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STUDY OBJECTIVES

The NSW Department of Planning and Environment (DP&E) is now in the process of preparing subregional plans that will manage growth and articulate *A Plan for Growing Sydney* at the subregional level to inform the preparation of Local Environmental Plans.

Urbis has been commissioned by the DP&E to provide detailed insights into the following:

- Specific barriers to economic growth for each centre that is supported by more detailed evidence and research
- Document centre specific actions identified in consultation with local councils, property developers, businesses and other stakeholders to facilitate potential investments and promote business activity in each centre and the subregion.

STUDY METHODOLOGY

This section describes our approach and scope of work to assist the DP&E address the key study objectives described above.

Table 1 and Map 1 show the 11 centres and three transport gateways that were covered as well as two centres Sutherland and Mount Druitt which are located across five subregions of Central, West Central, West, North and South.

Strategic Centres are defined in *A Plan for Growing Sydney* as:

‘The largest centres in the Sydney Metropolitan Area, when developed. They contain mixed-use activity of an amount, density and diversity that is of metropolitan significance, including commercial (office, business and retail), civic and cultural uses; government services; and higher density housing. They are typically on the passenger rail network or serviced by other high frequency public transport. Centres typically contain at least 10,000 jobs, with the potential to accommodate ongoing jobs growth over the long-term. They are priority locations for employment and retail activity.’

Transport Gateways are defined in *A Plan for Growing Sydney* as:

‘Locations with major ports or airports, and their surrounding precincts. They perform an essential and ongoing role to connect Sydney with locations across Australia and the world. Transport gateways are vital to Sydney’s prosperity and often support large concentrations of complementary business activity and employment.’

Sutherland and Mount Druitt were investigated as part of this barriers to growth work to progress an understanding of these centres.

A separate consultancy commissioned by the Department of Planning and Environment investigated Sydney’s 13 other strategic centres as well as two centres in the North, West Central and South West subregions.

As shown in Table 1, while centres are characterised as strategic centres or transport gateways, there is quite a variation in their size and employment they provide.

The centres assessed vary in size from Chatswood being most compact, occupying an area of 51 ha, to Marsden Park a larger greenfield centre, occupying an area of 636 ha. Current employment...
outcomes range even more widely from 200 jobs in Marsden Park to over 20,000 in Chatswood.

The Port Botany Precinct covers the largest geographical area of 774 ha. Employment outcomes in transport gateways also range dramatically from 4,600 jobs in Bankstown Airport-Milperra to over 22,700 jobs in the Sydney Airport Precinct.

We note that employment in planned precincts such as Marsden Park and Green Square will rise significantly as they are developed.
STUDY OBJECTIVES

3

STRATEGIC CENTRES, TRANSPORT GATEWAYS AND OTHER CENTRES

MAP 1
The study included seven key elements which are described below.

**ELEMENT 1: DOCUMENT REVIEW AND BASELINE RESEARCH**

Urbis reviewed previous relevant reports, and state and local planning policy documents and conducted baseline research as a first step in the project.

The baseline research covered the following for each centre:

- Journey to work (NSW Bureau Transport Statistics) analysis – where do workers who currently work in each centre live, how do they get to work and what industry do they work in?

- Employment forecasts by industry sector (NSW Bureau of Transport Statistics) for each centre and transport gateway

- Public transport provision (NSW DP&E)

- Retail, health and education amenities

- Historical building approval (Australia Bureau of Statistics, Historic Building Approvals)

- Private investment pipeline, including infrastructure, education and health related public investment in centres (Cordells Connect, 2015).

**ELEMENT 2: FIELD WORK**

Each centre and gateway was visited by the study team to ascertain recent changes to understand the context and outcomes for centres.

**ELEMENT 3: MARKET SOUNDING**

Key private sector peak bodies, property developers and owners, significant non-institutional land owners and business currently in each of the centres and gateways were interviewed to understand the following:

- Key barriers to the market making investments in centres

- Extent of missed economic opportunities due to barriers

- Growth prospects in different centres

- Most effective role for government to facilitate growth in each centre.

We have included the perspective of private sector, which have commented on what it would take to entice them to invest in the various centres across Sydney.

**ELEMENT 4: CONSULTING GOVERNMENT**

All local councils and relevant government authorities with involvement in the centres and transport gateways covered by Urbis were interviewed and consulted to understand their perspective on the key barriers to growth, effective policy levers and the appropriate role of each centre.

**ELEMENT 5: GIS ANALYSIS**

Geographical information systems (GIS) were utilised to perform the following analysis:
• Mutually exclusive catchments – define a mutually exclusive catchment area for each centre using drive time analysis, and estimate the current and future size of the resident population that is likely to use each centre with some regularity based on ease of access by road

• Land constraints – sites in each centre under strata titling or heritage overlay, and the distribution of land parcels by size

• Development potential – apply the LEP height and FSR limits by zone to understand the weighted average and full development potential built form that apply to each centre

• Journey to work – map the travel zone in which centre workers live by mode of travel to work

• Points of interest – map the location of key points of interest such as shopping centres public hospitals with Emergency Room, universities, TAFEs and train stations.

ELEMENT 6: TOWN PLANNING ASSESSMENT

The town planning assessment included research and analysis of the relevant authority’s, most recent and current Local Environmental Plans, land use zoning and flexibility, council capacity to manage development applications (i.e. number of DA staff), and extent of heritage considerations for each centres and transport gateways.

ELEMENT 7: URBAN DESIGN ASSESSMENT

A high level diagnosis of the urban design constraints for each of the centres and transport gateways covered by Urbis was undertaken.

REPORT STRUCTURE

This report provides detailed profiles on the 13 centres and three transport gateways allocated to Urbis for analysis.

The profiles provide insights on the following areas, namely:

• Context – the location and current role of the centre, transport infrastructure connectivity, and the overall context in which each centre sits

• Amenities – convenience and discretionary retail; dining and entertainment options; and regional facilities such as hospital, university, TAFE or regional shopping centre

• Key statistics and outcomes – current and future catchment population and level of investments

• Employment outcomes – the number of jobs provided in the centre in 2011 and projected in 2031, where do workers in the centre live and the industry composition of centre jobs from the NSW Bureau of Transport Statistics

• Planning context – relevant local planning policies that apply to the centre, land use zoning and flexibility, council capacity to support development

• Urban design – look and feel, scale and level of integration or fragmentation of the centre.
- **Opportunities** – encapsulates the extent of business opportunities and interest in investing in a centre articulated in the Market Sounding exercise.

- **Barriers to growth** – documents the factors that limit the growth outcomes in the centre

- **Enablers** – documents the suggestions from private sector and council interviewees for actions to facilitate potential investments and promote business activity in each centre and transport gateway.
KEY THEMES

There are a number of themes discussed at a subregional level for the Central and South subregions which are outlined below.

Discussion themes common to the **Central Subregion**, excluding Randwick Health and Education, and the Sydney Airport and Port Botany precincts, are as follows:

- Land prices are quite high in all centres which make them highly attractive for high density residential development and the recent activity in this sector is evidence of that

- As high density residential is commonly highest and best use in these centres, developers need incentives to consider commercial investment

- All centres are seen as mixed use centres, with a strong retail underpinning that naturally lends itself to an intensification of residential development

- Mixed use is seen as a positive economic outcome for a centre, not a compromise. Chatswood strategic centre, in the North Subregion is regarded as a successful mixed use centre and seen as a good reference point for best practice, despite the fact the centre’s commercial focus has been shifting to a more mixed use approach

- Future commercial tenant profiles in the centres are seen as being similar to what they are today, and thus likely to be small to medium sized businesses of a mainly professional, business, personal or medical services nature.

These themes are based on insights from the following strategic centres Urbis covered within this subregion:

- Bondi Junction
- Burwood
- Green Square.

Within the **Central Subregion**, road infrastructure is a leading concern for Green Square, Sydney Airport and Port Botany with Market Sounding and government interviewees (State and local) questioning how the inevitable increase in traffic will be managed.

From the interviews regarding the **South Subregion** it emerged that:

- While Sutherland is not a strategic centre, there is a preference for it to grow and be recognised as one. However, Miranda is also a large centre with an established retail centre, which has been further strengthened following the redevelopment of Westfield Miranda, and an attractive centre for business.

- Hurstville should be a strategic centre, though Kogarah is seen as having a different role. A joint planning approach to both centres is necessary to ensure that they are not in direct competition but jointly are a successful centre.
These themes are based on insights from the following centres Urbis covered within this subregion:

- Hurstville
- Kogarah
- Sutherland.

Urbis is not in a position to provide views on themes across the rest of the remaining four subregions across Sydney for the following reasons:

- The only strategic centre Urbis investigated in the North Subregion was Chatswood which did not allow for observations to draw subregional themes from
- There is only one strategic and one specialist precinct in the West Subregion, both in Penrith, which do not allow for enough observations to draw subregional themes from
- While Urbis covered three centres in the West Central Subregion, these centres comprise the minority of centres in the subregion
- Urbis did not cover any centres in the South West subregion
- No apparent common themes surfaced from the work undertaken on the centres by Urbis.
Bondi Junction is a major centre servicing the eastern suburbs of Sydney. This centre is located approximately 4 km south-east of the Sydney CBD, directly to the east of Centennial Park. Activity within the centre is concentrated around the Bondi Junction train station, which is anchored by the Westfield Bondi Junction.

**INFRASTRUCTURE:**
- **Train station:** Bondi Junction Station services the Eastern Suburbs and Illawarra and South Coast Lines.
- **Road:** The centre is bound to the north by Syd Enfield Drive, which provides connections to Ocean Street, Anzac Parade and the Eastern Distributor Motorway.

**AMENITIES:**
- **Hospital:** War Memorial Hospital (directly south-west)
- **University:** University of New South Wales (2.7km south-west)
- **TAFE:** Randwick TAFE (1.5km south-west)
- **Convenience retail:** The Westfield Bondi Junction has a range of convenience retailers including Coles and Woolworths. An ALDI store is located on Spring Street.
- **Discretionary retail:** Discretionary retail is focused primarily within Westfield Bondi Junction which comprises 106,000 sq.m. Oxford Street Mall also has a significant retail offering.
- **Dining/entertainment:** The dining/entertainment options are also concentrated within the Westfield Bondi Junction and along the Oxford Street Mall.

**CATCHMENT MAP**

**KEY STATISTICS**

**Catchment population:**
- Total population 2011: 213,553
- Total population 2031: 254,242
- Total growth (number) 2011-31: 40,689
- Total growth (%): 2011-31: 19%

**Investment in centre:**
- Value of building approvals 2012-14 ($ Million): $298.7
- Current private investment pipeline ($ Million): $276.8

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on dive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

According to the 2011 Census, there were some 12,100 people employed in Bondi Junction. The Bureau of Transport Statistics (BTS) projects that this will increase to approximately 15,200 people by 2031, representing a 26% increase.

Those employed in Bondi Junction live within a relatively tight catchment around the boundaries of the centre, with a large proportion living within 10 kilometres.

More specifically, those that travel by bus and private motor vehicle tend to be concentrated along the eastern coastline, particularly between Dover Heights in the north and Maroubra in the south. Those that travel to work by train generally live to the west of the centre, closely aligned to the train network patterns.

The most common mode of transport for workers of this centre is private vehicle, followed by train.

EMPLOYMENT BY INDUSTRY

The largest industry of employment within this centre is retail trade, with 3,370 workers in 2011, heavily influenced by the presence of the Westfield Bondi Junction. This is projected to increase 27% to 4,284 workers by 2031.

The health care and social assistance industry sector is projected to experience a strong 46% increase in employment numbers over the next two decades, with 2,068 workers by 2031.

Other significant industries of employment within the centre include professional, scientific and technical services; accommodation and food services; and administrative and support services.

The transport, postal and warehousing industry is projected to see a 10% decline in the number of workers employed between 2011 and 2031, declining to just 254 workers in 2031.

Top 5 Industries of Employment, 2011-2031

- **Retail Trade**: 4,284 workers in 2031, 3,370 in 2011
- **Health Care and Social Assistance**: 2,068 workers in 2031, 874 in 2011
- **Professional, Scientific and Technical Services**: 1,378 workers in 2031, 1,246 in 2011
- **Accommodation and Food Services**: 1,246 workers in 2031, 1,378 in 2011
- **Administrative and Support Services**: 874 workers in 2031, 1,246 in 2011

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Waverley Council
EPIs: Waverley LEP 2012
LEP: 2010
Land constraints: Heritage 54.6%
(% of centre area) Open space 3%

DIAGNOSIS

Authority: Low level of authority complexity (one LGA). Low level of legislative complexity (one EPI), however last strategic review of LEP controls occurred in 2010.

Commercial: Moderate commercial core in which residential is prohibited (60,719 sq.m/ 16%) and is capable of accommodating employment growth.

Height and FSR: Relatively generous heights (47m for B3 zone and 36.8m for B4 zone) and given residential prohibition in the B3 Commercial Core zone creates an incentive for commercial development in B3.

Residential: Largest land zoning by area is R3 Medium Density Residential which permits residential flat building (RFBs) and prohibits shop top housing.

Flexibility: Flexible business zones which allow a variety of uses, including all key commercial uses

Land constraints: 54.6% of the centre is affected by heritage or conservation provisions, however the majority of this affected land is residential conservation areas.
LAND USE FLEXIBILITY IN KEY ZONES

- B3 Zone: Residential prohibited (16% of centre)
- B4 Zone: Shop top housing permitted, RFBs prohibited
- Key commercial uses permitted
- Car sales and car servicing permitted
- Open land use tables.

COMMERCIAL AND RETAIL CORE PROTECTION

- Commercial core protected via prohibition of residential uses in B3 Commercial Core.

COUNCIL CAPACITY

Council capacity is low with an average net DA determination time of 82 days, 21 days longer than the Sydney Metro average. Waverley Council also determines a lower value of DAs than average for Councils in the Sydney Metro area.

Council Capacity (2013-2014)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>82 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$397,483,656</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Good integration between transport interchange and retail and commercial centre
- Tight core with retail and commercial concentrated in a small area
- Core dominated by high density development
- Modern, attractive and sophisticated design of the main retail offer, i.e. Westfield
- Centre is divided into two main components comprising Westfield to the east, and Oxford Street mall to the west which also includes Eastgate Shopping Centre
- Lack of high quality open space.
SENTIMENT OVERVIEW

Bondi Junction has developed a strong retail and residential focus. Council states that Bondi Junction currently experiences low demand for A-grade commercial, which may be a function of limited land and floor plate availability. It attracts specialised small businesses in the ICT sectors. Council continues to experience pressure to develop more residential instead of commercial.

From a private sector perspective, Bondi Junction is viewed as a successful centre that investors would like to be part of, however there is an overriding perception that the cost to do so make this prohibitive. From an investment perspective, Bondi Junction is strongly associated with being a retail centre because of the scale of retail development in the centre.

In recent years the growth of high density residential has strengthened the centre’s image as a mainly retail and residential centre. Equally, investors believe it should have a stronger commercial base.

ECONOMIC OPPORTUNITIES

The private sector believes that Bondi Junction has good fundamentals and good prospects to be a larger commercial office market because of:

- Proximity to a skilled professional worker catchment
- Proximity to desirable suburbs
- Proximity to the Sydney CBD
- Rail and bus interchange
- Attractive amenity for workers and residents.

Bondi Junction should be attractive as a place of work for professional residents who live in the area and are seeking a better work / life balance. A reduction in travel times would be a clear benefit as well as the proximity of being close to recreation amenity such as the beach.

There is a question over whether a large scale commercial tenant would locate in Bondi Junction. Most are confident that there will continue to be strong interest from the type of tenants that dominate the market, e.g. small professional businesses such as lawyers, accountants, medical specialists, ICT and knowledge businesses. Consequently, there is a sentiment that a moderate addition of commercial floorspace would most likely be absorbed by this type of tenant.

In terms of retail investment, there is limited opportunity for new retailers to enter the Bondi Junction market unless they are smaller specialists taking up space in the shopping centres. It is difficult to see where a larger scale business would locate in the future. A car retailer Urbis met with sees Bondi Junction is an ideal location for car retail and servicing integrated with other commercial, in the way Audi at East Village is integrated with other uses.

