerhouse Museum site. This will likely lead to temporary closures of active travel routes for commuters accessing Sydney CBD from Central Station, resulting in inconvenience, frustration, and changes to daily life routines.
- Cumulative potential way of life impacts associated with other development projects close to the site, which have the potential to increase community sensitivity. This may cause a cumulative sense of disruption, inconvenience, and frustration - residents and local workers experiencing "construction fatigue".

Powerhouse Renewal

- Improvements to way of life associated with new, high quality public cultural engagement and museum facility for visitors, local workers and residents associated with the delivery of a high quality, contemporary mixed-use development. Specifically, the proposed development would result in:
 - Potential improvements to way of life associated with the delivery of the Powerhouse Ultimo Renewal with potential to provide an estimate of up to approximately 200 total jobs (with 400 people employed across the suite of four Powerhouse sites, in its future state). The provision of new local employment opportunities close to public transport will improve daily routines by decreasing commute times for those workers.
 - Way of life benefits associated with the delivery of the Powerhouse Renewal including exhibition floorspace and open public space within close proximity to public transport, social infrastructure, and other daily living needs. New residents of the site and existing surrounding residents will enjoy improved living routines due to increased access and leisure.
 - Enhanced opportunities for recreation and social interaction for residents, workers, and visitors in the study area associated with the delivery of public domain and programmed internal exhibition/display space, including open space

Potential impacts

and pedestrian infrastructure. This will likely result in improvements to daily living routines due to increased amenity and walkability to daily needs.

- New leisure, creative/innovation industry and educational uses to be delivered on site have the potential to improve accessibility to such uses for workers and visitors to the area.

Responses / mitigation measures

During construction:

- Undertake detailed assessment of construction impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Prepare a detailed Construction Environmental Management Plan incorporating any necessary mitigation measures prior to the commencement of construction works.
- Implement mitigation measures, such as construction management plan, to reduce the impacts associated with noise and vibration and visual amenity during the construction phase.
- Implement mitigation measures included in other technical reports, including the Traffic Management Plan and Visual Impact Assessment.
- Develop and implement a communication and engagement strategy to communicate with surrounding residents, nearby businesses, workers and visitors to the area to ensure that all stakeholders are made aware of the timing and likely impact of the construction period. Opportunities for feedback and to ask questions should also be provided. Engagement should explore opportunities to minimise impacts and to understand community attachment to the sites and venues impacted.
- Continue to consult with the Council, adjacent businesses, TfNSW, and other key stakeholders, to minimise impacts and cumulative impacts.

Powerhouse Renewal

- Undertake detailed assessment of operational impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Green Travel Plan to be provided in Stage 1 SSDA
- Develop and implement an Operational Plan of Management, or integrate with existing Powerhouse operations.
- Consider new or improved through site accessways and connection points to the site to enhance the connectivity to the surrounding neighbourhood (e.g., from public transport stops, such as Railway Square and Sydney CBD).
- Conduct detailed analysis of noise emissions associated with tenancy uses as part of individual development applications.

Summary:

<p>Overall impact</p>	<p>Potential for disruption to daily routines of residents, workers, visitors, and users of surrounding roads during the construction phase of the proposal. Significant disruption due to the large number of workers, visitors and residents in the locality, and cumulative impacts to way of life due to presence of other construction activities in the locality.</p> <p>Overall improved access to high quality open space, cultural/museum institution, office space and visitor uses at this redevelopment would have a significant social benefit once operational.</p> <p>Social impact ratings associated with the change to Way of Life are considered High with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Medium (possible moderate) – negative • Operation: Low (unlikely minimal) - positive
<p>Likelihood</p>	<p>Short term construction impacts with longer term positive impacts associated with improved contemporary cultural facilities on this site.</p>

Potential impacts	
Duration	Operational benefits are long term, construction impacts are temporary (estimated as approximately 3 years).
Severity/ sensitivity	High sensitivity due to presence of high density residential, academic and office buildings and high use aquatic centre and leisure area in close proximity of the site, and various sensitive groups (children, elderly, people with limited mobility, and others) likely to be accessing Sydney CBD daily.
Extent	Construction impacts would mainly impact workers, residents, and visitors of the Primary Study Area. Operational impacts, such as access to new exhibitions and programming, leisure and creative industries with publicly accessible spaces and interconnectedness with Goods Line to Railway Square would benefit the residents, workers and visitors from across the PSA, Greater Sydney Area and beyond.
Potential to mitigate/ enhance	Construction impacts would need to be proactively mitigated due to the high-density environment. During operation, there is a high ability for workers, visitors, and local community to adapt to new facilities on the site, due to their proposed quality and design.

8.3.2 Health and wellbeing

Potential impacts
<p><u>During construction:</u></p> <ul style="list-style-type: none"> • Potential temporary changes to the use of the Museum infrastructure at this site due to construction activities and associated changes taking place in a live workplace environment. This may have wellbeing impacts for residents, workers, and visitors in the area, associated with construction dust, noise and vibration. It is noted that consultation activities with staff, visitors, Museum stakeholders, and the wider community indicates a strong preference for the Powerhouse to remain at its current location. It is also noted that strategic directions from state, health district, and local authorities support increased capacity on the site – as such, construction activities on site are necessary to achieve this. • Potential wellbeing impacts for residents, Museum staff, and other workers, residents, and visitors in the area, associated with construction dust, noise and vibration. • Potential impacts to health and wellbeing associated with changes to negative temporary impacts to wayfinding in and around the Powerhouse due to construction activities. This may disrupt the accessibility of health infrastructure on the site, resulting in poorer health and wellbeing. • Potential impact to health and wellbeing of local commuters, associated with temporary disruption to access of active transport infrastructure, and resulting in reduced opportunity for physical activity. • Potential for increased community sensitivity and impacts to wellbeing due to other recent or future construction impacts in the vicinity of the site (e.g., other redevelopment projects in the Darling Harbour area, Haymarket, Pyrmont, and Sydney CBD), with the potential impact of residents and local workers experiencing "construction fatigue". <p><u>Powerhouse Renewal:</u></p> <ul style="list-style-type: none"> • Existing as well as new pedestrian connections between Harris Street, The Goods Line and the site, and surrounding Sydney CBD have potential positive health and wellbeing impacts by enhancing convenience that can encourage uptake and use of active transport modes for commuting and physical activity by residents, workers, and visitors of the area. • Delivery of exhibition and office floorspace with potential to provide an estimate of to up to approximately 200 total jobs (with 400 people employed across the suite of four Powerhouse sites, in its future state) total employment opportunities will likely have a positive impact on wellbeing due to increased local employment opportunities, close to homes, public transport, and other social infrastructure. • The provision of public domain and internal space planned for this project has the potential to create wellbeing impacts (physical and mental health benefits) associated with access to green space open space. The project has the potential to enhance opportunities for recreation and social interaction for workers, residents, and visitors to the area, noting the limited opportunities for enjoyment of open spaces in high density inner city areas.

Potential impacts

Responses / mitigation measures

During construction:

- Undertake detailed assessment of construction impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Prepare a detailed Construction Environmental Management Plan incorporating any necessary mitigation measures prior to the commencement of construction works.
- Implement a Construction Traffic Management, Environmental Management Plan and Pedestrian Management Plan.
- Implement a Staging Plan for the development.
- Develop and implement a communication and engagement strategy to communicate with surrounding residents, nearby businesses, workers and visitors to the area to ensure that all stakeholders are made aware of the timing and likely impact of the construction period. Opportunities for feedback and to ask questions should also be provided.
- Collaborate with the Council, adjacent businesses, TfNSW etc to coordinate works to minimise impacts and cumulative impacts.

Powerhouse Renewal:

- Undertake detailed assessment of operational impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Implement a Change Management Plan for the Project to support the transition from the current working environment to the future working environment delivered by the proposed development.
- Implement the Green Travel Plan to encourage active and public transport use by future workers and visitors to the site, and to reduce traffic and congestion impacts across the precinct.
- Ensure the proposed open space follows universal design principles and can be enjoyed by people of all ages and abilities. Consider providing for diversity of recreation opportunities to enable a range of activities.
- Explore opportunities to incorporate Indigenous groups, staff and consumer feedback and priorities into the design of renewal project spaces.
- Ensure high quality design in relation to the landscape setting, potential food and beverage hospitality facilities, amount of vegetation and shade, condition of facilities, and equipment.

