WESTERN SYDNEY UNIVERSITY - BANKSTOWN CITY CAMPUS

SOCIO-ECONOMIC IMPACT ASSESSMENT

SEPTEMBER 2019
PREPARED FOR WESTERN SYDNEY UNIVERSITY

URBIS

URBIS STAFF RESPONSIBLE FOR THIS REPORT WERE:

Directors	Rachel Trigg; Richard Gibbs
Senior Consultants	Jodie Leeds; Theresa O'Neil; Victoria Lui
Consultant	Isabelle Kikirekov
Research Analysts	Jackson Whitehair; Geri Marks
Research Assistants	Zachary Orlando
Project Code	P0008854
Report Number	Version 2

urbis.com.au

TABLE OF CONTENTS

FIGURES:

TABLES:

MAPS:

CHARTS:

EXECUTIVE SUMMARY

Urbis Pty Ltd. (Urbis) was engaged by Western Sydney University (WSU) to prepare a Socio-Economic Impact Assessment (SEIA) in relation to the Western Sydney University Bankstown City Campus (WSU BCC) located at 74 Rickard Road, Bankstown along with a portion of 375 Chapel Street, Bankstown.

The proposed WSU BCC is a State Significant Development (SSD). This assessment has been undertaken to fulfil the requirements of the Secretary's Environmental Assessment Requirements (SEARs), issued on 22 February 2019 (SSD_9831).

The following table addresses SEARs and comments identified by Council and is discussed in more detail throughout the report.

Table 1 – Response to SEARs

SEARs	Council	Response to SEARs
The economic feasibility and suitability of the new campus, including potential direct and indirect economic benefits of the development to the Bankstown City Centre and the Canterbury Bankstown, Greater Sydney and NSW economies.	Potential direct and indirect economic benefits of the development to the Bankstown City Centre and Canterbury Bankstown, Greater Sydney and NSW.	A cost-benefit analysis of the WSU BCC estimated a net return of $1.5 billion over a 30-year time horizon under the benchmark case. The benefit-cost ratio (BCR) has been estimated to be 5.8 under the benchmark discount rate of 7%, with a high and low range estimates of 7.9 and 4.8 respectively. Refer to **Sections 3.2** and **6.**
The number of students expected to be based at the campus (expressed both as an estimated daily, weekly and annual population in the first year, and the forecast growth over 10 years) and the social impacts on the local community, including how the proposal adds to the social sustainability of the broader community.	The number of students expected to be based at the campus, expressed both as an estimated daily, weekly and annual population in the first year, and the forecast growth over 10 years.	As enrolment projections for WSU BCC have not been finalised, some assumptions have been made around the projected breakdown between cohorts, details of which are available in **Sections 3.4** and **7**.

SEARs	Council	Response to SEARs
The adequacy of open space, sport and recreation facilities to support the student and academic population.	The impact of the proposed development on local infrastructure and services, in particular local open space, the Bankstown Library and Knowledge Centre and rental accommodation in Bankstown City Centre and its surrounds.	The new WSU BCC will provide open space and community infrastructure to meet the needs of the incoming students, staff and visitors. The open space on Appian Way and the Level 3 terrace contains substantial embellishments to attract students and staff. Similarly, the library on Level 4 of the WSU BCC campus will be designed to cater directly for student needs. Given these purpose designed spaces, it is likely that the WSU BCC will have a minimal impact on the Bankstown Library and Knowledge Centre, and local open space. Most mobile students (83%) are already living in the local housing market or commuting to Milperra Campus from other housing markets, so the WSU BCC location's impact on the housing market is anticipated to be low. Increased accessibility of the WSU BCC campus and frequent train services to Bankstown Station will allow mobile students to live in the suburb of their choice. **Sections 4**, **5** and **7** provide greater detail.

	Details of any measures to minimise any adverse social and economic impacts, and those to capitalise on positive economic and social opportunities.	The assessment found that the WSU BCC would have long term positive social and economic benefits for Bankstown. Any potential adverse impact will be mitigated. Measures which are likely to enhance the positive social and economic impacts of the WSU BCC are discussed in **Section 8.1.** and include**:** • Considering partnership opportunities with local high schools to enhance exposure of the University • Implementation of scholarship opportunities for local students • Continue to work with Council to scope opportunities to provide programs and organise events at the WSU • Encourage students to utilise the university open space and Level 3 terrace • Make the spaces comfortable in all climatic conditions • Ensure students do not feel pressured to buy from food and beverage businesses in order to access open spaces • Enhance connections to businesses in Canterbury Bankstown • Encourage local first supplier agreements • Monitor the number of enrolments of international and regional students to determine if there is a need for student accommodation in the future.

SEARs	Council	Response to SEARs
	The number of construction and operational jobs generated by the proposed development including the number of FTE staff based at the campus, and other additional staff who may work at the campus on a periodic or casual basis.	Construction is expected to generate a substantial amount of employment with 198 direct jobs and 477 jobs supported through the supply-chain within the Canterbury Bankstown LGA. Refer to **Section 6** for more detail.
The proposed initial academic program, and planned changes over time which reflect local, regional and international demand. This should include details of the planned catchment of the university, including indicative student population proportions that are from Canterbury Bankstown, the South District, Greater Sydney, NSW interstate and international.	The proposed initial academic program, and planned changes over time which reflect local, regional and international demand. This should include details of the planned catchment of the university, including indicative student population proportions that are from Canterbury Bankstown, the South District, Greater Sydney, NSW interstate and international.	The proposed academic program and catchment is unknown at this stage, however it is expected to be in line with the current program at Milperra broadening over time to include specialisations that support and reflect the new locality in Canterbury Bankstown.

CONCLUSION

Based on the assessment in this report, the WSU BCC will likely have long term social impacts for students, staff and the community. The high architectural quality will likely enhance the brand and identity of Bankstown and the creation of an accessible, high profile university campus will increase engagement levels of local residents in tertiary education. The WSU BCC proposes open space, publicly accessible areas and community infrastructure that will meet the needs of students, staff and visitors. The open space and publicly accessible areas have been well targeted to user needs and are likely to be more attractive to students, staff and visitors than the surrounding open spaces. The size of WSU BCC and number of incoming students do not warrant the provision of social infrastructure beyond the proposed library.

The WSU BCC will have significant economic benefits and direct and indirect employment opportunities locally and within the Canterbury Bankstown LGA. It is anticipated that the construction will also contribute to direct and indirect employment through the supply-chain within the LGA.

There will be some costs associated with the base building, interior fit out and annual operating costs. However, the WSU BCC is expected to support direct and indirect jobs and generate activity in the local economy. The cost benefit analysis has found that the economic benefits significantly outweigh the costs.

The anticipated impacts of the proposed project on the Bankstown rental market are minimal. Most students are already living within the local housing market or commuting to Milperra Campus from other housing markets. The increase in mobile students is likely to be balanced by the increase in accessibility to the WSU BCC, frequent train services to Bankstown Station and increased housing choice for students.

Overall, the WSU BCC is expected to deliver long term positive social and economic benefits for the Canterbury Bankstown community. Measures that are likely to enhance the positive social and economic impacts of the WSU BCC are discussed throughout this report and any potential adverse impacts will be mitigated.

1. INTRODUCTION

Urbis Pty Ltd. (Urbis) was engaged by Western Sydney University (WSU) to prepare a Socio-Economic Impact Assessment (SEIA) in relation to the Western Sydney University Bankstown City Campus (WSU BCC) located at 74 Rickard Road, Bankstown along with a portion of 375 Chapel Street, Bankstown.

The proposed WSU BCC is a State Significant Development (SSD). This assessment has been undertaken to fulfil the requirements of the Secretary's Environmental Assessment Requirements (SEARs), issued on 22 February 2019. This assessment specifically addresses:

11. Social and Economic Impact

Include an assessment of the social and economic impacts of the development, including:

- The economic feasibility and suitability of the new campus, including potential direct and indirect economic benefits of the development to the Bankstown City Centre and the Canterbury Bankstown, Greater Sydney and NSW economies
- The number of students expected to be based at the campus (expressed both as an estimated daily, weekly and annual population in the first year, and the forecast growth over 10 years) and the social impacts on the local community, including how the proposal adds to the social sustainability of the broader community
- Adequacy of open space, sport and recreational facilities to support the student and academic population
- The proposed initial academic program, and planned changes over time which reflect local, regional and international demand. This should include details of the planned catchment of the university, including indicative student population proportions that are from Canterbury Bankstown, the South District, Greater Sydney, NSW, interstate and international.

1.1. PURPOSE AND SCOPE

A SEIA is a specialist study undertaken to identify, analyse, manage and monitor the direct and indirect social and economic impacts associated with a proposed development. The SEIA has been undertaken to fulfil the SEARs requirements issued on 22 February 2019.

Urbis understands that a separate Local Development Application is to be prepared for project early works including clearing of vegetation, site clearing, excavation and augmentation of existing services and utilities. While not a component of the SSDA, early works have also been included in the scope of the SEIA. The inclusion of early works in the SEIA ensures the economic and social impact of the entirety of the project are assessed.

1.2. METHOD

Social Impact Assessment

SIA is the process of analysing, monitoring and managing the intended and unintended social consequences, both positive and negative, of planned interventions which may include policies, programs, plans and projects.[1]

The significance of potential impacts is assessed by comparing the consequence level of impact against the likelihood of the impact occurring. The consequence and likelihood scale and criteria are provided in **Appendix A**. The identified impacts are assessed both prior to and after the implementation of management measures. Management measures are designed to reduce negative impacts and to enhance positive impacts. They can take different forms that are implemented in the planning, construction or operational stage of a proposal.

[1] International Association for Impact Assessment

SIAs typically conclude with an assessment of the overall impact level of a proposal. This is informed by the sum of all identified impacts and considers the likely impact on the status quo if the proposal does or does not proceed.

Economic Impact Assessment

The analysis of the economic impacts uses REMPLAN economic modelling to assess the potential direct and indirect economic benefits of both the construction and operations of the Campus. REMPLAN is an Input-Output model which captures inter-industry relationships within an economy. It can assess the area-specific direct and supply-chain flow-on transaction impacts of a development in terms of output, employment, wages and salaries and value-added. The analysis has reported the economic impacts of the Campus at the Canterbury Bankstown LGA, Greater Sydney and New South Wales levels. Economic impacts on Bankstown City Centre are identified through the direct impact of on-site activities.

REMPLAN uses either the value of investment, costs or employment generation as the primary input. For this analysis, the value of total upfront investment has been used as the key input to assess the benefits of the construction phase, whereas future employment on the WSU BCC site is the input to assessing the on-going economic benefits of the operation phase. Where employment estimates were not available for the retail, office and food service operations floorspace plans were used. Urbis industry benchmarks for employment per square metre were used to estimate the number of jobs expected to be supported by this floorspace, by industry category.

It should be noted that the results presented in this report are estimates only based on the existing state of economic activity in the area.

REMPLAN also models the impact of tourist spending on local economies. It uses the latest Tourism Research Australia on average expenditure of tourists which is then put through an input-output model to estimate economic impacts.

The primary inputs on which the economic benefit estimates are based were provided by WSU. These inputs included construction cost and floorspace area breakdown.

Urbis has also calculated the impact of social factors where possible. Social value has been estimated using financial proxies for changes which will have positive and/or negative effects the university brings to the Canterbury Bankstown region. For example, the value of new student population's likely significant positive impact on volunteering activity in the area can be estimated using UK Social Values Bank calculations of the value of the activity to the community.

Cost-benefit analysis has been conducted according to NSW Treasury Guidelines. A timeframe of 30-years has been used to calculate the net present value and benefit-cost ratio for the WSU BCC, with the recommended benchmark social discount rate of 7 percent. Sensitivity analysis was also conducted using the recommended lower and upper bound social discount rates of 3 and 10 percent, respectively. Economic impacts and social values on the Canterbury Bankstown LGA level were included in the analysis. Operations impacts were included as annually recurring costs or benefits.

The economic benefits from WSU BCC precinct will go beyond what is estimable from REMPLAN and social value estimates. Urbis has undertaken a review of the available evidence around the catalytic benefits a university campus would have on a metropolitan economy like Bankstown. These catalytic benefits include and go beyond the increased educational capital development of residents, to increased inward investment and innovation activity in the area.

Similarly, there may be negative impacts of the precinct development which are not captured in the cost-benefit analysis. Urbis has conducted a qualitative review of these factors such as the negative impact on congestion in traffic and public transport, and construction phase impacts on local businesses such as retail stores, food outlets and other services which rely on foot traffic and/or will be disrupted by noise or congestion.

2. PROPOSAL

2.1. SITE CONTEXT

The site includes 74 Rickard Road, Bankstown and a portion of 375 Chapel Street, Bankstown. In addition public domain works are proposed to Rickard Road, 70 Rickard Road and access is proposed via 80 Rickard Road.

The site is located within the Canterbury Bankstown LGA within the Bankstown Central Business District (CBD), approximately 17km of the Sydney CBD. Bankstown CBD is a major centre with extensive retail, commercial and civic uses. The site is currently an at grade public car park and provides open lawn space adjoining Paul Keating Park and Appian Way.

Surrounding the site are a mix of uses including commercial, community, civic and open space. To the east of the site is the City of Canterbury Bankstown and Bankstown Community Services building. To the west is Bankstown Town Hall, Bankstown Library and Bryan Brown Theatre. Directly to the south of the site is Paul Keating Park and to the south-east is a building associated with Bankstown Central Shopping Centre. To the north of the site, on the opposite side of Rickard Road, are predominately mixed-use buildings, as well as Bankstown Medical Centre.

Figure 1 – Site Context

Source: Six Maps, 2019

2.2. PROPOSED DEVELOPMENT

The WSU BCC is a stand-alone ground floor and 18 level vertical campus for the future expansion of academic programs offered by WSU. The building has been designed with flexible and adaptive spaces to facilitate the delivery of a variety of University programs and minimisation of specialised facilities to future proof the building for further expansion.

Key aspects of the WSU BCC are:

- An activated ground floor level with key student services, retail tenancies, tiered multi-purpose space and a lobby. A 'University Street' is also proposed north to south to facilitate connection to existing community uses and open space surrounding the site. The 'University Street' will also act as a pre-function and break out area and is located centrally to facilitate an integrated precinct.
- Core student spaces at the lower half tower section including:
  - Specialised research spaces and showcase facilities at Ground and Levels 1 and 2
  - Student Hub and Student Services at Level 3
  - Library at Level 4.
- Formal teaching, informal learning, research and staff workspaces at the lower and mid tower sections at Levels 5 to 12.
- Conference facilities and a large outdoor terrace at Level 13 to facilitate a variety of events.
- Landscaped podium roof top terraces at multiple levels to provide active social spaces for students, staff and visitors to interact.
- Two levels of basement car parking with 94 car parking spaces for users of the site, not including parking provision for students.

2.3. ACADEMIC PROGRAM

The Campus will encompass migration of most programs currently offered at the Milperra Campus, as well as a broadening of services to include specialisations that support and reflect the new locality in Canterbury Bankstown.

The academic programs to be established will be aligned with three research themes being:

- Health, Aging and Healthy Living
- Advances Manufacturing with a small and medium-sized enterprise (SME) focus
- Education.
- The WSU BCC will offer undergraduate programs in teacher education, psychology, arts and humanities, business (with focus on SMEs), accounting, IT and non-clinical health areas. Post-graduate programs will be offered in teacher education, arts, humanities, non-clinical nursing and ICT. Higher degree by research students associated with the research themes will also be located at the WSU BCC. It is estimated that there will be capacity for 8,000 to 10,000 students based on a timetable of 8am to 10pm Monday to Friday, with an anticipated 2000 students on campus at any one given time.
- Academic and professional staff located at the WSU BCC are anticipated to be from the Schools of Social Sciences and Psychology, Education, Humanities and Communication Arts, as well as a College to provide an alternate pathway to university for students with a low or no ATAR. Operations and staffing will include 150 academic staff and 80 professional staff. The flexible and adaptive spaces will also allow for hot desking opportunities (approximately 150-200 spaces) for casual and visiting staff and partners.

Figure 2 – Photomontage of proposed WSU BCC

Source: Lyons Architecture

3. SOCIO-ECONOMIC CONTEXT

3.1. DEMOGRAPHIC PROFILE

The following section contains a brief analysis of the characteristics of Bankstown (suburb) based on data from the ABS, DPE and BOCSAR. The full demographic data set is contained in **Appendix A**.

In 2016, Bankstown had a population of 32,113 people, representing 9% of the Canterbury Bankstown LGA's population. Key findings of the suburb's current population include:

- Bankstown has a **young adult population**, with 26.0% of the population aged 20 to 34 years, which is higher compared to Canterbury Bankstown LGA and Greater Sydney (22.4% and 23.1% respectively).
- Like Canterbury Bankstown LGA and Greater Sydney, the suburb is characterised as a **family area** with the majority (76.1%) of households being family households.
- There is a **high level of cultural diversity**, with a third (37.1%) of the population born in Australia compared to around half in Greater Sydney (49.6%) and NSW (57.1%). Furthermore, just under a fifth (17.7%) of residents speak English only at home, compared to 34.1% and 57.1% in Canterbury Bankstown LGA and in Greater Sydney respectively.
- **Unemployment is higher** in Bankstown (10.8%) compared to Canterbury Bankstown LGA (8.2%) and Greater Sydney (6.0%)
- The proportion of students **currently** attending **university is slightly lower in Bankstown** (17.0%) and Canterbury Bankstown LGA (17.3%) compared with Greater Sydney (19.2%).
- Almost one quarter (20.0%) of the Bankstown population have **attained a bachelor's degree or higher**. This is slightly more than Canterbury Bankstown LGA (19.7%) however lower than Greater Sydney (28.3%).
- Socio-Economic Indexes for Areas (SEIFA) data indicates the Bankstown is **extremely disadvantaged**. Bankstown is in the bottom 20% of all NSW suburbs for relative socio-economic advantage and disadvantage.
- Bankstown's disadvantaged status is also evident through the area's **low median personal weekly income** ($453) which is lower than Canterbury Bankstown LGA ($502) and Greater Sydney ($719).
- The suburb is **relatively** dense. Over half (54.5%) of the dwellings in the suburb are flats or apartments, compared with 25.9% in Canterbury Bankstown LGA and 28.1% in Greater Sydney.
- Canterbury Bankstown LGA is expected to experience **strong population growth**, increasing by 39.5% between 2016 and 2036. The LGA will experience strong growth in young adults (15-29 years), with this age group accounting for a fifth (19.4%) of the total population in 2036.

Crime and Safety

- BOCSAR data indicates that the site is in a hotspot for non-domestic assault, break and enter (non-dwelling), malicious damage to property, motor vehicle theft, steal from motor vehicle and robbery.
- Over the past two years (September 2017 to September 2018), Bankstown had **significantly higher crime rates** compared to Canterbury Bankstown LGA and NSW.
- The two-year crime trends (September 2016 – September 2018) indicate that incidents of malicious damage to property (-2.9%), motor vehicle theft (-4.5%) and steal from motor vehicle (-19.5%) have declined significantly in the Canterbury Bankstown LGA. All other crimes have remained stable.