There is also a sense that Bondi Junction could support tourism investment through hotel or serviced apartment development.

BARRIERS TO ECONOMIC GROWTH

The following barriers were identified by private sector experts and Council on discussions with them:

Proximity to CBD and other commercial precincts
The Sydney CBD is more of an attractor of A-Grade Commercial tenants, and there is additional competition from other centres including North Sydney and Chatswood.

Limited demand for high grade commercial floorspace
There is limited demand for high grade commercial floorspace from large scale corporate tenants.

Limited availability of large sites
Within the centre there are no large available sites for development.

High land prices
High land prices in the centre create a barrier for commercial development.

Fragmented land ownership
There is an issue of fragmented land ownership, which impedes consolidating large parcels of land for redevelopment.
Limited availability of A-Grade commercial floorplates
Bondi Junction is not known for having large commercial floorplates.

High density residential is currently highest and best use
The high cost of acquiring development sites in the commercial zone has created an investment appetite for high density residential as it is currently the highest and best use.

Market positioning as retail and residential centre
Large scale commercial tenants are attracted to centres with a critical mass of commercial tenants, which Bondi Junction is perceived to lack.

Council DA approvals timing (21 days above the Sydney Metro average)
Council’s average development approvals time is proving to be a disincentive to the business community.

LOT SIZES AND EXTENT OF STRATA TITLING

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Introduce site consolidation incentives through the Local Environmental Plans (LEPs) to make commercial development more attractive to investors and developers.

Introduce Height and FSR Incentives
Design control incentives through the Local Environmental Plans (LEPs) may create a more attractive market for new commercial development in the commercial core.

Consolidation by Government of sites
Government acquisition of sites in the centre for development opportunities.
Burwood is 12 km to the west of the Sydney CBD, and is characterised by a mix of commercial, residential and retail development. The centre has been developed around the train station with the main retail strip along Burwood Road anchored by Westfield Burwood in the north and spanning approximately 800 metres in length.

**INFRASTRUCTURE:**
- **Train station:** Burwood Station services North Shore, Northern, Western, Airport, Inner West and South Lines.
- **Road:** Burwood Road connects to Parramatta Road, connection east into the CBD and to the M4 Western Motorway travelling further west.

**AMENITIES:**
- **Hospital:** Strathfield Private Hospital (900 metres west)
- **University:** Australian Catholic University Strathfield (3.4 km west)
- **TAFE:** TAFE NSW Strathfield Campus (900 metres)
- **Convenience retail:** Burwood Plaza provides convenience based offer with Woolworths and Tong Li (GLA 12,200 sq.m). Retail high street provides a good mix of services, food retail and food catering (café, restaurants and takeaway) with a strong Asian influence.
- **Discretionary retail:** Westfield Burwood comprises 65,000 sq.m (GLA). Strong performing centre with a good mix of discretionary retailers and large fresh food and dining precinct.
- **Dining/entertainment:** Extensive offer throughout the high street, aligned with the local resident market and allows for evening activation. Club Burwood is also located on Burwood Road.

**KEY STATISTICS**

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Catchment population:</strong></td>
<td></td>
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<tr>
<td>Total population 2011</td>
<td>243,130</td>
</tr>
<tr>
<td>Total population 2031</td>
<td>306,800</td>
</tr>
<tr>
<td>Total growth (number) 2011-31</td>
<td>63,670</td>
</tr>
<tr>
<td>Total growth (%) 2011-31</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Investment in centre:</strong></td>
<td></td>
</tr>
<tr>
<td>Value of building approvals 2012-14 ($ Million)</td>
<td>$443.4</td>
</tr>
<tr>
<td>Current private investment pipeline ($ Million)</td>
<td>$848.3</td>
</tr>
</tbody>
</table>

*Source: ABS Census, BTS, CordellConnect, Urbis*

*Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.*
WHERE DO WORKERS COME FROM?

There were some 11,500 people employed in Burwood in 2011. The Bureau of Transport Statistics (BTS) projects that this will increase to 14,500 people by 2031, an increase of 26%.

As shown in Map 1.6, the place of residence of those who work within Burwood is focused around the centre itself, with the majority residing in the inner west, west and south west regions of Sydney, between the Sydney and Parramatta CBDs.

The majority of this centre’s workers use private transport to get to and from work and the place of residence of these workers is generally more concentrated around the centre.

Train travel is the second most common transport mode for workers, supported by the central location of the Burwood train station. Of those that travel by train, a large proportion live within close proximity to the western train line, extending between Parramatta and Penrith.

WORKERS PLACE OF RESIDENCE BY MODE (2011) MAP 1.6

EMPLOYMENT BY INDUSTRY

The largest industry of employment in Burwood in 2011 is retail trade, with almost 2,200 workers, driven by the Westfield Burwood and Burwood Plaza. This is projected to grow 32% by 2031 to 2,876 workers.

As shown in Chart 1.2, the second largest industry of employment was health care and social assistance, with 1,631 workers in 2011 and projected to grow 30% to 2031 (to 2,120 workers).

Other significant industries that generate employment within the centre include transport postal and warehousing; professional, scientific and technical services; and education and training.

Between 2011 and 2031, the only industry where the employment number is projected to decline is the arts and recreation services, with a 9% decline anticipated for the period.

Top 5 Industries of Employment, 2011-2031 CHART 1.2

BURWOOD

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Burwood
EPIs: Burwood LEP 2012
‘Strategic’ LEP: 2010
Land constraints: Heritage 11.2%
(% of centre area) Open space 9%

DIAGNOSIS

Authority: Low level of authority and legislative complexity (one EPI, one LGA)
Height and FSR: Significant height and FSR for B4 Mixed Use zoned (weighted average of 45.8m and 3.9:1). While significant FSRs permissible, residential floor space caps are implemented in the area surrounding Burwood Train Station which limit residential floor space to between 1.8:1 and 3:1 of the overall floorspace of a mixed use development.
Flexibility: Large B4 Mixed Use area (383,737 sq.m/ 56%) with flexible land uses permitted in accordance with the strategic role of the centre as a mixed use precinct.
Land constraints: Low 11.2% of the centre is affected by heritage and conservation provisions.

ZONING MAP

ZONING AND LAND USE

<table>
<thead>
<tr>
<th>Key Business Zones</th>
<th>B4 Mixed Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoned Land (selected zones)</td>
<td>B4</td>
</tr>
<tr>
<td>Area (sq.m)</td>
<td>383,737</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>56%</td>
</tr>
<tr>
<td>Weighted Average Height (metres)</td>
<td>45.8</td>
</tr>
<tr>
<td>Weighted Average FSR (X:1)</td>
<td>3.9:1</td>
</tr>
</tbody>
</table>
LAND USE FLEXIBILITY IN KEY ZONES

- B4 Mixed Use: RFBs and shop top housing, key commercial premises, car sales permitted, car servicing prohibited.
- Open land use table.

RESIDENTIAL FLEXIBILITY IN KEY BUSINESS ZONES

- Residential permitted in 91% of centre
- Caps placed on maximum residential floor space in core.

COMMERCIAL AND RETAIL CORE PROTECTION

- Commercial core somewhat protected via residential floor space caps
- No retail core protection mechanisms in place.

COUNCIL CAPACITY

Council capacity is low. While the average net DA determination time is 48 days, 13 days shorter than the Sydney Metro average, Council also determines a lower value of DAs than average for Councils in Sydney Metro.

<table>
<thead>
<tr>
<th>Council Capacity (2013-2014)</th>
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<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
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<tr>
<td>Average Net DA Time (Sydney)</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Tight compact centre based on a logical grid street network where the main road spin runs north-south whilst the train runs east-west
- Older centre but vibrant and active
- Well integrated train station connects with the surrounding land uses
- Retail strip contained within 800 metres
- Single high street, retail activates both sides of street
- Pedestrian friendly urban environment.
SENTIMENT OVERVIEW

Burwood Council sees the centre as an important strategic centre with a strong retail and commercial development focus. Council’s 2012 LEP encourages new commercial development though its mixed use zoning and FSR/Height controls but this has not necessarily generated the commercial development growth it would like. Although there is a very strong demand for residential development instead of commercial development, Council remain committed to facilitating additional commercial development if possible.

The Westfield redevelopment helped reinvigorate Burwood Road by opening up its ground floor to the street and attracting new eateries and supporting retail. Burwood now has better amenity that may attract new businesses.

Burwood is viewed by the private sector as a market that is positioned for further intense residential development, because of the following attributes:

- Strong retail shopping centre
- Vibrant high street
- Residential population of Asian background
- Proximity to Sydney CBD.

The market believes that the potential of Burwood for commercial investment should not be considered in isolation, but in conjunction with nearby centres including Sydney Olympic Park, Rhodes and Parramatta.

ECONOMIC OPPORTUNITIES

The private sector sentiment is geared towards Burwood being a successful high density residential centre. Council however, still supports a strong commercial core. Therefore, there is likely to be an opportunity to combine other uses with residential developments to create successful mixed use projects.

Burwood has a positive economic outlook, although the expectation of the private sector experts is this activity will be predominantly generated through retail and residential (i.e. mixed use) rather than commercial solely.

The Burwood Plaza sale and redevelopment provides opportunities for innovative mixed use development.

BARRIERS TO ECONOMIC GROWTH

Largely based on discussions with Council and private sector experts the following key barriers to growth were identified:

**Proximity to other middle ring commercial markets**
As with other strategic centres, (e.g. Parramatta, Sydney Olympic Park) there is competition with other commercial centres for tenants. Burwood is not perceived as a market for large scale tenants, and therefore must compete with other centres, especially for government anchor tenants. Competition also limits access to a skilled and professional labour market who is attracted towards centres with a wider range of professional employment opportunities.

**Limited demand for high grade commercial from large scale tenants**
There is limited demand for large and quality commercial floorspace from large scale tenants, partly due to this being available in nearby commercial precincts.

**Limited high grade commercial floor plates**
Burwood is considered to have poor quality commercial space relative to nearby modern commercial precincts such as Sydney Olympic Park. Prospective commercial tenants overlook Burwood for other precincts where they can get larger floorplates (e.g. Rhodes and Sydney Olympic Park).

**Limited availability of large sites**
Fragmented ownership in the centre impedes redevelopment.

**High land prices**
The perception is that land prices are too high thereby excluding Burwood as a viable centre for commercial investment.

**Extensive strata titling**
The extensiveness of strata titling limits development opportunities in the centre.
Market positioning as retail and residential centre
Large scale commercial tenants are attracted to centres with a critical mass of commercial tenants. Burwood is not perceived by the market in this way.

Lack of critical mass of residents
Burwood does not have the residential density in the centre to match demand. An increase in the residential population would provide economic opportunities.

Physical barrier
Council believes that the railway line and station create a perceived barrier between development north and south of the railway line.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Introduce height and FSR incentives
Introduce height and FSR incentives for the development of commercial floorspace through the Local Environmental Plans (LEPs).

Introduce site consolidation incentives
Introduce site consolidation incentives through the Local Environmental Plans (LEPs) to make commercial development more attractive to investors and developers.

Government consolidation of sites
Government acquisition of fragmented sites in the centre will create development opportunities.

Development over rail corridors
Reconsider commitment to develop over rail corridor to address commercial development supply and to address the centre physical connectivity barrier.
OVERVIEW

Servicing the northern suburbs of Sydney, Chatswood is a major retail hub with two regional shopping centres. Located approximately 7 km north of the Sydney CBD, the centre has undergone significant transformation of late particularly around the Chatswood train station, which has become a focus for Transit Oriented Development (TOD).

INFRASTRUCTURE:

Train station: Chatswood Station services North Shore, Northern, Western and Central Coast & Newcastle Lines.

Road: The Pacific Highway, one of Sydney’s main arterial roads, runs along the western boundary of the centre.

AMENITIES:

Hospital: Royal North Shore Hospital (2.5km south)

University: University of Technology, Sydney – Kuring-gai Campus (1.8km north-west)

TAFE: TAFE NSW – Northern Sydney Institute (1.5km north-west)

Convenience retail: Coles and Tong Li supermarkets located in Chatswood Chase Shopping Centre, while the Westfield Chatswood contains and ALDI and Coles supermarkets.

Discretionary retail: Westfield Chatswood comprises 76,000 sq.m and Chatswood Chase Shopping Centre comprises 59,000 sq.m.

Dining/entertainment: Significant dining and entertainment options in both the Westfield Chatswood and Chatswood Chase shopping centres, as well as along Victoria Avenue.

CATCHMENT MAP

KEY STATISTICS

<table>
<thead>
<tr>
<th>Catchment population:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population 2011</td>
<td>78,130</td>
</tr>
<tr>
<td>Total population 2031</td>
<td>101,212</td>
</tr>
<tr>
<td>Total growth (number) 2011-31</td>
<td>23,082</td>
</tr>
<tr>
<td>Total growth (%) 2011-31</td>
<td>30%</td>
</tr>
</tbody>
</table>

| Investment in centre:         |         |
| Value of building approvals 2012-14 ($ Million) | $1,062.2 |
| Current private investment pipeline ($ Million)    | $1,449.5 |

Source: ABS Census, BTS, CordellConnect, Urbis
WHERE DO WORKERS COME FROM?

As at 2011, there were approximately 20,300 people employed in Chatswood. This is forecast to increase to 26,200 people (29% growth) by 2031, becoming the largest employer out of all 16 strategic centres in 2031.

As there are a large number of people working in this centre in a range of industry sectors, the place of residence of the workers forms one of the largest catchment areas. Consequently this centre has one of the lowest proportions of workers who live within 5 kilometres.

The majority of this centre’s workers commute by private motor vehicle, with these workers tending to live in the northern suburbs of Sydney and along the Northern Beaches.

A notable share of workers also use the train to commute to and from work, with the place of residence of these workers being more widely distributed across Sydney, as shown in Map 1.10.

EMPLOYMENT BY INDUSTRY

With the Westfield Chatswood, Chatswood Chase and Mandarin Centre shopping centres present within this centre, it comes as no surprise that retail trade is the largest industry of employment, employing just under 3,500 workers in 2011. As evident in Chart 1.3, this was shortly followed by the professional, scientific and technical services industry, with almost 3,300 workers.

The retail trade industry is expected to grow 28% to 4,445 workers by 2031, while the professional, scientific and technical services industry is forecast to increase just 18% to 3,892 workers.

Other significant industries within the centre include health care and social assistance, construction, and information media and telecommunications.

Employment numbers within all other industry sectors within Chatswood are expected to increase between 2011 and 2031 except for wholesale trade, which is expected to experience a slight 1% decline.

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2031</th>
<th>Change (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Trade</td>
<td>4,445</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>3,892</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>3,057</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>2,089</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td>2,332</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Willoughby
EPIs: Willoughby LEP 2012
‘Strategic’ LEP: 2012
Land constraints: Heritage 4.5% (% of centre area) Open space 1%

DIAGNOSIS

Authority: Low level of authority and legislative complexity given that the centre only falls under one local council and one EPI
Commercial: Large commercial core (217,134sq.m/ 59%) which is protected from residential development
Residential: Prohibition of residential over 59% of centre limits potential for growth if office demand is weak, and limits mixed use capacity
Flexibility: Land use flexibility is moderate with key commercial premises in B3 Commercial Core and B4 Mixed Use zones and residential flat buildings prohibited but shop top housing permitted in B4 Mixed Use zone.

Land constraints: Limited heritage constraints (4.5%) and small open space provision (1%). Railway line airspace is largely developed.

ZONING MAP

MAP 1.11

ZONING AND LAND USE

<table>
<thead>
<tr>
<th>Key Business Zones</th>
<th>B3 Commercial Core, B4 Mixed Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoned Land (selected zones)</td>
<td>B3</td>
</tr>
<tr>
<td>Area (sq.m)</td>
<td>217,134</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>59%</td>
</tr>
<tr>
<td>Weighted Average Height (metres)</td>
<td>*Could not be calculated with available data</td>
</tr>
<tr>
<td>Weighted Average FSR (X:1)</td>
<td>4.5</td>
</tr>
</tbody>
</table>
LAND USE FLEXIBILITY IN KEY ZONES

- **B3 Zone**: Shop top housing and RFBs prohibited, key commercial uses permitted, car sales permitted, car servicing prohibited.
- **B4 Zone**: Shop top housing permitted, RFBs prohibited, key commercial uses permitted, car sales permitted, car servicing prohibited.
- Open land use tables.