Summary:

<p>Overall impact</p>	<p>Potential wellbeing impacts associated with aspects of construction activity (e.g., sensitivity to noise and vibration), and wellbeing impacts associated with construction activities adjacent on Harris Street and Goods Line active transport link, which may reduce opportunities for or discourage physical activity. Impacts would be significant due to the large number of workers, visitors and residents in the locality, and potential cumulative impacts to health and wellbeing arising due to other construction activities in the locality.</p> <p>Overall improved amenity and provision of publicly accessible green space would have a significant positive benefit to community, once the site is operational. The redevelopment of the site, if impacts associated with construction are well mitigated, will ensure positive health and wellbeing outcomes for the community.</p> <p>Social impact ratings associated with the change to Health and Wellbeing are considered High with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: High (possible moderate) - negative • Operation: Medium (possible moderate) - positive
<p>Duration</p>	<p>Operational benefits are long term, construction impacts are temporary (estimated as approximately 3 years).</p>

Potential impacts	
Severity/ sensitivity	High sensitivity due to presence of high density residential and office buildings and high use leisure area in the PSA/SSA area of the site, and various sensitive groups (children, elderly, people with limited mobility, and others) likely to be accessing Sydney CBD daily.
Extent	<p>Construction impacts would mainly impact the workers, residents and visitors of the Primary Study Area.</p> <p>Operational impacts, such as access to the new publicly accessible park and active transport links would benefit the residents, workers and visitors from across the Sydney City LGA and beyond.</p>
Potential to mitigate/ enhance	<p>Construction impacts would need to be proactively mitigated due to the high-density environment.</p> <p>During operation, there is a high ability for workers, visitors and local community to adapt to new facilities on the site, due to their proposed quality and design.</p>

8.3.3 Accessibility

Potential impacts

During construction:

- Temporary negative impacts to accessibility associated with the noise, dust and vibration caused by the establishment of the construction site and construction activity across the site (MacArthur Street), which may result in impacts to access to and use of social infrastructure, particularly access to Railway Square and UTS via The Goods Line and Ian Thorpe Aquatic Centre and recreational areas.
- The number of construction vehicles accessing the site may be up to 50-60 vehicles²² entering the designated works zone on the Eastern side of Harris Street, currently used by coaches during the day which will impact visitor amenities.
- Potential impacts to accessibility due to increased traffic movements and congestion along key roads (Harris St. and Pier St. Underpass) due to construction activities and vehicle movements in the area. This may potentially impact access to and use of social infrastructure, businesses, or other amenity in the area.
- Potential disruption to access to local residential and commercial buildings, public transport stops, businesses, and open space in the area due to reduced availability of parking opportunities due to pressure from construction worker vehicles and truck (potentially 50-60 trucks per day) movements. This may result in increased inconvenience and frustration.
- Potential wayfinding and streetscape impacts associated with establishment of the construction site (including hoardings) and construction activities that could disrupt ease of access for local residents, workers, and visitors in the area.
- Cumulative impacts of construction in the Railway Square and Tech Central precinct developments taking place in the locality, leading to an extended period of inconvenience and disruption. It is noted that this development is aligned with state policy directions for the precinct.

Powerhouse Renewal:

- Notable significant increase in provision of social infrastructure, to meet the needs of the local and extended Sydney population, which will have a significant positive impact.
- The provision of additional floorspace on this site has the potential to improve accessibility to diverse uses within the Ultimo, Pyrmont and Western Harbour precincts and for visitors across Greater Sydney and beyond, close to jobs and other amenity, and that is accessible by various modes of active and public transport, reducing the need for workers and visitors to rely on private vehicles.
- The provision of improved pedestrian access and connections (MacArthur and Harris Streets) delivered by this project has the potential to enhance connectivity and convenience for residents, workers, and visitors using the active transport networks in the area.
- Improved integration with the Ultimo Pedestrian Network (The Goods Line) including potential additional pedestrian connections from the Goods Line to the north and west of the existing northern terminus.
- Retention of revitalised open space will allow for improved access to public open space in the CBD and Ultimo context, with enhanced connectivity and convenience for residents, workers, and visitors in the study area.

Responses / mitigation measures

During construction:

- Undertake detailed assessment of construction impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Prepare a detailed Construction Environmental Management Plan incorporating any necessary mitigation measures prior to the commencement of construction works.
- Implement mitigation measures set out in the Construction Management Plan to reduce the impacts associated with noise and vibration, air quality and wayfinding during the construction phase.

²² JMT Traffic Management Report, 2022

Potential impacts

- Implement a Construction Traffic Management and Pedestrian Management Plan to ensure traffic movements have minimal impact on surrounding land uses and the community in general, particularly minimising trucks using local streets for site access with consideration to pedestrian ingress/egress.
- Explore potential for internal and external wayfinding strategies to ensure that the site and surroundings remain legible and walkable for users of the site during both construction and operation.
- Develop and implement a communication and engagement strategy to communicate with surrounding residents, nearby businesses, workers, and visitors to the area to ensure that all stakeholders are made aware of the timing and likely impact during the construction phase.
- Engage with stakeholders (incl local business owners) and explore opportunities to retain easy access to daily living needs, amenity, and services.

Powerhouse Renewal:

- Undertake detailed assessment of operational impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Continue exploring opportunities to incorporate staff and consumer feedback and priorities into the design of the projects office/exhibition spaces and public domain, particularly recognition of traditional custodians and engagement with the First Nations community groups.
- Consider new vehicle access to the Harris Street buildings on the northern side of Macarthur Street as proposed.
- Implement a Change Management Plan for the Project to support the transition from the current working environment to the future working environment delivered by the proposed development.
- Ensure pedestrian connections between the site and surrounding educational institutions are accessible to people experiencing reduced mobility (e.g., ensuring surrounding walking paths are level and well-maintained, there are frequent resting places).
- Develop an Operational Plan of Management (or integrate with existing Powerhouse operations) to monitor the impact of the expanded Powerhouse operations on staff and other stakeholders. Ensure adequate wayfinding and pedestrian connections to active transport links and public transport stops in the locality to support active and public transport use to access the site.
- Ensure the buildings and proposed open space follows universal design principles and can be enjoyed by people of all ages and abilities.

Summary:

<p>Overall impact</p>	<p>Overall improved access to high quality cultural and recreational facilities at Powerhouse Ultimo would have a significant positive benefit to way of life. The redevelopment of the site, if impacts associated with construction are well mitigated, will ensure positive social outcomes for the community.</p> <p>Negative social impacts associated with way of life are medium during construction, but low during operation:</p> <ul style="list-style-type: none"> • Construction: Medium (possible moderate) – negative • Operation: High (likely major) – positive
<p>Likelihood</p>	<p>Positive impacts of the proposed development are highly likely.</p>
<p>Duration</p>	<p>Operational benefits are long term, construction impacts are temporary (estimated as approximately 3 years).</p>
<p>Severity/ sensitivity</p>	<p>High sensitivity due to presence of high density residential and office buildings and high use leisure area in close proximity of the site, and various sensitive groups (children, elderly, people with limited mobility, and others) likely to be accessing Sydney CBD daily. High sensitivity due to temporary impacts on high-use active transport and road infrastructure in the area</p>

Potential impacts	
Extent	<p>Construction impacts would impact the workers, residents, and visitors of the Primary Study Area, as well as users of Harris, Pier and MacArthur Streets, Pyrmont Bridge and Western Distributor.</p> <p>Operational impacts, with access to the Powerhouse, socio-cultural/economic benefits derived publicly accessible space would benefit the residents, workers, and visitors from across the Secondary Study Area and beyond.</p>
Potential to mitigate/enhance	<p>Construction impacts would need to be proactively mitigated due to the high-density environment and potential impacts on Pyrmont Bridge, Darling Harbour foreshore and Western Distributor users. During operation, there is a high ability for workers, visitors, and local community to adapt to new facilities on the site, due to their proposed quality and design.</p>

8.3.4 Livelihoods

Potential impacts

During construction:

- Increased access to employment opportunities within the construction sector during the construction phase. While these jobs will be temporary, project-based work is typical to the sector. It is estimated that 440 direct FTE construction jobs will be supported during the construction phase of the project
- Organisational changes with consideration to the redevelopment, may impact current staff wellbeing, income levels and livelihoods.
- Potential negative impacts for livelihoods due to the establishment of the construction site and associated activities include:
 - Reduced patronage for local businesses, based on loss of customers who are currently working at or otherwise visiting the existing buildings on the site.
 - Reduced patronage for local businesses, cultural and tourism attraction venues, tourism accommodation providers and other businesses in the area due to loss of amenity, noise, vibration, dust, road closures, reduced parking and other impacts associated with the construction activities, particularly in the context of Covid-19 and preferences for many employees opting to work from home may impact the businesses in the locality and community vitality.

Powerhouse Renewal:

- Potential positive impacts from expanded capacity of the site. The proposal will support up to an estimated approximately 200 direct FTE jobs (with 400 employment roles across all four Powerhouse facilities across Greater Sydney) on an ongoing basis, making a significant contribution to employment in the southern Sydney CBD, noting the context of expansion of the Tech Central, Sydney CBD and transport development to Pyrmont. As a major national cultural facility, the job opportunities would be available across private, government and non-profit sectors, and potentially accessible to various groups within the community.
- Increased activation of the site due to increased capacity and re-design has the potential to increase patronage for other local businesses in the area.
- Potential positive impacts on livelihoods associated with permanent changes to streetscape and provision of amenity. This may have positive impacts, adding to City and urban revitalisation uplift surrounding the site.

Responses / mitigation measures

During construction:

- Undertake detailed assessment of construction impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Prepare a detailed Construction Environmental Management Plan incorporating any necessary mitigation measures prior to the commencement of construction works.
- Continue with strategic Create NSW engagement activities to communicate with surrounding residents, nearby businesses, workers and visitors to the area to ensure that all stakeholders are made aware of the timing and likely impact of the construction period. Opportunities for feedback and to ask questions should also be provided.
- Consider developing and implementing social procurement and employment practices (e.g. targeted employment of disadvantaged groups during the construction and operational phase of the development) in order to increase social and community benefits associated with income generation focused on vulnerable/minority community cohorts.

Powerhouse Renewal:

- Undertake detailed assessment of operational impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Collaborate with the Council, adjacent businesses, TfNSW etc to coordinate works to minimise cumulative impacts.