3.2. ECONOMIC PROFILE

The following section outlines the economic profile of the Canterbury Bankstown LGA. The profile highlights the historic role of the area for traditionally industrial-based employment, as well as emerging industry sectors of health care and retail which serve the growing Western Sydney population.

Key Industries of Output

The following table outlines the gross revenue generated by businesses and organisation across a number of industry sectors in the Canterbury Bankstown LGA. In 2018, the estimated total output for the LGA was $35.2 billion.

Manufacturing, Construction and Rental, Hiring and Real Estate are the top three industries which generate around 55% of overall output across the LGA.

Table 2 – Canterbury Bankstown Total Output by Industry (2018)

Industry Sector	$ million	%
Manufacturing	$9,810.13	27.9%
Construction	$5,633.42	16.0%
Rental, Hiring and Real Estate Services	$3,916.26	11.1%
Transport, Postal and Warehousing	$2,756.48	7.8%
Wholesale Trade	$1,907.98	5.4%
Health Care and Social Assistance	$1,728.20	4.9%
Education and Training	$1,350.75	3.8%
Retail Trade	$1,270.82	3.6%
Financial and Insurance Services	$1,065.66	3.0%
Professional, Scientific and Technical Services	$1,029.50	2.9%
Public Administration and Safety	$818.53	2.3%
Accommodation and Food Services	$792.59	2.3%
Administrative and Support Services	$789.56	2.2%
Other Services	$697.62	2.0%
Electricity, Gas, Water and Waste Services	$695.85	2.0%
Information Media and Telecommunications	$522.54	1.5%
Arts and Recreation Services	$259.50	0.7%
Mining	$106.75	0.3%
Agriculture, Forestry and Fishing	$61.24	0.2%
Total	**$35,213.37**	**100.0%**

Source: REMPLAN (2018 Release); Urbis

Employment by Industry

The following table represents the total employment by industry. In 2018, there were a total 97,813 jobs within the Canterbury Bankstown LGA. The top five employment industries accounted for nearly 58% of total jobs. These industries were:

1. Manufacturing
2. Health Care and Social Assistance
3. Construction
4. Retail Trade
5. Education and Training.

Manufacturing and Health Care and Social Assistance provide 26.2% of jobs and are essentially even in provision of employment. The employment profile of the LGA reflects the traditionally industrial base (Manufacturing), with emerging sectors such as Construction, Health and Social Assistance and Retail Trade that complement the growth of the Western Sydney population.

Table 3 – Canterbury Bankstown Employment by Industry (2018)

Industry Sector	Jobs	%
Manufacturing	12,837	13.1%
Health Care and Social Assistance	12,809	13.1%
Construction	11,417	11.7%
Retail Trade	10,145	10.4%
Education and Training	9,431	9.6%
Transport, Postal and Warehousing	8,982	9.2%
Accommodation and Food Services	5,958	6.1%
Wholesale Trade	4,625	4.7%
Other Services	4,518	4.6%
Public Administration and Safety	4,197	4.3%
Professional, Scientific and Technical Services	3,589	3.7%
Administrative and Support Services	3,175	3.2%
Financial and Insurance Services	1,486	1.5%
Rental, Hiring and Real Estate Services	1,408	1.4%
Arts and Recreation Services	1,135	1.2%
Electricity, Gas, Water and Waste Services	980	1.0%
Information Media and Telecommunications	892	0.9%
Agriculture, Forestry and Fishing	148	0.2%
Mining	81	0.1%
Total	**97,813**	**100.0%**

Source: REMPLAN (2018 Release); Urbis

3.3. HOUSING PROFILE

This section outlines the housing profile for the suburb of Bankstown and Canterbury Bankstown LGA against the Sydney Metropolitan average. The profile explores the dwelling types, housing tenure and housing stress among these areas.

Dwelling Type and Housing Tenure

Across the suburb of Bankstown, the Canterbury Bankstown LGA and Metropolitan Sydney, density increased between 2006 and 2016. The proportion of flats, units and apartments increased by five percent in Bankstown, three percent in the Canterbury Bankstown LGA and four percent across the Sydney Metropolitan area. Canterbury Bankstown had 106,570 dwellings and the suburb of Bankstown had 9,420 dwellings in 2016.

Furthermore, the average household size grew from 2.9 people per dwelling in 2006 to 3.1 and 3.0 people in 2016 across Bankstown and the Canterbury Bankstown LGA, respectively. The emergence of larger household sizes and increasing density indicates the growing population across Sydney, especially across the Western Sydney region which has developed significantly over the past decade.

Table 4 – Extract of Dwelling Type and Housing Tenure, 2006 Census

Dwelling Type	Bankstown	Canterbury Bankstown LGA	Sydney Metropolitan Average
Separate House	37%	64%	64%
Semi-detached	13%	13%	12%
Flat, Unit or apartment	50%	23%	24%

Source: ABS Census 2006; Urbis
Note: Values may not equal 100% due to rounding

Table 5 – Extract of Dwelling Type and Housing Tenure, 2011 Census

Dwelling Type	Bankstown	Canterbury Bankstown LGA	Sydney Metropolitan Average
Separate House	35%	62%	61%
Semi-detached	12%	14%	13%
Flat, Unit or apartment	54%	24%	26%

Source: ABS Census 2011; Urbis
Note: Values may not equal 100% due to rounding

Table 6 –Extract of Dwelling Type and Housing Tenure, 2016 Census

Dwelling Type	Bankstown	Canterbury Bankstown LGA	Sydney Metropolitan Average
Dwelling Type			
Separate House	33%	58%	57%
Semi-detached	11%	16%	14%
Flat, Unit or apartment	55%	26%	28%

Source: ABS Census 2016; Urbis
Note: Values may not equal 100% due to rounding

Housing Stress

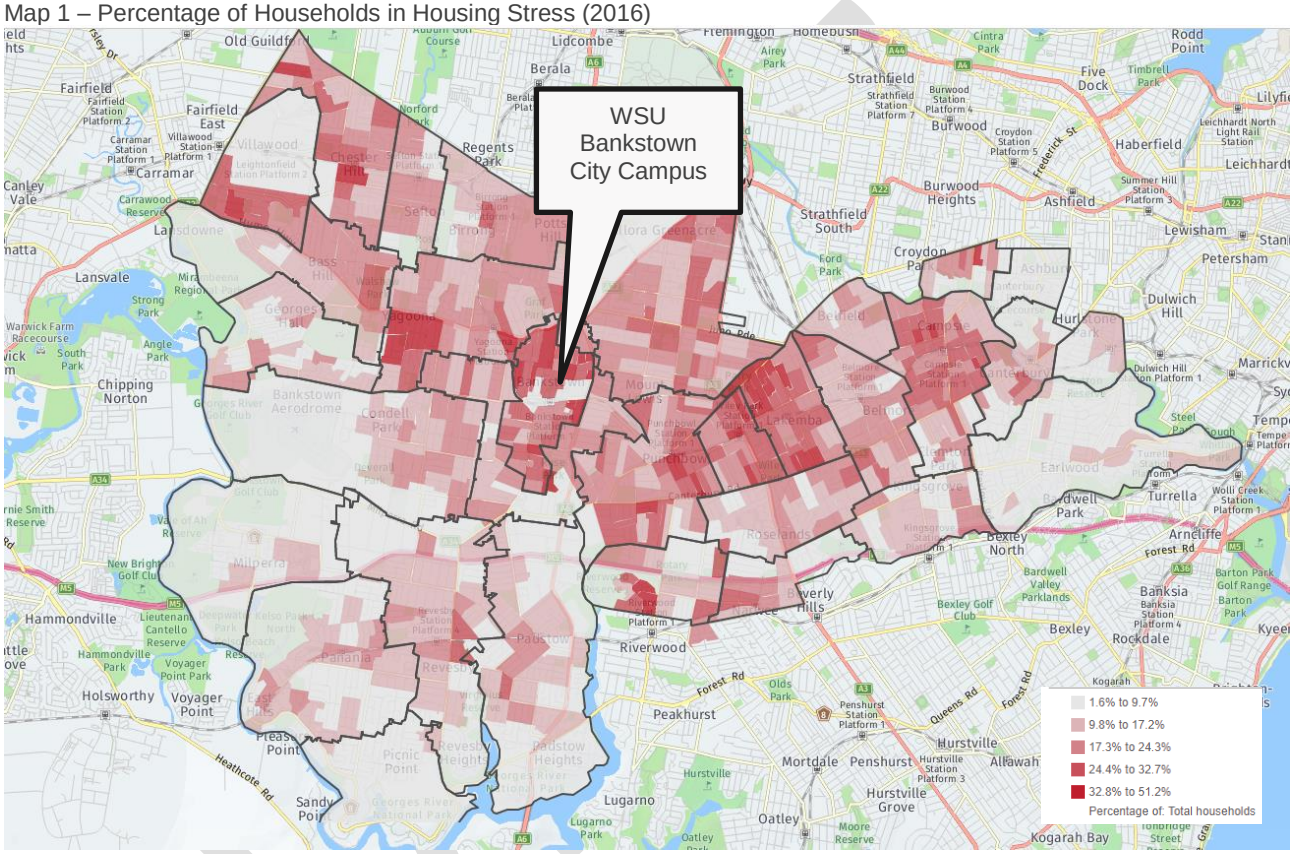
Housing affordability is a key issue within Canterbury Bankstown. Our analysis researched the percentage of households in housing stress to form an understanding of the issue and potential impacts of the proposed project on affordability in the Canterbury Bankstown LGA.

Housing stress is defined as households in the lowest 40% of incomes who are paying more than 30% of their usual gross weekly income on housing costs (National Centre for Social and Economic Modelling).

In 2016, 25.2% of households in Bankstown and 18.6% of households across the Canterbury Bankstown LGA were experiencing housing stress. There were a higher proportion of households in housing stress at the suburb and LGA level compared to the Greater Sydney average of 11.8%.

High levels of housing stress place households at further risk of household financial constraints, homelessness, physical and mental vulnerability and social isolation.

Map 1 – Percentage of Households in Housing Stress (2016)



Source: id.community

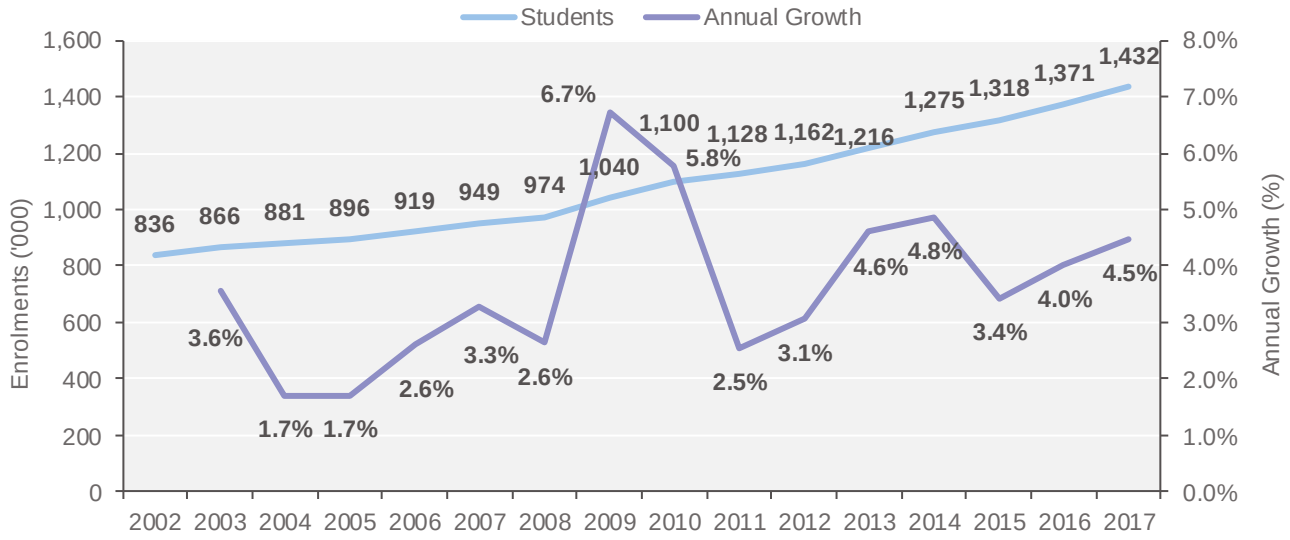
3.4. HIGHER EDUCATION OVERVIEW

This section reviews the historic performance and outlook for the higher education sector in Australia in order to provide the national context for the proposed project. Higher education is a main driver in the Australian economy.

The higher education sector in Australia has experienced rapid growth over the past decade driven by both domestic and international factors. As illustrated in Chart 3.1, total higher education enrolments in Australia increased every year from 2002 to 2017, albeit the rate of growth varied (from 1.7% in 2005 to 6.7% in 2009).

By 2017 (the most recent comprehensive data available), an additional 600,000 students were enrolled in higher education institutions in Australia compared to 2002 – translating to an average annual growth rate over the period of 3.7%. The total number of higher education enrolments in Australia in 2017 was 1,432,293, an increase of 61,098 students from 2016 (4.5%).

Chart 3.1 - Total Higher Education Enrolments in Australia 2002-17



Source: Department of Education; Urbis

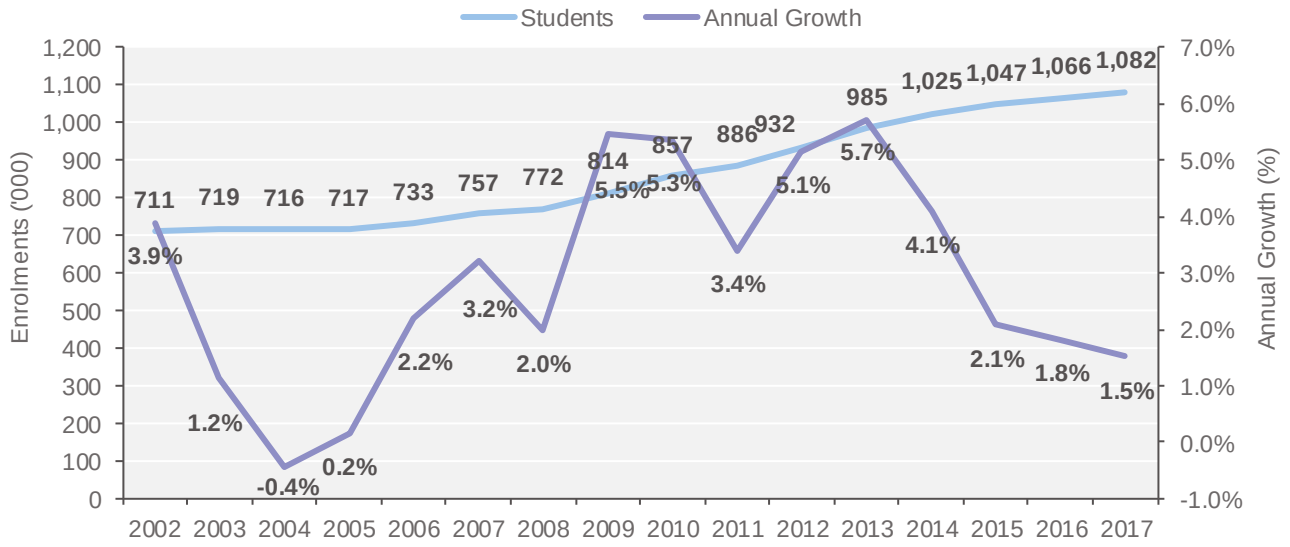
Domestic Higher Education

Historic Enrolments

There were 1,081,821 domestic students in 2017, an increase of 1.5% from 2016. Domestic student enrolments in higher education institutions increased in all years between 2002 and 2015, except in 2004 when the proportion of Commonwealth Grant Scheme (CGS) funding was reduced. Enrolments grew thereafter as the proportion of CGS funding increased again.

This reflects the impact that government funding can potentially have on domestic higher education enrolments, and therefore it is important to consider likely future changes in government funding, and the associated risks and opportunities that this might represent.

Chart 3.2 - Domestic Student Higher Education Enrolments in Australia 2002-17



Source: Department of Education; Urbis

Student Enrolment Growth Drivers

Key drivers and barriers to growth in domestic higher education student enrolments in Australia are discussed below.

Government Policy and Funding

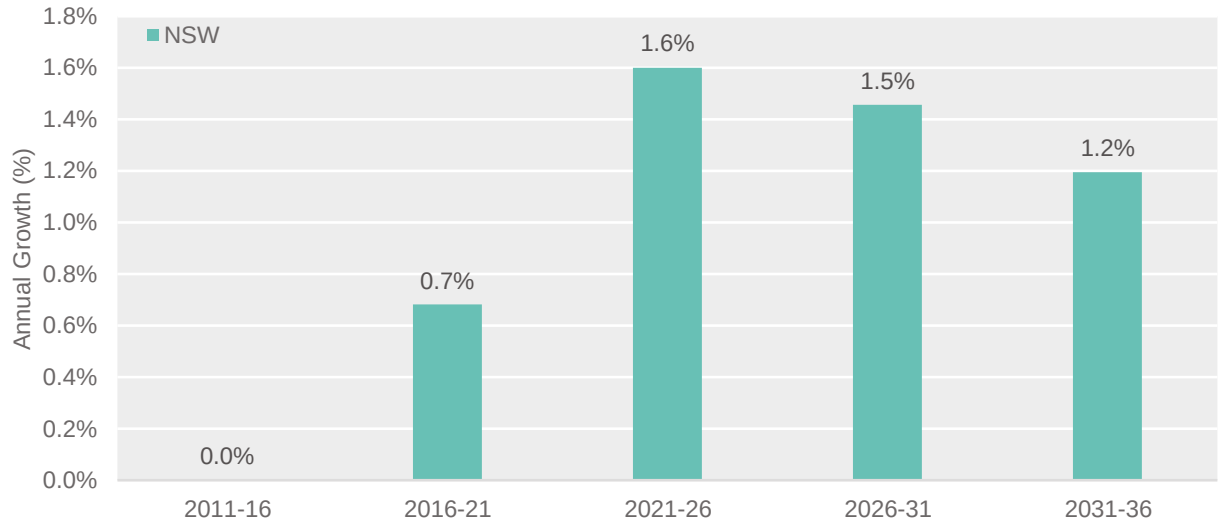
In the 2017-18 Federal Budget, the Government announced changes to education funding including:

- University student fees will increase by 1.8% each year between 2018 and 2021, totally a 7.5% increase.
- Reduction in the income threshold for repayment of Higher Education Loan Program (HELP) debts commencing in 2016-17. This included reducing the income level where repayments start, to $42,000 with the repayment rate increasing with income, from 1% at the minimum threshold to 10% at $119,882, the maximum threshold.
- A combination of the above changes, namely higher repayment rates and lower HELP thresholds for repayment, may have a negative impact on university demand, making studying less attractive than in the past, and potentially prohibitive for some students. This is particularly relevant for students from lower socio-economic bands.
- Universities will receive a direct funding cut of $384.2 million over two years. This will come in the form of an 'efficiency dividend' to the Commonwealth Grant Scheme of 2.5% in 2018 and another 2.5% in 2019. These cuts result in universities receiving less per student in subsidies in the future, however it is difficult to say how this will impact on services.
- Changes to income support for people on the Newstart unemployment benefit and Youth Allowance resulting in reductions in payments to young people seeking employment or in tertiary education. This may place higher pressure on students and may push them to forgo university and undertake full time employment as they cannot afford to study and work part time.