COMMERCIAL AND RETAIL CORE PROTECTION

- Commercial core protected via prohibited residential uses in B3 zone
- Retail core protected through 100 sq.m GFA limit on shops west of the railway line

COUNCIL CAPACITY

Council capacity is moderate with an average net DA determination time of 63 days, 2 days longer than the Sydney Metro average. Willoughby City Council determines a lower value of DAs than average for councils in the Sydney Metro area.

<table>
<thead>
<tr>
<th>COUNCIL CAPACITY (2013-2014)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>63 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$350,096,046</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Strong integration between transport interchange and retail core
- High quality and diverse retail offer
- Good integration between retail and public spaces
- Modern attractive leisure and entertainment precinct
- High quality attractive and usable public space at The Concourse
- Vibrant and activated centre in the evenings and weekends
- Modern centre for residential living
- Rail line provides good definition between retail and commercial core.
SENTIMENT OVERVIEW

Council is strongly committed to the strategic centre role of Chatswood. It sees the centre as an important commercial, retail and residential centre for the region. The increase in residential over the last two decades has greatly increased retail and social infrastructure demand. There is continuing demand for additional residential at the expense of additional commercial development. Council remain committed to a strong commercial office future and its current planning controls and planning incentives support this.

Private sector experts view Chatswood as a positive exemplar of a centre that has attracted a balance of investment in terms of infrastructure, retail, residential and cultural set against a backdrop of an established and steady commercial centre. Today, it is viewed as a successful mixed use centre.

The centre’s image profile has shifted from a commercial and retail centre to a predominately residential and retail centre. Fundamentally however, Chatswood is still a fairly sound commercial market.

The centre shows what is possible for centres with similar characteristics including Hurstville and Burwood, with a strong retail core and an increasing Asian residential population who value having amenity on their doorstep. Willoughby Council is recognised in being instrumental in articulating a vision for Chatswood and delivering to that.

ECONOMIC OPPORTUNITIES

The opportunities for an increase commercial investment are seen as limited, if at all. Subsequently, the future role of Chatswood as a commercial centre is under question in light of the increased residential development, and the attractiveness of competing precincts particularly Macquarie Park.

There are concerns about the likely exit of government tenants (NSW Health and Transport NSW) and the challenge to backfill those spaces.

Any future opportunities for investment in Chatswood are perceived to be in retail growth not in the provision of commercial office provision. In terms of supermarkets alone, there is an undersupply in Chatswood.

“The horse has bolted in Chatswood, you won’t get commercial back”

BARRIERS TO ECONOMIC GROWTH

The following barriers were identified by private sector experts and Council on discussions with them:

High cost of land
High cost of land impedes development opportunities.

Residential is currently highest and best use
Commercial development is not as viable relative to residential development and thus creating an impediment to commercial investment.

Chatswood is in close proximity to highly competitive CBD markets, e.g. North Sydney, St Leonards, Sydney CBD, and Macquarie Park
Compared to Chatswood, there is high quality modern accommodation and more affordable rents in Macquarie Park, and other centres.

Quality and size of commercial floorplates in Chatswood
Prospective commercial tenants overlook Chatswood for other precincts where they can get larger floorplates. Council states that the development of residential units in areas that were once zoned to be commercial (through the previous Part 3A and Planning Proposal appeals process) has decreased the availability of good commercial office space.

Uncertainty about the future role of Chatswood as a commercial centre
The outcome of the above point that there is a market perception that Chatswood has developed into a mainly residential and retail centre and commercial is secondary to these uses.

No availability of land for additional retail development in the centre
Outside the two main shopping centres (Westfield Chatswood and Chatswood Chase), there are no opportunities for significant retail investment, i.e. Chatswood is ‘full’.
Consideration of out-of-centre retail developments undermines confidence
There has been consideration given to an out-of-centre development which potentially damages confidence of major retail owners in the centre, and creates a sense of uncertainty and risk.

Government agencies withdrawing from Chatswood e.g. Transport NSW, NSW Health
As government is often seen as an important commercial anchor for centres, any exit will send a message of not supporting Chatswood as a commercial centre and potentially undermining confidence.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

FSR and height control incentives
Provide height and FSR incentives via the Local Environmental Plans (LEPs) to allow Chatswood to fulfil its potential to attract investment.

Centres Policy
Adopt Centres’ Policy to ensure certainty for major shopping centre owners located in the Chatswood centre.
GREEN SQUARE

CONTEXT

Green Square is a designated strategic centre that has the potential to accommodate some 7,000 additional jobs by 2031. It currently reflects an area in transition from an industrial precinct to recently accommodating a significant uplift in residential development.

INFRASTRUCTURE:

Train station: Green Square Train Station
Road: Road access from the North via Bourke Street and Botany Road, which connects the centre to the Sydney CBD.
Road access south is via Botany Road and O’Riordan Street. Access south-east is via South Dowling Street / Southern Cross Drive.

AMENITIES:

Hospital: None
University: None
TAFE: None
Convenience retail: Currently serviced by the Coles at Waterloo, with some convenience retail located on the ground floor of new residential towers
Discretionary retail: Limited discretionary retail. Given its proximity to the Sydney CBD and other centres it is unlikely that this centre will accommodate a significant amount of discretionary retail floorspace.
Dining/entertainment: Limited existing dining/entertainment however will likely grow as the centre is developed.

KEY STATISTICS

Catchment population:
- Total population 2011: 179,285
- Total population 2031: 266,191
- Total growth (number) 2011-31: 86,906
- Total growth (%): 48%

Investment in centre:
- Value of building approvals 2012-14 ($ Million): $1,361.7
- Current private investment pipeline ($ Million): $2,411.6

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

Green Square was one of the smallest employing strategic centres in 2011, employing just 2,800 people. This is projected to grow significantly however, increasing to 10,800 by 2031.

Despite the limited employment in 2011, the place of residence of Green Square workers is widely and sparsely dispersed across Sydney.

As at 2011, the most common mode of transport for workers was private vehicles, with the majority residing within relatively close proximity to the centre.

The next most common mode of transport was train, although this mode accounted for a significantly lower number of workers. Workers that travelled by train were widely distributed, particularly to the west and south west of Sydney.

Bus patron workers generally live in eastern Sydney.

EMPLOYMENT BY INDUSTRY

As at 2011, wholesale trade was the largest industry of employment within this centre due to its history as an industrial precinct. To 2031, this industry is projected to experience minor growth of 14% over the two decades to just 515 workers, as evident in Chart 1.4.

Despite coming off a lower base in 2011 of 426 workers, the retail trade industry is projected to expand dramatically, increasing to an estimated 1,431 by 2031 (236% increase).

By industry sector, the strongest percentage growth between 2011 and 2031 is forecast in the financial and insurance services sector (4,039%). Solid growth is also projected in the education and training, information media and telecommunications, and arts and recreation services industries.

Over this same period, negative growth is projected in the agriculture, forestry and fishing (-40%); manufacturing (-31%); electricity, gas, water and waste services (-4%); and the transport, postal and warehousing (-1%) industry sectors.

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>Change (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholesale Trade</td>
<td>515</td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td>376</td>
<td></td>
</tr>
<tr>
<td>Electricity, Gas, Water and</td>
<td>387</td>
<td></td>
</tr>
<tr>
<td>Waste Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>878</td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: City of Sydney

EPIs: Green Square LEP 2013 (Stage 1), Green Square LEP 2013 (Stage 2), City of Sydney LEP 2012

‘Strategic’ LEP: 2013

Land constraints: Heritage 9.4%

(% of centre area) Open space 5%

DIAGNOSIS

Authority: Low level of authority complexity (one LGA). High level of legislative complexity (three EPIs) including a process of ‘switching on’ LEP controls via a Voluntary Planning Agreement

Flexibility: Significant B4 Mixed Use zoned area (67%) which permits a high level of land use flexibility including key commercial premises, RFBs and shop top housing

Land constraints: Low level of heritage or open space constraints

ZONING AND LAND USE

<table>
<thead>
<tr>
<th>Zoned Land (selected zones)</th>
<th>B3</th>
<th>B4</th>
<th>B2</th>
<th>Resi</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area (sq.m)</td>
<td>-</td>
<td>409,725</td>
<td>30,712</td>
<td>137,775</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>-</td>
<td>67%</td>
<td>5%</td>
<td>22%</td>
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<tr>
<td>Weighted Average Height (metres)</td>
<td>* Could not be calculated with available data</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Weighted Average FSR (X:1)</td>
<td>* Could not be calculated with available data</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**LAND USE FLEXIBILITY IN KEY ZONES**

- Highly flexible zoning provisions.
- B4 Mixed Use: Shop top housing permitted, RFBs permitted, key commercial premises permitted, car sales and repairs permitted.
- B2 Local Centre: Shop top housing permitted, RFBs permitted, key commercial premises permitted, car sales and repairs permitted.

**RESIDENTIAL FLEXIBILITY IN KEY BUSINESS ZONES**

- No limitations placed on residential floor space where permitted.

**COMMERCIAL AND RETAIL CORE PROTECTION**

- No commercial core protection.
- Restriction placed on retail development outside Green Square Town Centre (no larger than 1,000 sq.m) to protect the future Town Centre.

<table>
<thead>
<tr>
<th>COUNCIL CAPACITY (2013-2014)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>59 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney Metro)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$3,611,474,723</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney Metro)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

**URBAN DESIGN**

The urban design characteristics of this centre can be summarised as follows:

- Modern and new
- Mixed use centre including high density residential, retail on ground floor and office uses
- The planned town centre co-located with Green Square station will underpin activity
- Easy to navigate pedestrian links to residential areas within Green Square will be an important enabler for its integration of its mix of uses.

**COUNCIL CAPACITY**

Council capacity is extremely high with an average net DA determination time of 59 days, 2 days shorter than the Sydney Metro average. City of Sydney Council determines the highest value of DAs in the Sydney Metro area.
SENTIMENT OVERVIEW

Green Square is seen as a significant urban renewal opportunity and there is genuine interest in seeing how this project will evolve.

There is however a general concern about the lack of infrastructure to support the vision of Green Square. The main comments are that the road network that converges on Green Square is poor due to congestion. It is difficult to see how the current road system will cope with the number of residents going into Green Square Town Centre. A visually appealing and safe access for pedestrians is also noted as lacking.

The other sentiment heard relates to the visual appeal of the urban landscape, and specifically how unappealing it is. The general perception of the surrounding environment is that it is a somewhat desolate abandoned industrial landscape. Until people start to see changes to the above, the realisation of Green Square will seem a long way off. The concern therefore is that progress is too slow.

“The story is a hard one to tell, tenants need to be able to see the vision”

ECONOMIC OPPORTUNITIES

At this stage the economic opportunity beyond residential construction is not clear. Property experts are in agreement that it will be difficult to attract commercial tenants to Green Square until the town centre has amenity for workers.

Once there is amenity, the type of commercial tenant that could be attracted is a company that is likely to be operating in comparable commercial markets. Examples of similar markets are Rhodes, Sydney Olympic Park or Pyrmont. Green Square is likely to be competing for commercial tenants with Australian Technology Park nearby, which has the advantage of being established. It is very unlikely that a commercial tenant would relocate from the Sydney CBD.

Possible commercial sectors could be ICT, which would tie in with the technological and knowledge arc that includes the three universities and logistics particularly if there is a connection with the airport.

The view is that there should be good alignment between the residential profile and the worker profile, and thus a good outcome in terms of minimising travel times and providing employment opportunities locally.

There is an expectation there will be retail, though the vision for this is not well known. The one missed opportunity that stands out is the undersupply of supermarkets relative to the population. There is a plan for a small supermarket, however there is a belief that a full line supermarket is supportable. It is important to note that parking is an issue already associated with the area, and to have no parking at all in the town centre is a concern.

BARRIERS TO ECONOMIC GROWTH

As noted above the progress of infrastructure is seen as critical to the economic success of Green Square. The key hurdle for any prospective commercial tenants is there is nothing there, and that is too great a risk to take on behalf of employees. Key barriers hindering commercial investment are:

Limited existing amenity in the Town Centre e.g. retail, parks, plazas etc.
Commercial tenants need to see the vision unfolding which means physical amenity in place to provide confidence in the place.

Unattractive industrial landscape, i.e. it’s not pretty’
The area is unattractive for commercial tenants who have an obligation to provide a quality environment for their employees.

Competition with other commercial precincts
Green Square is competing with many established commercial precincts including Sydney Olympic Park, Australian Technology Park, Macquarie Park and Rhodes.

Lack of critical commercial mass
It is not an established commercial precinct which makes it a riskier choice compared to established commercial precincts. Prospective tenants are averse to being the ‘first mover’.
Public transport connections are not strong
Private sector and Council perceive that bus and rail services are limited relative to other commercial precincts (this needs to be monitored as connectivity changes with the development of Green Square Town Centre). To interviewees it appears inadequate for the projected growth in workers and residents for both the Town Centre and more broadly in the Green Square area.

Parking ratios
If workers, residents and shoppers are not able to utilise public transport, and not able to park in the Town Centre they will be forced to compete for on-street parking in the area which is already limited.

Traffic congestion on the main roads
There are traffic pressures on the roads converging on Green Square e.g. Botany Road, Bourke Road, Bourke Street and O’Riordan Street. There is concern over capacity for additional car or bus traffic.

Contamination and flooding impacts
Contamination and flooding are driving up development costs.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Develop amenity at Green Square
Develop parks and plazas to help build confidence in the long term story. Once the market sees definitive signs of progress, there will be greater openness to considering Green Square. The visual appeal of the area will be enhanced once this occurs.

Government focus on improved public transport service
Government to provide additional bus services to the area, and continued investigation of feasibility of light rail and metro rail extensions to Green Square.

State or Council management and future planning of road traffic
A plan is needed to manage the increase in traffic on roads that are already congested.

Council review of parking ratios
An improvement to the parking ratios would provide developers with the opportunity to provide parking for customers and workers in the town centre. This should be done in conjunction with broader integrated transport strategy response.
Bankstown is a major centre anchoring south-western Sydney. The precinct is highly active and caters extremely well to the local residents and workers. The train station separates the northern ‘new town’ from the southern ‘old town’ precinct. However, multiple pedestrian channels are provided to connect the two areas. Residential transit orientated development also features within Bankstown with a cluster of five high rise towers developed along the train line on South Terrace.

**INFRASTRUCTURE:**
- **Train station:** Bankstown Station (Bankstown Line)
- **Road:** Access to Stacey Street providing connection to the South Western Motorway (south of precinct) or Hume Highway (north of precinct) providing connection east or west.

**AMENITIES:**
- **Hospital:** none
- **University:** University of Sydney Cumberland Campus
- **TAFE:** Bankstown College of TAFE
- **Convenience retail:** Food retail, food catering and services along South and North Terrace. Pedestrian friendly, active with limited vacancies, largely local retail operators evidenced by quality of fitouts.
- **Discretionary retail:** Concentrated within Bankstown Central 85,800 sq.m (GLA).
- **Dining/entertainment:** There are a number of food and beverage outlets provided along South Terrace in addition to the Bankstown Sports Club. Offer provided is tailored to the ethnically diverse local resident market.

**CATCHMENT MAP**

**KEY STATISTICS**

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Catchment population:</strong></td>
<td></td>
</tr>
<tr>
<td>Total population 2011</td>
<td>289,876</td>
</tr>
<tr>
<td>Total population 2031</td>
<td>372,694</td>
</tr>
<tr>
<td><strong>Total growth (number) 2011-31</strong></td>
<td>82,818</td>
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<tr>
<td><strong>Total growth (%) 2011-31</strong></td>
<td>29%</td>
</tr>
<tr>
<td><strong>Investment in centre:</strong></td>
<td></td>
</tr>
<tr>
<td>Value of building approvals 2012-14 ($ Million)</td>
<td>$253.8</td>
</tr>
<tr>
<td>Current private investment pipeline ($ Million)</td>
<td>$623.0</td>
</tr>
</tbody>
</table>

*Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.*
WHERE DO WORKERS COME FROM?