Potential impacts	
Summary:	
Overall impact	<p>Provision of new contemporary cultural and technical facilities within the existing museum would have a significant positive benefit to livelihoods derived from creative enterprise and vocational development. Enhanced livelihoods through community and industry engagement/employment opportunities and education/support networks within the strategic Tech Central activation precinct. Increased employment opportunities in the construction industry.</p> <p>Potential future changes to viability of businesses in the area associated with amenity impacts and change of foot traffic in the locality (during construction, and operation).</p> <p>Individuals may perceive negative impacts in relation to their personal and employment rights and livelihoods during the construction and operational phase, regardless of due process, legal/union protections and just compensation terms being in place.</p> <p>Social impact ratings associated with the change to Livelihoods are considered high with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Medium (possible moderate) - change could be experienced either as positive or negative, depending on the receiver, noting chance for new jobs and also job losses • Operation: Medium (possible moderate) - positive
Likelihood	Positive impacts of the proposed development are highly likely.
Duration	Operational benefits are long term, construction impacts are temporary (estimated as approximately 3 years).
Severity/ sensitivity	Sensitivity would depend on the profile of the workforce on this site, and nearby businesses. Due to high-density nature of the Sydney CBD area, this could include various vulnerable/minority groups.
Extent	Construction impacts would mainly impact existing and future workers, residents, and visitors of the Primary Study Area.
Potential to mitigate/ enhance	<p>Construction impacts would need to be proactively mitigated due to the high-density environment. During operation, there is a high ability for workers, visitors and local community to adapt to new facilities on the site, due to their proposed quality and design.</p> <p>Operational impacts, such as access to new cultural institution and creative industries development offering, contemporary facilities to support education/upskilling/innovation and enterprise/economic development with publicly accessible open space would benefit the residents, workers, and visitors from across the Secondary Study Area and beyond.</p>

8.3.5 Community, including its composition, cohesion, character

Potential impacts

During construction:

- The construction period may temporarily disrupt or change the existing local community surrounding the site, including:
 - Impacts to composition:
 - Changes to the composition of the local community may be experienced during construction, with an increased number of construction workers in the local area. The construction period is forecast to generate an estimate of 440 job-years. This may have a negative impact on community cohesion and perceptions of safety due to an increased presence of strangers.
 - Potential impacts to heritage and social fabric of the area associated with building design upgrades.
 - Impacts to sense of place: Changes to the streetscape due to construction activities has the potential to impact community connection to and sense of place.
 - Potential impacts to how the community functions associated with the establishment of a major construction site which may impact daily routines and networks of Powerhouse staff, patients, visitors, volunteers, local residents and any businesses in the area.

Powerhouse Renewal:

- Potential changes to the community composition of Powerhouse renewal associated with the increased capacity of the museum, which would increase the number of staff, visitors and contractors accessing the site, leading to changes in the composition of the community of the site. However, it is noted that the renewal of the Powerhouse is aligned with strategic drivers for the future of the area.
- Enhanced public spaces in the Powerhouse Ultimo site, including at least one significant public space for gathering and activities, and improved pedestrian infrastructure will likely result in enhanced opportunities for social interaction between workers, residents, and visitors in the study area. This may lead to increased community cohesion in a high-density environment.
- Potential benefits to community cohesion associated with the delivery of public domain improvements including open space. This has the potential to improve community cohesion by providing space for social interaction. The Powerhouse Ultimo site currently generates a significant level of visitation on a daily basis. Most recent data prior to the COVID-19 pandemic indicated an annual visitation to the site of 757,000 people. Therefore, the net increase in visitation as a result of the proposal is estimated to be within the parameters of:
 - 3,100 visitors per day over a typical weekday
 - 3,720 visitors per day over a typical weekend
- Changes to community size and composition associated with reconfiguration of the site ingress and access points.
- Provision of floorspace in this area may catalyse new social and professional networks among the workforce of the new facilities to meet NSW Government strategic objectives for Sydney's Innovation Corridor (Tech Central). This may also result in changes to the size and composition of existing community, with new hospitality offerings attracting new and diverse audiences as customers, and international visitors to the area.
- Potential negative impacts to community associated with changes to sense of place and loss of connection to place with potential changes to non-heritage fabric associated with building design upgrades.

Responses / mitigation measures

During construction:

- Undertake detailed assessment of construction impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Prepare a detailed Construction Environmental Management Plan incorporating any necessary mitigation measures prior to the commencement of construction works.

Potential impacts

- Implement a Construction Management Plan to reduce the impacts associated with disruption to Ryde Hospital during the construction period.
- Develop a Communications and Engagement Strategy to communicate with surrounding residents, workers, patients and carers and visitors to ensure that all stakeholders are made aware of the timing and likely impact of the construction period. Opportunities for feedback and to ask questions should also be provided.
- New built forms should consider impacts to heritage, privacy, views, public open space and minimise negative impacts to the local residential amenity.
- Form and massing of new built forms should consider and provide appropriate relationships to the internal and functional requirements with reference to articulation of former historical significance of the buildings.

Powerhouse Renewal:

- Undertake detailed assessment of operational impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Implement an Operation Management Plan (or integrate with existing Powerhouse operations) for the proposed development to identify opportunities to enhance access and convenience for workers and visitors to the proposed development, and to manage safety issues as they arise.
- Explore opportunities to maximise the value of the new public spaces through design elements, programming and activation that invite residents, workers, visitors and the broader community to the new precinct (e.g. seating, performances, markets).
- Explore opportunities to include high quality internal gathering spaces, breakout spaces and other design elements to support worker wellbeing within the proposed development.

Summary:

Overall impact	<p>Enhanced connection to place and place narratives associated with high quality design of public space. Improved ability to create new memories and associations with the venue due to museum operations. The redevelopment of the site, if impacts associated with construction and operation of the site are well mitigated, can support positive social outcomes for the community.</p> <p>Social impact ratings associated with the change to Community are considered Medium to High with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Medium (possible moderate) - negative • Operation: High (likely major) – change could be perceived either as positive or negative, depending on the receiver
Likelihood	Short term construction impacts with longer term positive impacts associated with improved health care facilities and public space at this site.
Duration	Operational benefits are long term, construction impacts are temporary.
Severity/ sensitivity	High sensitivity due to presence of high density residential and office buildings and high use leisure area in close proximity of the site, and various sensitive groups (children, elderly, people with limited mobility, and others) likely to be accessing Sydney CBD daily.
Extent	<p>Construction impacts would mainly impact the workers, residents, and visitors of the Primary Study Area.</p> <p>Operational impacts, such as access to the revitalised Powerhouse with public open space upgrade would benefit the residents, workers, and visitors from across the Sydney City LGA and beyond.</p>
Potential to mitigate/ enhance	Construction impacts would need to be proactively mitigated due to the high-density environment. During operation, there is a high ability for workers, visitors, and local community to adapt to new facilities on the site, due to their proposed quality and design.

8.3.6 Culture: shared beliefs, customs, values and stories, and connections to land, places, buildings

Potential impacts

During construction:

- Potential changes to the community's connection to place associated with the construction period, which would result in changes to the appearance and functionality of the site and may disrupt place narratives associated with the site.
- Changes to the composition or fabric to the Harris Street frontage and non-heritage listed buildings and fabric.
- Changes to appearance, sense of place, and uses of the site due to the construction period has the potential to change connection to place for local residents, workers, and visitors.

Powerhouse Renewal:

- The provision of publicly accessible open space in this project has the potential to improve sense of place due to improved quality and design of open space in the area. This open space could increase spaces for gathering and events in this prominent, highly visible, and accessible location.
- Potential positive impacts to culture and development of creative industries associated with the proposed activation of the renewed Powerhouse building within the Tech Central precinct. This may allow for greater cultural association or connection with the site, depending on programming types.
- Increased activation of the site due to notable increased capacity and re-design has the potential to facilitate new places narratives and improved connection to place.

Responses / mitigation measures

During construction:

- Undertake detailed assessment of construction impacts during the preparation of the Stage 2 State Significant Development Application/Environmental Impact Statement.
- Prepare a detailed Construction Environmental Management Plan incorporating any necessary mitigation measures prior to the commencement of construction works.
- The site's heritage values can be appropriately managed through further Aboriginal and non-Aboriginal heritage investigations and management processes to be developed and implemented as part of the future detailed design and construction phases.
- Consider opportunities for public space interpretation of the former site (Federations structures) to promote the history of the site e.g. interpretations of original demolished features such e.g. link to tramways; also improving access and linkages to the Goods Line and public connections to Darling Harbour²³.
- Implement ACHAR recommendations by undertaking further investigations to determine to determine the nature, extent and significance of any sub-surface Aboriginal objects and archaeological resources within the study area via test excavations²⁴. Follow procedures for Aboriginal Unexpected Finds and Human Remains procedures, should they be encountered.
- Prior to commencement of future site works, site contractors should undergo an Aboriginal cultural heritage induction to communicate the significance of the site, deposits, and need to protect and conserve.
- Explore opportunities to utilise the hoardings to exhibit artwork or photography of history, local culture and heritage to reduce visual impact of construction activity.
- Develop and implement a communication and engagement strategy to communicate with surrounding residents, nearby businesses, workers and visitors to the area to minimise impacts and to understand community attachment to the sites and venues impacted. Create NSW, the Powerhouse and any future delivery partners should continue to consult with identified Aboriginal stakeholders (RAPs) throughout the project.