Population Growth

The 15 to19-year old cohort represent a significant driver of growth in university enrolments. Chart 3.3 illustrates the growth in this cohort over five-year intervals for the Canterbury Bankstown LGA and remainder of New South Wales. As illustrated in Chart 3.3, New South Wales' 15 to 19-year age group is forecast to continue to grow strongly from 2021 onwards. Canterbury Bankstown is forecast to experience a lower but stable growth rate from 2021 onwards, with a slight decline between 2016 and 2021.

Chart 3.3 - Historic and Forecast Growth of 15-19 Age Group in NSW 2016-36



Source: Department of Planning; Urbis

International Education in Australia

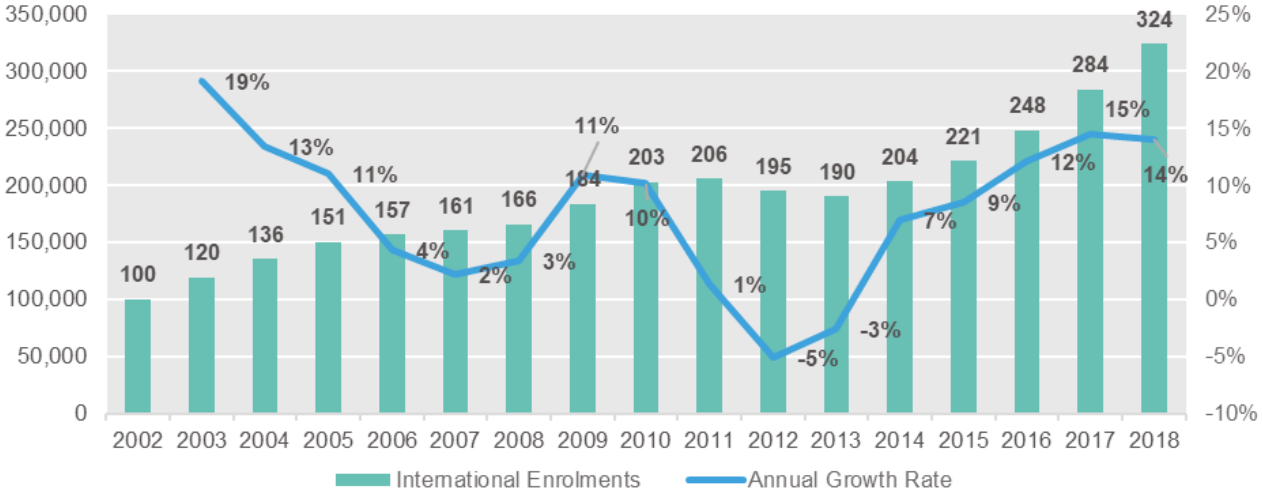
Historic Enrolments

The growth in international students has been a major driver of the overall increase in higher education growth. International higher education enrolments grew in all years from 2002 to 2010, before stabilising in 2011-2013. Overseas student enrolments increased by 4.5% in 2015 to 363,451. Growth in the number of international student enrolments outpaced growth in domestic student enrolments from 2002 to 2010, resulting in the international student segment accounting for a growing proportion of all students enrolled in higher education institutions.

Preliminary data for 2018 indicates international enrolments are continuing to grow, with 323,948 international enrolments to June 2018, equating to an increase of 14% from the same period in 2017. China and India have both recorded strong growth between 2017 and 2018 of 17% and 27% respectively. According to uCube statistics published by Department of Education and Training, other Sydney based universities (University of Sydney, UTS, UNSW and Macquarie University) experienced 38% international students of all full time on campus enrolments in 2017.

Western Sydney University has a lower than average proportion of international students compared to other universities due to its core mission of serving the local Western Sydney population. The Milperra Campus of WSU has a very small proportion of international students, representing only 6% of enrolments during 2018.

Chart 3.4 - International Student Higher Education Enrolments in Australia 2002-18 (year to June)



Source: Department of Education; Urbis

International Student Forecasts

The Australian Government Department of Immigration and Border Protection (DIBP) produces forecasts of international students studying in Australia. Forecasts also include international students who have applied for non-higher education courses such as vocational, education and training (VET) courses and short stay language courses.

DIBP has estimated annual international arrivals will increase to 167,900 by June 2019, at an annual growth rate of 8.3%. DIBP has estimated net arrivals to increase from 76,000 in 2015 to 107,000 in FY June 2019.

4. SOCIAL INFRASTRUCTURE

This section describes the existing and proposed social infrastructure accessible to WSU BCC students, staff and visitors and assesses whether that infrastructure is sufficient to meet the needs generated by the development. The assessment focuses on three types of social infrastructure:

- Open space
- Sport and recreation facilities
- Community infrastructure.

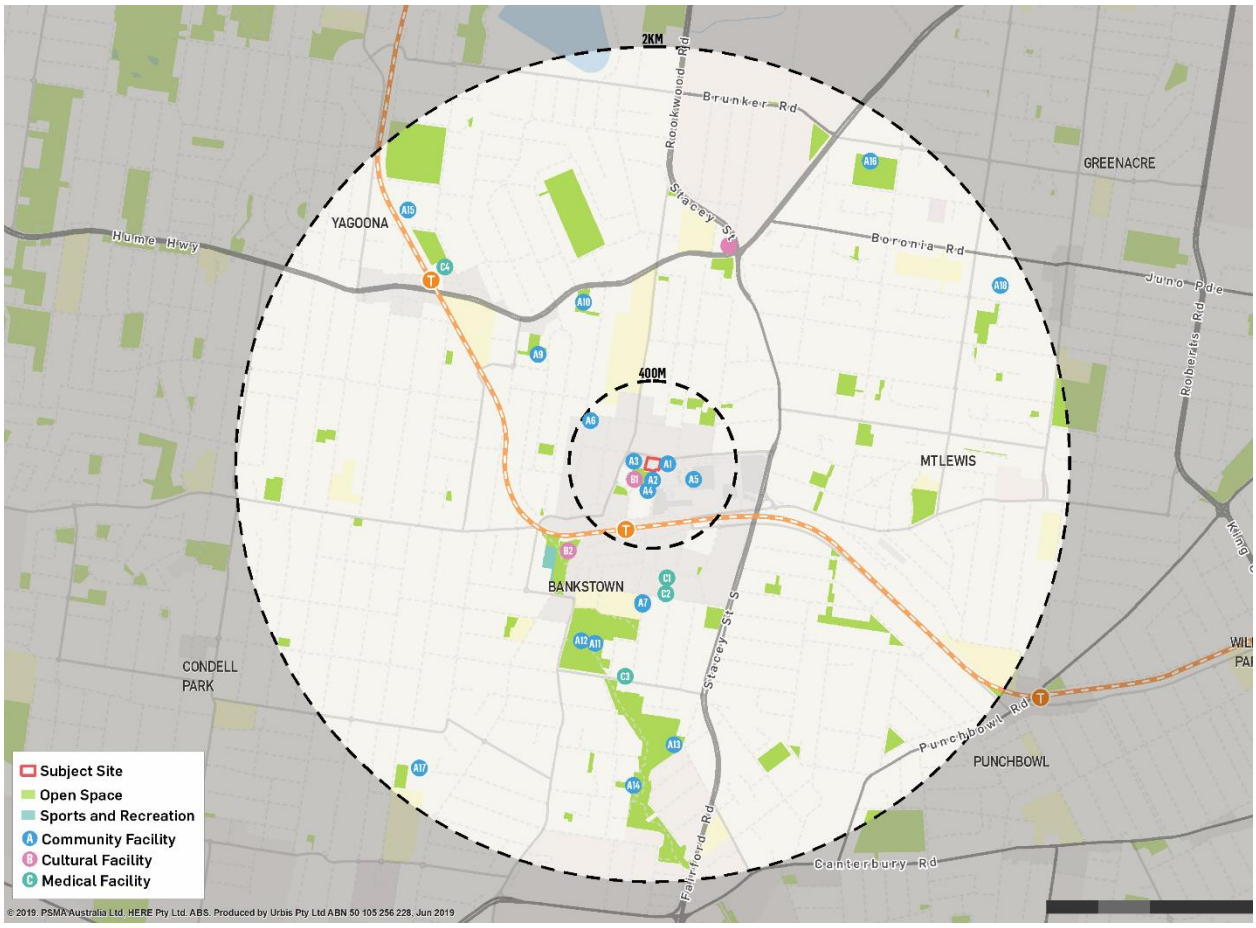
The impacts of WSU BCC on social infrastructure within the Bankstown CBD are discussed in Section 5.

Figure 3 shows the location of this infrastructure within a 400m and 2km radius of the WSU BCC site. More detail is provided in **Appendix D.**

The assessment of social infrastructure traditionally starts with the use of population-based benchmarks, which quantify the facilities and spaces required to meet resident needs. Assessing the provision of social infrastructure associated with a proposed university campus is more complex than that associated with residential development, as existing social infrastructure benchmarks were not designed to apply to education and office uses.

Where possible, this section uses comparisons with existing university campuses in Sydney as a substitute for residential population benchmarks. It also discusses the qualitative aspects of social infrastructure provision, particularly relating to location, accessibility, design and use.

Figure 3 – Existing community infrastructure and open space



Source: Urbis

4.1. OPEN SPACE

Existing Open Space

There is approximately 2.23ha of open space within 400m of WSU BCC and 60.8ha within 2km. There are two main areas of open space within walking distance of WSU BCC: Paul Keating Park and RM Campbell Reserve.

Paul Keating Park is located immediately south of the site. The park comprises a grassed area of open space with tall vegetation along the perimeter. The vegetation provides some shade along the boundary, however the internal grassed area is open and lacks shade. The park is suitable for passive and active play opportunities, though the lack of shade may restrict some play opportunities in hotter months. The western boundary of the park contains a pedestrian walkway that will link to the site and a stepped amphitheatre. The south east corner of the park contains a children's playground and play equipment. The playground is covered with sails to provide shading.

The RM Campbell Reserve is located approximately 300m north east of the site. The south eastern portion of the reserve contains a large, grassed area of open space with tall vegetation that provides shade throughout the day. The north western portion of the site contains a children's playground, gym equipment and areas of vegetated open space. The reserve is suitable for passive and active play opportunities, as well as sedentary recreation purposes.

Other areas of open space within the 2km radius of the site consist predominantly of reserves and parks which cater for passive and active recreation and ecological purposes. To the south, the Bankstown City Gardens and Salt Pan Creek reserves provide for passive recreation. There are also several smaller reserves which typically act as a connection between streets or residential blocks.

Proposed Open Space

The proposed WSU BCC incorporates 1,341m^2 of publicly accessible external space. This consists of a 422m^2 landscaped area along Appian Way and a 911m^2 terrace on Level 3, as well as a small landscaped area on Rickard Road.

Appian Way will be the main pedestrian thoroughfare associated with the site and is located adjacent to the ground level retail food and beverage tenancies. It is proposed to largely be a paved area, landscaped with street trees, seats and tables in different configurations. Appian Way also includes a large meeting table supplied with electricity, as well as an area of lawn with permanent seating in the north eastern corner of the site.

The small additional landscaped area on Rickard Road includes seating, tables and shade trees.

The Level 3 terrace is located next to the Student Hub. It is connected by an external stair to Paul Keating Park and is accessible by the wider community. The terrace is proposed to be 'zoned' in alignment with internal uses and include areas for:

- Group study and events, with seating around larger tables which are supplied with electricity
- Dining, with inbuilt tables and seating in different configurations
- Recreation, gaming and technology, table tennis, wifi, tables of different sizes and bench seating
- An Indigenous space which provides an opportunity for yarning circles and other Indigenous engagement activities, as well as a large table and chairs as a dedicated external learning space.

In addition to the main terrace on Level 3, the proposal also incorporates smaller terraces and balconies on most levels, which are not publicly accessible. Of note are the terraces on Levels 7, 13 and 16, which are 691m^2, 332m^2 and 287m^2 respectively. These terraces provide for spill out space for the neighbouring collaborative space and conference facilities on the three levels.

Provision Analysis

The former Bankstown City Council's *Open Space Strategic Plan 2022* (undated) identified a deficit of open space within Bankstown CBD. It is therefore important that WSU BCC provide open space to meet the needs of students, staff and visitors. These needs are likely to include informal meeting space, individual and small group study spaces, locations for breaks between classes, and space for quiet contemplation.

The proposed open space associated with WSU BCC is moderate in scale. However, it is:

- Well located adjacent to key activity generators within the building and visible from street frontages
- Thoughtfully designed, with a variety of large and small spaces across the site to cater for different needs, experiences and climatic conditions
- Highly embellished, with contemporary furniture and plantings and inclusions such as charge stations for electronic devices, free wifi, larger tables for outdoor learning opportunities and space for yarning circles.

The open space also includes dining space which is available for students, staff and visitors accessible and not associated with a retail outlet.

The open space provision and design is therefore very well targeted to user needs. It is likely to be attractive to students, staff and visitors and meet the open space needs associated with their attendance at the WSU BCC site.

While the landscaped area on Appian Way and the Level 3 terrace are publicly accessible, it is unlikely these will be extensively used by members of the general community. It is therefore unlikely the proposal will contribute significantly to the existing shortfall of open space in the CBD area.

4.2. SPORT AND RECREATIONAL FACILITIES

Existing Sports and Recreational Facilities

There is one recreational facility located within 400m of the site and eight located within 2km. Most of these facilities are outdoor sports fields, with three being multipurpose sports courts or indoor recreational facilities.

The Bankstown Police Citizens Youth Club (PCYC) is located within 400m of the site and operates a range of programs and activities for the community. The PCYC includes a gym, boxing basketball, martial arts, dance classes, table tennis and school holiday activities.

The John Mackay Sports Centre is a new, purpose built indoor sports facility suitable for cricket, soccer, fitness and other indoor sports activities. It is located within the Bankstown Memorial Oval precinct which also includes outdoor sports fields.

Proposed Sports and Recreational Facilities

The WSU BCC does not include any sports and recreation facilities.

Provision Analysis

Table 7 compares the provision of sports and recreation facilities at university campuses within Sydney and the University of Newcastle's recently completed city campus building with the proposed WSU BCC. It is structured around two typologies of facility provision (traditional and city campuses) to show the differences between student and worker needs associated with the different campus typologies.

All three of the traditional campuses cover large areas and have 40,000 or more students. These campuses provide on-campus facilities including fitness and aquatic centres and one or more ovals for sports use.

All of the traditional campuses also include on site purpose-built student accommodation (PBSA). The sport and recreation facilities are therefore providing for the needs of the residential population associated with the universities, in addition to catering for wider student and staff demand.

Table 7 – Sports and recreation facilities comparisons

Campus	Area	No. students	No. PBSAs	Sport and recreation facilities
Traditional campuses				
University of NSW Kensington Campus	38ha	60,000	7	One fitness and aquatic centre One oval
University of Sydney	72ha	60,000	9	One fitness and aquatic centre

Campus	Area	No. students	No. PBSAs	Sport and recreation facilities
Camperdown and Darlington Campus				Four ovals (associated with residential colleges) Multiple tennis courts (associated with residential colleges)
Macquarie University Macquarie Campus	126ha	40,000	6	One fitness and aquatic centre Five ovals Tennis courts
City campuses				
University of Technology Sydney City Campus	NA	40,000	5	One fitness and aquatic centre
Western Sydney University Parramatta City Campus	26,500m^2	Up to 10,000	0	None
University of Newcastle Newcastle City Campus	14,000m^2	2,300	0	None
Western Sydney University Proposed Bankstown City Campus	26,270m^2	Up to 10,000	0	None proposed

Source: Urbis, based on information provided on university websites as at June 2019

When looking at these comparisons to a traditional campus, the size of WSU BCC does not warrant the provision of sport and recreation facilities to serve students, staff and visitors using the campus. In addition, the facilities on the WSU BCC do not need to serve the needs of students residing in student accommodation, as is the case with the traditional campuses and the University of Technology Sydney's City Campus.

4.3. COMMUNITY INFRASTRUCTURE

Existing Community Infrastructure

There are three community facilities located within 400m of the site and seven within 2km. The facilities include library services, cultural facilities, and community centres and halls.

The site is adjacent to the Bankstown Library and Knowledge Centre, which offers a range of library services, multicultural and language services and community programs that include arts and health seminars. Immediately west of the Library is the Bryan Brown Theatre and Function Centre, which includes a 300-seat theatre and four meeting and conference spaces of different capacities.

Further south, the Sporting Hall of Fame at Bankstown Memorial Park includes function spaces for workshops or seminars. It can seat 25 people board style or 60 people theatre style with a kitchen available for use.

There are no medical facilities within 400m of the WSU BCC and four within 2km. The Bankstown Community Health Centre is located approximately 500m south of the site and offers a range of services including general practice, child, youth and family services, child protection and counselling, women's health, psychologists and nursing.

Proposed Community Infrastructure

The WSU BCC incorporates a 381m^2 multi-function space on the ground floor. The space is publicly accessible and will be available for WSU BCC and public events. The WSU BCC also includes 1,740m^2 of library space on Level 4. It does not include any childcare or medical facilities.

Provision Analysis

Table 8 compares the provision of community infrastructure at relevant university campuses with the proposed WSU BCC.

Table 8 – Community infrastructure comparisons

Campus	Area	No. students	No. PBSAs	Community infrastructure
Traditional campuses				
University of NSW Kensington Campus	38ha	60,000	7	Library Four long day care centres One health service
University of Sydney Camperdown/Darlington Campus	72ha	60,000	9	Library Four long day care centres One health service
Macquarie University Macquarie Campus	126ha	40,000	6	Library Two long day care centres One health service One hospital
City campuses				
University of Technology Sydney City Campus	NA	40,000	5	Library Two long day care centres One health service
Western Sydney University Parramatta City Campus	26,500m^2	Up to 10,000	0	Library
University of Newcastle Newcastle City Campus	14,000m^2	2,300	0	Library
Western Sydney University Proposed Bankstown City Campus	26,270m^2	Up to 10,000	0	Library

Source: Urbis, based on information provided on university websites as at June 2019

Table 8 shows the traditional campuses all provide social infrastructure including libraries, childcare and health services. Of the city campuses, only the University of Technology Sydney, which caters for a large student population, provides community infrastructure beyond a library.

When looking at these comparisons, the size and scale of the WSU BCC does not warrant the provision of community infrastructure beyond the proposed library to serve students, staff and visitors using the campus.

As with other city campuses of a similar size and scale, it is expected that if WSU BCC students and staff will access childcare and medical services within the city centre or near their homes in other locations. As shown in Figure 3, there are four medical facilities located within 2km of the site. Any additional demand would be accommodated and may have positive effects in stimulating the provision of services by local businesses.