There were approximately 10,500 people employed in Bankstown in 2011 and this is projected to grow to 12,800 by 2031, representing a 21% increase.

The places of residence of people who work in this strategic centre are largely contained within a relatively localised catchment area, with the majority of workers living within a 10 km radius.

The widest distribution is seen in the private motor vehicle transport mode, which is to be expected as this mode is not restricted by rail infrastructure or particular bus routes.

Private motor vehicle transport is the most common mode of transport for people who work in Bankstown by a significant margin.

EMPLOYMENT BY INDUSTRY

Chart 1.5 shows that, as at 2011, retail trade was the highest industry of employment for the centre employing 1,918 workers and is projected to grow 27% to 2,426 workers by 2031. This number is driven by the presence of the Bankstown Central Shopping Centre.

Despite coming off a lower 2011 base, the health care and social assistance industry is projected to experience stronger growth of 40% over this period, with employment in this industry projected to exceed 2,200 workers.

Other major industries of employment within this centre include public administration and safety; accommodation and food services; and education and training.

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Trade</td>
<td>2,426</td>
<td>2,223</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>2,223</td>
<td>1,675</td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>1,675</td>
<td>1,239</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>1,239</td>
<td>1,250</td>
</tr>
<tr>
<td>Education and Training</td>
<td>1,250</td>
<td>1,250</td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Bankstown

EPIs: Bankstown LEP 2015

‘Strategic’ LEP: 2014

Land constraints: Heritage 3.4%

(% of centre area) Open space 5%

DIAGNOSIS

Authority: Low level of authority and legislative complexity given that the centre only falls under one local council and one EPI

Height and FSR: Generous heights and FSR in the B4 Mixed Use zones (weighted average of 34.4m and 3:1) which promotes significant mixed use development in the vicinity of the train station

Residential: Residential permitted in 94% of centre (35% of the centre is zoned R4 High Density Residential) which creates potential for significant residential growth

Flexibility: Very large B4 Mixed Use area (520,281sq.m/ 36%) with highly flexible land uses (RFB, shop top housing, key commercial premises, car sales and servicing)

Commercial: No incentives or requirements to provide commercial floor space

Land constraints: Limited heritage constraints (3.4%) and moderate provision of open space (5%)
LAND USE FLEXIBILITY IN KEY ZONES

- Residential permitted in 94% of the centre
- B4 Mixed Use: RFBs permitted, shop top housing permitted, key commercial premises permitted, car sales and servicing permitted
- Open land use table.

COMMERCIAL AND RETAIL CORE PROTECTION

- No retail or commercial core protection mechanisms in place.

COUNCIL CAPACITY

Council capacity is high with an average net DA determination time of 51 days, 10 days shorter than the Sydney Metro average. Bankstown City Council determines an similar value of DAs to the Sydney Metro area average.

<table>
<thead>
<tr>
<th>Council Capacity (2013-2014)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>51 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$428,261,664</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Geographically dispersed with several streets providing services, food retail and convenience retail offer
- Sprawl discourages pedestrian activity
- Centre is fragmented due to train station location, impacting connectivity.
SENTIMENT OVERVIEW

Bankstown has a strong retail, residential and specialised community services centre. The centre’s retail focus has historically been dominated by Bankstown Square but the Bankstown City Plaza pedestrian mall also provides a cultural focus with associated specialised retail and commercial uses. The primary commercial focus is small business and not-for-profit and community services. Bankstown is also strong in private sector language and associated education services.

Demand for A-grade commercial development is low in Bankstown. There is a strong demand to increase the amount of residential development within the centre’s mixed use zone.

In all interviews with the private sector, there is a clear sense of enthusiasm and confidence in Bankstown being a strong strategic centre in future because:

- Geographically, it is well placed to be a centre that serves the middle south western area
- The centre has an established strong retail core
- There is already a momentum for change
- Already has city status
- Growth in LGA population
- Likely gentrification
- Has the diverse population mix to underpin a vibrant centre.

Relative to many other centres, Bankstown has fewer hurdles particularly when it comes to land prices and availability of land for significant development.

ECONOMIC OPPORTUNITIES

There is a view that Bankstown could evolve into a highly and successful mixed use centre underpinned by strong retail and new high density residential development. The market can see potential for increased development across a number of uses such as:

- High density residential
- Expansion of retail
- Increase in commercial floorspace appropriate for that market, namely:
  - Government
  - South West regional offices of state or national businesses
  - Local small to medium administration and professional services.
- Short term accommodation, e.g. hotels and serviced apartments.

Council sees great potential in working with the University of Western Sydney to enhance education services in the CBD (already has a large TAFE to north of centre).

The proposed Metro Rail Link may generate long term interest in new commercial development in the centre.

BARRIERS TO ECONOMIC GROWTH

The following barriers were identified by private sector experts and Council on discussions with them:

Market positioning is mainly as a retail and residential centre

Bankstown is not seen as a major commercial precinct by investors and developers.
Proximity to other middle ring commercial markets e.g. Parramatta, Sydney Olympic Park

As with other strategic centres, there is competition with other commercial centres for tenants. While Bankstown is not on the radar for large scale private tenants, it competes with other centres for Government anchor tenants.

Limited demand for high grade commercial from large scale tenants

Bankstown has an image for B, C and D grade commercial stock and is unlikely to ever be seen as a quality office market like Chatswood. The perception is that Bankstown caters only to local or Government tenants, and consequently is unlikely to appeal to institutional investors.

Fragmented land ownership

The issue of too many different land owners as an impediment to identifying a large parcel of land for development is associated with Bankstown.

“The centre is too finely chopped up”

Extensive strata titling

The extensiveness of strata titling limits development opportunities in the centre.

ENABLERS

The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Site consolidation incentives for amalgamation

Introduce site consolidation incentives via the Local Environment Plans (LEPs). Amalgamation of land within the centre will help address the barrier of fragmented land ownership and create consolidated land parcels for large scale investment.

Introduce height and FSR incentives

Introduce height and FSR incentives for the development of commercial floorspace through the Local Environmental Plans (LEPs).

Allow for flexibility in mixed use zoning

Allow for flexibility in uses under mixed use zoning to include uses such as hotels and car retail.

Government consolidation of sites

Government acquisition of fragmented sites in the centre will create development opportunities.

Bankstown Airport height controls

The view is that for Bankstown to realise its potential as a strategic centre, scale and density in the centre are important. There are strict height limits in the centre associated with Bankstown Airport.
HURSTVILLE

CONTEXT

Hurstville is located approximately 14 km south-west of the Sydney CBD. The centre benefits from a well-integrated train station which is accessed below Hurstville Central and houses a number of medium density bank offices. Accordingly, the location of the station does not impede on surrounding land uses.

INFRASTRUCTURE:

Train station: Hurstville Station (Illawarra line, south coast line)

Road: King Georges Road joins the Princes Highway connecting further south, provides connection to the M5 travelling east or west which also connects to the CBD.

AMENITIES:

Hospital: St George Hospital (3.1 km east)

University: none

TAFE: St George TAFE

Convenience retail: Hurstville Central contains a Coles supermarket and 35 specialty shops, total centre GLA of 11,000 sq.m. Concentration of local grocers and services along high street with limited vacancies evident.

Discretionary retail: Highest concentration in Westfield Hurstville with a total GLA of 62,000 sq.m. Strongly performing centre with limited vacancies.

Dining/entertainment: Limited offer, resulting in lack of evening activity.

KEY STATISTICS

Catchment population:

- Total population 2011: 175,384
- Total population 2031: 222,815
- Total growth (number) 2011-31: 47,432
- Total growth (%): 27%

Investment in centre:

- Value of building approvals 2012-14 ($ Million): $563.3
- Current private investment pipeline ($ Million): $856.5

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on dive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

Hurstville employed 10,600 people in 2011 and the Bureau of Transport Statistics (BTS) projects that this will increase to approximately 13,100 people by 2031.

As shown in Map 1.22, Hurstville has one of the tightest catchments of all strategic centres in this study in terms of workers’ place of residence, with the majority of workers living within 5 km from the centre.

As at 2011, private motor vehicle transport was the most common mode of transport for workers by a significant margin. Further, this transport mode had the highest proportion of workers who lived within 5 km of the centre.

Despite the presence of the Hurstville train station within the centre, this is still only the second most common mode of transport for those that are employed within Hurstville.

EMPLOYMENT BY INDUSTRY

The public administration and safety industry sector was the largest employer in Hurstville in 2011. This industry is projected to experience moderate growth of 22%, to 2,354 workers by 2031 as shown in Chart 1.6.

Despite coming off a marginally lower base in 2011, the retail trade industry is projected to undergo stronger growth to 2031 of 26%, with similar growth seen in the construction industry. The strongest growth over the 20 year period however is projected in the education and training industry (28%) to 851 workers by 2031.

All industry sectors within this centre are projected to grow over these two decades except for information media and telecommunications, which is projected to see a 13% decline.

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2031</th>
<th>Change (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Administration and Safety</td>
<td>2,354</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td>2,267</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>1,553</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>1,722</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>942</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Hurstville, Kogarah

EPIs: Hurstville LEP 2012, Hurstville Draft Local Environmental Plan (Hurstville City Centre), Kogarah LEP 2012

‘Strategic’ LEP: Hurstville - 2014 (City Centre controls in draft)
Kogarah - 1998

Land constraints: Heritage 14.5%
(%) of centre area: Open space 5%

DIAGNOSIS

Authority: High level of authority and legislative complexity given that the centre falls within two local councils and three EPIs

Commercial: Small commercial core (36,390 sq.m) in close proximity to train station which prohibits residential and permits key commercial uses

Height and FSR: Moderate heights and FSR when compared to comparable centres

Residential: Predominately a residential centre with 60% of the centre zoned R2 Low Density Residential or R3 Medium Density Residential

Land constraints: Moderate heritage constraints (14.5%) and moderate provision of open space (5%)

ZONING AND LAND USE

<table>
<thead>
<tr>
<th>Key Business Zones</th>
<th>B3 Commercial Core, B4 Mixed Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoned Land (selected zones)</td>
<td>B3</td>
</tr>
<tr>
<td>Area (sq.m)</td>
<td>36,390</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>2%</td>
</tr>
<tr>
<td>Weighted Average Height (metres)</td>
<td>31.6 (Hurstville LGA only)</td>
</tr>
<tr>
<td>Weighted Average FSR (X:1)</td>
<td>4.2 (Hurstville LGA only)</td>
</tr>
</tbody>
</table>
LAND USE FLEXIBILITY IN KEY ZONES

- B3 Commercial Core: RFBs prohibited, shop top housing prohibited, key commercial premises permitted, car sales permitted, car servicing prohibited
- Hurstville B4 Mixed Use: RFBs permitted, shop top housing permitted, key commercial premises permitted, car sales permitted, car servicing prohibited in Hurstville and permitted in Kogarah
- Open land use tables.

COMMERCIAL AND RETAIL CORE PROTECTION

- Commercial core protected via prohibited residential uses in B3 Commercial Core.

COUNCIL CAPACITY

Council capacity is moderate in both Councils. The average net DA determination is 12 days higher than the Sydney average in Hurstville and 7 shorter in Kogarah, however both Councils determine a lower value of DAs than is average across Sydney region.

Council Capacity (2013-2014)

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Hurstville)</td>
<td>73 days</td>
</tr>
<tr>
<td>Average Net DA Time (Kogarah)</td>
<td>54 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Hurstville)</td>
<td>$257,977,968</td>
</tr>
<tr>
<td>Value DAs determined (Kogarah)</td>
<td>$220,792,000</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Old, dated centre with moderately low level of pedestrian activity
- Pedestrian friendly well integrated with transport, retail and commercial uses
- Scale promotes pedestrian activity.
SENTIMENT OVERVIEW
Council sees Hurstville as an important sub-regional centre, equally focussed on retail, residential and commercial. The commercial core around Forest Road is under increasing pressure to facilitate more retail and residential developments. The current commercial focus is in the insurance/banking/financial sectors, although there does not appear to be strong demand to expand upon this. Council are currently investigating whether there are planning-related reasons for the current limited commercial development potential.

Private sector sentiment sees Hurstville having the potential to be a ‘Chatswood for the south’, although this relies on a strong vision by different levels of government for this to be possible. The centre is seen as having good fundamentals to be a strategic centre for the South Subregion namely:

- Anchored by a strong retail centre
- Population with above average incomes
- Strong growth in Asian population drives demand for new services.

Hurstville is regarded as the logical centre in geographic terms to be the key centre for the south sub-region being a mid-point between Sydney CBD and Sutherland. Hurstville does not have the same competition issues like centres that have quality commercial precinct nearby, e.g. Burwood and Chatswood. While Kogarah is close, Hurstville is seen as the higher order centre in the South Subregion.

ECONOMIC OPPORTUNITIES
Based on the private sector interviews, the demand for commercial space in Hurstville appears to be strong, and will further tighten with the planned conversion of 3 commercial sites in Hurstville to residential. Therefore, providing opportunities to increase the supply of commercial floor space is likely to be positively received by the market.

For large scale retail investment to occur, retailers need opportunities to deliver retail in different new environments for example mixed use.

The centre also has fundamentals to be a strong and vibrant residential centre and therefore mixed use developments should have a role in the centre to both provide commercial and activate the centre.

BARRIERS TO ECONOMIC GROWTH
Based on discussions with Council and private sector experts the following barriers were identified:

Market positioning as a residential and retail centre
Large scale commercial tenants are attracted to centres with a critical mass of commercial tenants. Hurstville is not perceived by the market in this way.

There is limited demand for large scale floorspace
Hurstville is not generally considered by large scale private sector tenants.

Limited supply of quality commercial space
Hurstville is considered to have poor quality commercial space in terms of overall look and feel and adequate size floorplates.

Fragmented land ownership
The issue of too many different land owners as an impediment to identifying a large parcel of land for development is associated with Hurstville.

Residential is currently highest and best use
The high cost of acquiring development sites in Hurstville inevitably incentivises developers to develop residential over commercial because residential is highest and best use.

Restrictive FSR and building height controls
Due to high land values in Hurstville, achieving scale is critical for viability.

Hurstville Strategic Centre controlled by 2 councils and 3 EPIs
This results in complexity and regulatory uncertainty for the private sector.

Lack of state government direction on the town centre
There does not appear to be an understanding of what the vision for the town centre is, either from council or state government. Without a strong
vision, the centre risks not being considered as a long term significant investment opportunity.

Uncertain DA timelines (12 days above the Sydney Metro average)
Uncertain timelines and processes are associated with Hurstville increasing the risk for investors.

Extensive strata titling
The extensiveness of strata titling limits development opportunities in the centre.

Lack of cross-regional, north-south transport connections
Hurstville would benefit from high-frequency public transport connections linking it to other centres such as Parramatta, Bankstown and Liverpool.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Stronger directive for the provision of commercial floorspace in the centre
With the increased tightening of the commercial market, the provision of commercial space may need to be mandated for the centre, either as stand-alone or part of mixed use developments.

Allow for flexibility in mixed use zoning
Allow flexibility in uses under mixed use zoning such as hotels and car retail.

FSR and height control incentives
Provide height and FSR incentives via the Local Environmental Plans (LEPs) to allow Hurstville to fulfil its potential to attract investment.

Provide incentives for site consolidation
Provide incentives to prospective investors via the Local Environmental Plans (LEPs) to encourage site amalgamation in the centre to provide development parcels suitable for commercial and residential development.

Government consolidation of sites
Government acquisition of sites in the centre to provide development opportunities.

Co-ordinated government approach towards vision for Hurstville
Develop, define and articulate the vision for Hurstville to the market in order to show the investment opportunities for developers.