²³ D Cracknell Lonergan Heritage Assessment Report, 2020

²⁴ ACHAR report, Curio Projects, April 2022

Responses / mitigation measures

During operation:

- There may be a need to consider opportunities for culturally appropriate spaces within the development to support diversity/inclusion, as well as spaces/ITC facilities to promote cross-cultural learning and interpretation with consideration to a culturally and linguistically diverse visitors, residents and workers.
- Ensure outdoor and indoor gathering spaces are welcoming to all community members. Consider opportunities to improve connection to place through programming the publicly accessible spaces to include the broader community, including for cultural celebrations.
- Consider opportunities for native plantings and soundscapes inspired by Australian environments Incorporate Aboriginal and Torres Strait Islander cultural heritage into the design of indoor and outdoor spaces, and potentially naming that reflects Indigenous place names.
- Create NSW, the Powerhouse and any future delivery partners should continue to consult with identified Aboriginal stakeholders (RAPs) throughout the project.

Summary:

Overall impact	<p>Potential changes to connection to place due to changes to the appearance and use of the site, potential disruption or change to use of cultural infrastructure and heritage items in situ.</p> <p>However, if impacts associated with construction and operation are well mitigated, this may contribute to new place narratives that will reinforce positive public perceptions for the redevelopment. Social impact ratings associated with the change to Culture are considered low with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Low (unlikely minor) - negative • Operation: Low (likely minimal) – change could be perceived either as positive or negative, depending on the receiver
Likelihood	<p>Positive impacts of the proposed development are likely, and negative impacts are minor during construction.</p>
Duration	<p>Operational benefits are long term, construction impacts are temporary (estimated as approximately 3 years).</p>
Severity/ sensitivity	<p>High sensitivity due to the community perceptions around the historic importance and context of the site/area. The surrounding area undergoing major developments (transport, precinct) with high density academic, office, residential buildings in close proximity of the site. High sensitivity due to various sensitive groups (children, elderly, people with limited mobility, and others) likely to be accessing the Sydney CBD daily.</p>
Extent	<p>Construction impacts would impact current workers, residents and visitors of the Primary Study Area, many of whom may be from Greater Sydney, or beyond.</p> <p>Operational impacts would be experienced by former, current and future residents, workers and visitors to the area, who may be from Greater Sydney, and beyond.</p>
Potential to mitigate/ enhance	<p>Any future management of the site should have regard to the Draft Conservation Management and ACHAR Plans (2022) prepared by qualified heritage and cultural heritage experts prior to any substantial alterations and additions to the site. The 'Powerhouse' history of the site should be considered and integrated into future developments of the site with consideration to publicly accessible socio-cultural presence be maintained. Create NSW, the Powerhouse and any future delivery partners should continue to consult with identified Aboriginal stakeholders (RAPs) throughout the project.</p> <p>Construction impacts would therefore need to be proactively mitigated in prioritising conservation sensitivities through appropriate specialist ACHAR investigations and conservation management. During operation, there is a high ability for workers, visitors, and local community to adapt to new facilities on the site, due to their proposed quality and design.</p>

8.3.7 Surroundings – amenity

Potential impacts

During construction:

- The establishment of the construction site, including hoardings, has the potential to create negative amenity impacts, including:
 - Changes to streetscape, as location is highly visible along Harris Street.
 - Potential impacts on perceptions of safety in the area due to changes in sightlines.
- Impacts on amenity of the area associated with vibration, dust, noise, and truck movements associated with construction activity. This will likely reduce amenity and opportunities for enjoyment of surroundings for people that typically utilise the existing centre and foreshore for breaks, leisure, exercise, or commuting.
- Potential amenity impacts due to increased activation of the locality from an increased number of construction workers in the area - approximately 440 jobs are expected to be created in the delivery of this project, of which many of these will be construction workers.

During operation:

- In particular, the enhancement the public domain in this project has the potential to improve amenity and enjoyment of surroundings in a high-density inner-city area. This may increase spaces for gathering and events in an accessible and vibrant location.
- The retention and renewal of Powerhouse Ultimo will deliver an international standard museum with new and refurbished spaces for museum operations, exhibitions, programs and associated industry and creative uses that will activate and engage audiences to generate diverse employment opportunities.
- Increased activation of the site due to increased capacity and re-design has the potential to improve perceptions of safety in the surroundings.
- The renewal will deliver exhibitions that showcase the Powerhouse Collection, international exhibitions and programs that support the creative industries.
- Potential noise impacts on existing residents, workers, and visitors in the study area due to delivery of additional floorspace. This may result in decreased amenity.
- Potential for increased traffic movements and traffic or pedestrian congestion along Harris, MacArthur and Pier Streets surrounding the site associated with workers, visitors, delivery, and other services accessing this building.

Responses / mitigation measures

- Implement mitigation measures set out in the Construction Management Plan to reduce the impacts associated with the construction phase.
- Implement mitigation measures included in technical reports, including Noise and Vibration Assessment, Air Quality Assessment, Construction Traffic Management Plan and Visual Impact Analysis.
- Develop and implement a communication and engagement strategy to communicate with surrounding residents, nearby businesses, workers, and visitors to the area to ensure that all stakeholders are made aware of the timing and likely impact of the construction period. Opportunities for feedback and to ask questions should also be provided (to be further developed in Stage 2 SSDA)
- Explore opportunities to utilise the hoardings to exhibit artwork or photography of local culture and heritage to reduce visual impact of construction activity and catalyse improved connection to place at the site during the construction phase.
- Ensure the proposed open space follows universal design principles and can be enjoyed by people of all ages and abilities.
- Open space planning in high density needs to give consideration to accommodating a range of uses in a limited space. Explore opportunities to minimise conflict between users and with neighbours (e.g., noise and complaints).
- Implement the Green Travel Plan to encourage active and public transport use by future residents and tenants of the site, and to reduce traffic and congestion impacts across the precinct.

Potential impacts

- Develop and implement an Operational Plan of Management (or integrate with existing Powerhouse operations) for the proposed development to identify opportunities to enhance access and convenience for workers and visitors to the proposed development during its operation, to enhance safety and to manage any traffic and transport issues as they arise.

Summary:

Overall impact	<p>There would be significant amenity impacts associated with construction. However, it is noted that the construction site would be located in the Sydney CBD, which is frequently undergoing construction activity and consequent changes to the streetscape.</p> <p>Provision of high quality architectural buildings, publicly accessible park and space at this prominent location can have a positive benefit to surroundings if elements of the proposal are supported by the local community. However, it is noted that the change to the appearance of the site would be significant and may not appeal to all current residents, workers and visitors to the area.</p> <p>Social impact ratings associated with the change to Surroundings and amenity are considered Very High with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Very high (almost certain major) - negative • Operation: Very high (almost certain transformational) - change could be perceived either as positive or negative, depending on the receiver
Duration	<p>Operational benefits are long term, construction impacts are temporary (estimated as approximately 3 years).</p>
Severity/ sensitivity	<p>High sensitivity due to presence of high density residential and office buildings and high use leisure area in close proximity of the site, and various sensitive groups (children, elderly, people with limited mobility, and others) likely to be accessing Sydney CBD daily.</p>
Extent	<p>Construction impacts would mainly impact the workers, residents and visitors in the Primary Study Area.</p> <p>Delivery of the new landmark building and associated publicly accessible open spaces would benefit the residents, workers and visitors to the area, who may be from Greater Sydney and beyond.</p>
Potential to mitigate/ enhance	<p>Construction impacts would need to be proactively mitigated due to the high-density environment. Ongoing contact and engagement will be crucial to ensure stakeholders are informed about all changes that may impact them throughout the project. Further to this, the proposed Construction Management Plan will be crucial to ensure that any foreseeable construction impacts are mitigated prior to them arising.</p> <p>During operation, there is a high ability for workers, visitors and local community to adapt to new facilities on the site, due to their proposed quality and design. An Operational Plan of Management (or consideration of existing Powerhouse operations) for the proposed development would be important to identify opportunities to enhance access and convenience for workers and visitors to the proposed development during its operation, to enhance safety and to manage any traffic and transport, or other issues as they arise.</p>

8.4 Monitoring and management framework

To monitor and measure the ongoing impact of the proposed development on relevant stakeholders and the surrounding community, the following framework is recommended:

8.4.1 During construction

- Development of a Construction Management Plan that includes complaints handling procedure for identifying and responding to community issues related to construction impacts.
- Implementation of the Change Management Strategy and Communications and Consultation Plan developed for the Project that detail the processes and communication strategies to ensure that key stakeholders are advised and consulted about major changes and disruptions, and the process for providing feedback and further consultation during the Project.

8.4.2 During operation

- Continued consultation with relevant stakeholders, as identified by Create NSW, to identify emerging social issues and trends.
- Development and implementation of an Operational Plan of Management (or consideration of existing Powerhouse operations) with respect to data collection (e.g. user surveys) to enable ongoing monitoring of the performance of the proposed facilities over time.

9.0 Employment Assessment

9.1 Introduction and approach

This section provides estimates of the economic benefits associated with the construction and operation of the proposed development, as is specified through the SEARs.

Economic impacts associated with the proposed development have been prepared with input-output modelling undertaken with reference and compliance to best-practice guidelines.