5. SOCIAL IMPACTS

The following section provides a detailed assessment of the significant social impacts of the WSU BCC. The impacts are assessed with any planned mitigation measures to determine the residual impact level. The assessment process used to determine each impact level is described in **Appendix A.**

5.1. ENHANCING THE IDENTITY AND BRAND OF BANKSTOWN

Description of impact	
The impact of the WSU BCC on enhancing the identity and brand of Bankstown.	
Current environment	
The previous Bankstown City Council's Economic *Development Strategy 2014-17* (the Strategy) provided ten key focus areas with associated actions for Council to implement. The first key focus area as part of the Strategy was to enhance the Bankstown 'brand'. The Strategy recognises that there are widespread negative perceptions across the Sydney community that impacts on the reputation of Bankstown. This likely stems from Bankstown's lower socio-economic status, lower levels of educational attainment and the influence of negative media coverage. Two visions to help strengthen the brand of Bankstown outlined in the Strategy were to encourage façade improvements in the town centre and increased opportunities for branding through marketing campaigns which may include high profile persons or institutions who identify with Bankstown. The Canterbury Bankstown *Community Strategic Plan 2028* (the Strategic Plan) also includes key visions for improved identity and branding. This includes encouraging more interesting town centres and establishing Canterbury Bankstown City as a cosmopolitan destination city with high quality social interactions and buildings.	
Proposal	
The proposal will establish a high standard of architectural, urban and landscape design in Bankstown. The building has been designed by Lyons Architecture, an award-winning firm specialising in university precincts and new learning environments. The design intent is to create a dramatic stacked building form articulated with landscaped terraces and Hawkesbury sandstone, which is understood to be symbolic to the Georges River and its Bankstown offshoots. The proposal will contribute to the vision to encourage more interesting town centres and strengthen the establishment of Canterbury Bankstown as a destination city with high quality architectural buildings. The symbolic elements of the built form are also important in embracing and celebrating Bankstown's identity. The establishment of a university in Bankstown CBD will also provide additional opportunities for inclusion in positive media coverage and marketing campaigns. As an example, Western Sydney University's recently opened vertical campus in Parramatta has attracted positive media coverage, strengthening the image and brand of Parramatta as a place that embraces higher education.	
Impact level (without management measures)	
Consequence level: Major High positive impact	Likelihood: Likely
Planned enhancement measures	

- It is assumed that Western Sydney University will have a branding and/or marketing strategy to promote the WSU Bankstown Campus and support its role within the Bankstown CBD.

Residual impact (considering management measures)

Consequence level: Major Very high positive impact	Likelihood: Likely

The establishment of a university campus of high architectural quality will help strengthen Bankstown CBD as a destination city. Based on the implementation of the above management measures, it is expected that enhancing the identity and brand of Bankstown will have a high positive impact.

5.2. INCREASED ENGAGEMENT IN HIGHER EDUCATION

Description of impact

Increased opportunities for Canterbury Bankstown residents to pursue higher education opportunities.

Current environment

Currently, there is no university located in Bankstown suburb itself. The Strategic Plan includes a vision to for Canterbury Bankstown to establish itself as an education precinct with opportunities for residents to participate in tertiary education.

Bankstown suburb and the City of Canterbury Bankstown have lower levels of higher education attainment levels. The 2016 ABS Census data shows that 20.0% of the Bankstown suburb population and 19.7% of the City of Canterbury Bankstown population have a bachelor's degree level or above as the highest level of attainment. This is 8.3% to 8.6% lower than the Greater Sydney population where 28.3% of the population have a bachelor's degree level or above.

Proposal

The establishment of a new university to Bankstown CBD will provide additional opportunities for local residents to participate in tertiary education and research. The academic program will offer courses in teacher education, psychology, arts and humanities, business, accounting, IT and non-clinical nursing and ICT. The courses offered at WSU BBC will include undergraduate and post graduate degrees by coursework and research and diploma offerings. The College will also be located at WSU BBC which is a program that provides alternative pathway courses into university for students with a low or no ATAR.

Impact level (without management measures)

Consequence level: Major High positive impact	Likelihood: Likely

Planned enhancement measures

- Integration of education space to encourage strong research links with industry to facilitate student placements, internships and graduate opportunities.
- Inclusion of the Bandanami Centre for Indigenous Education, an initiative to support and inspire Aboriginal and Torres Strait Islander education.

Residual impact (considering management measures)	
Consequence level: Major Very high positive impact	Likelihood: Likely
Bankstown suburb and the City of Canterbury Bankstown currently have lower levels of higher education attainment levels. The proposed WSU BBC will likely enhance engagement levels of local residents participating in tertiary education. The proposal will also include the Bandanami Centre for Indigenous education to support tertiary education opportunities for Aboriginal and Torres Strait Islander people. Based on the implementation of the above management measures, it is expected that increased engagement in higher education will continue to have a high positive impact.	

5.3. ENHANCED SOCIAL AND CULTURAL ACTIVITIES

Description of impact
The catalytic role of the University in further enhancing new social and cultural activities to Bankstown CBD.
Current environment
The previous Bankstown City Council's *Economic Development Strategy* states that Bankstown does not have a significant profile in the creative and cultural industries despite recognition of creative talent within its community. The City of Canterbury Bankstown currently offers arts and cultural services including the Bankstown Arts Centre located to the south of the site. This centre caters for a range of events and exhibitions, art markets and workshops.
Proposal
Universities can have significant catalytic impacts on the communities in which they are located. At a national and international scale, it is evident that university towns are important social hubs and major attractors for students and professionals. This is evident in existing university regions in Sydney, for instance Parramatta, Macquarie, Kensington and Ultimo are hubs of social activity as a flow on effect from university campuses. As stated above there is existing social and cultural activity in Bankstown CBD and at Western Sydney University's Milperra Campus which are likely to be incorporated at the WSU BBC. For example, the SWEATSHOP is a current literacy movement based at the Western Sydney University Milperra Campus and is part of the Writing and Society Research Centre. SWEATSHOP supports marginalised communities through artistic pursuits including writing, performance, visual art, photography and filmmaking. The projects are also often in collaboration with other organisations, including the City of Canterbury Bankstown. For example, the City and SWEATSHOP held a poetry and prose showcase at the Bankstown Arts Centre in 2018 to celebrate the talent of young writers from South-West Sydney. Additionally, the proposed academic program includes offerings in teacher education and arts and humanities which are likely to provide greater social activity through potential outreach programs with the wider community and guest lectures. This may include offering writing workshops for local HSC students or literary, music and/or art competitions that encourage participation with the local community. The proposed building will include spaces on the ground floor level where artistic, cultural and creative works are visible and accessible for the wider community to celebrate.

Impact level (without management measures)	
Consequence level: Major High positive impact	Likelihood: Likely
Planned enhancement measures	
• Inclusion of the Bandanami Centre for Indigenous Education, which shares the cultures, languages, history and contemporary experiences of Aboriginal and Torres Strait Islander people with the Australian community.	
Residual impact (considering management measures)	
Consequence level: Major Very high positive	Likelihood: Likely
WSU BBC will further enhance existing social and cultural activities offered in Bankstown CBD. It is expected that existing cultural programs and initiatives currently offered at the Milperra Campus will be integrated in the future as part of the WSU BBC. It is also expected that WSU BBC will have a catalytic role in the development of other social and cultural events and activities in the local area. There are no planned enhancement measures identified at this time, however enhancing social and cultural activities will have a high positive impact for Bankstown CBD.	

5.4. IMPROVED SAFETY AND ACTIVATION

Description of impact
Increased opportunities for casual surveillance, site activation and controlled safety mechanisms on the site to enhance a sense of safety for the public and incoming students.
Current environment
The existing site is dominated by an at grade carpark that contains informal landscaping along the site boundary. Analysis of crime data indicates that Bankstown has higher rates of ‘steal from motor vehicles’ and ‘motor vehicle theft’ compared with the Canterbury Bankstown LGA. Crime data also indicates that the area is a hotspot for ‘malicious damage to property’, ‘break and enter non-dwelling’ and ‘robbery’ crimes.
Proposal
The design includes architectural and landscape elements to enhance the site’s visual appearance and improve the streetscape. The design of the ground floor aims to incorporate activation and the creation of a civic space through the inclusion of retail tenancies, a through-site link or ‘University Street’ and a shared pedestrian zone at Appian Way to the east. The WSU BCC has potential to instil a sense of pride and place in the area, as well as activating the site for a sense of safety. A CPTED Assessment has been prepared by Urbis to analyse the proposed WSU BCC and identify potential improvements that may help to reduce crime and anti-social behaviour. The assessment highlights that concentrating retail uses on the ground floor level toward the pedestrian zone along Appian Way will contribute to an active street frontage and maximise casual surveillance opportunities.

The WSU BCC includes a secure basement car park with access control, boom gates, swipe access and roller shutter doors for after-hours entry and exit. The Building Manager's office is to be located within the basement for increased surveillance. These mitigation measures have potential to reduce 'motor vehicle theft' and 'steal from motor vehicle' crimes that are identified within the top crimes of Bankstown suburb.

The WSU BCC will include security measures including access control, CCTV surveillance and an intruder detection system.

Impact level (without management measures)

Consequence level: Moderate Positive impact	Likelihood: Likely

Planned management measures

- Mitigation and management measures identified in the CPTED Assessment prepared by Urbis.

Residual impact (considering management measures)

Consequence level: Major High positive impact	Likelihood: Likely

The WSU BCC will improve the current condition of the site by increasing activation and contributing to the civic space. The design and landscaping elements, retail tenancies, through site links and open space will enhance the visual appearance of the site and encourage casual surveillance. The WSU BCC will implement access and safety control for an enhanced sense of safety on the site. The WSU BCC will have a high positive impact for pedestrians and users of the site.

5.5. PRESSURE ON RENTAL PRICES

Description of impact

Increased pressure on rental prices in Bankstown suburb and Canterbury Bankstown LGA.

Current environment

In 2016, 25% of households in Bankstown and 18% of households across the Canterbury Bankstown LGA were experiencing housing stress, higher than the Greater Sydney average of 11.8%.

The cost of renting a two-bedroom apartment has gone from $320 per week in March 2009 to $420 per week in March 2019. This increase in the median rent translates to an annual average growth rate of 2.8% for the past 10 years that has been supported by strong population growth and delivery of new housing supply which achieves higher rents. In the last 12 months, rents have stabilised with the overall softening in the housing market, despite lower than average completions in 2018.

The WSU Milperra Campus had 6,873 full time enrolled students as of 2018.

The Milperra Campus has an affiliated purpose-built student accommodation (PBSA) facility, WSU Village Bankstown, with 290 beds operated by Campus Living Villages (CLV). As of June 2019, the facility was only 30% occupied (87 beds), reflecting low overall demand for purpose-built accommodation.

Of the total mobile student population of 520, only 87 are living within purpose-built student accommodation. The remaining 433 mobile students (not living at home with parents) in need of housing

are already living within the local housing market or in other housing markets and commuting to WSU Bankstown's Milperra Campus.

This low demand can be attributed to the following conditions:

1. High proportion of local students
2. Relative affordability in the local housing market compared to PBSA
3. Inferior location of the Milperra Campus away from transport and amenity.

Proposal

As enrolment projections for the new WSU BCC have not been finalised, this assessment assumes the future student cohort breakdown will remain aligned with the existing breakdown at the Milperra Campus.

Frequent train services to Bankstown Station will also allow mobile students to live in the suburb of their choice. While purpose-built student accommodation (PBSA) may be an ideal solution for some students, domestic and international, it is not necessarily the least expensive option. For this reason, it is common that many students only stay in PBSA for the first year of their course of study and then move (with friends) to a private rental option.

For more detailed analysis, please see Section 7.

Most mobile students (83%) are already living in the local housing market or commuting to Milperra Campus from other housing markets, so the WSU BCC location's impact on the housing market is anticipated to be low.

The anticipated increase in mobile students is likely to be balanced by increased accessibility of the WSU BCC and housing choice for students.

WSU will cater for the future accommodation needs of students. In June 2019 demand at the Milperra campus was for 87 beds. A typical student accommodation facility ranges between 200-300 beds, the optimal number for critical mass for strong student community and to justify project management and development risk.

A needs assessment will be conducted, and the required level of provision made either by WSU or through a third party provider if required. It is considered that any impact on the rental market would be low.

It is also noted that many of the existing 290 accommodation beds across 66 apartments and villas at the Milperra Campus may be converted to affordable housing, which would ultimately improve access to housing for the broader community.

Impact level (without management measures)

Consequence level: Minor Low negative impact	Likelihood: Unlikely

Planned management measures

- None

Residual impact (considering management measures)

Consequence level: Minor Low negative	Likelihood: Unlikely

The future student cohort breakdown is extended to remain aligned with the existing Milperra Campus, except for international students. The increase in international students is likely to be balanced by an increased accessibility of housing choice for students and will have a minor negative impact on the rental market.

5.6. CHANGE TO COMMUNITY PROFILE

Description of impact

Change to the existing demographic characteristics of the Canterbury Bankstown LGA.

Current environment

Bankstown is characterised as a family area, with a majority (76.1%) of dwellings being family households. Over half the population are aged 0 to 19 years (27.8%) and 30 to 49 years (28.1%).

In addition, Bankstown is an extremely disadvantaged community and is in the bottom 20% of all NSW suburbs for relative socio-economic advantage and disadvantage. This disadvantage is reflected of the unemployment rate of 10.8% which is higher than the Canterbury Bankstown LGA and Greater Sydney rates.

Proposal

Universities can be catalysts for change to a local community, including changes to the demographic profile. Changes to community profiles can have positive impacts, but also have the potential to cause fragmentation and a sense of exclusion within the local community.

However, as discussed above and in Section 7, only 520 students are considered mobile students who must move from other locations in order to attend WSU BCC. Bankstown already has a high proportion of young adults aged 20 to 34 years (26.0% compared to 23.1% in Greater Sydney). This population numbers 5,370, so even in the unlikely scenario that all mobile students moved directly to Bankstown to attend WSU BCC, this would result in only a 9.68% increase in this age group.

In terms of socio-economic advantage, the majority of the university student population have low socio-economic status as they generally either partake in part-time paid work or do not partake in paid work and are supported by family, student support schemes or scholarships. It is unlikely that the expected student population will influence a direct shift in the socio-economic status of Bankstown in the short-term. However, there is an opportunity for positive long-term change to the socio-economic status as a result of increased tertiary education opportunities available for residents in the region.

Impact level (without management measures)

Consequence level: Minor Low negative impact	Likelihood: Unlikely

Planned management measures

- High-quality landscaped public domain that provides a link to Paul Keating Park and the future Council customer service centre and includes a key plaza with seating and landscaping to encourage use by the local community.

Residual impact (considering management measures)	
Consequence level: Minor Low negative impact	Likelihood: Possible
The likelihood of significant change to the community profile of Bankstown due to the WSU BCC is low due to the size of the campus, the number of mobile students it is likely to attract and the relatively high proportion of young adults already living in the suburb.	

5.7. PRESSURE ON COMMUNITY INFRASTRUCTURE

Description of impact	
WSU BCC can accommodate up to 2,000 persons on site, however, has potential to attract up to 10,000 students and associated staff and visitors. This has potential to place pressure on existing community infrastructure.	
Current environment	
See Section 4 for a description of the existing community infrastructure located near WSU BCC.	
Proposal	
The WSU BCC is located immediately north of Paul Keating Park and west of the Bankstown Library and Knowledge Centre. This creates potential for students, staff and visitors to use the park to help meet their open space needs and the Library for informal meeting space and to access library materials.	
Impact level (without management measures)	
Consequence level: Moderate Negative impact	Likelihood: Possible
Planned management measures	
• Provision of well-located and highly embellished open space which has been designed to meet the needs of students, staff and visitors • Provision of 1,740m^2 of library space and 381m^2 multi-function space	
Residual impact (considering management measures)	
Consequence level: Minor negative Low negative impact	Likelihood: Unlikely
The new WSU BCC will provide open space and community infrastructure to meet the needs of the incoming students, staff and visitors. The open space on Appian Way and the Level 3 terrace contains shade, seating, tables, power outlets, free wifi and other embellishments. In comparison, the area of Paul Keating Park immediately south of the WSU BCC consists largely of a grassed area with some unshaded terrace seating. It is therefore highly likely that most students, staff and visitors will be attracted by the higher level of open space quality to remain on campus. Similarly, the library on Level 4 of the WSU BCC campus will be designed to cater	

directly for student needs. It will be located above the Student Hub on Level 3, which provides breakout and study space for students between classes. Given these purposes designed spaces, it is likely the impact of the WSU BCC on Bankstown Library and Knowledge Centre will be minimal, despite its close proximity.

The co-location of the Student Hub and Level 3 terrace will also assist in attracting and retaining students, staff and visitors within the WSU BCC, minimising the impact on the neighbouring social infrastructure.

5.8. PRESSURE ON TRANSPORT, TRAFFIC AND PARKING

Description of impact

The increase in student population accessing the site has potential to place pressure on existing transport networks as well as traffic and parking within the local area.

Current environment

Travel characteristics

Traffic analysis undertaken in the Traffic and Parking Report indicates that there are approximately 5,000 people employed within the Bankstown CBD destination zone. A majority of workers commute by private vehicle and public transport accounted for approximately 15% of commuting trips, mostly train.

Public transport networks

Public transport in the area consists of rail and buses. Bankstown is a terminus for several bus services and provides regional connectivity as it is the main interchange for the T2 andT3 train line. The Sydenham to Bankstown section of the T3 line will be upgraded as part of the Sydney Metro works.

Pedestrian and cycle networks

Footpaths are provided in the local area with signalised crossings at major intersections. Raised tables and zebra crossings are provided along the Mall at intersections.

Cycle infrastructure in the local area is limited. Cyclists travelling to and from the site do so along existing roadways with traffic.

Traffic volumes

Traffic volume assessments of the existing road networks have found that intersections currently operate at satisfactory levels.

Parking

The Traffic and Parking Report states that there is a large quantity of on street and off-street parking near the site, including the site.

Proposal

Parking

The WSU BCC will remove the existing at grade car park containing approximately 43 spaces and the removal of 16 spaces along Appian Way. It is proposed to construct a new driveway ramp to the two-level basement car park containing 94 car parking spaces. The proposed parking provision meets the DCP

requirements for commercial and educational uses and the Traffic and Parking Report takes the view that limiting onsite parking is a key travel demand measure to encourage students to travel by other modes.

A loading dock is proposed within the basement with provision of MRV size vehicle spaces and vans.

Traffic

The Traffic and Parking Report estimates that the WSU BCC will generate 53 vehicle trips in the AM peak and 49 vehicle trips in the PM peak. The Appian Way drop off is assumed to generate 51 movements in the AM peak period and 35 in the PM pea period. Traffic modelling indicates that local road intersections will continue to operate at satisfactory levels of services and no road network upgrades are required.