Streamline Council DA decision making
Commit to improve DA processing times through streamlining the process and setting statutory timeframes.
State government infrastructure investments
Investigate feasibility of cross transport rail connections with other strategic centres such as Parramatta, Bankstown and Liverpool, and policy coordination in delivery of regional transport infrastructure.
KOGARAH

CONTEXT

Kogarah is located approximately 13 km from the Sydney CBD and 6 km from the Sydney Airport. The centre has been developed around the train station and includes retail, high density residential, two hospitals and a TAFE.

INFRASTRUCTURE:

Train station: Kogarah Station

Road: Kogarah does not have direct road access to a major motorway. Road access north to the Sydney CBD and Airport is via Princes Highway.

AMENITIES:

Hospital: St George Hospital and St George Private Hospital

University: None

TAFE: St George TAFE

Convenience retail: Kogarah contains the Kogarah Town Centre Shopping Centre a supermarket centre, which comprises approximately 4,500 sq.m of retail GLA. The centre is well integrated with Kogarah train station, and has direct access to the high street on Railway Parade / Regent Street.

While there appears to be little vacancy in the Kogarah Town Centre and along the high street, the western side of the station is notably less activated and contains a higher proportion of vacancy than the remainder of the centre.

Discretionary retail: Kogarah contains limited discretionary retail, which can be attributed to its close proximity to Hurstville with the Westfield Hurstville.

Dining/entertainment: Moderate range of dining options on the high street.

CATCHMENT MAP

KEY STATISTICS

<table>
<thead>
<tr>
<th>Catchment population:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population 2011</td>
</tr>
<tr>
<td>Total population 2031</td>
</tr>
<tr>
<td>Total growth (number) 2011-31</td>
</tr>
<tr>
<td>Total growth (%) 2011-31</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Investment in centre:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of building approvals 2012-14 ($ Million)</td>
</tr>
<tr>
<td>Current private investment pipeline ($ Million)</td>
</tr>
</tbody>
</table>

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

In 2011, Kogarah provided employment for 10,300 people. The Bureau of Transport Statistics (BTS) projects that this will increase to 14,300 by 2031.

The place of residence of those who work within Kogarah forms a relatively broad catchment area, as shown in Map 1.26. The majority of workers tend to reside around Botany Bay and the Georges River.

As at 2011, the most common mode of transport for these workers was private motor vehicle, with the majority living within 10 km from the centre.

Of those who work within the centre and travel by bus, the places of residence are focused around Botany Bay, particularly between Brighton Le Sands and Sans Souci. Train patrons, however, are far more widely distributed across the Metropolitan Sydney region, loosely aligned with the train network.

WORKERS PLACE OF RESIDENCE BY MODE (2011)

EMPLOYMENT BY INDUSTRY

As at 2011, the highest industry of employment within Kogarah was the health care and social assistance sector. This industry is also projected to undergo the strongest growth of all industries in the centre, growing by 47% to 8,052 by 2031.

The financial and insurance services industry was the second largest sector in 2011, albeit significantly smaller than the health care and social assistance industry, with just 1,403 workers. This industry, however, is projected to experience strong growth to 2031 of 46%.

Other major industries of employment within the centre include education and training; public administration and safety; and professional, scientific and technical services. By 2031, it is anticipated that retail trade will replace the professional, scientific and technical services industry as the fifth largest employer within Kogarah, increasing to 444 workers by 2031.

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>Change (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care and Social Assistance</td>
<td>8,052</td>
<td></td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>2,048</td>
<td></td>
</tr>
<tr>
<td>Education and Training</td>
<td>1,230</td>
<td></td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>552</td>
<td></td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>401</td>
<td></td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Kogarah and Rockdale

EPIs: Kogarah LEP 2012, Rockdale LEP 2011

‘Strategic’ LEP: Kogarah – 1998
Rockdale – 2011

Land constraints: Heritage 23.5%
(% of centre area) Open space 12%

DIAGNOSIS

Authority: High level of authority and legislative complexity (two EPIs, two LGAs) including differing permissibility for the same zone in each LGA (e.g. R3 Medium Density Residential) creates potential for divergent development outcomes within the one centre

Instruments: Rockdale LEP has undergone recent strategic review, while Kogarah LEP 2012 was a translation of the 1998 instrument.

Zoning: Centre has a predominant residential zoning. Significant portion is zoned SP2 Infrastructure (17%) reflecting the existing health-related services.

Flexibility: Moderately sized B4 Mixed Use zoned land (145,650sq.m/ 11%) with high levels of land use flexibility including RFBs, shop top housing and key commercial uses which promotes mixed uses surrounding Kogarah Train Station

Land constraints: Moderate heritage constraints with 23.5% of the centre being affected by heritage provisions and high levels of open space provision (12%).
**LAND USE FLEXIBILITY IN KEY ZONES**
- B4 Zone: RFBs permitted, shop top housing permitted, key commercial premises permitted, car sales permitted, car servicing prohibited
- SP2 zoned land permits health-related uses
- Land use flexibility for some zones (e.g. R3 Medium Density Residential) differs between Rockdale and Kogarah Councils.

**COMMERCIAL AND RETAIL CORE PROTECTION**
- No commercial or retail core protection mechanisms in place.

**COUNCIL CAPACITY**
Council capacity is moderate in both Kogarah and Rockdale Councils. While the average net DA determination time is equivalent to or less than the Sydney average in both Council areas, the value of DAs determined is lower than the Sydney average in both council areas.

<table>
<thead>
<tr>
<th>Council Capacity (2013-2014)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Rockdale)</td>
<td>61 days</td>
</tr>
<tr>
<td>Average Net DA Time (Kogarah)</td>
<td>54 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Rockdale)</td>
<td>$343,119,674</td>
</tr>
<tr>
<td>Value DAs determined (Kogarah)</td>
<td>$220,792,000</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

**URBAN DESIGN**
The urban design characteristics of this centre can be summarised as follows:
- The areas surrounding the train station are quite vibrant and active
- The Kogarah town centre and high street are pedestrian friendly with uses closely clustered around the train station
- The Kogarah town centre and high street benefit from strong integration and connectivity with the train station
- The centre is divided by the train station and line, affecting the activity levels west of the station
- The hospital is separated from the town centre and act as two distinct precincts.
SENTIMENT OVERVIEW

Council believe Kogarah is a centre with a medical (St George public and private hospitals) and education specialisation (TAFE and the adjoining regionally significant high schools). It is understood that both the hospitals and TAFE have expansion plans. Kogarah also plays a role as headquarters to St George/Westpac, with plans to provide 3,000 more jobs.

Land for commercial/retail expansion appears limited. The existing centre land is also fragmented, making it difficult to achieve substantial lot consolidation for higher-order commercial and retail development within centre. Major pressure for residential development exists in the centre, combined with Kogarah struggling to fill the commercial/retail floor space currently zoned.

In the Market Sounding, the common observation of Kogarah is that it is geographically too close to Hurstville to be a strategic centre, and by that definition is competing with Hurstville.

Unlike many other strategic centres, Kogarah does not have a strong enough retail offer to be able to compete with surrounding centres such as Hurstville. The low scale high street retail profile gives the centre a village feel. The question therefore is whether Kogarah has all the necessary fundamentals for a strategic centre.

Nevertheless, Kogarah is seen by the private sector as having distinctive attributes of an important centre largely due to the medical uses. Kogarah has an education profile due to the location of St George TAFE. Therefore, the centre is seen by the market as having a different role to Hurstville. It is important that neither centre, i.e. Kogarah or Hurstville, undermines the other in their plans for growth, but they have complementing roles.

ECONOMIC OPPORTUNITIES

As a tertiary referral hospital, St George attracts specialists wanting to locate in the centre which should make this a key commercial market. Demand from medical professionals is strong and sales and rental rates reflect this. It will be important to ensure there are appropriate spaces for such tenants, which are typically smaller (50-150 sq.m).

There appears to be capacity within Kogarah for intense residential development. In line with this development are inevitable opportunities for more retail which could be included as part of mixed use developments.

The market has questions on how quickly the St George office space will be absorbed and what tenant would take-up the space, should the bank vacate. If this were to occur, it would provide space for medical related businesses.

BARRIERS TO ECONOMIC GROWTH

Largely based on discussions with Council and private sector experts the following key barriers to growth were identified:

Proximity to Hurstville
This is the most critical barrier since potential investors looking for a strategic centre in the south region naturally favour Hurstville.

Market positioning as a specialised centre
Businesses are inclined to be in Kogarah because of the hospital than any other offer.

Fragmented land ownership
The centre is finely chopped up in terms of ownership and thus presenting a barrier for large scale development.

Limited availability of commercial space for medical specialists
There is a limited supply of small tenancies for medical specialists and professionals attracted to the area by the hospital.

Limited floorspace for large scale tenants
The centre has not historically been an important commercial market and the commercial supply reflects that.

Limited night time activation
The lack of night time activity in the centre means it does not draw the same level of interest for investment as other centres like Burwood or Chatswood.
Affordable Housing Supply
An undersupply in affordable housing is a disincentive in attracting new employees to the centre.

Congested transport connections
The road network in Kogarah experiences high levels of congestion.

LOT SIZES AND EXTENT OF STRATA TITLING

Limited parking
Parking is seen as a problem and increases the reliance on public transport, or deters potential workers or customers from doing business in Kogarah.

Competition from other commercial precincts
There are other precincts of a similar distance from the Sydney CBD.

Kogarah Strategic Centre controlled by 2 councils and 3 EPIs
Results in complexity and regulatory uncertainty for the private sector.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Create development partnership between Kogarah and Hurstville LGAs
This will facilitate a combined approach to development across the two centres to create economic investment that is complementary.

Redefine Kogarah from a strategic centre to a specialised centre
The reclassification of Kogarah to a specialised health and education centre will address the issue of competing with Hurstville.

Articulate the different roles and vision of Kogarah and Hurstville
Communicate the vision for each centre to further validate Kogarah’s role.

Provide incentives for site consolidation through the LEP
Create opportunities for more intense commercial and residential uses.

Government consolidation of sites
Government acquisition of fragmented sites in the centre will create development opportunities.

Set minimum density for residential in the centre
Provide opportunities to increase the residential population in the centre.

Implement a centre activation program
Develop an urban activation strategy to generate activity in the evenings.
SUTHERLAND

CONTEXT

Sutherland is a major centre that currently operates primarily as a neighbourhood centre, providing convenience retail to a local resident catchment. It benefits from a well-integrated train station and includes the Sydney Institute Sutherland Campus and Loftus TAFE.

INFRASTRUCTURE:

Train station: Sutherland Station
Road: Access north via Old Princes Highway and west via the Menai bypass.

AMENITIES:

Hospital: None
University: None
TAFE: Loftus TAFE and Sydney Institute Sutherland Campus directly south of the centre
Convenience retail: Sutherland has a well activated high street, with low vacancy. While it doesn’t contain any shopping centres, it is served by two supermarkets (IGA and Superbarn).
Discretionary retail: Limited discretionary retail with no national chains. The local resident population is serviced primarily by Westfield Miranda to the east.
Dining/entertainment: Some dining, appropriate for the existing scale of the centre.

CATCHMENT MAP

KEY STATISTICS

Catchment population:
- Total population 2011: 214,499
- Total population 2031: 261,259
- Total growth (number) 2011-31: 46,760
- Total growth (%): 22%

Investment in centre:
- Value of building approvals 2012-14 ($ Million): $189.2
- Current private investment pipeline ($ Million): $134.8

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

Sutherland was one of the smallest employers in 2011, employing just 4,800 people. This trend is expected to continue into 2031, with the Bureau of Transport Statistics (BTS) projecting that the number of people employed in the centre will grow to just 6,700.

Those who work in Sutherland live in one of the tightest catchment areas of all centres, with the majority of workers living within 5 km of the centre and only a very small proportion living more than 10 km away.

Private motor vehicle is the most common mode of transport by these workers, by a significant margin. As evident in Map 1.30, these workers tend to reside in the surrounding Sutherland Shire.

Train is the second most common mode of transport, with the highest concentrations of workers who commute by train residing around Hurstville, Miranda and Cronulla.

EMPLOYMENT BY INDUSTRY

The public administration and safety sector was the largest industry in Sutherland in 2011, employing almost 1,300 workers. This industry sector is also projected to see the strongest growth in employment numbers to 2031, with growth of 74% to 2,253 workers projected.

Other major industries of employment within the centre, albeit to a lesser extent, include health care and social assistance; professional, scientific and technical services; retail trade; and education and training.

Despite growth in these industries, several industries are also expected to see a decline in employment between 2011 and 2031. These industries include information media and telecommunications (-19%), manufacturing (-11%), arts and recreation services (-11%) and agriculture, forestry and fishing (-9%).

Top 5 Industries of Employment, 2011-2031

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Sutherland

EPIs: Draft Sutherland LEP 2015

‘Strategic’ LEP: 2015

Land constraints: Heritage 37.6%

(% of centre area) Open space 9%

DIAGNOSIS

Authority: Low level of authority and legislative complexity given that the centre only falls under one local council and one EPI. Notably, the LEP was finalised in mid-2015 after years of uncertainty.

Commercial: Moderately sized commercial core (226,031sq.m/9%) with highly flexible land uses (residential and key commercial uses permitted)

Height and FSR: Moderate height and FSR for commercial core (weighted average 13.9 m/1.17:1) which does not incentivise either commercial or residential development

Residential: Residential permitted in key uses across centre (B3 Commercial Core, R4 High Density Residential, R2 Low Density Residential)

Land constraints: High level of heritage constraint (37.6% of centre affected by heritage or conservation provisions) and moderate level of open space provision. Additionally, approximately 20% of the centre has an Environmental zoning.
Land Use Flexibility in Key Zones

- B3 Commercial Core: RFBs permitted, shop top housing permitted, key commercial premises permitted, car sales and servicing permitted
- Open land use table
- Some 25% of the centre is zoned SP1/SP2 reflecting special uses across the centre, permitting related land uses.

Commercial and Retail Core Protection

- No retail or commercial core protection mechanisms in place.

Urban Design

The urban design characteristics of this centre can be summarised as follows:

- Nice regional town centre feel which encourages pedestrian activity
- Sutherland station splits the centre into two halves, affecting the connectivity of the centre.

Council Capacity

Council capacity is high with an average net DA determination time of 62 days, 1 day longer than the Sydney Metro average. Sutherland Shire Council determines a higher value of DAs than average for Councils in the Sydney Metro area.

Council Capacity (2013-2014)

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>62 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$583,787,655</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>
SENTIMENT OVERVIEW

Sutherland Council considers the Sutherland Centre to be a local/regional service and administrative centre servicing the needs of the LGA. It feels that it has no real large scale commercial or retail development potential. However, it plays a complementary role with other centres along the Cronulla line corridor – with Miranda’s Westfield and associated commercial services; Caringbah’s medical and educational focus and Cronulla’s tourism/retail, residential and small commercial office focus. As such, Council has a view that the rail corridor between Sutherland and Cronulla could be considered as a larger specialised precinct catering to regional needs.

As Sutherland is not included as a strategic centre in a Plan for Growing Sydney, it really only appears to have market potential in legal and administrative small business (associated with Law Courts and Council) and residential.

Council also raised whether Lucas Heights should be considered as a specialised centre due to its strong employment generation potential associated with its scientific research function and associated commercial development opportunities.

From a private sector perspective, Sutherland is not considered a logical strategic centre because:

- The current centre has a limited low scale retail offer with no strong anchor tenants
- There is very limited commercial development in the centre
- The major retail centre in the Sutherland Shire is Miranda
- There is more commercial development in other locations within the Sutherland Shire e.g. Caringbah, Taren Point, Cronulla
- Low population density around the Sutherland Town Centre.

Overall, Sutherland is perceived as a local service centre than a strong commercial/retail hub.

ECONOMIC OPPORTUNITIES

As stated, Council believe there is little investment interest in the Sutherland Centre. The private sector believes that there may be an undersupply of supermarkets in Sutherland, with some “majors” expressing interest in the centre. Should there be investment by Woolworths or Coles in the future, it may be a catalyst for further retail investment. However, there are no apparent visible opportunities beyond this retail interest due the strong regional shopping centre presence at Miranda and Hurstville.