Input-output tables are a 'map' of the economy that track the flow of products, services, and payments through the many industries, households, government organisations and foreign transactions that make up the Australian economy.

Every industry requires inputs from many other industries, plus the inputs of workers and machinery and equipment to produce output. Input-output modelling uses averages derived from the ABS Input Output Tables to estimate the impact on all industries when one industry expands its production. The modelling used in this report is based on the 2018/19 ABS National Accounts release.

As with all economic models input-output models include a number of limitations, which include the following inherent assumptions: unlimited supplies of all resources including labour and capital, prices remaining constant, technology is fixed in all industries, and import shares are fixed.

Having regard for these limitations, the modelling used for the purposes of this assessment applies the **Simple Multiplier effect measure**. The Simple Multiplier effects measure estimates the expansion of other industries required to support the initial (direct) increase in the original industry; and does not include the additional impacts of extra wages and employment income being spent across the economy (spill-over effects).

Use of the **Simple Multiplier effect measure** is in-line with best practice industry standards and reflects a conservative position. Results from the modelling should be interpreted as indicative of the potential impact the project will have on the Australian economy.

The modelling provides estimates of the following economic benefits as a result of the project:

- **Construction Employment** - direct construction job-years supported by construction of the development and indirect job-years supported across all other industries over the construction period.

'Job-years' is defined as the number of full-time equivalent (FTE) jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year. Only applies to construction employment.
- **Ongoing Employment** - direct and indirect FTE jobs supported by the ongoing operation of the project annually.
- **Value Added** - direct and indirect value added generated during the construction and operational phase of the project. Value Added is defined as the wages, salaries, and supplements plus gross operating surplus (income earned by businesses) required in producing the extra output (construction investment and operating output/turnover). This represents the standard measure of economic contribution, that is, the increase in economic activity as measured by gross domestic product (GDP).

Estimates of the economic benefits of the proposed development will be realised across the national economy, given the scale and diversity of the New South Wales economy, a large proportion of these benefits will be realised locally. The benefits have been prepared for:

- **Construction Phase:** Economic activity during the construction phase of the project which will be spread across the construction program.
- **Operational Phase:** Ongoing economic activity once the project is completed.

9.2 Construction phase impacts

The construction phase is estimated to directly support employment of approximately 440 job-years and deliver an estimated direct value-add to the economy of \$61.3 million. This has been based on a CIV for the development as provided by the Proponent.

When the multipliers are taken into account, total state-wide economic effects over the construction program are estimated to be employment of 1,710 (direct and indirect) job-years and a total direct value-add to the economy of \$225.2 million.

Table 7 Construction Phase Economic Benefits (\$2020/21)

	Construction Phase (spread over construction period)		
	Direct	Indirect	Total
Employment (job-years)	440	1,270	1,710
Value Added (\$M)	\$61.3	\$163.9	\$225.2

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2018/19; ABS, Consumer Price Index

*Job-years: Number of FTE jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year.

9.3 Operational phase impacts

Economic benefits associated with the operation of the proposed development have been based on supportable employment estimates prepared by Create NSW. These estimates are understood to have been prepared with reference to relevant industry benchmarks.

It is estimated the proposed development will support total FTE employment of up to 200 jobs upon completion and full occupancy. It is estimated that these direct jobs at the site will generate a direct value-add to the economy of \$18.6 million per annum.

When the multipliers are taken into account, total ongoing economy-wide effects are estimated at: FTE employment of 340 jobs supported and a total direct value-add to the economy of \$34.4 million per annum, based on total direct and indirect employment.

In addition to ongoing jobs at the Powerhouse Ultimo site, it is understood that there will be an estimated 400 people employed flexibly across the suite of four Powerhouse sites, in its future state (based on information provided by Create NSW). This includes up to an estimated 200 FTE direct workers at the Powerhouse Ultimo.

The estimated 400 FTE direct ongoing workers across the Powerhouse sites will generate a direct value-add to the economy of \$37.1 million per annum. When considering the multiplier effect, total ongoing employment is estimated at 670 FTE jobs (direct and indirect), including a total value add to the economy of \$68.8 million per annum.

Table 8 Operational Phase Economic Benefits (\$2020/21)

	Operational Phase (annual)		
	Direct	Indirect	Total
<u>Economic benefits at Powerhouse Ultimo</u>			
Total Employment (FTE)	200	140	340
Value Added (\$M)	\$18.6	\$15.8	\$34.4
<u>Economic benefits across all Powerhouse sites</u>			
Total Employment (FTE)	400	270	670
Value Added (\$M)	\$37.1	\$31.7	\$68.8

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2018/19; ABS, Consumer Price Index

Note: Figures Rounded

10.0 Concluding comments

An assessment of the social impact categories, as defined within the Social Impact Assessment Guideline (NSW DPE, 2021) has been undertaken with consideration to the issues identified through the baseline analysis. Each category of impact outlined in the SIA Guideline is appraised with a significance of the impact based on the likelihood and magnitude of the change experienced by the community. This assessment is subject to further assessment as part of the Stage 2 Development Application, when final design, operational parameters and construction impacts are known.

10.1 Potential negative impacts identified

Key negative impacts identified with the proposed development relate to:

- Cumulative impacts on the surroundings and amenity of the PSA associated with dust, noise, vibration due to construction activity along Harris Street, MacArthur Street and The Goods Line, Tech Central and Central Station areas.
- Potential impacts on accessibility associated with increased traffic and decreased parking due to construction activities. This is likely to be short-term only.
- Temporary negative impacts to way of life associated with changes to wayfinding and pedestrian and vehicle access routes associated construction activities, including users of Harris Street and Western Distributor and the Light Rail.
- Careful consideration will be required to provide permeable movement on the site and seamless pedestrian focused connections to its surroundings, in particularly given topological/tactility constraints on MacArthur Street and the Harris Street interface to create a connected and engaging public domain.
- Temporary impacts to accessibility associated with changed staffing arrangements and visitors on site to accommodate for construction activities, potentially leading to decreased accessibility of the general public and changes in work routines.
- The removal of items of heritage and archaeological significance as the site is developed and the community's response.
- Future management and operations of Powerhouse Ultimo. Key to the delivery of positive benefits are ensuring that programs take into consideration the local setting, cultural values and population needs of the local area and communities .
- Potential impacts on the surroundings, amenity and community in the context of Tech Central and Sydney Metro West developments which is undergoing significant redevelopment activity and "construction fatigue" within the PSA.
- Management of construction impacts be managed in accordance with legislation and regulation, through a Construction Management Plan to be developed in consultation with Create NSW, stakeholders and the community.
- As the site is located in a medium density CBD environment, the area is likely to be accessed by a large number of sensitive receivers which may be predisposed to increased sensitivity to changes to environmental factors, accessibility and routines. This cohort may include university students, children, elderly, people with limited mobility, people experiencing illness, disability or homelessness, and others.

10.2 Potential social benefits of the project

The redevelopment will deliver important community wellbeing and economic benefits at a district, regional national scale, as well as a local scale including:

- The establishment of a world class museum that will provide significant public access to Powerhouse Collections and present international exhibitions alongside engaging communities with local histories.
- Delivering a highly operational precinct that contributes to delivery of strategic State and Local Government directives for activation of visitor and night-time economies, while creating spaces which encourage the local community to engage with the precinct.
- The activation of enhanced spaces for creative, research and education programs, providing opportunities to collaborate with schools, universities and industry, assisting in improvements of life-long education outcomes for students, supporting long term social and economic wellbeing.
- The project will strengthen key academic relationships with UTS, Sydney University, Sydney Institute of Technology TAFE to bring about a range of opportunities including creative industries, research, innovation and enterprise development in meeting NSW Government objectives in delivery of the Pyrmont Peninsula Place Strategy and Sydney's Innovation and Technology Precinct.
- New cultural and entertainment opportunities during both day and night, providing a significant positive contribution to the diversification of the local night-time economy.
- Planned Sydney Metro West and Pyrmont railway stations to support infrastructure investment.
- Supporting the sustainability and transformation of Ultimo, Tech Central and Darling Harbour as an internationally renowned commercial and cultural destination, by adaptively renewing the existing Powerhouse buildings. The proposal has the potential to enhance the cultural significance and characteristics of the south-eastern CBD through its design, provision of public open space, and improvements to streetscape and pedestrian amenity and wayfinding.
- Drawing upon its rich, heritage and architectural fabric as well as the museums expanded program provides a strong foundation for the creation of a thriving public domain that can be a vital component to the ongoing cultural life of Sydney.
- The proposal would also contribute to the growing diversification and activation of the Sydney CBD, Tech Central and Ultimo-Camperdown areas at night.
- Improved access and wayfinding through to open space. The proposed renewal of Powerhouse Ultimo would maintain publicly accessible open space, in a prominent location, and well accessible by public and variety of active transport modes. High quality activated open space at this site has the potential to support worker, resident and visitor wellbeing, increased opportunities for physical activity, and offering new opportunities for social interaction and build social cohesion within the largely anonymous CBD environment.
- Potential long term positive impacts to community connection associated with increased opportunities for social interaction between workers, residents and visitors to the area due to provision of new public and commercial spaces for people to meet and gather, including:
 - Cultural engagement, creative, educational and research programmes on the site, which may facilitate casual encounters and encourage workers, residents and visitors to the site to interact.
 - Potential benefits to community cohesion associated with increased pedestrian activation on the site, including through site links, catalysing new opportunities for community interaction and connection.
- Provision of amenity and public open space would support wellbeing and social cohesion of local worker and resident communities and is much needed in order to attract workforce and visitors back to Sydney CBD that has seen significant drop of users and visitors due to remote-working trends and border closures related to the Covid-19 pandemic.
 - The Powerhouse Ultimo Renewal provides a unique opportunity to create a vibrant, creative hub at the south of the Sydney CBD in meeting strategic objectives for NSW Government's Connecting with the Camperdown-Ultimo collaboration area.