State Government transport initiatives

Sydney Metro and South West Metro is planned to open in 2024. Metro will convert the Bankstown rail line between Bankstown to Sydenham to a high frequency, driverless Metro service. It will increase the frequency of trains on the line by 15 per hour in each direction.

The State Government is expected to increase bus services and routes linking Bankstown with suburbs to the west and north to provide an alternative to private car. The Traffic, Transport and Access report (Aecom, 2017) submitted with the Sydney Metro proposal projected a reduction in the amount of 'park and ride' occurring as a result.

Impact level (without management measures)

Consequence level: Moderate Moderate negative impact	Likelihood: Likely

Planned management measures

- Preparation of a Green Travel Plan to encourage staff and students to use sustainable modes of travel as identified in the Traffic and Parking Report prepared by ARUP.

Residual impact (considering management measures)

Consequence level: Minor Low negative impact	Likelihood: Possible

The site is currently well serviced by public transport with improvements currently underway to rail and bus networks within the area. A Green Travel Plan will likely encourage staff and students to utilise sustainable modes of transport rather than private car.

While it is expected that the WSU BCC will generate additional traffic in the locality, the assessment undertaken within the Traffic and Parking Report concludes that intersections surrounding the site will continue to operate at satisfactory levels. Therefore, the transport, traffic and parking impacts associated with the WSU BCC are expected to be a low negative impact.

5.9. CONSTRUCTION

Description of impact	
Potential loss of local amenity during construction.	
Current environment	
The site is currently used as an at-grade car park and is located within the Bankstown Civic Precinct. There is currently no construction occurring on site.	
Proposal	
Impacts of construction are expected to result from noise and vibrations from excavation, construction, trucks and traffic. It is likely that there will be a reduced level of local amenity as a result of noise and vibrations during the excavation and construction stage of development. However, excavation and construction will occur temporarily at the onset of the development and can be managed with a Construction Management Plan (CMP). Construction traffic has not been assessed as part of this proposal and it is considered that there will be some temporary increases to truck and vehicle movements during construction. Due to the building footprint, construction vehicles will likely undertake material loading and unloading within on-street construction zones when access to the site is unavailable. A Traffic Construction Management Plan will identify proposed mitigation measures to reduce potential negative traffic impacts during construction.	
Impact level (without management measures)	
Consequence level: Moderate Negative impact	Likelihood: Likely
Planned management measures	
• Preparation and implementation of a Construction Management Plan (CMP) and Construction Traffic Management Plan (TCMP)	
Residual impact (considering management measures)	
Consequence level: Minor Low negative impact	Likelihood: Likely
The reduced amenity during construction is expected to be a minor negative impact limited to the construction period. With the implementation of management measures in the CMP and CPTMP, this will likely result in a reduced level of inconvenience for the temporary construction period and a low negative impact.	

6. ECONOMIC IMPACTS

6.1. ECONOMIC SUSTAINABILITY ANALYSIS

The following section assesses the potential risks and threats associated with the demand for higher education in Bankstown to provide insight into the economic sustainability of the proposed project.

The extent of risks associated with the project have been assessed based on a likelihood and consequence matrix. The matrix compares the likelihood of the factor occurring with the impact that the issue would have on higher education. Potential consequences have been defined as:

- I**nsignificant:** May result in a small impact on future demand if not addressed, though should be able to be fully mitigated
- **Minor:** May result in a decline in overall demand with mitigation actions only able to partially minimise impacts
- **Medium:** May result in a considerable decline in demand, with mitigation activities unlikely to prevent impacts
- **Major:** Could impact the overall financial viability of the project.

Based on the matrix below, the risks have been categorised as low, moderate, high or very high.

	Consequence			
Likelihood	**Insignificant**	**Minor**	**Medium**	**Major**
Unlikely (<10%)	**Low**	**Low**	**Moderate**	**Moderate**
Possible (≈ 10-50%)	**Low**	**Moderate**	**Moderate**	**Moderate**
Likely (≈ 50-90%)	**Low**	**Moderate**	**High**	**High**
Almost Certain (>90%)	**Moderate**	**Moderate**	**High**	**Very High**

Source: Urbis

Circumstances that may affect the viability of the project are outlined in Table 10 overleaf.

Table 9 – Potential Factors Influencing Economic Sustainability of the Proposed Project

Potential Factors Influencing Demand	Commentary on Potential Impact	Level
Overall solvency of WSU	The overall solvency of WSU BCC would be affected if it could not meet its financial obligations. This event would be unlikely as indicated by the recent expansion of the campuses, as well as, federal funding into tertiary education and research grants.	**Low**
Student Enrolment Growth (lower than expected enrolment growth would have a negative impact on demand)	Enrolment growth is a major driver of higher education. WSU BCC has not yet finalised forecasts for enrolment growth at their campus, but challenges in hitting enrolment targets pose the largest risk to financial stability and planning.	**Low**
Higher Education Competition (international competition for students continues to grow rapidly)	Australia is supported by high quality educational infrastructure in comparison to developing countries and represents an attractive location for international students. WSU has historically served the local market, however has recently been recognised in the top 500 universities worldwide (QS University Rankings 2019), indicating some global recognition. Bankstown CBD is more desirable than the Milperra location in terms of access, amenity and making the WSU BCC more competitive than previously positioned. The new state-of-the-art facility will also help competitive positioning among Australian and international universities.	**Low**
Australian Dollar (the value of the Australian Dollar significantly affects the affordability of studying within Australia)	The value of the AUD has generally fallen against other key market currencies including China, India, Singapore and the USA in the last few years. This means that studying in Australia has become cheaper, in relative terms. There is anecdotal consensus among economists that it is unlikely to rise significantly from this level in the short to medium term.	**Low**

Potential Factors Influencing Demand	Commentary on Potential Impact	Level
Government Policy Changes (changes such as visa policy and university deregulation can influence the number of student enrolments)	Changes such as visa policies, capped places and university deregulation can influence the number of student enrolments. The Federal Government's decision to cap the amount of Commonwealth Grant Scheme (CGS) funding has left universities with funding at the 2017 level. It is projected that the shortage of funding is the equivalent of 10,000 university places in 2018. Examples of changes that have had a negative impact on international student enrolments have been noted in the UK where government policy on student visas has changed, however Urbis is not aware of any current policies in the Australian context that would negatively impact international student growth prospects. Potential fee deregulation for domestic students will have to be monitored as impacts of this potential changes are difficult to estimate.	**Low**
Student Desires (the changing needs and wants of the student cohort will constantly change how student accommodation is provided)	The student cohort constantly evolves as generations pass through the higher education providers and student accommodation will need to keep pace of their changing needs and wants. It is important that the existing facilities evolve in line with student desires across areas such as catering, technology, common facilities and other services.	**Low**

Source: Urbis

6.2. DIRECT BENEFITS

Employment impacts were estimated in terms of the number of jobs created including full-time, part-time and casual positions. The level of economic impact has been estimated in gross value added (GVA) terms. GVA is a measure of the value of goods and services produced by an area, industry or sector comparable with the national measure of gross domestic product (GDP). REMPLAN estimates the economic impact of the project using industry averages specific to the region. REMPLAN estimates the flow on or indirect effects of economic activity using a regional input-output model. Indirect supply chain impacts are those felt within industries that supply goods to the industries directly affected by the project.

Construction Phase

REMPLAN modelling in Table 6.2 shows that an investment stimulus of $286 million has the potential to create benefits over the construction phase. The construction phase includes early works, base building construction and interior fit-out. Early works including clearing of vegetation, site clearing, excavation and augmentation of existing services and utilities. While the early works are not included as a part of the SSDA the economic impacts have been included in this assessment to cover all costs and benefits of the project in comparison to the base case where there is no change to the site.

The project will sustain 675 jobs at any time during of the construction phase in the Canterbury Bankstown LGA. This jobs number includes 198 direct jobs and 477 supply-chain jobs. Up to $162.7 million in GVA will be generated over the construction phase. This equates up to $82 million per annum over an assumed construction period of 18 months.

Table 10 – Construction Phase Economic Activity in Canterbury Bankstown

Impact Summary	Direct Effect	Supply-Chain Effect	Total
Output ($M)	$282.2	$288.5	$570.8
Employment (jobs)	198	477	675
Wages and Salaries ($M)	$28.8	$58.7	$87.6
Value-added ($M)	$60.6	$102.1	$162.7

1. Reflects construction employment generated per annum
2. Expressed as a net present value of future GVA
Source: REMPLAN, Urbis

Operations Phase

The WSU BCC has potential to deliver 716 direct ongoing jobs. The number of direct jobs for the proposed development is estimated by referring to floorspace employment benchmarks as outlined in Table 6.2. Employment estimates draw on the findings of the City of Sydney 2018 Floorspace and Employment Survey and Urbis floorspace benchmarks.

Table 11 – WSU BCC Employment Estimates

Floorspace Use	Floorspace Area (NLA m^2)	Job Density (m^2/job)	Estimated Employment
University/ Education Space – Levels 1-3 and 5-12	16,285	50	326
University/ Education Space – Levels 14-18	5,197	16	321
Library	1,740	83	21
Conference Centre	815	27	30
Food and Beverage Services	489	27	18
Total	**24,526**		**716**

Source: City of Sydney (2018) Floorspace and Employment Survey, Urbis benchmarks

Impacts of Campus operations on economic activity within the Canterbury Bankstown LGA will amount to $138.3 million a year in GVA. Tertiary education will have a $112.0 million impact on GVA including a $26.4 supply-chain impact in the LGA. These impacts are outlined by operations area in Table 13.

Operating Expenses for WSU BCC are projected to be $4.5 million per year and provide the following benefits for the local community:

- GVA of $2.0 million per annum to the local economy.
- Full time employment of up to 4 workers involved in building operations.

Table 12 – Operational Economic Activity by Sector in Canterbury Bankstown

Operations	Direct Employment (jobs)	Direct GVA Impact ($M)	Supply-Chain GVA Impact ($M)	Total GVA Impact ($M)
Tertiary Education (including Library)	667	$105.0	$23.8	$128.8
Conference Centre	30	$4.3	$1.4	$5.8

Food and Beverage Services	18	$1.1	$0.4	$1.5
Building Operations	4	$1.5	$0.6	$2.0
Total	**720**	**$112.0**	**$26.3**	**$138.3**

Source: City of Sydney (2018) Floorspace and Employment Survey, Urbis benchmarks, REMPLAN

Annual operating impacts of WSU BCC activities will generate $114.3 million in annual wages and salaries, as outlined in **Table 13.**

Table 13 – Overall Operational Economic Activity in Canterbury Bankstown

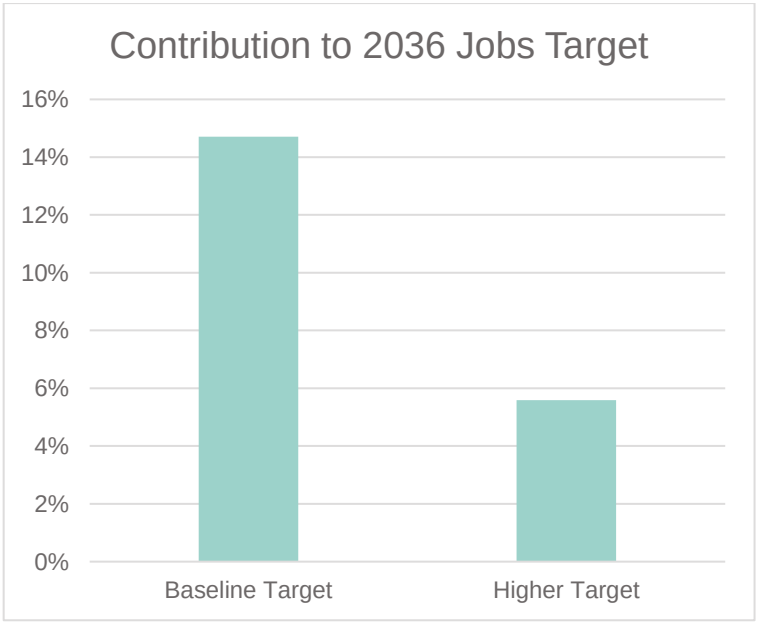
Impact Summary	Direct Effect	Supply-Chain Effect	Total
Output ($M)	$173.0	$59.7	$232.7
Employment (jobs)	720	175	895
Wages and Salaries ($M)	$98.6	$15.8	$114.3
Value-added ($M)	$112.0	$26.3	$138.3

Impact on City Centre

According to the South District Plan[2], Bankstown CBD has a baseline target for jobs growth from 2016 to 2036 of 4,900 and a higher target of 12,900. Campus operations of WSU Bankstown forecast to provide a lift of 720 jobs in the Bankstown CBD. This represents nearly 14.7% of the Baseline Jobs growth target and 5.6% of the higher target, as shown in Chart 6.1.

Jobs growth fostered by the proposed WSU BCC is concentrated in education and knowledge-intensive industries, two areas recognised as key growth channels for Bankstown CBD to 2036. The campus building is projected to support 667 education and research jobs.

Chart 6.1 - Progress to Draft South District Plan 2036 Jobs Targets for Bankstown CBD

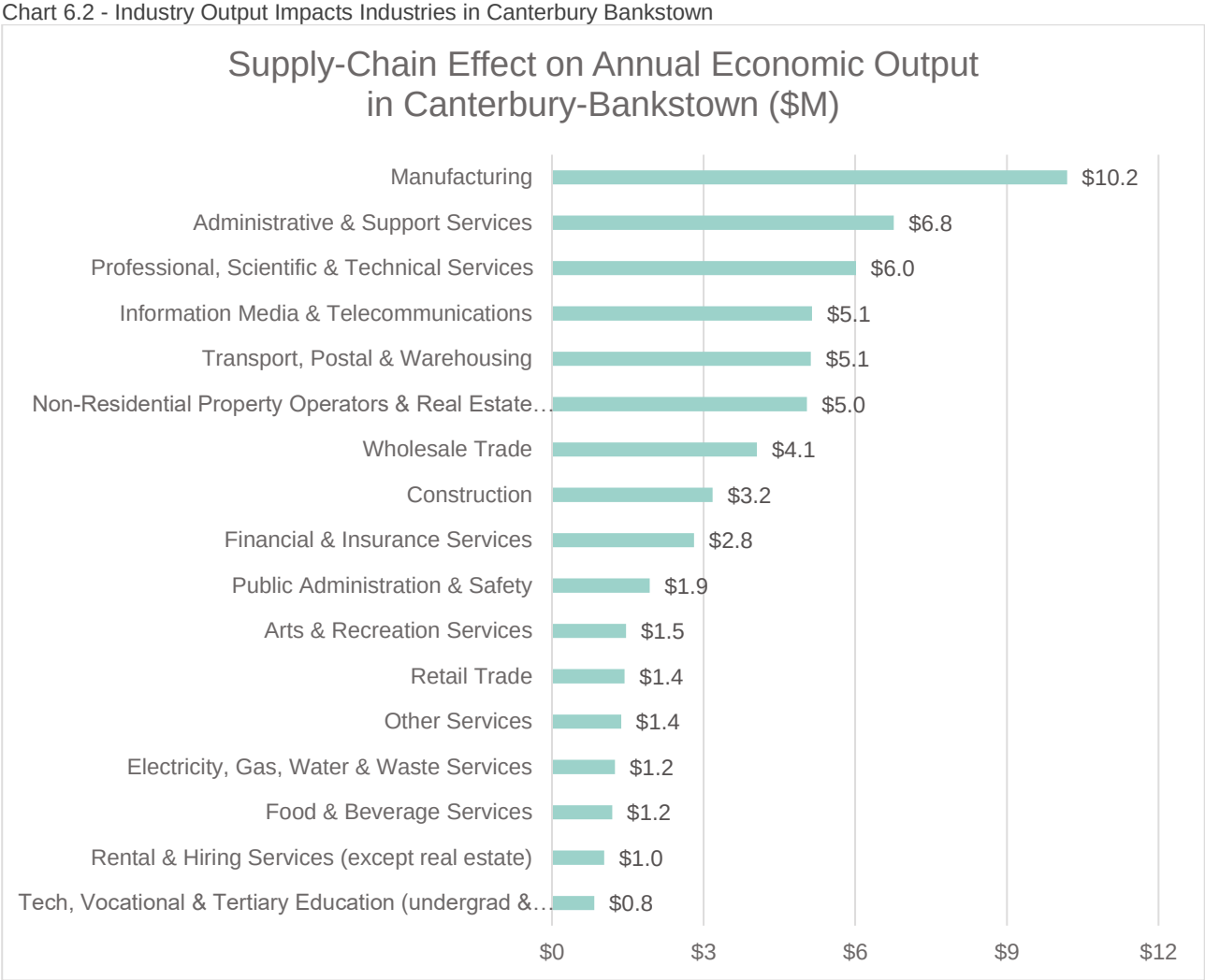


Source: Greater Sydney Commission Draft South District Plan, Urbis

[2] Greater Sydney Commission, *Our Greater Sydney 2056 South District Plan*, (2018)

Local supply-chain impacts on the Bankstown CBD will be significant. The major local industries to benefit through increased demand for their output will be in the professional, scientific and technical services, manufacturing and administrative and support services. These sector impacts are reported in Chart 6.2.

Chart 6.2 - Industry Output Impacts Industries in Canterbury Bankstown



Source: REMPLAN

The supply-chain activity flowing from technical, vocational and tertiary education in the Canterbury-Bankstown area has its greatest impact on the manufacturing sector with every dollar of education output using six cents of manufacturing output. The other key sectors significantly impacted by higher education include administrative and support services, professional, scientific and technical services, rental, hiring and real estate and information media and telecommunications.

6.3. INDIRECT BENEFITS

Regional Supply-Chain Impacts

REMPLAN estimates the flow on or indirect effects of economic activity using a regional input-output model. Indirect supply chain impacts are those felt within industries that supply goods to the industries directly affected by the project. For consistency with other items only the supply chain impacts on the Canterbury Bankstown LGA region are included in the cost-benefit analysis.

Supply-chain impacts on economic activity and employment in the surrounding areas flowing from direct impacts on has been estimated at 3 regional levels as represented in Figure 4.

Figure 4 – Economic Impact Regions

Canterbury Bankstown LGA	
Greater Sydney	
New South Wales	

Source: REMPLAN

Most of the economic impacts will be experienced directly on Campus providing 720 jobs and contributing $112.0 million in annual GVA as outlined in Table 6.5. Supply-chain activity generated from operations on Campus will facilitate demand for 175 jobs in the Canterbury Bankstown LGA, an additional 71 jobs elsewhere in Greater Sydney and an additional 16 jobs in areas of New South Wales outside of Greater Sydney. The overall impact on employment in New South Wales will be an additional 982 positions.