BARRIERS TO ECONOMIC GROWTH

Based on discussions with Council and private sector experts the following barriers were identified:

Small residential catchment
The existing catchment is small and there is low population growth forecast.

Limited demand for high grade commercial floorspace from large scale tenants
Sutherland is not a centre identified by the private sector for significant commercial floor space. Hurstville and Miranda are more realistic market ready options serving the southern region of Sydney.

Limited space/land to grow
The Sutherland Centre is “landlocked” and does not provide any ability for redevelopment or growth outside the current centre footprint.

Extensive strata titling
The extensiveness of strata titling limits development opportunities in the centre.

Relationship with Miranda and Caringbah
Miranda has long been established as the key retail centre for the Sutherland Shire. The recent redevelopment of Westfield Miranda has firmly cemented its role for the long term. Similarly, Caringbah is a higher employment generator through its Hospital and TAFE sites.
Perception as small civic, administration and small business hub
The private sector perceives Sutherland as a small civic precinct serving a local population. There appears to be no interest by the private sector to move beyond this function.

Local government vision to maintain village feel
There is a perception among the private sector that Council wishes to maintain the small village feel of Sutherland.

Introduce site consolidation incentives through the LEP
Site consolidation and larger floor plate potential would create renewed incentives for commercial developers to consider Sutherland. However, the widespread strata titling would still discourage site consolidation by the private sector.

Government consolidation of sites
Government acquisition of fragmented sites in the centre will create development opportunities.

Rebrand the Sutherland to Cronulla corridor as a specialised precinct
Identifying the rail corridor between Sutherland and Cronulla as a precinct specialising in retail, health, education and tourism employment growth, may generate increased demand for commercial development investment in Sutherland.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Council to set minimum residential density
Set minimum density for residential development within the centre to facilitate population growth and vibrancy in the centre.
MARSDEN PARK

CONTEXT

Marsden Park is a specialised precinct located in the North West Growth Centre (NWGC). The planned location of the town centre is the corner of Richmond Road and South Street. The town centre will provide retail services and amenities to local residents and workers.

In addition to the town centre, the planned specialised precinct will contain a significant amount of zoned employment lands:

- 70 hectares of commercial land
- 40 hectares of bulky goods retailing
- 206 hectares of industrial land.

Marsden Park is envisioned to accommodate a significant industrial / business park hub on its extensive employment lands.

INFRASTRUCTURE:

Train station: None
Road: Access to M7 via Richmond Road

AMENITIES:

Hospital: None
University: None
TAFE: None
Convenience retail: None
Discretionary retail: None
Dining/entertainment: None

CATCHMENT MAP

KEY STATISTICS

<table>
<thead>
<tr>
<th>Catchment population:</th>
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<tbody>
<tr>
<td>Total population 2011</td>
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<tr>
<td>Total population 2031</td>
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<tr>
<td>Total growth (number) 2011-31</td>
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<tr>
<td>Total growth (%) 2011-31</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Investment in centre:</th>
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</thead>
<tbody>
<tr>
<td>Value of building approvals 2012-14 ($ Million)</td>
</tr>
<tr>
<td>Current private investment pipeline ($ Million)</td>
</tr>
</tbody>
</table>

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

Marsden Park employed the lowest number of people in 2011, employing just 205 people. By 2031, the Bureau of Transport Statistics (BTS) projects that employment within the precinct will increase to 4,555. Despite this significant increase, this centre will remain the lowest employer of all 16 strategic centres in 2031 assessed by Urbis.

Due to the limited number and varied nature of jobs within Marsden Park, the catchment area of where the workers reside is broad and irregular.

The majority of the workers commute to work using private motor vehicles, which is primarily out of necessity due to the lack of public transport infrastructure currently servicing this specialised precinct. The place of residence of these workers follow no clear patterns, however they tend to be located in the north-western region of Sydney.

As this precinct gets developed, it is likely that more workers will reside within and around the local area.

EMPLOYMENT BY INDUSTRY

Due to the lack of development of this precinct, employment across all industry sectors in 2011 was very limited. The largest industry sector in 2011 was construction, with just 42 people employed in this industry. This is projected to grow 531% to 264 workers by 2031 as development within the precinct ramps up.

Despite coming off a marginally lower base of 37 workers in 2011, the transport, postal and warehousing industry sector is projected to experience stronger growth of 791% over the two decades to 2031, resulting in 329 workers as shown in Chart 1.9.

Within this precinct, the greatest growth in employment from 2011 to 2031 (in percentage terms) is projected in the professional, scientific and technical services industry which is expected to grow from just 6 workers in 2011 to 687 by 2031. All other industry sectors, apart from mining, are expected to experience growth over the period.

Top 5 Industries of Employment, 2011-2031

**Chart 1.9**

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2031</th>
<th>Change (2011-2031)</th>
</tr>
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<tbody>
<tr>
<td>Construction</td>
<td>264</td>
<td>329</td>
<td>205</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>329</td>
<td>59</td>
<td>270</td>
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<tr>
<td>Manufacturing</td>
<td>59</td>
<td>29</td>
<td>-30</td>
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<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>29</td>
<td>185</td>
<td>156</td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Department of Planning, Blacktown Council
EPIs: Growth Centres SEPP
‘Strategic’ LEP: 2011-2013
Land constraints: Heritage 0.4%, Open space 9%

DIAGNOSIS

Authority: Moderate level of authority and legislative complexity (one EPI, two authorities)
Industrial: Industrial zones form largest land use in the centre (34%). Residential and commercial premises are prohibited in these zones which supports the role of Marsden Park as an industrial precinct.
Height and FSR: Height for B4 Mixed Use development (1%) of the centre is moderate (weighted average 26.8m) and moderate for B2 Local Centre zoned site at 28m.
Flexibility: A variety of business zones are located in the centre (B2, B4, B5 and B7) which permit a wide variety of commercial premises. The amendment to the Growth Centre SEPP to permit out of centre retail in the Marsden Park Industrial Precinct may impact delivery of the Marsden Park Town Centre (B2 zone).
Land constraints: Limited heritage constraints (0.4%) and large provision of open space (9%)
LAND USE FLEXIBILITY IN KEY ZONES

- **B4 Zone**: Permits all key commercial uses, permits shop top housing, prohibits RFBs, car sales and car servicing permitted
- **B2 Local Centre**: Permits all key commercial uses, permits shop top housing, prohibits RFBs, car sales and servicing permitted
- Open land use tables.

COMMERCIAL AND RETAIL CORE PROTECTION

- Shops permitted in the B2 Local Centre, B4 Mixed Use and B7 Business Park zones
- Amendments to the Growth Centres SEPP have allowed out-of-centre retailing in the Marsden Park Industrial Precinct, which together with bulky goods uses have created a retail employment sub-precinct.

COUNCIL CAPACITY

Council capacity is very high. While the average net DA determination time is 67 days, 6 days longer than the Sydney Metro average, Blacktown City Council determines the second highest value of DAs in the Sydney Metro area (second only to City of Sydney Council).

Council Capacity (2013-2014)

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<tr>
<td>Average Net DA Time (Council)</td>
<td>67 days</td>
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<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
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<tr>
<td>Value DAs determined (Council)</td>
<td>$967,679,403</td>
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<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Potential connectivity issues between the industrial precinct to the south and town centre located on South Street and Richmond Road.
SENTIMENT OVERVIEW

Blacktown Council believes that the demand for a new centre at Marsden Park is strong, with residential development within vicinity already occurring, as well as industrial/warehousing development to the centre’s south. Floor space potential in the new centre will be approximately 30,000 sq.m, which will help provide the regional focus council and the state government requirement for it to service the residents of North-West Growth Centre and residents of Penrith and Hawkesbury. It will complement the Rouse Hill centre’s current role (and not be too dissimilar in the uses it develops if considered alongside Norwest).

The private sector believes Marsden Park represents a strong investment opportunity for retail but the cost of entry is high for an outer centre. The fact that Marsden Park is a growth centre in a city with limited greenfield development relative to other cities has generated a lot of interest. The establishment of large format retailers such as IKEA and Masters in the centre already sends a message this centre has strong economic growth potential.

The other comment on Marsden Park is there will be no rail in the centre once it opens, which will limit the type of future commercial investment in the centre to small local businesses with locally based employees. There is a concern that, once again, council and the state government are facilitating residential growth in the region well before the requisite transport upgrades.

ECONOMIC OPPORTUNITIES

Retailers and shopping centre owners recognise the investment potential of Marsden Park but there is uncertainty as to when the centre will come online.

Council are confident that the centre will attract the key commercial development players because of its large floor plate potential. Council also state that residential development is already occurring around the centre, with the pattern of growth in new residential communities in Western Sydney suggesting that the market is ready to facilitate increased densities in and around this centre, thereby being attractive from a future transport infrastructure and servicing perspective.

BARRIERS TO ECONOMIC GROWTH

The following barriers to economic growth have been identified based on discussions with Blacktown Council and private sector experts:

No rail station
The absence of rail in the short term limits the potential of the centre to be a strong employment hub from the outset. In the longer term, there is a need to also to improve north-south transport connections, mainly a new rail connection from the Sydney Metro City and Southwest to the Sydney Metro Northwest through the Second Sydney Airport site and WSEA.

Limited transport infrastructure capacity
Although there are plans for substantial arterial road upgrades in the region servicing Marsden Park, the current state of arterial road capacity will not cope with the substantial growth expected in the region.

Limited centre capacity
There is a private sector view that the area allocated for centre retail and commercial development land uses may not be large enough.

High land prices relative to other Western Sydney centres
The centre may not be able to fulfil its economic potential due to the relatively high cost of what is largely Greenfield land.

High service costs
There is also uncertainty regarding costs associated with servicing (water, sewerage, electricity etc.).

Lag in providing necessary social infrastructure provision
There is a concern, both from Council and the private sector, about a lag in up-front social infrastructure delivery may affect amenity and potential development return. Developers are interested in innovative approaches to funding early social infrastructure provision but have no formal mechanisms in place to do so.
ENABLERS

The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Commitment to transport infrastructure delivery
Extend the Sydney Metro Northwest to Marsden Park.

State investment in road infrastructure
Upgrade the capacity of arterial roads to support the additional growth.

Future proof the centre for change of uses
Ensure there is flexibility in the mixed use zoning to allow for change of use in the future from market demand.

Deliver regional infrastructure through innovative developer contribution agreements
New funding mechanisms are required, beyond Section 94 Developer Contributions, to fund regional social infrastructure such as schools, hospitals, regional open space and recreation and cultural facilities. Upfront provision of such infrastructure will ensure high levels of community amenity.

Consider widening area allocated for the town centre
The private sector would support reconsideration of the area zoned for the town centre uses (retail and commercial).
MOUNT DRUITT

CONTEXT

Mount Druitt is located in the West subregion. The centre is located between the Penrith and Parramatta centres which are much larger and established centres. The layout of Mount Druitt appears more like a bulky goods precinct with five separate centres in addition to bulky automotive uses occupying the town centre.

INFRASTRUCTURE:

Train station: Mount Druitt Station (serviced by the western line). Bus interchange connected via pedestrian bridge to train station.

Road: Connection to the M4 Western Motorway to the south of the precinct providing connection east into the Sydney CBD. Access to the Westlink M7 Motorway providing access to the north-west subregion.

AMENITIES:

Hospital: Mount Druitt Hospital (1.6km west)

University: none

TAFE: Mount Druitt College of TAFE

Convenience retail: Limited convenience offer outside of Westfield, also includes freestanding ALDI store.

Discretionary retail: Highest concentration within Westfield Mount Druitt comprises 58,900 sq.m. Myer vacated centre, low to mid-range specialty tenant offer.

Dining/entertainment: Limited offer contained within Westfield, no precincting in town centre and lack of evening dining options. Expansive Rooty Hill RSL Club to the east provides a dining offer in addition to Club facilities.

CATCHMENT MAP

KEY STATISTICS

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Value</th>
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<tr>
<td>Total population 2011</td>
<td>153,039</td>
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<tr>
<td>Total population 2031</td>
<td>184,258</td>
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<td>Total growth (number) 2011-31</td>
<td>31,219</td>
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<td>Total growth (%) 2011-31</td>
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<td>Value of building approvals 2012-14 ($ Million)</td>
<td>$356.7</td>
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<td>Current private investment pipeline ($ Million)</td>
<td>$577.7</td>
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</table>

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

As at 2011, Mount Druitt employed some 5,100 people. By 2031, the Bureau of Transport Statistics (BTS) projects that this will increase to approximately 7,100 people.

Despite a large proportion of the workers of the centre living within 5 km of the centre, a notable proportion also live outside of the 10 km radius, as shown in Map 1.38.

The vast majority of the workers use private motor vehicles to get to and from work despite the provision of a train station and bus interchange within the centre. Of those who commute by private motor vehicle, a major share lives within 5 km of the centre.

Those who travel to work by bus also tend to live within 5 km of the centre while those who travel by train tend to be more widely dispersed and generally extend eastwards and westwards along the train lines, with concentrations also residing to the north-east of the centre.

EMPLOYMENT BY INDUSTRY

In 2011, the largest industry of employment in this centre was retail trade with 1,433 workers, buoyed by the Westfield Mount Druitt. This is projected to increase to over 2,000 workers by 2031, representing growth of 40%.

The second largest industry sector in 2011 was the health care and social assistance sector which employed almost 1,100 workers in facilities such as the Mount Druitt Hospital and the Mt. Druitt Medical and Dental Centre. This industry is projected to experience the greatest growth (in percentage terms) to 2031 of 55% (to 1,654 workers).

As Chart 1.11 shows, other major industries of employment in the centre include accommodation and food services, education and training, and public administration and safety, which are all projected to grow by 2031. Industries that are projected to experience a decline in employment over the 20 year period include arts and recreation services (-26%) and financial and insurance services (-8%).

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2031 Projected</th>
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</thead>
<tbody>
<tr>
<td>Retail Trade</td>
<td>2,012</td>
<td>2,042</td>
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<tr>
<td>Health Care and Social Assistance</td>
<td>1,654</td>
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<td>Accommodation and Food Services</td>
<td>938</td>
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<td>Education and Training</td>
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<tr>
<td>Public Administration and Safety</td>
<td>714</td>
<td>714</td>
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</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

 Authorities: Blacktown
EPIs: Blacktown LEP 2015
‘Strategic’ LEP: 2015
Land constraints: Heritage 0.3%
(% of centre area) Open space 17%

DIAGNOSIS

 Authority: Low level of authority and legislative complexity (one EPI, one LGA)
Commercial: The incentive to provide commercial development in the B3 zone limits potential for centre growth if commercial demand is weak
Height and FSR: Significant B3 Commercial Core (243,138 sq.m/27%) which is protected from residential development with a significant weighted average height (40m).

B4 Mixed Use zoned land (13%) has a moderate generous average height (32m) and flexible land use permissibility.

Zoning: The largest land use zoning is SP1 Special Uses/SP2 Infrastructure zoned land (43%) which reflects the existing TAFE use in the centre

Land constraints: Limited heritage constraints (0.3%) and an open space provision which equates to 17% of the centre.
LAND USE FLEXIBILITY IN KEY ZONES

- B3 Commercial Core: Residential prohibited, key commercial premises permitted
- B4 Mixed Use: RFBs prohibited, shop top housing permitted, key commercial premises permitted
- Car sales permitted, car servicing prohibited
- Open land use table.

COMMERCIAL AND RETAIL CORE PROTECTION

- Commercial core protected via residential prohibition
- No retail core protection mechanisms in place.

COUNCIL CAPACITY

Council capacity is very high. While the average net DA determination time is 67 days, 6 days longer than the Sydney Metro average, Blacktown City Council determines the second highest value of DAs in the Sydney Metro area (second only to City of Sydney Council).