- The Powerhouse Ultimo Renewal is well complimented by adjacent creative, educational and institutional uses, with three major academic institutions being; University of Technology, Sydney University, TAFE NSW Ultimo Campus as well as national media agency, ABC, all located within 5 minutes walk of the precinct.
- The proposal will support significant economic benefits through jobs and economic activity. The proposal will support an estimated 1,710 (direct and indirect) job-years during the construction phase of the project. In addition, the ongoing phase of the project will support an estimated 340 direct and indirect FTE jobs, generating an estimated \$34.4 million in value added to the local and regional economy annually.

10.3 Summary of impacts

Overall, it is considered that the potential negative amenity and way of life impacts arising from the construction and operation of the facility in the immediate locality can be well managed and mitigated through a robust Construction Management Plan, Operational Plan of Management, and the ongoing planned consultation with the local community and relevant stakeholders. This assessment is subject to further assessment as part of the Stage 2 Development Application, when final design, operational parameters and construction impacts are known.

The renewal and expansion of the Powerhouse Ultimo – if impacts associated with construction are well mitigated – will ensure positive social outcomes for the broader community. Broader benefits of the investment in the renewal of this significant national scale public cultural facility, the associated public programming and community infrastructure will be widespread, significant, and long term.

Appendix A. Information sources

The following sources of information have been referenced for this assessment:

National

- *ABS Census of Population and Housing 2016* (Australian Bureau of Statistics, 2016)

State

- *Premier's Priorities* (NSW Government, 2019)
- *Better Placed* (NSW Government Architect, 2017)
- *Greener Places* (NSW Government Architect, 2020)
- *NSW Infrastructure Strategy 2018-2038* (NSW Government, 2018)
- *Sydney's Walking Future* (Transport for NSW, 2013)
- *Sydney 24 Hour Economy Strategy* (NSW Treasury, 2020)
- *The Cultural Infrastructure Plan 2025+* (Create NSW, 2019)
- *Sydney Innovation and Technology Precinct Panel Report* (NSW Government, 2018)
- *Darling Harbour Development Plan No 1*. (NSW Government, 1985)
- *Pymont Peninsula Place Strategy* (NSW Government, 2020)
- *Draft Darling Harbour Urban Form Strategy* (NSW Government, 2016)
- *Transport for NSW Employment Forecasts* (TfNSW)

Regional

- *Greater Sydney Region Plan: A Metropolis of Three Cities* (Greater Sydney Commission, 2017)
- *Our Greater Sydney 2056: Eastern City District Plan* (Greater Sydney Commission, 2018)

Local

- *Western Harbour Precinct - Business Improvement District Trial* (City of Sydney, 2021)
- *A City for All: Social Sustainability Policy* (City of Sydney, 2016) and *Action Plan* (2018)
- *City Plan 2036: Local Strategic Planning Statement* (City of Sydney, 2019)
- *Creative City: Cultural Policy and Action Plan 2014 – 2024* (City of Sydney, 2014)
- *Digital Strategy* (City of Sydney, 2017)
- *Draft Central Sydney Planning Strategy 2016 – 2036* (City of Sydney, 2016)
- *Draft Greening Sydney Strategy* (City of Sydney, 2021)
- *Draft Sydney Development Control Plan: Open and Creative Planning Reforms* (City of Sydney, 2020)
- *Economic Development Strategy* (City of Sydney, 2013)
- *Tourism Action Plan* (City of Sydney, 2013)
- *Community Recovery Plan* (City of Sydney, 2020)
- *OPEN Sydney: Future directions for Sydney at night* (City of Sydney, 2013)
- *Sustainable Sydney 2030: Community Strategic Plan 2017 – 2021* (City of Sydney, 2017)
- *Sydney Development Control Plan 2012 (Sydney DCP)* (City of Sydney, 2012)
- *Tech Start-ups Action Plan* (City of Sydney, 2016)

Appendix B. Summary of strategic policy drivers

This table synthesises the findings of a review of state and local policies, strategies and documents that articulate the desired social, cultural, and economic outcomes relevant to the proposed development.

Table 9 Strategic policy review

Policy theme	Key drivers	Policy/ Plan
<p>Positioning Sydney as a global tourist destination, including Pyrmont Peninsula</p>	<p>The NSW Visitor Economy Strategy aims to rebuild the state’s tourism potential post-COVID 19, with ambition for world-class infrastructure and a 24-hour economy. The Government recognises “vibrant contemporary culture” (pg. 36) as one of the state’s strengths, and plans to invest in new arts, cultural and infrastructure.</p> <p>The Visitor Economy Industry Action Plan aims to increase overnight visitor expenditure by 2030. This will involve making visitor information available via digital technology and investing in critical infrastructure (including world-class cultural infrastructure).</p> <p>Metropolitan Sydney is a major contributor to the national visitor economy. It is a Council priority to increase Sydney’s national and global competitiveness as a tourist destination by capitalising on the potential of urban renewal sites.</p> <p>NSW DPE envisions the Pyrmont Peninsula as a renowned cultural and entertainment precinct: “The Peninsula will blossom as a cultural and creative destination with the Powerhouse Museum, the Maritime Museum, the Lyric Theatre, and other cultural and creative uses extending the cultural ribbon” (Pyrmont Peninsula Place Strategy, pg. 21). Within the peninsula, Ultimo is positioned as a hub of creativity and learning.</p> <p>It is a state priority to see Greater Sydney become “a leading cultural capital in the Asia-Pacific” (NSW Cultural Plan, pg. 8). Community engagement identified demand for cultural production space, particularly rehearsal space which is flexible and affordable in order to foster inclusivity in the creative industries.</p> <p>A key direction of the Pyrmont Place Strategy is celebrating culture and heritage. The peninsula contains many heritage listed and culturally significant structures, including the Powerhouse Museum, which play a role in the area’s attractiveness. NSW DPE will create “an integrated plan for the Ultimo creative precinct, including improved presence of, and access to, heritage buildings...” (pg. 30).</p>	<ul style="list-style-type: none"> • <i>NSW Visitor Economy Strategy 2030 (Destination NSW, 2020)</i> • <i>Tourism Action Plan (City of Sydney, 2013)</i> • <i>Pyrmont Peninsula Place Strategy (NSW DPE, 2020)</i> • <i>The Cultural Infrastructure Plan 2025+ (Create NSW, 2019)</i> • <i>Visitor Economy Industry Action Plan (Business NSW, 2018)</i>
<p>Supporting Tech Central, the Innovation Corridor, and the state economy</p>	<p>Pyrmont Peninsula forms part of the innovation corridor, connecting with thriving industries in Tech Central, Redfern, and Eveleigh. This corridor will be a key point of investment for the State Government in order to facilitate economic growth, technological innovation, and job opportunities.</p> <p>Priorities for the Camperdown-Ultimo Collaboration Area include provision of social and civic infrastructure for present and future populations, improvement of local transport and amenity, and the promotion of innovation and technology. The Powerhouse Museum is recognised as a significant employer, knowledge and skill contributor to the area.</p> <p>The Sydney Innovation and Technology Precinct (Tech Central) has been identified as a ‘Lighthouse Precinct’ – “Lighthouse Precincts will generate new jobs, become sought-after places where people want to live and work, and act as magnets for focused investment” (Global NSW Strategy, pg. 14). It is a state priority to grow these precincts by supporting activation processes.</p> <p>Tech Central is an emerging precinct in close proximity to the site, which will soon be home to a wealth of emerging industries and technologies. Long-term goals for the precinct include provision of over 25,000 additional innovation jobs, 250,000+sqm of commercial floorspace (a percentage of which will be affordable for start ups and</p>	<ul style="list-style-type: none"> • <i>Pyrmont Peninsula Place Strategy (NSW DPE, 2020)</i> • <i>Camperdown-Ultimo Place Strategy (Greater Sydney Commission, 2019)</i> • <i>Tech Central Brochure (Global NSW, 2020)</i> • <i>Economic Development Strategy (City of Sydney, 2013)</i> • <i>Pyrmont Peninsula Economic Development Strategy (NSW Government, 2020)</i>