Table 14 – Economic Impacts of Operations by Region

$M	Direct Impact	Supply-Chain Impact			Total Impacts
Region	WSU Bankstown	Canterbury Bankstown LGA	Rest of Greater Sydney*	Rest of New South Wales**	New South Wales
Output ($M)	$173.0	$59.7	$28.3	$5.2	$266.1
Employment (jobs)	720	175	71	16	982
Wages and Salaries ($M)	$98.6	$15.8	$7.5	$1.1	$122.8
Value-added ($M)	$112.0	$26.3	$14.2	$2.7	$155.2

**Excludes supply-chain impacts within Canterbury Bankstown LGA*

***Excludes supply-chain impacts within Greater Sydney*

Conference and Event Attendance

Economic benefits are likely to result from conference and event attendance at the WSU BCC, with visitors to the WSU BCC expected to contribute to economic activity in the region.

Given the specificity of this purpose for visitation, there is limited data on the economic contribution of visitors to conferences and events. Based on economic analysis from the REMPLAN model on tourism economic impacts in the Canterbury Bankstown LGA, the average spend per trip for a domestic day visitor is $105, with average spend increasing to $726 for domestic overnight visitors (based on an average stay of 3 nights) and $2,302 for international visitors (based on an average stay of 22 nights).

While tourism economic impacts provide a comparable proxy for use in calculations, it is difficult to estimate the precise proportion of domestic and overseas visitors that may comprise conference and event attendees at the WSU BCC. The composition of attendees will also be influenced by the nature of events hosted by WSU i.e. multi-day academic conferences, local lectures, internal university events.

It may be possible to approximate the number of people that may be in attendance for events and conferences at the WSU BCC. Based on an analysis of the floorspace occupancy of the WSU BCC' facilities, there is opportunity for WSU to host up to 320 guests in their conference facilities and terrace space, and up to 250 guests in their tiered multipurpose space. Data provided by WSU on event and meeting room booking information from the One Parramatta Square campus for 2018 indicated that a total of 197 events were hosted over the year, with an average occupancy rate of 29%. Assuming a similar occupancy rate and number of events, up to 32,564 individuals may attend. WSU has indicated that they intend to facilitate significantly more events at their WSU BCC in comparison to One Parramatta Square and as such this estimate represents a lower bound estimate.

However, given the uncertainty around the number and nature of conferences and events that WSU seeks to host at the WSU BCC, value has not been assigned to the economic value of conference and event attendance.

Catalytic Impacts of the University

Catalytic impacts relating to the establishment of the WSU BCC encompass the productivity and economic performance benefits which flow from the opening of a university campus in an urban economy. While direct, supply-chain, and consumption impacts of the university development can be measured using input-output modelling, catalytic impacts are harder to value. It is not possible to compare current economic activity to the counterfactual situation of the same economy without the WSU BCC. Economists also have difficulty with distinguishing between the economic activity a university has helped create with economic activity which attracted the university in the first place. Given the likelihood for existing human capital and innovation to feed into, and impact on, the effects of the WSU Bankstown, its impacts cannot be truly causal.

There is general agreement in the literature that universities confer significant benefits to their surrounding cities or regions, beyond direct and indirect economic impacts. A framework developed by the European

Commission to assess the extent of regional innovation impacts created by universities, identified benefits as falling into the following four categories:[3]

- Education and human capital development
- Research, technological development, knowledge transfer and commercialisation
- Entrepreneurship and support to enterprise development
- Regional orientation, strategic development and knowledge transfer.

Attempts to quantify these impacts have been varied, with studies commonly criticised for double counting or omitting spill-over effects, such as increases in the general level of productivity or enhanced civic responsibility.[4] In some instances, certain benefits are easier to estimate than others. For example, the impact of opening a university campus on local human capital development may be estimated through changes in graduate earnings as a result of educational attainment or changes in local labour income more generally.[5]

However, estimated benefits such as changes to local innovation have been harder to capture. Studies pointing to evidence of increased innovation such as a rising trend in patent applications have been criticised as insufficient to estimate the true impact of a university campus.[6]

Universities also have changing roles and functions as economic agents in depending on their contexts. Higher education institutions often develop new partnerships in their communities which will occur to a greater or lesser extent based on the current economic, social and political context of the area. As identified by researchers in a study of the role of universities in urban regeneration, this has been reflected in the key trends in economic studies of universities, with studies shifting from a focus on "scientific production and high-tech spill-overs" to "a diversity of channels and mechanisms of knowledge transfer", and from a national level to a more regional and local level.[7]

Table 15 below outlines the key catalytic economic benefits which would be attributable to proposed WSU BCC development, according to thematic areas that have been modified from the European Commission framework.

Table 15 – Catalytic Impacts of the WSU BCC

Impact	Drivers
Human capital	• Increase in opportunities for higher educational attainment for local students, and others across Sydney and NSW • Increase in local human capital, from students seeking part-time work close to WSU BCC and retention of graduates in local employment opportunities • Improvements productivity as a result of increase in skilled local labour supply, with flow-on effects to wages and economic growth
Knowledge transfer and development	• Increase in knowledge transfer due to proximity to civic institutions such as the Bankstown Library and the Bankstown Town Hall, and potential to share facilities

[3] Koen Jonkers, Robert Tijssen, Athina Karvounaraki, Xabier Goenaga, 'A regional innovation impact assessment framework for universities', *Joint Research Centre, European Commission* (2018).
[4] John Siegfried, Allen R. Sanderson, Peter McHenry, "The economic impact of colleges and universities", *Working Paper* No. 06-W12 (2006).
[5] Shawn Kantor, Alexander Whalley, "Knowledge spillovers from research universities: evidence from endowment value shocks", *TIAA-CREF Institute* (2012).
[6] Anna Valero, John Van Reenen, "The economic impact of universities: evidence from across the globe", *Economics of Education Review* 68 (2019): 53.
[7] Manuel Fernández-Esquinas, Hugo Pinto, "The role of universities in urban regeneration: reframing the analytical approach", *European Planning Studies* Vol. 22, No. 7 (2014); 1462.

	• Opportunities for community-based technology and knowledge development to occur through use of WSU BCC amenities and spaces (e.g. public lectures, conferences, events) • Strategic partnerships and outreach between WSU and key regional stakeholders and businesses • Academic consulting and leadership opportunities
Business innovation	• Contributions to local business innovation due to focus on entrepreneurship and small-to-medium enterprises in academic program, specifically in areas of health, advanced manufacturing and education • Deliberate linkages fostered between academics and business/industry by WSU • Efficiencies arising from proximity of campus to manufacturing industry in region, new airport, and highly connected public transport
Regional development	• Enables Bankstown CBD to become a hub for innovation, research and technological development • Supports local economic and social development indirectly by attracting commercial and retail businesses to area • Offers cultural amenities by offering access to facilities, spaces and events that can enrich the local community

Public Space

The WSU BCC will be adding 2,181m^2 to the public space available in Bankstown CBD. This public space will consist of:

- 1,270m^2 of maintained external ground floor space which will be available for public access including Appian Way lawn and recreation zone are to be used for market stalls and other events as shown in Figures 5 and 6.

Figure 5 – Ground Floor Area

Source: Schematic Design Drawings

Figure 6 – Appian Way Design

Appian Way entry showing ground level columns

Source: Schematic Design Report Volume 1

- 911m^2 of third floor terrace adjacent to the library which will be publicly accessible via an external stairway with afterhours access. As shown in Figure 6 the terrace with have space for outdoor dining, events and other recreational activities.

Figure 7 – Level 3 Terrace

Source: Schematic Design Drawings

The value of the WSU BCC's contribution to public space in the Bankstown City Centre has been evaluated using the equivalent land rent from an area of 2,181m^2 would costs in the area.

Increased Volunteering

The introduction of university campuses to an area is often associated with flow-on improvements in the surrounding community. The increase in prosocial behaviour in the area resulting from the introduction of a new university campus will be reflected in increased volunteer activity of the additional students. University students volunteer at higher rates than the population average. The WSU BCC will likely create strong links between university students and organisations in the Canterbury Bankstown community which can facilitate this increased volunteer activity. Although volunteers contribute time and effort for no pay, their labour contribution can be estimated based on benchmarks wages.

Summary

Table 16 summarises the indirect economic benefits of the WSU BCC development. While the impact of the public space and volunteering activity could be estimated, the significant economic impacts from the local spending of conference and event attendees and catalytic impacts of the WSU BCC are not able to be quantified at this stage. As such, the cost-benefit analysis will be a conservative estimate of the economic benefits as it does not include these items. Details around the estimation of the impacts of public space and volunteering are outlined in Appendix E Tables E.1 and E.2.

Table 16 – Indirect Benefit Summary

Outcome	Commentary	Impact Value
Economic Value of Public Space	The provision of community space accessible to the public. Public space has been valued at the land rent applicable to the size and location.	**$276,000**
Increased Volunteering in Local Area	Volunteering activity of university students. Estimated hours of volunteering are based on the age cohorts at WSU and volunteer statistics. The value of volunteered time was based on the Australian minimum wage.	**$1,207,000**

Conference and Event Attendance	The WSU BCC is planned to facilitate a range of conferences and events utilising several areas of the site. Attendees travelling into the Bankstown City Centre for these events will bring significant economic activity to the area. The magnitude of the economic impact is not able to be quantified at this stage. This is due to uncertainty around forecasts for attendee numbers and their demographics (locals, inter-state, international, etc).	Value not assigned
Catalytic Impacts of the University	The catalytic impacts of university activities are likely to be highly positive and significant toward generating future economic growth in the region. At this stage there is a lack of empirical data from which to estimate the economic impacts of a university campus on urban development through the channels outlined.	Value not assigned

6.4. DIRECT COSTS

Construction Costs

Construction will involve a direct cost to WSU over an 18-month period. As outlined in Table 17, the build is estimated to involve a $216 million investment in the base building with another $70 million on the interior fit-out to total $286 million. While the early works are not included in the SSDA they are included in this assessment as a component of the consideration of the entire project.

Table 17 – Construction Costs and Timeline

Construction costs ($M)		**Construction Timeline**	
Base Building	$216	Start month:	July 2020
Interior Fit-Out	$70	Completion month:	January 2022
Total	**$286**		

Operating Costs

Operating costs for running the WSU BCC building have been estimated to run at $4.5 million per year. The components of this operating cost are outlined in Table 18. This estimate is based on a total WSU BCC NLA of 26,270m^2 using Rawlinsons 2019 guide operating costs for high rise office buildings. A large part of this cost, $1.4 million, is council rates and taxes which are both a cost to the WSU BCC and revenue to government and therefore cancel out in the cost-benefit analysis. These operating cost estimates exclude GST.

Table 18 – Annual Operating Cost Estimates by Category

Cost Category	**Operating Costs ($'000)**	**Cost Category**	**Operating Costs ($'000)**
1. Rates and Taxes	$1,437	8. Building Staff	$187
2. Insurances	$242	9. Security	$134
3. Air-Conditioning	$263	10. Repairs and Maintenance	$200
4. Lifts	$213	11. Management	$313
5. Fire Protection	$42	12. Sundries	$139
6. Energy	$738	13. Void Allowance	$87

7. Cleaning	$473		
Operating Costs			**$4,466**
Operating Costs Excluding Rates and Taxes			**$3,029**

Source: Rawlinsons, Urbis calculations

6.5. INDIRECT COSTS

Loss of parking

Currently the site is a Council car park with 60 spaces. This car park generates no revenue for Council as it is a 2-hour free zone. However, the loss of parking has an opportunity cost to the area due to the loss of 60 spaces. An estimated economic value $657,000 per annum in will be lost by building over the car park. The economic value was calculated using prices for a park in a proximate carpark to the site. The loss is somewhat mitigated by the reduction in car park maintenance cost for Council.

Traffic Congestion

Traffic congestion has economic costs due to impacts on travel times. Rising travel times increase the cost of movement thereby reducing the efficiency of the regional economy and stifling economic activity. The ARUP Traffic and Parking Report[8] indicates that the impact on traffic congestion will be negative but minimal, given the proximity of the site to public transport options. Congestion is likely to occur along Rickard Road and Appian Way. There are concerns with the limited provision of parking on the site, which may have knock-on effects on congestion in the area due to displacement of cars from parking on other sites. However, this is likely to be managed by the increasing availability of public transport alternatives, such as the Sydney Metro.

Public Transport Congestion

Due to the lack of provision of parking, the WSU BCC site will heavily rely on public transport to serve its students. Increased public transport congestion will create lower economic efficiency in the region by increasing travel times. Congestion will also increase the future expenditure burden for governments which will be responsible for investing in increasing public transport services to ease the congestion.

The public transport system is well-positioned to handle this increase in demand. The ARUP Traffic and Parking Report[9] states that the site is centrally situated in the public transport system, being near Bankstown train station as well as being served by 16 bus routes. The transition to Sydney Metro in 2024 will provide extra capacity. Sydney Metro will result in an extra seven trains arriving at Bankstown station per hour, an increase of 87.5%.

Construction Phase Noise

Construction phase noise can reduce the economic activity of businesses surrounding the site as the noise can drive away foot traffic and lower the productivity of workers. Noise can also negatively impact local residents and property owners by reducing property values and rental returns respectively. Noise may also lower their productivity by impacting sleep patterns and reducing their capacity to work from home.

There is likely to be minimal impact of construction phase noise on local residents and businesses, due to the relatively short duration of the construction phase (18 months) and the nature of the surrounding area. Given the relative lack of street-level businesses and residences proximate to the site, construction noise resulting from the WSU BCC will not significantly impact negatively on the surrounds.

Summary

Table 19 summarises the indirect economic costs associated with the WSU BCC development. The lost car park has is the only impact for which a value has been estimated. Details around the estimation of the impact of the loss of the car park are outlined in **Appendix D** Table E.3. Other possible indirect economic costs from

[8] ARUP, "Western Sydney University Bankstown City Campus Development Traffic and Parking Report" (2018)
[9] ARUP, "Western Sydney University Bankstown City Campus Development Traffic and Parking Report" (2018)

the WSU BCC outlined have not been estimated as it has been determined that they will have minor levels of impact. As such, there impact of excluding these costs from the cost-benefit analysis will be negligible.

Table 19 – Indirect Cost Summary Table

Outcome	Commentary	Value of Impact
Lost Car Park	Development is expected to result in a loss of the 60 car spaces located on the site. However, this loss will be partially mitigated by a corresponding fall in car park maintenance costs for the council.	**-$657,000**
Traffic Congestion	The impact of development is expected to be relatively low and manageable.	Value not assigned
Public Transport Congestion	There is likely to be minimal impact on public transport congestion due to the accessibility of the site to public transport and the extra capacity that will be provided by the upcoming Sydney Metro.	Value not assigned
Construction Phase Noise	The impact of construction phase noise is projected to be small due to the 18-month construction phase and the relative lack of businesses and residents in the surrounding area.	Value not assigned

6.6. COST BENEFIT ANALYSIS

Economic Impacts

As outlined in Section 1.2, the NPV of costs associated with the WSU BCC was calculated over a time horizon of 30 years, using the recommended social discount rate of 7 percent, resulting in a total NPV of $319.0 million. Table 20 shows that construction costs comprised the largest cost item ($273.5 million) while the value of the lost car park represented the smallest ($8.7 million).

Table 20 – Costs Summary

Net Present Value of Costs (30 years) ($M)	
Construction Costs	$273.5
Operating Costs	$36.8
Lost Car Park	$8.7
Total Costs NPV	**$319.0**

Note: All values are 30-year period present value in 2019 dollars using a benchmark discount rate of 7%. All dollar values are in millions.

The NPV of benefits associated with the WSU BCC was also calculated using the same time and discount rate parameters, resulting in a total NPV of $1.9 billion. Benefits comprised economic benefits, which were measured as GVA to the Canterbury Bankstown LGA from direct and supply-chain impacts, and social benefits, which were calculated using financial proxies for changes. Table 21 shows that economic activity resulting from the operation of the development produced the greatest economic benefit ($1.7 billion) while the value of public space produced the smallest ($3.4 million).

Table 21 – Benefits Summary

Net Present Value of Benefits (30 years) ($M)	
Construction - Economic Activity in LGA	$157.1
Operations - Economic Activity in LGA	$1,678.5
Public Space	$3.4
Volunteering	$14.7
Total Benefits NPV	**$1,853.7**

Note: All values are 30-year period present value in 2019 dollars using a benchmark discount rate of 7%. All dollar values are in millions.

As demonstrated in Table 22, the development produces a total net benefit of $1.5 billion with a benefit-cost ratio of 5.8. Sensitivity analysis was conducted using the recommended lower and upper bound social discount rates of 3 and 10 percent, producing a net benefit range of $1.2 - $2.4 billion and a benefit-cost ratio ranging between 4.8 and 7.9. A more completed analysis of how each item impacts the sensitivity analysis is presented in Appendix D Table E.4.

Table 22 – Cost-Benefit Analysis and Sensitivity Analysis

$M	Low	Benchmark	High
Discount rate	3%	7%	10%
Net Present Value of Costs	$350.5	$319.0	$303.7
Net Present Value of Benefits	$2,784.0	$1,853.7	$1,455.2
Net benefits	**$2,433.5**	**$1,534.7**	**$1,151.6**
Benefit-Cost Ratio	**7.9**	**5.8**	**4.8**

Note: All values are 30-year period present value in 2019 dollars using a benchmark discount rate of 7%. All dollar values are in millions.

7. RENTAL HOUSING IMPACTS

7.1. INTRODUCTION

The following rental housing impacts analysis assesses the potential impacts of the proposed project on the local housing market within Bankstown. This assessment has analysed the future student population at the WSU BCC and the proportion of students that would require rental accommodation. This demand was compared to available supply (existing and proposed) to understand whether the WSU BCC will have a material impact on the availability and affordability of accommodation within the local housing market.

7.2. BANKSTOWN HOUSING MARKET

Adequacy of Housing Supply

Comparison of housing completions and population growth is a simple way to understand supply and demand in a given housing market.

According to the NSW Department of Planning and Environment, there were an average of 1,754 dwelling completions per year in the Canterbury Bankstown LGA between 2012 and 2018. The proportion of medium to high density dwellings as a proportion of total completions also increased from 55% to 85% between 2012 and 2018.

However, based on population growth and household size for the LGA, there was demand for approximately 1,827 dwellings per year from 2012 -2018, equating to an undersupply of housing in the Canterbury Bankstown LGA over recent years. Furthermore, the average household size in the Canterbury Bankstown LGA also increased from 2.9 people to 3.0 people, reflecting the underlying shortage in housing.

Housing stress is defined as households in the lowest 40% of incomes who are paying more than 30% of their usual gross weekly income on housing costs (National Centre for Social and Economic Modelling). In 2016, 25% of households in Bankstown and 18% of households across the Canterbury Bankstown LGA were experiencing housing stress, higher than the Greater Sydney average of 11.8%.

Rental Housing Market

According to the Department of Family and Community Services, the weekly median rent for a house, townhouse and unit in Bankstown (postcode 2200) is $545, $600 and $420, respectively.

The cost of renting a two-bedroom apartment has gone from $320 per week in March 2009 to $420 per week in March 2019, coincidentally the same as the overall median rent. This increase in the median rent translates to an annual average growth rate of 2.8% for the past 10 years that has been supported by strong population growth and delivery of new housing supply which achieves higher rents. In the last 12 months, rents have stabilised or slightly decreased with the overall softening in the housing market and in spite of lower than average completions in 2018.