Council Capacity (2013-2014)

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>67 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$967,679,403</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Old, unattractive and hard concrete environment resembling more of a collection of bulky goods uses than a town centre
- Parking divides precinct in at least five distinct retail areas namely: Shop Smart Outlet Centre, Luxford Court Centre, ALDI, Zoe Place and Westfield
- Precinct sprawled and separated by land uses not conducive to a typical town centre environment, i.e. bulky goods including automotive uses
- No appealing public spaces or active high street spine.
SENTIMENT OVERVIEW

Council view Mt Druitt as a specialised centre servicing the social and community needs of the surrounding population. The Mt Druitt centre evolved in the early 1970’s as the closest service centre to the large-scale public housing development in the region. Over time, Mt Druitt has become a regional social support services centre, specialising in social and community services, with a large number of not-for-profit support agencies locating there. The centre is particularly relied upon to serve the relatively low socio-economic population that lives within its catchments (which stretches as far as Penrith to west and beyond Blacktown to east). It also has an important retail focus, a large hospital precinct and is well serviced by public transport. As such, Council believe that the current centre appears to work for the large regional population it serves.

From the private sector perspective, Mt Druitt still has image issues related to the socio-economic profile of the surrounding community. As such, commercial investors see Mt Druitt as a centre primarily for federal and state government agencies, and supporting services. On the other hand, Westfield remains committed to maintaining its asset further investment in upgrade the centre.

There is also consensus among the private sector that Mt Druitt is a different centre to Blacktown, and thus does not have the same investment potential. Given this and the proximity to Blacktown, there should be a regional approach to planning.

“It will always be a middle level centre”

ECONOMIC OPPORTUNITIES

The current service centre role of Mt Druitt could be enhanced or expanded if the Western Sydney Employment Area (WSEA) starts growing (Mt Druitt is the closest centre).

It currently experiences good transport links but more cross-regional high frequency bus services to and through Mt Druitt would likely be well patronised and generate the potential for additional investment in the centre.

Although the business community may have a negative perception regarding Mt Druitt’s amenity and quality, the local perception regarding the quality of Mt Druitt is relatively good.

The hospital development has been a great enabler for subsidiary and supportive commercial businesses. Any expansion of the hospital/education precinct could generate more commercial investment.

The expectation is that opportunities for growth will need to come from the government by way of locating departments and agencies in the centre to generate employment. There is likely to be some private sector investment spin-off as a result of increased government investment, though this would still be related to the services provided by the government.

BARRIERS TO ECONOMIC GROWTH

The following barriers were identified based on discussions with Council and private sector experts:

Proximity to Blacktown
Blacktown is more attractive for investment compared to Mt Druitt and therefore businesses looking for a location in this part of the western region will likely preference Blacktown.

Negative social image
The socio-economic issues of the surrounding region (related to the large public housing estates located there) are so well known, it has become a barrier difficult for investors to ignore, whether it is real or perceived.

Poor quality urban environment
The general look and feel of the urban environment is a further detraction.

Lack of high frequency local bus services
People would use the centre more if there were higher frequency bus links provided to connect the surrounding residential area.
ENABLERS

The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Local government investment in the urban environment
Upgrades in the centre are important to avoid the decline of existing retail and businesses and thereby providing support to businesses as well as amenity for the community.

Provide high frequency bus services
Provide high frequency bus services from surrounding residential areas.
Penrith is a Regional City Centre, approximately 50 km from the Sydney CBD at the foot of the Blue Mountains. Penrith serves as a major centre to the north western region providing regional transport and employment, retail and entertainment facilities.

**INFRASTRUCTURE:**
- **Train station:** Penrith Station (serves as an interchange between, Northern and Western Lines and Blue Mountains Line).
- **Road:** M4 Western Motorway and the Great Western Highway travelling east to the CBD, Westlink M7 travelling south.

**AMENITIES:**
- **Hospital:** Nepean Hospital (2.5 km east)
- **University:** University of Western Sydney Penrith Campus (4.5 km east)
- **TAFE:** TAFE NSW Kingwood Campus (4.5 km east)
- **Convenience retail:** High Street contains mix of discretionary retail, services, food and non-retail (Australia Post, banks, real estate agents, local businesses). Lower end and dated offer, high vacancy, lack of national retail operators, dispersed. Nepean Village 20,800 sq.m (GLA), limited vacancies, food retail trading strongly.
- **Discretionary retail:** Westfield Penrith 91,000 sq.m (GLA)
- **Dining/entertainment:** Lack of offer outside shopping centres, limited evening activation, limited offer dispersed throughout High Street, no clear precincting.

**Source:** ABS Census, BTS, CordellConnect, Urbis

**Note:** Catchments are based on dive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

In 2011, Penrith contained employment for 14,400 people, with this number projected to increase to approximately 19,000 by 2031.

Due to the relatively large employment number of Penrith, the place of residence of workers appears widely dispersed, however the majority of workers live within 5 km of the centre.

As evident in Map 1.42, private motor vehicles were the most common mode of travel to work in 2011, with the majority of these workers living within 5 km of the centre.

To a remarkably lesser extent, workers also travel to work by train, with these workers mostly residing around the western train line between Parramatta and Katoomba.

The limited number of bus patrons is generally located within close proximity to the centre.

EMPLOYMENT BY INDUSTRY

Retail trade was the largest industry sector in Penrith in 2011 with 3,210 workers. This was shortly followed by the public administration and safety industry with 3,134 workers.

In the two decades between 2011 and 2031, these industries are projected to grow by 36% and 27%, respectively.

The third largest industry in this centre, being health care and social assistance, is expected to experience the strongest growth of all industry sectors over the period. This industry is projected to grow 54% to 3,563 workers by 2031.

Other notable industries of employment within the centre include accommodation and food services, and professional, scientific and technical services.

All other industries are projected to expand between 2011 and 2031 except for information media and telecommunications which is to remain relatively unchanged.

Top 5 Industries of Employment, 2011-2031

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Penrith
EPIs: Penrith LEP 2010
‘Strategic’ LEP: 2014
Land constraints: Heritage 2.4%
(% of centre area) Open space 9%

DIAGNOSIS

Authority: Low level of authority and legislative complexity (one EPI, one LGA)
Commercial: The large B3 Commercial Core represents 28% of the centre and prohibits all residential development which limits potential for growth where office demand is weak
Height and FSR: The centre is geographically very large in area, with significant tracts zoned B3 Commercial Core (259,715 sq.m) and B4 Mixed Use (347,565 sq.m). These zones have relatively high heights limits i.e. substantial development capacity is available which represents a need to generate significant demand to create outcomes which fulfil the built form potential of the centre
Flexibility: B4 Mixed Use (38%) is a highly flexible zone which allows RFBs, shop top housing and key commercial premises
Land constraints: Limited heritage constraints (2.4%) and moderate open space provision (8%)

ZONING AND LAND USE

<table>
<thead>
<tr>
<th>Zoned Land (selected zones)</th>
<th>B3</th>
<th>B4</th>
<th>Other Bus.</th>
<th>Resi.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area (sq.m)</td>
<td>259,715</td>
<td>347,565</td>
<td>-</td>
<td>188,323</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>28%</td>
<td>38%</td>
<td>-</td>
<td>20%</td>
</tr>
<tr>
<td>Weighted Average Height (metres)</td>
<td>26.4</td>
<td>21.1</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Weighted Average FSR (X:1)</td>
<td>* Could not be calculated with available data</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
LAND USE FLEXIBILITY IN KEY ZONES

- B3 Commercial Core: RFBs prohibited, shop top housing prohibited, key commercial uses permitted
- B4 Mixed Use: RFBS permitted, shop top housing permitted, key commercial uses permitted
- Closed land use tables.
- Car sales permitted, car servicing prohibited.

COMMERCIAL AND RETAIL CORE PROTECTION

- No retail or commercial core protection mechanisms in place.

COUNCIL CAPACITY

Council capacity is high with an average net DA determination time of 52 days, 9 days shorter than the Sydney Metro average. Penrith City Council also determines a higher value of DAs than the average for councils in the Sydney Metro area.

COUNCIL CAPACITY (2013-2014)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>52 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$519,669,425</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Old, dated and poorly integrated centre with a poor sense of place
- Elongated retail strip spanning 1.5 km; discouraging pedestrian activity
- Lack of anchor, precincting and clustering of uses, e.g. food and beverage on High Street
- Large town centre area of 106 hectares.
SENTIMENT OVERVIEW

Of all the subject centres Urbis covered, Penrith generates the most optimism from the private sector. It is currently an important service centre for the surrounding region, which has the potential for significant growth once the south-west and north-west growth centres come on line. Unlike many other Sydney regional or strategic centres, there has not been the same pressure to develop residential in the centre, with retail and commercial predominating. This will change as the region grows, with Council planning for both residential and commercial office growth around substantial civic upgrades between the railway station and High Street.

ECONOMIC OPPORTUNITIES

Substantial growth across the Western Sydney region is expected to generate large-scale commercial office and residential investment in the Penrith Centre.

Council are committed to long term upgrading the centre’s urban amenity to facilitate investor interest.

Council and the University of Western Sydney have identified potential knowledge/IT synergies with the commercial development opportunities being explored by Health/Education precinct.

Large scale at-grade parking facilities provide an ideal redevelopment opportunity in the centre’s core between Penrith Station and High Street.

BARRIERS TO ECONOMIC GROWTH

The following key barriers were identified based on discussions with Council and private sector experts:

Lack of critical mass in residential population
Although Council are committed to a long term residential and commercial office core in the centre, there is currently low demand for these from investors at the moment.

Fragmentation of sites
Fragmented property ownership and small lot sizes has been an issue in attracting large scale commercial development, though we understand Council are addressing this through lot consolidation between the railway station and the High Street.

Limited outbound market
Low residential population and national park to the west of Penrith limit the size of the outbound market.

Limited demand for high grade commercial from large scale tenants
There is limited demand for large and quality commercial floorspace from large scale tenants, partly due to this being available in nearby commercial precincts.

Geographical sprawl, dislocated centre and uncertainty about core
Council are aware of the poor urban amenity that exists in the centre currently. They are committed to a long term strategy of urban amenity improvements centred around a civic square/park between the railway station and High Street.

Out-of centre activity undermines certainty
There is a perception that the extensive planned growth in employment generating uses across the region (e.g. Western Sydney Employment Area) may compromise the investment attractiveness of the regional centre.
ENABLERS

The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

**Introduce site consolidation incentives**
Introduce site consolidation incentives through the Local Environmental Plans (LEPs) to make commercial development more attractive to investors and developers.

**Government consolidation of sites**
Government acquisition of fragmented sites in the centre will create development opportunities.

**Define the core of the centre through large scale civic improvements**
Council’s long term commitment to civic upgrade and improvement will improve the urban amenity of the centre and encourage greater residential and commercial investment.

**Introduce height and FSR incentives**
Introduce height and FSR incentives for the development of commercial floorspace through the Local Environmental Plans (LEPs).

**Introduce centre’s policy as an assessment instrument**
Out of centre developments should be subjected to consistent decision making the by the State Government and rigorous assessment to protect the existing retail core within the centre and provide certainty for investments within the centre.
CONTEXT
Penrith Health & Education precinct serves as the major health and education hub for the outer western region with the nearest precinct being the much larger Westmead hospital precinct in Parramatta. The proposed specialised centre is approximately 4 km from the Penrith Major Centre.

INFRASTRUCTURE:
Train station: Kingswood Station (western line 3.5 km west)
Road: M4 Western motorway provides access into the Sydney CBD

AMENITIES:
Hospital: Nepean Hospital
University: University of Western Sydney
TAFE: Western Sydney Institute of TAFE
Convenience retail: none
Discretionary retail: none
Dining/entertainment: Limited to provision within university and hospital only.

CATCHMENT MAP

KEY STATISTICS

<table>
<thead>
<tr>
<th>Catchment population:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>Regional</td>
</tr>
<tr>
<td>Growth prospects</td>
<td>Very strong</td>
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</table>

<table>
<thead>
<tr>
<th>Investment in centre:</th>
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</thead>
<tbody>
<tr>
<td>Value of building approvals 2012-14 ($ Million)</td>
<td>$168.3</td>
</tr>
<tr>
<td>Current private investment pipeline ($ Million)</td>
<td>$1,630.4</td>
</tr>
</tbody>
</table>

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on dive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

The Penrith Education and Health precinct provided employment for approximately 6,400 people in 2011. The Bureau of Transport Statistics projects that this will increase to 9,100 people by 2031.

The place of residence of the precinct’s workers forms a moderately localised catchment area, with a substantial proportion of the workers living within 5 km of the precinct as shown in Map 1.46.

Despite the Kingswood train station being located within this precinct, the vast majority of this precinct’s workers use private motor vehicles to travel to and from work. These workers mostly live within 10 km of the centre, in suburbs such as Cambridge Park, Penrith, South Penrith and Glenmore Park.

The proportion of residents who commute via train is very limited and even more so for those who commute by bus.

EMPLOYMENT BY INDUSTRY

With the University of Western Sydney, Western Sydney Institute of TAFE and Nepean Hospital located within this specialised precinct, it is understandable that the health care and social assistance, and education and training industry sectors are the top industries of employment for the precinct.

In 2011, the health care and social assistance sector employed 3,508 workers while the education and training sector employed 1,754 workers. By 2031, these industries are expected to grow by 54% and 28% respectively, to reach the employment numbers shown in Chart 1.12.

Rounding out the top five industry sectors in the precinct in 2011 were public administration and safety, retail trade, and accommodation and food services, however employment in these industry sectors was significantly lower.
OVERVIEW OF PLANNING CONTEXT

Authorities: Penrith

EPIs: Penrith LEP 2010, Penrith 1998 LEP (Urban Land)

‘Strategic’ LEP: 2014

Land constraints: Heritage 21.3%

(% of centre area) Open space 9%

DIAGNOSIS

Authority: Low level of authority complexity, high level of legislative complexity due to large area of land deferred from the current LEP and zoned by the 1998 LEP.

Flexibility: Special Uses zoning (5(a) and SP2) equate to 49% of the centre, and permit health and education associated land uses where relevant.

Commercial: Large portion of B4 Mixed Use zoned land (203,575 sq.m) with moderate height and FSR and highly flexible land uses (permits residential flat buildings and shop top housing).

Land constraints: High level of heritage constraint (21.3% of the centre affected by heritage and conservation provisions) and high level of open space provision (9%).
LAND USE FLEXIBILITY IN KEY ZONES

- B4 Mixed Use: RFBs permitted, shop top housing permitted, key commercial premises permitted, car sales permitted, car servicing prohibited
- Closed land use table
- 49% of centre zoned for special uses which permit health and education associated land uses as relevant.

COMMERCIAL AND RETAIL CORE PROTECTION

- No retail core protection mechanisms in place.

COUNCIL CAPACITY

Council capacity is high with an average net DA determination time of 52 days, 9 days shorter than the Sydney Metro average. Penrith City Council also determines a higher value of DAs than average for councils in the Sydney Metro area.

<table>
<thead>
<tr>
<th>Council Capacity (2013-2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
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<tr>
<td>Average Net DA Time (Sydney)</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Lack of connectivity between two uses, some 3 km apart
- Not a clear health and education precinct given the two uses are a significant 3 km apart.
SENTIMENT OVERVIEW

Council and UWS view the Health and Education Precinct as having great potential for generating new commercial development (mainly in business park type development). UWS, in particular, see their Werrington campus as providing great income generating opportunities to support the education and research function of the University.

UWS are developing an incubator building on its Werrington campus to generate interest for the development of a business park. Council has rezoned within the education precinct to support the long term mixed use and commercial development in this part of the campus.

Potential medical research and commercial opportunities between UWS and Nepean Hospital have not really been investigated – most of UWS’s health focus is in Campbelltown, with research related opportunities generated there.

The Hospital is under pressure to expand to cater to future demand, with Council recognising the need to facilitate redevelopment potential on and around the current site through recent zoning changes.

ECONOMIC OPPORTUNITIES

The vast amount of land owned by UWS in this precinct provides ideal opportunities for innovative large scale commercial development opportunities.

The site is highly accessible to the motorway network and the Western Railway line.

Council are highly supportive of UWS’s plans, and see it as complementary to the existing and future Penrith strategic centre.

BARRIERS TO ECONOMIC GROWTH

Based on discussions with Council and private sector experts, the following barriers were identified:

Health and Education uses are geographical too far and separate from each other

The long distance and separation between the UWS campus and the Penrith Nepean Hospital results in missed opportunities in terms of synergies and the emergence of supporting business.