Policy theme	Key drivers	Policy/ Plan
	<p>early stage companies), and attraction of 25,000 new students. A connected, vibrant, and high amenity built environment will be crucial to support the growth of this precinct by attracting and retaining knowledge workers.</p> <p>Policy highlights the critical importance of a high amenity CBD to attract a high calibre, global knowledge economy workforce and businesses. This is a key driver for the Sydney CBD – Sydney’s premier commercial office location.</p> <p>Improving public domain quality and amenity for workers is a key foundation for Sydney’s continuing successful growth and development. Enhancing CBD amenity is premised on “direct investment in infrastructure, assets, services, events and activity to improve the amenity, liveability and functioning of the City,” as per the City’s Economic Development Strategy.</p> <p>Key opportunities to advance the growth of Pyrmont Peninsula and its role within the Innovation Corridor include investment in transport infrastructure, collaboration with education institutions, and increasing the diversity of businesses (particularly within the creative, arts, and entertainment industries). Barriers to this include a lack of commercial floorspace, connectivity/permeability issues, and maintenance of historical character.</p> <p>Policy indicates the power of cultural precincts in the transformation of neighbourhoods and economic development. A vibrant cultural precinct has the ability to attract global capital, knowledge workers, and tourists.</p> <p>Building human capital is vital to economic growth. It is a state priority to improve educational outcomes and provide contemporary training opportunities in order to establish a healthier and more educated workforce.</p>	<ul style="list-style-type: none"> • <i>Global NSW Strategy (Global NSW, 2021)</i> • <i>Cultural Infrastructure Strategy 2016 Advice to the NSW Government (Infrastructure NSW, 2016)</i> • <i>NSW 2040 Economic Blueprint (NSW Treasury, 2019)</i> • <i>Kickstarting the productivity conversation (Office of the NSW Productivity Commissioner, 2019)</i>
<p>Ensuring a sufficient supply of social infrastructure to support community wellbeing</p>	<p>As one of the fastest growing LGA’s in Australia, the City of Sydney is expected to accommodate 320,000 additional residents by 2031, up from 248,736 in 2020. Prior to the COVID-19 pandemic, Sydney LGA also accommodated for over 629,000 visitors, students, and workers each day.</p> <p>It is a local priority to deliver social infrastructure in alignment with population growth and change in order to support community wellbeing. Council has recognised the role of social infrastructure in encouraging social interaction, fostering cohesion, and building community resilience.</p> <p>The City of Sydney’s Community Recovery Plan has recognised the impact of COVID-19 on disadvantaged communities within the LGA. It is a local priority to address rising inequality in Sydney LGA through infrastructure: “An equitable society is founded on a principle that all people, no matter their income, can afford the essentials of daily life. These include fresh and healthy food, services such as health care and education, social supports and other items such as internet access. We would also expect recreational and cultural pursuits to be accessible to all” (pg. 21).</p> <p>The City of Sydney’s Social Sustainability Policy and Action Plan has identified a need for affordable cultural and creative space, local libraries, community centres, and child-friendly spaces (i.e., play spaces). Social infrastructure should be multipurpose where possible and open during the day and night, in order to suit diverse community needs.</p> <p>Major centres such as Sydney CBD play a key role in meeting the employment, education and goods and service needs of their communities, while delivering social and economic benefits. It is a state and local priority to deliver a “30 minute city” where employment and education opportunities, daily living needs, and</p>	<ul style="list-style-type: none"> • <i>City Plan 2036: Local strategic planning statement (City of Sydney, 2019)</i> • <i>Sustainable Sydney 2030: Community Strategic Plan (City of Sydney, 2017)</i> • <i>Community Recovery Plan (City of Sydney, 2020)</i> • <i>A City for All: Towards a socially just and resilient Sydney (City of Sydney, 2019)</i> • <i>Eastern City District Plan (Greater Sydney Commission, 2018)</i> • <i>NSW Government State Outcomes (NSW Government, 2019)</i>

Policy theme	Key drivers	Policy/ Plan
	<p>housing are accessible to each other in 30 minutes or less, via public transport.</p> <p>It is a priority of the City of Sydney Council's A City for All strategy to create "a liveable city [which] supports high quality of life and wellbeing" (A City for All, pg. 27). Members of the community should have access to a diverse range of facilities and services within a vibrant local neighbourhood which supports their daily needs.</p> <p>The City's most recent <i>City Plan 2036</i> aims to encourage wellbeing, liveability and social connectedness by providing 'great places and spaces designed for people of all ages and abilities'.</p> <p>It is a Premier's Priority to increase access to green, open and public space, as they support health, wellbeing, resilience, and local economies.</p> <p>NSW DPE is responsible for creating a strong and liveable NSW and generating maximum community benefit from government land and property. The Premier and Cabinet are responsible for excellence in arts, culture, and heritage, empowerment of Aboriginal communities, and effective delivery of infrastructure.</p>	
<p>Diversifying economic, cultural and social activities within the City of Sydney LGA and NSW more broadly</p>	<p>Sydney CBD's global economic role is supported by its high amenity and liveability, as well as its entertainment, cultural, tourist and conference facilities.</p> <p>According to state and local policy, City of Sydney LGA should function socially/culturally as a 'city of villages' and economically as a 'network of sectors, markets, and high-performance clusters'. It is vital that each community, is a space to live, study and learn, shop, create, play, and work with a distinct civic character.</p> <p>Policy highlights the need for affordable spaces for start-ups and other small businesses in order to promote and diversify commercial activities in Sydney. 'Opportunity spaces', low-rent office space, and hubs with affordable and accessible digital tools and technology to attract and nurture local talent to encourage business innovation and economic growth. Creation of temporary and long-term creative workspaces is encouraged in policy.</p> <p>The City of Sydney Cultural Strategy and Making Space for Culture report serves to inform a common understanding of the challenges faced in making space for culture, opening new avenues of dialogue and pathways to explore for solutions including subsidised space to support the growth creative and social enterprises in Sydney.</p> <p>It is a state priority to strengthen peoples' engagement with aboriginal art, culture, languages, and identities. Create NSW will promote Aboriginal artistic intellectual property, broker opportunities for Aboriginal art practitioners and businesses, and invest in Aboriginal arts product development. Principles for the development of Aboriginal art and cultural projects include cultural authority and agency, prior informed consent and consultation, recognising rights and maintaining culture, integrity of Aboriginal culture, and attribution and sharing benefits.</p> <p>It is a state vision to make NSW "known for its bold and exciting arts and culture that engage our community and reflect our rich diversity" (p. 10), supporting the arts and cultural sector by revitalising state cultural infrastructure as part of the NSW Arts and Cultural Policy Framework's ambition for Excellence.</p> <p>Sydney is home to the majority of arts and cultural businesses in NSW. It is a strategic objective of the State Infrastructure Strategy to "deliver world-class institutions to maintain strong cultural... sectors and support the visitor economy" (pg. 208). In order to achieve excellence, the Government will modernise and upgrade state cultural institutions to meet contemporary standards and invest in spaces for small to medium-sized cultural production.</p>	<ul style="list-style-type: none"> • <i>Our Greater Sydney 2056: Eastern City District Plan</i>, Greater Sydney Commission (2018) • <i>Draft Central Sydney Planning Strategy 2016 – 2036 (City of Sydney 2016)</i> • <i>Making Space for Culture in Sydney (City of Sydney, 2020)</i> • <i>NSW Aboriginal Arts & Cultural Strategy (Create NSW, 2015)</i> • <i>Aboriginal Arts & Culture Protocols (Create NSW, 2011)</i> • <i>NSW Government Plan for Aboriginal Affairs (OCHRE) (NSW Government, 2013)</i> • <i>NSW Arts and Cultural Policy Framework (Create NSW, 2015)</i> • <i>Building Momentum: State Infrastructure Strategy (Infrastructure NSW, 2018)</i>

Policy theme	Key drivers	Policy/ Plan
<p>Renewed activation, diversification, and growth of night-time economy in Sydney CBD</p>	<p>A more robust night-time economy in Sydney CBD is supported by Council policy. Development should diversify night-time social and recreational options and contribute to a safe and welcoming public realm.</p> <p>State and local policy recognises that improving and diversifying the night-time economy in Sydney CBD will support the ongoing growth of the area as an employment and tourism destination, by improving amenity for workers and visitors.</p> <p>The City of Sydney Council recognises that successful global cities offer “a wide choice of leisure and entertainment, and a rich mix of private and public attractions for a diversity of ages, lifestyles, and cultures, including families” (pg. 12). It is a Council priority to match the diversity of choices available during the day into the evening and create a viable transition between daytime and night-time economies.</p> <p>A 24 hour economy is seen as vital in post-pandemic recovery, through economic development concentrated in night-time hubs that are vibrant, diverse, and create a feeling of community connectedness.</p>	<ul style="list-style-type: none"> • <i>OPEN Sydney: Future directions for Sydney at night (City of Sydney, 2013)</i> • <i>Sydney 24 Hour Economy Strategy (NSW Treasury, 2020)</i> • <i>Draft Sydney Development Control Plan: Open and Creative Planning Reforms (2020)</i>
<p>Walkability, accessibility, and connectivity</p>	<p>The City of Sydney Council is prioritising improved walkability by increasing the safety and comfort of streets, providing direct, pleasant, sociable, and interesting walking connections, and enabling businesses and services to deliver the needs of local communities within easy walking distance. With greater than 92% of trips being walking in the Sydney CBD each day, meeting demands for connectivity, safety, and natural amenity are vital to promote walking and meet current and future demand.</p> <p>Major centres such as Sydney CBD play a key role in meeting the employment, education and goods and service needs of their communities, while delivering social and economic benefits. It is a state and local priority to deliver a “30 minute city” where employment and education opportunities, daily living needs and housing are accessible to each other in 30 minutes or less via public transport. The GSC is committed to delivering a well-connected city which is safe and walkable and optimises community infrastructure.</p> <p>“In Sydney, the location of the major cultural institutions and facilities close to the harbour is a major point of distinction and attractiveness. This natural advantage should be leveraged by providing physical and virtual links between cultural locations and institutions to create a cohesive CBD cultural precinct” (Infrastructure NSW Advice to the NSW Government, pg. 49).</p> <p>The Greater Sydney Commission recognises that providing adequate infrastructure to support population growth is essential to delivering a liveable, productive and sustainable community. Investment in public transport projects, including Sydney Metro will improve business-to-business connections and enhance the attractiveness of the Sydney CBD as a commercial centre.</p> <p>The Western Harbour Precinct Planning Framework Review Report has identified several issues related to traffic congestion and the public transport network in the area. Additionally, social infrastructure is in high demand due to the broad user base, including residents, workers, students, and visitors. There is a need to provide efficient public transport solutions and connections to social infrastructure.</p>	<ul style="list-style-type: none"> • <i>City Plan 2036: Local strategic planning statement (City of Sydney, 2020)</i> • <i>Our Greater Sydney 2056: Eastern City District Plan, Greater Sydney Commission (2018)</i> • <i>Better Placed, NSW Government Architect (2017)</i> • <i>NSW Infrastructure Strategy 2018-2038 (NSW Government, 2018)</i> <p><i>City Plan 2036: Local strategic planning statement (City of Sydney, 2019)</i></p> <p><i>Western Harbour Precinct including the Pyrmont Peninsula Planning Framework Review Report (Greater Sydney Commission, 2019)</i></p> <p><i>Cultural Infrastructure Strategy 2016 Advice to the NSW Government (Infrastructure NSW, 2016)</i></p>