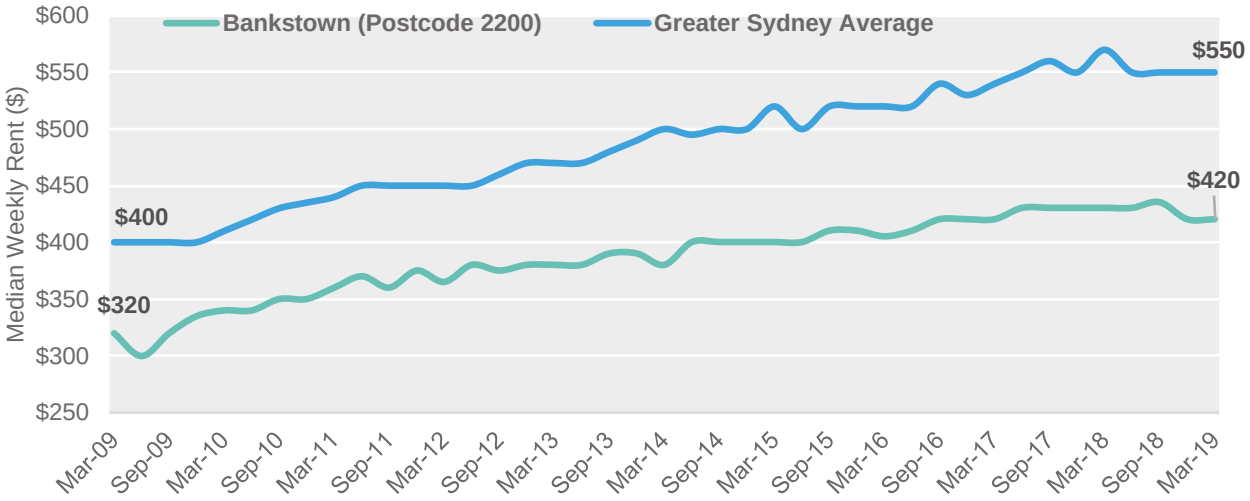
Across Greater Sydney, the median rent of a two-bedroom apartment rose from $400 per week to $550 per week, equating to an average annual growth rate of 3.2% over the past ten years. The lower median rents and growth rates relative to the Greater Sydney average highlight the affordability of Bankstown as a suburb.

Table 23 – Median Rent by Dwelling Type (Bankstown 2200 Postcode, March 2019)

	Weekly Median Rent
House	$545
Townhouse	$600
Unit	$420

Source: NSW Department of Family and Community Services 2019; Urbis

Chart 7.1 - Two Bedroom Apartment Median Weekly Rent for Bankstown March 2009 to March 2019



Source: NSW Department of Family and Community Services 2019; Urbis

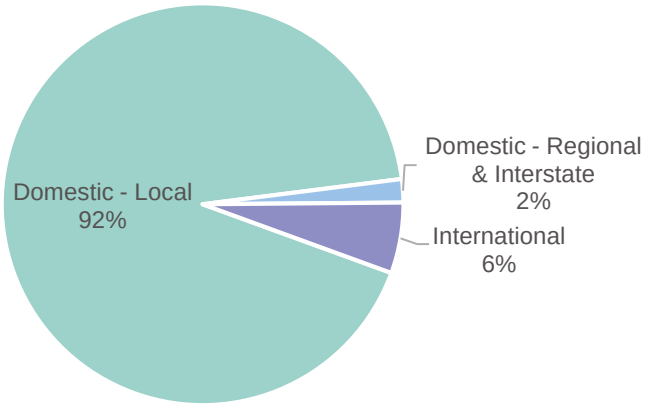
7.3. ROLE OF STUDENT DEMAND IN THE BANKSTOWN HOUSING MARKET

Existing Condition

The WSU Bankstown (Milperra) Campus had 6,873 full time enrolled students as of 2018. The Campus caters primarily to local domestic students who make up 92% of total enrolments. Domestic regional, interstate and international students together form a cohort of 'mobile' students, who are students who must move from other locations in order to attend WSU Bankstown. These students have the highest propensity to live in Purpose-Built Student Accommodation (PBSA).

Mobile students make up a relatively low percentage of overall students at WSU Bankstown compared to other universities. WSU BCC currently has a mobile student population of 520 students, 8% of total enrolments.

Chart 7.2 - WSU Bankstown Enrolment by Origin 2018



The WSU BCC has an affiliated purpose-built student accommodation facility, WSU Village Bankstown, with 290 beds operated by Campus Living Villages (CLV). As of June 2019, the facility was only 30% occupied (87 beds), reflecting low overall demand for purpose-built accommodation.

Of the total mobile student population of 520, only 87 are living within PBSA. The remaining 433 mobile students (not living at home with parents) who are in need of housing are already living within in the local housing market or in other housing markets and commuting to WSU Bankstown's Milperra Campus.

This low demand can be attributed to the following conditions:

1. High proportion of local domestic students
2. Relative the affordability in the local housing market compared to PBSA
3. Inferior location of the Milperra Campus away from transport, employment and amenity.

The rental price per bed at WSU Village Bankstown ranges from $183 to $338 per week for a bedroom in three, four, five bedroom and studio apartments.

The cost of renting in Bankstown CBD is consistent with or cheaper than at the WSU Village. There is also relatively more access to amenity and public transport, making it a superior option.

Table 24 – Western Sydney University Village Rents by Room Type 2019

	Weekly Rent (per bed)	Weekly Rent (per apartment)
Studio Superior	$338	$338
Studio	$309	$309
Three Bedroom Villa Ensuite	$237	$711
Four Bedroom Apartment Ensuite	$236	$944
Three Bedroom Villa	$218	$654
Four Bedroom Apartment	$212	$848
Five Bedroom Apartment	$200	$1,000
Four Bedroom Villa	$183	$732

Note: Rents at WSU Village Bankstown include furnishings, utilities, internet, and pastoral care
Source: CLV Western Sydney University Village; Urbis

Future Condition with Bankstown CBD Campus

Student Accommodation Demand

The calculated demand for student accommodation is based on expected future conditions at the WSU BCC. The Urbis demand analysis begins with the understanding that different student groups will have different propensities to seek PBSA (e.g. a first-year international undergraduate student will generally have a higher preference for on WSU BCC accommodation compared to a local domestic postgraduate student). Propensity is simply defined as the proportion of students within a given cohort who choose to live in student accommodation.

The current level of demand for accommodation based on the occupancy at the Milperra facility equates to 87 students in WSU Village Bankstown, out of a total supply of 290 beds. This indicates that there is currently an oversupply of PBSA in the market at this time.

The analysis sought to understand how student accommodation demand conditions would change based on the relocation of WSU Bankstown academic facilities to the Bankstown CBD. Urbis has been advised by WSU that the profile of students is likely to be similar to that currently experienced at the Milperra campus, which includes a low proportion of international student enrolments (6% in 2018).

Future Enrolment Projections and Assumptions

As enrolment projections for the new WSU BCC have not been finalised, Urbis have assumed the future student cohort breakdown to remain aligned with the existing breakdown at the Milperra Campus. WSU have advised Urbis that the percentage of international students is likely to remain at its current 6% level. This is still a far lower proportionate share compared to other universities and reflects the suburban nature of this campus and the historic market share held by WSU of international enrolments.

In order to estimate the maximum possible impact the WSU BCC could have on the local housing market, demand calculations have been based on the proposed maximum building load calculations completed by WSU. This indicates a future full-time student headcount of 10,000 students with a similar mix to the current Milperra campus. Local domestic students are already part of the Sydney housing market, with many living with parents, therefore they have no real impact on the existing housing market.

Projected Student Accommodation Demand

A typical student accommodation facility ranges between 200-300 beds, as provided at Milperra. This is the optimal number for critical mass for strong student community and to justify project management and development risk.

While purpose-built student accommodation (PBSA) may be an ideal solution for some students, domestic and international, it is not necessarily the least-expensive option. For this reason, it is common that many students only stay in PBSA for the first year of their course of study and then move (with friends) to a private rental option.

Frequent train services to Bankstown Station (400 metres from the WSU BCC) will also allow mobile students to live in the suburb of their choice, as students will have good access to other areas that provide a higher supply of purpose built student accommodation (e.g. Inner Sydney).

Future of Existing WSU Bankstown Village Facility

The future of the existing PBSA facility on the Milperra Campus is uncertain. It is likely that occupancies at the WSU Village will suffer further if the facility remains open after WSU BCC moves to the CBD. The existing facility may eventually be repurposed for other housing uses, contributing to overall housing stock (290 beds across 66 apartments and villas). As most of the current facilities were recently constructed (2012), it unlikely the facility would remain vacant, though it may require some investment for conversion to another residential use.

Many of the existing 290 accommodation beds may be converted to affordable housing, which would ultimately improve access to housing for the broader community.

Other Proposed Accommodation Facilities

There are currently no known public proposals for student accommodation facilities within the Bankstown CBD or surrounding area at this time.

WSU has advised that it will cater for the future accommodation needs of students. In June 2019 demand at the Milperra campus was low at 87 beds, out of a total supply of 290 beds. WSU is monitoring student accommodation demand and will conduct a future needs assessment to ensure the required level of provision is made, either directly by WSU of through a third-party provider, as required. WSU have advised that the future demand for student accommodation will be assessed on a regular basis and met.

7.4. ANTICIPATED IMPACTS

The anticipated impacts of the proposed project on the Bankstown rental market are minimal.

WSU BCC will attract a broader range of students, but its location also opens up greater housing choice

The WSU BCC's location in the CBD will attract a broader range of students than the existing Milperra campus, likely increasing the proportion of mobile students and the number of students who are seeking housing close to the Campus.

However, high quality train services to Bankstown Station (400m from WSU BCC) will allow students to live in a wider range of suburbs.

Mobile student counts are small in comparison to size of housing market

Most mobile students (83%) are already living in the local housing market or commuting to WSU BCC from other housing markets, so the new WSU BCC location's impact on the housing market is anticipated to be low.

The anticipated increase in mobile students is likely to be balanced by increased accessibility of the WSU BCC and housing choice for students.

Even if a PBSA facility is not constructed and in the unlikely scenario that all mobile students were to enter the housing market in the Bankstown suburb, the additional students would represent just 2.1% of total beds within the local housing market (9,420 dwellings with an average of 2.6 beds per dwelling).

PBSA accommodation has potential to add to overall housing supply

Student accommodation has been considered on sites not traditionally available to residential construction, such as shopping centre air space development (enabled by simpler ownership and operating structure of single owner student accommodation compared to strata residential development). Such a project would mean that development of a student accommodation site would not necessarily absorb a potential residential development site and allow for more total housing to be developed within the Bankstown local housing market.

7.5. MINIMISING ADVERSE IMPACTS

As WSU finalises and confirms forecasting for enrolments at the new WSU BCC, if the proportion of international students increases substantially beyond that projected in this analysis (thus increasing demand for student accommodation), WSU should consider a dedicated student accommodation facility and undertake a detailed demand study for PBSA. This facility should be considered as part of their ongoing review of their overall housing strategy across all campuses. Such a facility would minimise impacts on the local housing market.

8. CONCLUSION

Based on the assessment in this report, the WSU BCC will likely have long term social impacts for students, staff and the community. The high architectural quality will likely enhance the brand and identity of Bankstown and the creation of an accessible, high profile university campus will increase engagement levels of local residents in tertiary education. The WSU BCC proposes open space, publicly accessible areas and community infrastructure that will meet the needs of students, staff and visitors. The open space and publicly accessible areas have been well targeted to user needs and are likely to be more attractive to students, staff and visitors than the surrounding open spaces. The size of WSU BCC and number of incoming students do not warrant the provision of social infrastructure beyond the proposed library.

The WSU BCC will have significant economic benefits and direct and indirect employment opportunities locally and within the Canterbury Bankstown LGA. It is anticipated that the construction will also contribute to direct and indirect employment through the supply-chain within the LGA.

There will be some costs associated with the base building, interior fit out and annual operating costs. However, the WSU BCC is expected to support direct and indirect jobs and generate to the local economy.

The anticipated impacts of the proposed project on the Bankstown rental market are minimal. Most students are already living within the local housing market or commuting to Milperra Campus from other housing markets. The increase in mobile students is likely to be balanced by the increase in accessibility to the WSU BCC, frequent train services to Bankstown Station and increased housing choice for students.

Overall, the WSU BCC is expected to deliver long term positive social and economic benefits for the Canterbury Bankstown community. Measures that are likely to enhance the positive social and economic impacts of the WSU BCC are discussed throughout this report and any potential adverse impacts will be mitigated.

8.1. ADDITIONAL ENHANCEMENT MEASURES

The following measures should be considered by Western Sydney University to enhance the student and academic use of community facility and open space provision at WSU BCC and to support local business and employment opportunities within Canterbury Bankstown LGA.

- Consider partnership opportunities with local secondary high schools to enhance exposure of the University to high school students. This could include hosting local school education competitions, awards nights or other events.
- Implementation of scholarship opportunities for local students to enhance participation rates of local students in tertiary education.
- Continue to work with Council to scope opportunities to provide programs and organise events at the WSU BCC to foster relationships between the local community, students and staff of the University.
- Encourage students to utilise the WSU BCC open space and Level 3 terrace to reduce potential pressure on existing open space. The following may be incorporated into student areas:
  - Make the spaces comfortable in all climatic conditions with the provision of shade in summer and heaters in winter
  - Use design features and operational policies to ensure students do not feel pressured to buy from food and beverage businesses in order to access open spaces on Appian Way and the Level 3 terrace.
- To enhance connections to businesses in Canterbury Bankstown the following might be considered:
  - Use of conference space
  - Shared use of office space
  - Advertising on campus
  - Connections between WSU BCC staff and local businesses

  - Sponsorship by local business on campus
  - Connecting local business with student groups.
- Encourage local first supplier agreements when the WSU BCC requires services for:
  - New construction activity
  - Building and facilities maintenance
  - Catering
  - Event services and management
  - Market stall places.
- Continue to monitor the number of enrolments of international students at WSU BCC. Should enrolments increase substantially and increase demand for student accommodation, a detailed demand study for PBSA may be required.

DISCLAIMER

This report is dated 3 September 2019 and incorporates information and events up to that date only and excludes any information arising, or event occurring, after that date which may affect the validity of Urbis Pty Ltd's (**Urbis**) opinion in this report. Urbis prepared this report on the instructions, and for the benefit only, of Western Sydney University (**Instructing Party**) for the purpose of Socio-Economic Impact Assessment (**Purpose**) and not for any other purpose or use. To the extent permitted by applicable law, Urbis expressly disclaims all liability, whether direct or indirect, to the Instructing Party which relies or purports to rely on this report for any purpose other than the Purpose, and to any other person which relies or purports to rely on this report for any purpose whatsoever (including the Purpose).

In preparing this report, Urbis was required to make judgements which may be affected by unforeseen future events, the likelihood and effects of which are not capable of precise assessment.

All surveys, forecasts, projections and recommendations contained in or associated with this report are made in good faith and based on information supplied to Urbis at the date of this report, and upon which Urbis relied. Achievement of the projections and budgets set out in this report will depend, among other things, on the actions of others over which Urbis has no control.

In preparing this report, Urbis may rely on or refer to documents in a language other than English, which Urbis may arrange to be translated. Urbis is not responsible for the accuracy or completeness of such translations and disclaims any liability for any statement or opinion made in this report being inaccurate or incomplete arising from such translations.

While Urbis has made all reasonable inquiries, it believes necessary in preparing this report, it is not responsible for determining the completeness or accuracy of information provided to it. Urbis (including its officers and personnel) is not liable for any errors or omissions, including in information provided by the Instructing Party or another person or upon which Urbis relies, provided that such errors or omissions are not made by Urbis recklessly or in bad faith.

This report has been prepared with due care and diligence by Urbis and the statements and opinions given by Urbis in this report are given in good faith and in the reasonable belief that they are correct and not misleading, subject to the limitations above.

APPENDIX A SOCIAL IMPACT METHODOLOGY

			Consequence level				
			1	2	3	4	5
			Minimal	Minor	Moderate	Major	Extreme
Likelihood	A	Very likely	A1	A2	A3	A4	A5
	B	Likely	B1	B2	B3	B4	B5
	C	Possible	C1	C2	C3	C4	C5
	D	Unlikely	D1	D2	D3	D4	D5
	E	Rare	E1	E2	E3	E4	E5

Low		Moderate		High		Very high	

Impact level

The level of impact will relate to both positive and negatives. They have been established through consideration of the following.

Consequence

The following criteria are used to assess the consequence level of a potential social impact:

- Duration – The timeframe over which the impact occurs or the frequency of potential impacts.
- Extent – The geographical area or the number of people affected.
- Severity – Scale or degree of change from the existing condition as a result of an impact.
- Sensitivity – The extent to which people or an environment can adapt to or mitigate the impact.

Likelihood

The following scale outlines the likelihood of a potential impact occurring throughout the project lifecycle, without mitigation.

- Rare – Extremely unlikely that the impact will occur, at any stage throughout the project lifecycle.
- Unlikely – Unlikely that the impact will occur, at any stage throughout the project lifecycle.
- Possible – Possible that the impact will occur, at any stage throughout the project lifecycle.
- Likely – Likely that the impact will occur, at any stage throughout the project lifecycle.
- Very likely – Very likely that the impact will occur, at any stage throughout the project lifecycle.