Appendix C. Resident demographic profile

Category	PSA	SSA	Greater Sydney
Income			
Median individual income (annual)	\$22,440	\$49,520	\$37,460
Variation from Greater Sydney median	-40.1%	32.2%	na
% of persons (15 years or older) earning \$1,000pw or more	22.3%	48.2%	37.3%
Median household income (annual)	\$71,060	\$100,890	\$92,200
Variation from Greater Sydney median	-22.9%	9.4%	na
% of Households earning \$2,500pw or more	21.8%	35.5%	31.8%
Individual income			
<i>No income</i>	28.3%	12.7%	12.3%
<i>Low</i>	36.8%	26.0%	34.2%
<i>Medium</i>	28.1%	42.3%	41.9%
<i>High</i>	6.8%	19.0%	11.6%
Household income			
<i>No income</i>	14.6%	5.6%	2.0%
<i>Low</i>	13.9%	13.9%	14.1%
<i>Medium</i>	37.9%	31.9%	39.6%
<i>High</i>	33.6%	48.5%	44.3%
Age Structure			
0 years	0.5%	0.9%	1.2%
1-2 years	0.8%	1.4%	2.6%
3-4 years	0.6%	1.0%	2.6%
5-6 years	0.4%	0.8%	2.6%
7-11 years	0.9%	1.5%	6.2%
12-17 years	1.0%	1.6%	6.9%
18-24 years	35.1%	17.1%	9.6%
25-34 years	36.3%	33.8%	16.2%
35-49 years	15.1%	22.1%	21.3%
50-59 years	3.6%	9.1%	12.3%
60-69 years	3.4%	6.3%	9.4%
70-84 years	1.9%	3.9%	7.1%
85 years and over	0.4%	0.8%	1.9%
Males	48.3%	51.8%	49.3%
Females	51.3%	48.2%	50.7%
Total persons	11,170	207,430	4,823,900
Median Age (years)	26.0	32.0	36.0
Country of Birth			
Australia	17.6%	46.0%	61.9%
<i>Aboriginal and Torres Strait Islanders</i>	0.5%	1.1%	1.4%
Other Major English Speaking Countries	4.0%	12.8%	7.6%
Other Overseas Born	78.4%	41.2%	30.5%
<i>% speak English only at home</i>	23.6%	58.7%	62.5%
Previous Address			
	-	-	-

Same address as 1 year ago	56.2%	67.8%	83.9%
Different address 1 year ago	43.8%	31.9%	16.0%
Same address as 5 year ago	21.4%	31.4%	56.6%
Different address 5 year ago	78.6%	67.7%	42.9%
<u>Household Composition</u>	-	-	-
<i>Couple family with no children</i>	26.0%	29.7%	23.8%
<i>Couple family with children</i>	10.0%	10.9%	37.5%
Couple family - Total	36.0%	40.5%	61.3%
One parent family	4.5%	4.7%	11.1%
Other families	3.7%	1.9%	1.3%
Family Households - Total	44.2%	47.1%	73.7%
Lone person household	26.4%	37.3%	21.7%
Group Household	29.4%	15.5%	4.6%
<u>Dwelling Structure (Occupied Private Dwellings)</u>	-	-	-
Separate house	0.1%	1.9%	57.2%
Semi-detached, row or terrace house, townhouse etc.	6.8%	20.0%	14.0%
Flat, unit or apartment	93.0%	77.7%	28.2%
Other dwelling	0.0%	0.4%	0.5%
<i>Occupancy rate</i>	91.6%	88.2%	92.3%
Average household size	2.8	2.1	2.8
<u>Tenure Type (Occupied Private Dwellings)</u>	-	-	-
Owned outright	13.0%	14.4%	30.0%
Owned with a mortgage	14.0%	20.6%	34.2%
Rented	72.4%	64.4%	35.1%
<i>State or territory housing authority</i>	3.4%	7.8%	4.2%
<i>Housing co-operative/community/church group</i>	3.3%	1.3%	0.5%
Other tenure type	0.6%	0.6%	0.7%
<u>Attending Education (% of those attending)</u>	-	-	-
Pre-school	0.7%	2.5%	6.9%
Infants/Primary Total	2.8%	8.8%	32.2%
<i>Government</i>	69.5%	71.3%	68.4%
<i>Catholic</i>	10.6%	14.2%	19.7%
<i>Other</i>	19.9%	14.5%	11.9%
Secondary Total	3.1%	7.0%	25.0%
<i>Government</i>	70.0%	44.3%	54.8%
<i>Catholic</i>	7.5%	23.4%	26.4%
<i>Other</i>	22.5%	32.2%	18.9%
Technical or Further Educational Institution	12.8%	11.5%	7.6%
University or other Tertiary Institution	63.2%	57.2%	24.2%
Other type of educational institution	17.3%	12.9%	4.0%
<i>% of total population attending education</i>	45.0%	24.5%	25.2%
<u>Highest Level of Education Completed (% of population aged 15 years and over)</u>	-	-	-
Year 12 or equivalent	89.3%	86.2%	67.5%
Year 9-11 or equivalent	7.2%	11.3%	26.7%
Year 8 or below	2.2%	1.8%	4.4%
Did not go to school	1.3%	0.8%	1.5%

Highest Level of Non-School Qualification	-	-	-
Postgraduate degree	18.8%	20.7%	13.9%
Graduate diploma or certificate	2.0%	3.8%	3.4%
Bachelor degree	53.3%	49.3%	36.4%
Advanced diploma or diploma	17.0%	14.1%	17.7%
Certificate	8.9%	12.1%	28.6%
% of persons with non-school qualifications (persons 15 years and above) - excludes not-stated and inadequately described	51.6%	59.7%	52.7%

Employment Status	-	-	-
Unemployed/ looking for work	10.5%	6.0%	6.0%
Labour force participation rate	60.7%	73.5%	65.6%

Need for Assistance			
With Need for Assistance	8.2%	6.1%	4.9%
No Need for Assistance	86.3%	86.6%	88.7%
Need not stated	5.5%	7.3%	6.4%

Top 10 Countries of Birth	PSA	SSA	Greater Sydney
1	China (29.5%)	Australia (46.0%)	Australia (61.9%)
2	Australia (17.6%)	China (11.4%)	China (5.0%)
3	Thailand (11.2%)	England (5.2%)	England (3.4%)
4	Indonesia (7.3%)	Thailand (3.8%)	India (2.9%)
5	Korea South (4.8%)	New Zealand (3.1%)	New Zealand (1.9%)
6	India (2.8%)	Indonesia (2.9%)	Vietnam (1.8%)
7	Vietnam (2.5%)	Korea South (1.9%)	Philippines (1.7%)
8	Malaysia (2.4%)	India (1.5%)	Lebanon (1.2%)
9	Hong Kong (2.3%)	United States of America (1.5%)	Korea South (1.1%)
10	Taiwan (2.0%)	Hong Kong (1.3%)	Hong Kong (0.9%)

Top 10 Languages Spoken at Home	PSA	SSA	Greater Sydney
1	Mandarin (28.4%)	English (58.7%)	English (62.5%)
2	English (23.6%)	Mandarin (11.3%)	Mandarin (5.1%)
3	Thai (10.9%)	Thai (3.6%)	Arabic (4.3%)
4	Cantonese (7.7%)	Cantonese (3.3%)	Cantonese (3.1%)
5	Indonesian (6.4%)	Indonesian (2.4%)	Vietnamese (2.2%)
6	Korean (4.4%)	Spanish (2.0%)	Greek (1.7%)
7	Chinese - other (2.4%)	Korean (1.7%)	Hindi (1.4%)
8	Vietnamese (2.3%)	French (1.4%)	Italian (1.4%)
9	Japanese (1.8%)	Italian (1.2%)	Indo Aryan - other (1.3%)
10	Spanish (1.6%)	Vietnamese (1.2%)	Korean (1.3%)