APPENDIX B DEMOGRAPHIC PROFILE

Demographic table – 2016 ABS Census data

Data item	Bankstown (SSC)	City of Canterbury Bankstown (LGA)	Greater Sydney (GCCSA)
Population	32,113	346,302	4,823,991
Median age	32	35	36
Average people per household	3.1	3.0	2.8
Age distribution (%)			
Aged 0-4	8.9%	7.2%	6.4%
Aged 5-9	7.2%	7.0%	6.4%
Aged 10-14	5.9%	6.3%	5.8%
Aged 15-19	5.8%	6.3%	6.0%
Aged 20-24	7.8%	7.1%	7.1%
Aged 25-29	9.3%	7.6%	7.9%
Aged 30-34	8.9%	7.7%	8.1%
Aged 35-39	7.0%	6.9%	7.4%
Aged 40-44	6.4%	6.6%	7.1%
Aged 45-49	5.8%	6.4%	6.7%
Aged 50-54	5.9%	6.3%	6.3%
Aged 55-59	5.6%	5.8%	5.8%
Aged 60-64	4.4%	4.9%	5.0%
Aged 65-69	3.5%	4.1%	4.4%
Aged 70-74	2.4%	3.1%	3.3%
Aged 75-79	2.1%	2.6%	2.4%
Aged 80-84	1.5%	2.0%	1.8%
Aged 85+	1.6%	2.2%	2.0%
Country of birth and Indigenous identification (%)			
Australia	37.1%	49.6%	57.1%
Born overseas country #1	Vietnam: 14.1%	Lebanon: 5.7%	China: 4.7%
Born overseas country #2	Lebanon: 6.2%	Vietnam: 5.5%	England: 3.1%

Data item	Bankstown (SSC)	City of Canterbury Bankstown (LGA)	Greater Sydney (GCCSA)
Born overseas country #3	China (excludes SARs and Taiwan): 5.3%	China (excludes SARs and Taiwan): 5.4%	India: 2.7%
Aboriginal or Torres Strait Islander	0.4%	0.7%	1.5%
Language spoken at home (%)			
English only	17.7%	34.1%	58.4%
Language other than English #1	Arabic: 21.1%	Arabic: 17.2%	Mandarin: 4.7%
Language other than English #2	Vietnamese: 19.0%	Vietnamese: 7.2%	Arabic: 4.0%
Language other than English #3	Mandarin: 4.9%	Greek: 5.4%	Cantonese: 2.9%
Family composition (%)			
Couple family without children	24.4%	26.9%	33.4%
Couple family with children	51.8%	52.8%	49.5%
One parent family	21.3%	18.2%	15.2%
Other family	2.4%	2.1%	1.8%
Household composition (%)			
Family households	76.1%	77.0%	73.6%
Lone person households	20.1%	19.6%	21.6%
Group households	3.8%	3.3%	4.7%
Dwelling structure (%)			
Separate house	33.0%	57.1%	56.9%
Semi-detached	11.4%	16.1%	14.0%
Flat or apartment	54.5%	25.9%	28.1%
Other dwelling	0.7%	0.6%	0.6%
Tenure (%)			
Owned outright	22.9%	30.2%	29.1%

Data item	Bankstown (SSC)	City of Canterbury Bankstown (LGA)	Greater Sydney (GCCSA)
Owned with mortgage	25.3%	29.6%	33.2%
Rented	47.8%	36.4%	34.1%
Other tenure type	0.7%	0.7%	0.9%
Employment (%)			
Worked full-time	54.3%	56.8%	61.2%
Worked part-time	29.6%	29.8%	28.2%
Away from work	5.3%	5.1%	4.5%
Unemployed	10.8%	8.2%	6.0%
Occupation (%)			
Professionals	17.2%	18.9%	26.3%
Technicians and Trades Workers	13.3%	14.0%	11.7%
Clerical and Administrative Workers	12.9%	15.1%	14.6%
Managers	7.6%	10.1%	13.7%
Sales Workers	10.4%	10.0%	9.0%
Labourers	12.9%	10.6%	7.5%
Community and Personal Service Workers	12.9%	10.5%	9.6%
Machinery Operators and Drivers	10.5%	8.4%	5.6%
Income ($)			
Median personal weekly income	$453	$502	$719
Median family weekly income	$1181	$1437	$1,988
Median household weekly income	$1120	$1298	$1,750
Level of highest educational attainment (%)			
Year 9 or below	9.7%	10.3%	7.1%

Data item	Bankstown (SSC)	City of Canterbury Bankstown (LGA)	Greater Sydney (GCCSA)
Year 10	8.8%	10.5%	9.4%
Year 11	3.2%	3.3%	3.1%
Year 12	23.9%	21.2%	17.3%
Certificate level I-IV	8.9%	11.3%	12.2%
Advanced Diploma and Diploma level	8.5%	8.6%	9.3%
Bachelor Degree level and above	20.0%	19.7%	28.3%
Educational institution attending in 2016 (%)			
University	5.7%	5.7%	6.1%
Motor vehicles (%)			
None	13.8%	11.3%	11.1%
1 motor vehicle	42.2%	37.2%	37.1%
2 motor vehicle	28.0%	31.4%	32.8%
3 or more vehicles	11.7%	16.2%	15.7%

Socio Economic Indexes for Areas (SEIFA)

The Socio-Economic Indexes for Areas (SEIFA) has been developed by the Australian Bureau of Statistics (ABS) to provide an overview of social and economic wellbeing and welfare of communities across a range of spatial scales. Four indices have been developed:

- Index of Relative Socio-Economic Disadvantage: focuses primarily on disadvantage, and is derived from Census variables like low income, low educational attainment, unemployment, and dwellings without motor vehicles.
- Index of Relative Socio-Economic Advantage and Disadvantage: is a continuum of advantage (high values) to disadvantage (low values), and is derived from Census variables related to both advantage and disadvantage.
- Index of Economic Resources: focuses on financial aspects of advantage and disadvantage, using Census variables relating to residents' incomes, housing expenditure and assets.
- Index of Education and Occupation: includes census variables relating to the educational attainment, employment and vocational skills.

Scores: A lower score indicates that an area is relatively disadvantaged compared to an area with a higher score. The area with the lowest score is given a decile of 1, the area with the second lowest score is given a decile of 2 and so on, up to the area with the highest score is given the highest decile.

SEIFA Index, 2016

	Advantage and Disadvantage	
	Score	Decile

	Advantage and Disadvantage	
City of Canterbury Bankstown (LGA)	961	6
Bankstown	912	2

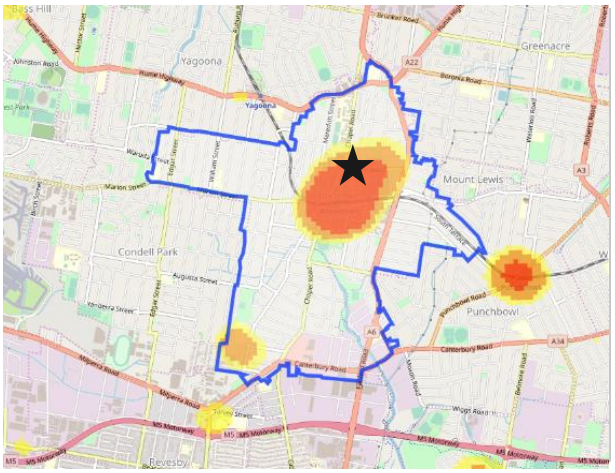
Population projections for City of Canterbury Bankstown (LGA)

City of Canterbury Bankstown (LGA)	Year						
	2016	2021	2026	2031	2036	% of 2036 population	% change 2016 - 2036
Aged 0 to 4	28,450	30,600	32,500	34,450	36,650	7.3%	28.8%
Aged 5 to 9	24,750	28,150	30,500	32,550	34,250	6.8%	38.4%
Aged 10 to 14	22,450	24,800	28,150	30,550	32,500	6.5%	44.8%
Aged 15 to 19	21,900	23,500	26,050	29,400	31,750	6.3%	45.0%
Aged 20 to 24	23,900	24,650	26,600	29,300	32,450	6.5%	35.8%
Aged 25 to 29	26,600	27,000	28,350	30,450	33,100	6.6%	24.4%
Aged 30 to 34	27,800	29,050	29,950	31,450	33,400	6.6%	20.1%
Aged 35 to 39	25,400	29,000	30,700	31,650	33,050	6.6%	30.1%
Aged 40 to 44	24,200	26,350	30,150	32,000	32,900	6.5%	36.0%
Aged 45 to 49	23,150	24,750	27,050	30,950	32,750	6.5%	41.5%
Aged 50 to 54	22,350	23,300	25,100	27,450	31,250	6.2%	39.8%
Aged 55 to 59	20,850	22,000	23,150	25,000	27,250	5.4%	30.7%
Aged 60 to 64	17,500	20,150	21,400	22,650	24,550	4.9%	40.3%
Aged 65 to 69	15,050	16,750	19,350	20,700	22,000	4.4%	46.2%
Aged 70 to 74	11,800	14,350	16,050	18,650	20,050	4.0%	69.9%
Aged 75 to 79	9,350	10,750	13,300	15,000	17,500	3.5%	87.2%
Aged 80 to 84	7,100	7,750	9,150	11,500	13,100	2.6%	84.5%
Aged 85 +	7,750	8,450	9,400	11,250	14,300	2.8%	84.5%
Total persons	360,350	391,350	426,900	464,950	502,800	-	-
Change	24,400	31,000	35,550	38,050	37,900	-	-

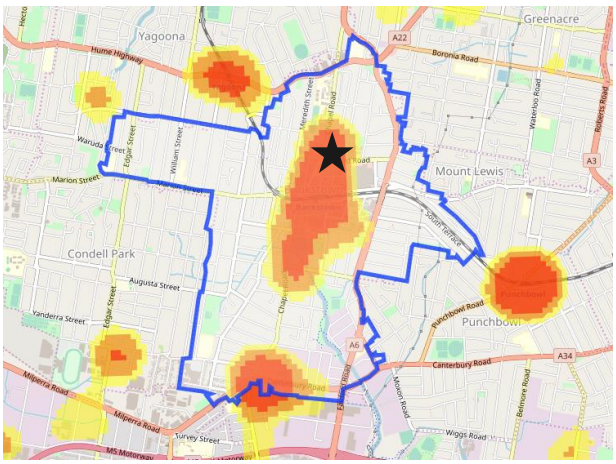
City of Canterbury Bankstown (LGA)	Year						
	2016	2021	2026	2031	2036	% of 2036 population	% change 2016 - 2036
Growth rate (%)	1.4%	1.7%	1.8%	1.7%	1.6%	-	-

Source: 2016 ABS Census data, Department of Planning and Environment

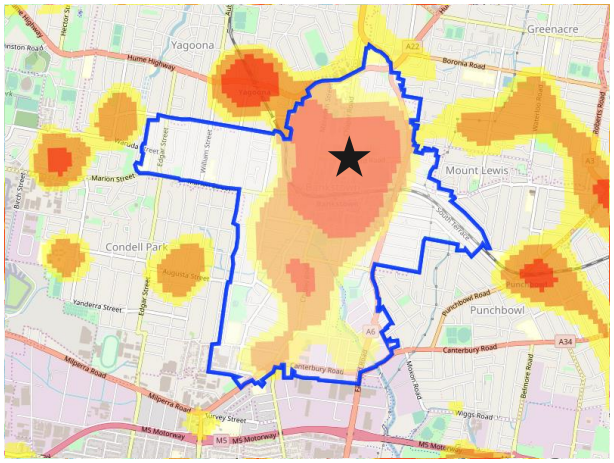
APPENDIX C CRIME PROFILE



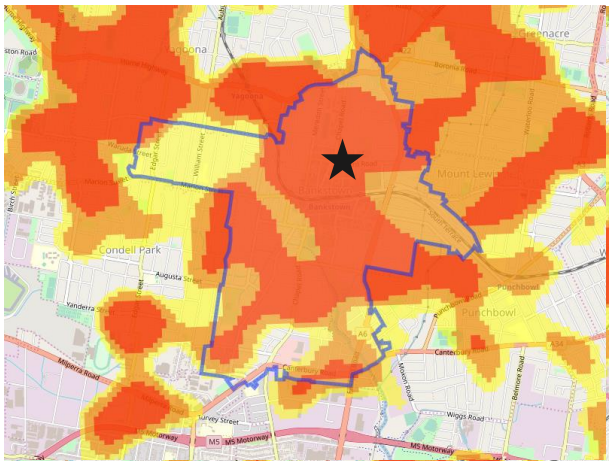
Picture 1 – Non-domestic assault



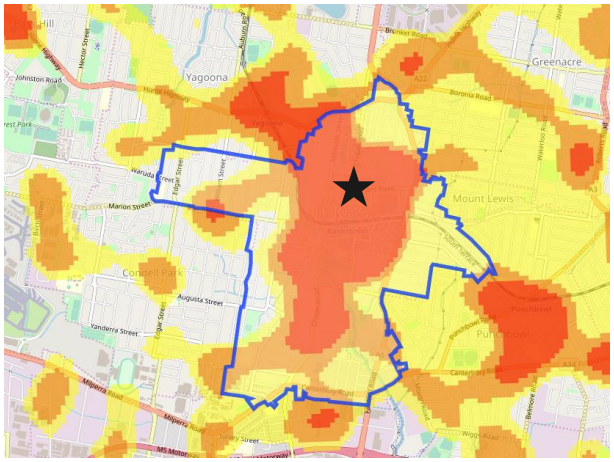
Picture 2 – Break and enter non-dwelling



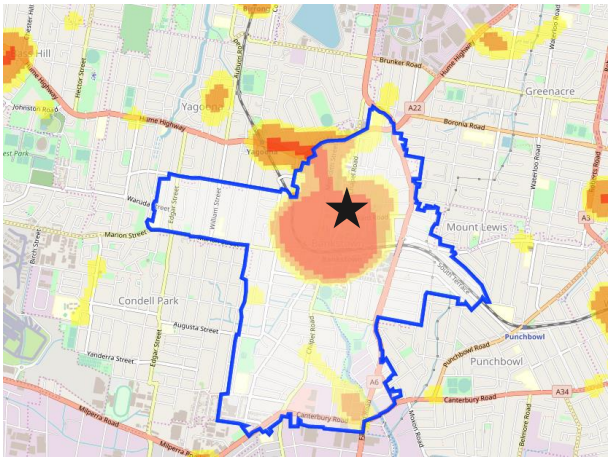
Picture 3 – Malicious damage to property



Picture 4 – Motor vehicle theft



Picture 5 – Steal from motor vehicle



Picture 6 – Robbery

APPENDIX D COMMUNITY INFRASTRUCTURE

Table 25 – Community Infrastructure within 400m and 2km radius

POI LABEL	POI TYPE	POI NAME
A1	Tourist Information Centre	BANKSTOWN VISITOR CENTRE
A2	Picnic Area	PLAYGROUND
A3	Library	BANKSTOWN LIBRARY AND KNOWLEDGE CENTRE
A4	Picnic Area	PHIL ENGISCH RESERVE
A5	Post Office	CENTRO BANKSTOWN POST OFFICE
A6	Community Facility	BANKSTOWN PCYC
A7	Community Facility	BANKSTOWN ACTIVITY CENTRE
A8	Community Facility	1ST 3RD BANKSTOWN SCOUT HALL
A9	Picnic Area	PLAYGROUND
A10	Picnic Area	PLAYGROUND
A11	Sports Centre	JOHN MACKAY INDOOR SPORTS CENTRE
A12	Community Facility	SPORTING HALL OF FAME
A13	Community Facility	BANKSTOWN BULLS JRLFC
A14	Picnic Area	RUSE PARK
A15	Community Facility	1ST YAGOONA SCOUT HALL
A16	Community Facility	EAST BANKSTOWN FOOTBALL CLUB
A17	Community Facility	BANKSTOWN SPORTS STARS FOOTBALL CLUB
A18	Swimming Pool	GREENACRE LEISURE CENTRE
B1	Outdoor Theatre	Outdoor Theatre
B2	Art Gallery	BANKSTOWN ARTS CENTRE
B3	Historic Site	BANKSTOWN RESERVOIR
C1	Medical Centre	BANKSTOWN COMMUNITY HEALTH CENTRE
C2	Medical Centre	BANKSTOWN COMMUNITY HEALTH CENTRE STANLEY STREET
C3	Medical Centre	THE CORNER YOUTH HEALTH SERVICE
C4	Medical Centre	YAGOONA EARLY CHILDHOOD HEALTH CENTRE

APPENDIX E COST-BENEFIT ANALYSIS CALCULATIONS

Public Space Valuation

Appendix Table E.1 – Public Space Value Calculations

Outcome	Commentary	Proxy Value	Attribution Rate	Impact Value
Economic Value of Public Space	The provision of open space will help alleviate Bankstown CBD's shortage of open space. This presents both a value to the community and an avoided cost to government who may alternatively need to provide open space. Economic value of the open space is estimated using the land rent for the space.	**$278,000** per annum (2,181m^2 x $2,547/m^2 x 5%) Source: Valuer General[10] and Urbis Based on 2,181m^2 of open space at $2,547 per m^2. Annual yield is assumed to be 5%, based on commercial property in Bankstown.	**100%**	**$278,000**

Volunteering Value in Local Area

Appendix Table E.3 - Volunteering Value Calculations

Outcome	Commentary	Proxy Value	Attribution Rate	Impact Value
Increased Volunteering in Local Area	Volunteering activity in the Bankstown area by the addition of university students. Estimated hours of volunteering are based on the age cohorts at WSU and volunteer statistics.	**$877** per additional student in Bankstown ($18.93 x 46hours) Source: WSU[11], Fair Work Australia[12] and Volunteering Victoria[13] Average hours of volunteering per year for WSU students estimated to be 46 based on	**28%** (Bachelor students) **31%** (Post-Graduate students) Source: Volunteering Victoria	**$1,207,000** Based on a student population increase from 4,815 to 7,500 in Bankstown. Estimated increase of volunteers: 1,156 Bachelor students 220 Post-Graduate students

[10] NSW Valuer General, "Land values in the Canterbury Bankstown local government area", http://www.valuergeneral.nsw.gov.au/land_value_summaries/lga.php?lga=258andbase_date=01072018, accessed 19/06/2019

[11] Western Sydney University, "Pocket Profile 2017"

[12] Fair Work Ombudsman, "Minimum wages", https://www.fairwork.gov.au/how-we-will-help/templates-and-guides/fact-sheets/minimum-workplace-entitlements/minimum-wages, accessed 19/06/2019

[13] Volunteering Victoria, "Key facts and statistics about volunteering in Victoria – 2016 Census Update" (2018)

	student cohort age breakdown and Volunteering Victoria averages. Value of volunteered time is based on the Australian minimum wage of $18.93.			

Lost Cark Park Costs

Appendix Table E.3 - Volunteering Value Calculations

Outcome	Commentary	Proxy Value	Attribution Rate	Impact Value
Lost Cark Park	60 car spaces on site are currently benefiting the community and will be lost with the WSU BCC development. Although the WSU BCC will provide parking access will be limited to staff. There will also be a reduction in maintenance costs to Council, however these are considered minor and excluded from the analysis.	**$657,000** Source: Compass Centre Care Park[14] (60 x $3 x 10hours x 365days) Value of parking is assumed equivalent to $3 per hour at the nearby Compass Centre Car Park. Our calculation is based on the car park's 60 spaces are being fully occupied for 10 hours per day (8am to 6pm) for 365 days per year.	**100%**	**$657,000**

Sensitivity Analysis

Appendix Table E.4 – Cost-Benefit Analysis and Sensitivity Analysis by Item

$M	Low	Benchmark	High
Discount Rate	3%	7%	10%
Costs			
Construction Costs	$280.4	$273.5	$268.7
Operating Costs	$56.8	$36.8	$28.2
Lost Car Park	$13.3	$8.7	$6.8
Total Costs	**$350.5**	**$319.0**	**$303.7**
Benefits			
Gross Value Added by Construction	$161.1	$157.1	$154.3
Gross Value Added by WSU BCC Operations	$2,595.1	$1,678.5	$1,287.1
Public Space	$5.2	$3.4	$2.6
Volunteering	$22.7	$14.7	$11.2
Total Benefits	**$2,784.0**	**$1,853.7**	**$1,455.2**

[14] InterPark, "Compass Centre Bankstown Car Park", https://www.interpark.com.au/parkings/compass-centre-bankstown-car-park/, accessed 19/06/2019

Net Benefits	**$2,433.5**	**$1,534.7**	**$1,151.6**
Benefit-Cost Ratio	**7.9**	**5.8**	**4.8**

Note: All values are 30-year period present value in 2019 dollars. All dollar values are in millions.