LOT SIZES AND EXTENT OF STRATA TITLING

MAP 1.48

Low density residential limits synergies

The low density uses, mainly low density residential, between the hospital and the university limits opportunities for better integration of this precinct and opportunities to create synergies.
Fragmentation of sites
The issue of small lots and fragmentation of sites is an impediment to delivering a large scale development.

Extensive strata titling
The extensiveness of strata titling limits development opportunities in the centre.

Lack of clarity on the difference in roles between the Penrith Regional City Centre and Penrith Health and Education
There is a perception amongst the private sector that the Penrith Regional City Centre and the Penrith Health and Education compete for private and public investment, and their positioning is not clear.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Consider rezoning low residential density (R2) sites to mixed use
Consider rezoning the current low density residential areas between the hospital and the university to enough more employment generating uses and better leverage the planned investment in the light rail.

Provide incentives for site consolidation
Provide incentives to prospective investors via the Local Environmental Plans (LEPs) to encourage site amalgamation in the centre to provide development parcels suitable for commercial and residential development.

Government consolidation of sites
Government acquisition of sites in the centre to provide development opportunities.

State government and local council provide clarity on the different roles of the Penrith Regional City Centre and Penrith Health and Education
Ensure the future development in Penrith Regional City Centre, and the Penrith Health and Education complement each other rather than compete with each other.
BANKSTOWN AIRPORT - MILPERRA

CONTEXT
Bankstown Airport is used largely for general aviation, parcel freight and recreation flying. As such this precinct is largely an industrial area. A large proportion of the land operated by Bankstown Airport is used for non-airport related uses and has been subleased by various operators. In addition to industrial uses, this includes a Bunnings Warehouse, ALDI supermarket, BP and KFC. Beyond this, the surrounding land uses include industrial, low density residential and some retail uses.

INFRASTRUCTURE:
Train station: Bankstown Station (4.3 km east)
Road: South western motorway provides access into the Sydney CBD

AMENITIES:
Hospital: Bankstown Lidcombe Hospital (3.5 km west)
University: University of Western Sydney (1.8 km south)
TAFE: none close by
Convenience retail: Limited to ALDI supermarket, KFC and BP along Milperra Road. Bankstown town centre is 5 km to the east
Discretionary retail: No discretionary retail offer provided, Bankstown Village within the town centre represents the closest offer
Dining/entertainment: Limited offer

KEY STATISTICS

<table>
<thead>
<tr>
<th>Catchment population:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>Specialised</td>
</tr>
<tr>
<td>Growth prospects</td>
<td>Low to moderate</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Investment in centre:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of building approvals 2012-14 ($ Million)</td>
<td>$91.1</td>
</tr>
<tr>
<td>Current private investment pipeline ($ Million)</td>
<td>$219.2</td>
</tr>
</tbody>
</table>

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

As at 2011, there were some 4,600 people employed in Bankstown Airport – Milperra. This is expected to grow to approximately 5,200 by 2031, representing a 13% increase over two decades. This is one of the lowest rate increases of all centres in this study covered by Urbis, equal to only the Sydney Airport and Environs Specialised Precinct.

Despite the relatively limited worker population of the centre, the place of residence of workers is widely dispersed particularly for those using private transport, as shown in Map 1.50.

Due to the isolation of the centre from any train stations (Bankstown train station is approximately 4.3km east), the vast majority of the workers use private transport to get to and from work. This is also influenced by the common industries of employment of the workers (see opposite), whereby the industries often require the use of private transport such as trucks and vans.

EMPLOYMENT BY INDUSTRY

Manufacturing was the largest industry of employment in Bankstown Airport – Milperra in 2011, employing 1,873 people, the majority of which were in transport equipment manufacturing. This will remain the largest industry sector for the centre in 2031 projected to employ 1,934 workers, representing a marginal growth of just 3% over a 20 year period.

The second largest industry of employment, albeit a significantly smaller workforce, was the transport, postal and warehousing industry. This industry employed 738 people in 2011, projected to grow to 893 by 2031, as shown in Chart 1.14. This represented a growth of 21%.

The strongest growth over the 20 year period in percentage terms is expected in the health care and social assistance industry, which is predicted to grow by 40%, albeit from a low based. Other major industries of employment within the centre include construction and retail trade.

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>2031</th>
<th>Change (2011-2031)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>1,934</td>
<td>2,000</td>
<td>66</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>893</td>
<td>893</td>
<td>0</td>
</tr>
<tr>
<td>Construction</td>
<td>355</td>
<td>377</td>
<td>22</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>304</td>
<td>377</td>
<td>73</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Bankstown, Bankstown Airport Ltd, Minister for Transport

EPIs: Bankstown LEP 2015, Bankstown Airport Masterplan

‘Strategic’ LEP: 2014

Land constraints: Heritage 89.1%

(% of centre area) Open space 1%

DIAGNOSIS

Authority: High level of statutory complexity (two EPIs/policies) and authority complexity

Development: Majority of land is held by the Commonwealth Government which restricts ability of state and local government to control development outcomes

Land uses: Significant portion of centre zoned for airport-related uses (3,109,300sq.m/89%) with limited airport related uses, and non-related airport uses as dictated in the Bankstown Airport Masterplan

Flexibility: Some 10% of the centre is zoned for industrial uses and significant tract of industrial lands to the south of the centre. These areas are capable of accommodating employment growth, however industrial zoning restricts land use flexibility

Land constraints: Significant heritage constraints, with 89.1% of centre (representing the airport land) affected by heritage and conservation provisions.

ZONING AND LAND USE

<table>
<thead>
<tr>
<th>Key Business Zones</th>
<th>Nil business zones, SP2 Infrastructure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoned Land (selected zones)</td>
<td>SP2</td>
</tr>
<tr>
<td>Area (sq.m)</td>
<td>3,109,300</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>89%</td>
</tr>
</tbody>
</table>
LAND USE FLEXIBILITY IN KEY ZONES

- Non-aviation related uses are permitted on airport land in accordance with an approved Masterplan under the *Airports Act 1996*.
- Residential, office and retail premises prohibited in industrial zone

COMMERCIAL AND RETAIL CORE PROTECTION

- No protections as non-aviation uses permissible via Masterplan may include out-of-centre retail development which undermines the centres hierarchy.

COUNCIL CAPACITY

Council capacity is high with an average net DA determination time of 51 days, 10 days shorter than the Sydney Metro average. Bankstown City Council also determines an equivalent value of DAs to the Sydney Metro area.

<table>
<thead>
<tr>
<th>Council Capacity (2013-2014)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>51 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Council)</td>
<td>$428,261,664</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Lack of connectivity between uses
- Requirements as part of airport use limits surrounding amenity and potential development options (i.e. Building height restrictions)
- Airport and industrial use does not integrate well with surrounding low density residential uses.
SENTIMENT OVERVIEW
There has been a long term decline in aviation movements at Bankstown Airport, which leads to questions on how the growth of the Airport will be managed if this decline continues. Further to this, Bankstown Airport stated in their preliminary airport Masterplan that aviation movements are unlikely to return to historic highs over the next 20 years.

While aviation uses are unlikely to expand, the airport does have excess non-aviation land with employment land potential.

Bankstown Council will soon commence a planning study for the Milperra industrial area, which will integrate the current Bankstown Airport Masterplan and the Milperra industrial area, which currently has a strong warehousing component, is economically strong because of its direct access to the M5 and M7.

ECONOMIC OPPORTUNITIES
Bankstown Airport forecast a moderate increase of 1.35% in aviation activity from 2015 onwards. This growth rate reflects moderate growth expectations, and a historic decline in aviation movements between 2000 (321,036) and 2012 (220,294 aviation movements).

Nonetheless, the Airport and the industrial area’s proximity to the Moorebank and Enmore multi-modal facilities places it in a strong economic position.

Council is also keen to work with UWS to explore potential commercial development opportunities for scientific research within industrial precinct.

The airport’s Masterplan identified 130 hectares of land as being in surplus of aviation and the environment, and is mooted for additional non-aviation commercial development.

BARRIERS TO ECONOMIC GROWTH
Based on discussions with Council and the Bankstown Airport Corporation, further informed by observations from private sector, the following barriers were identified:

**Aviation uses limit commercial development**
Areas of the airport are off-limits to future development because of restrictions in place to facilitate safe operation of the airport.

**Poor public transport connections**
Take-up by commercial tenants is limited by poor transport connections. Any new tenants will be restricted to businesses that have workers able to use car based transport to travel to work.

**Lack of co-ordinated planning between Milperra and Bankstown Airport**
Economic development opportunities for Milperra should be planned in conjunction with Bankstown Airport in order to maximise the opportunity for growth at the Airport.

**Heritage constraints increases costs**
The heritage considerations results in higher costs for developers.

**Inefficient building design**
The commercial and industrial buildings are typically older stock and subsequently lack the efficiencies of modern building design codes.

**Long terms leases impede development**
Long-term leases on older buildings inhibit redevelopment to higher and better uses.

**Airport needs pre-commitment from a major tenant**
Unless there is pre-commitment from a major tenant, the Airport will not undertake a development.
Planning Complexities
There are additional planning complexities resulting from three levels of government - local, state and federal. Consequently the need for co-ordinated decision making hinders development decisions.

Distance from Metro bus service
The distance from the existing metro bus stop and the Airport creates difficult public transport access.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

State government transport
In order to facilitate higher employment density introduce more rapid transit metro bus services and multiple bus stops in closer proximity to industrial tenants in the airport with greater access to Bankstown Airport.

Co-ordinated planning of the Airport and Milperra industrial area
Implement regulatory framework to ensure integration of the Airport Masterplan with the proposed Milperra Industrial Area Planning Study.

Strategic co-ordination
Implement a regulatory framework to improve co-ordination and approach to planning and infrastructure between the different levels of government.

Co-ordinate commercial opportunities
Coordinate potential commercial/research opportunities between UWS, Bankstown Council and Bankstown Airport.
The Sydney Airport Precinct contains Sydney’s Domestic and International Airports, as well as the suburb of Mascot. Sydney’s Airport is approximately 6 km from the Sydney CBD. The main employment hub has been developed around Mascot Station, and comprises a number of A-grade commercial buildings catering to blue chip tenants and high density mixed use buildings. Approaching the entrance of the airport there is an appropriate transition of land use from commercial buildings to hotels that service a business market. In addition to the surface road network, the precinct is connected via a subterranean rail line that also provides access to the Sydney CBD.

**INFRASTRUCTURE:**

**Train station:** 3 Stations: Mascot, Domestic Airport and International Airport.

**Road:** Accessible from the Sydney CBD via O’Riordan Street. Airport Drive and the M5 Freeway provide access to west and south Sydney via Foreshore Road.

**Amenities:**

- **Hospital:** None
- **University:** None
- **TAFE:** None
- **Convenience retail:** Limited convenience retail, with small scale ground floor retail servicing local workers in Mascot. Local residents likely serviced by Eastlakes Shopping Centre, to the east of the centre (with access to Westfield Eastgardens beyond the precinct).
- **Discretionary retail:** Mainly within the airport terminals.
- **Dining/entertainment:** Dining and entertainment mainly within the airport terminals, and cafes and restaurants servicing Mascot workers during daytime.

**CATCHMENT MAP**

**KEY STATISTICS**

**Catchment population:**

<table>
<thead>
<tr>
<th>Total</th>
<th>Sydney Metro</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Growth prospects:** Very strong

**Investment in centre:**

| Value of building approvals 2012-14 ($ Million) | $954.2 |
| Current private investment pipeline ($ Million)   | $2,770.0 |

Source: ABS Census, BTS, CordellConnect, Urbis

Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

The Sydney Airport Precinct was the largest employer of all 16 strategic centres considered in this study, employing 22,700 people in 2011. This is projected to grow to 25,700 people by 2031, where it will become the second highest employer behind Chatswood.

The place of residence of workers of the Sydney Airport Precinct forms one of the widest catchment areas of all centres, partly due to the high employment number. Whilst the majority live within 10 km of the precinct, a substantial number live beyond this.

As shown in Map 1.54, the most common mode of transport for workers of the centre is private motor vehicle, with the highest concentrations of these workers living between the Sydney Harbour and the Parramatta River to the north and the Georges River to the south.

Trains are the second most common method of commuting for workers, supported by the provision of train stations within and near the precinct.

EMPLOYMENT BY INDUSTRY

The focus of employment within this precinct is the transport, postal and warehousing industry sector, employing over 12,000 people in 2011. This industry is projected to experience limited growth to 2031 (1%) to just over 12,200 workers, as shown in Chart 1.14.

Other common industries of employment within the centre in 2011, albeit to a significantly lesser extent, include wholesale trade, accommodation and food services, manufacturing and administrative support and services.

Between 2011 and 2031, the largest percentage increase is expected in the health care and social assistance industry, which is projected to increase 85% from 541 in 2011 to 1,000 by 2031. Significant growth is also projected in the public administration and safety (64%), information media and telecommunications (59%) and education and training (57%) industry sectors.

Employment losses are projected in some industries, with the largest decline expected in the manufacturing industry (-23%).

Top 5 Industries of Employment, 2011-2031

<table>
<thead>
<tr>
<th>Industry</th>
<th>2011</th>
<th>Change (2011-2031)</th>
<th>2031</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>12,208</td>
<td></td>
<td>13,128</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>1,887</td>
<td></td>
<td>1,887</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>1,839</td>
<td></td>
<td>1,839</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>981</td>
<td></td>
<td>1,463</td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td>1,463</td>
<td></td>
<td>1,463</td>
</tr>
</tbody>
</table>

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT


EPIs: Botany Bay LEP 2013, Rockdale LEP 2011, Sydney Airport Masterplan

‘Strategic’ LEP: 2013

Land constraints:

- Heritage 31.1%
- Open space 0.8%

DIAGNOSIS

Authority: High level of legislative and authority complexity as the largest portion of land in the centre is owned by the Commonwealth Government and subject to a Masterplan.

Height and FSR: Large area of B4 Mixed Use zoned land (222,135 sq.m) with significant height and FSR controls which promotes high density residential and mixed use growth in the vicinity of Mascot Station

Flexibility: Dominant land use is SP2 Infrastructure (77%) which permits airport-related land uses, or non-aviation use under masterplan.

- Large range of business zoned including B5 Business Development and B7 Business Park which permit office/business premises and prohibits retail development. This provides employment uses while protecting the success of the B2 Local Centre zoned land in the vicinity of Mascot Station.

Land constraints: High level of heritage constraints (31.1%) and moderate provision of open space (5%)
LAND USE FLEXIBILITY IN KEY ZONES

- **B4 Mixed Use**: RFBs permitted, shop top housing permitted, key commercial uses permitted, car sales permitted, car servicing prohibited
- **B5 Business Development**: RFBs prohibited, shop top housing prohibited, office and business premises permitted, car sales and servicing prohibited
- **B7 Business Park**: RFBs prohibited, shop top housing prohibited, office and business premises permitted, car sales permitted, car servicing prohibited
- **SP2 Special Uses**: reflect airport-related land uses (and potential for out of centre retailing via airport-related retail uses)
- Open land use table.

COMMERCIAL AND RETAIL CORE PROTECTION

- Retail core protected via prohibition of retail premises in B5 Business Development and B7 Business Park zones.
- Out of centre retailing possible as an airport-related land use.

COUNCIL CAPACITY

Botany Bay Council capacity is low, with net DA determination times more than double the Sydney average (101 days), the second longest in the Sydney metro area.

<table>
<thead>
<tr>
<th>COUNCIL CAPACITY (2013-2014)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Botany Bay)</td>
<td>101 days</td>
</tr>
<tr>
<td>Average Net DA Time (Rockdale)</td>
<td>61 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Botany Bay)</td>
<td>$613,252,975</td>
</tr>
<tr>
<td>Value DAs determined (Rockdale)</td>
<td>$343,119,674</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Mascot is a consolidated business precinct, with easy access from its station to commercial buildings
- Transit from the business precinct around the Mascot Station to the airport is not designed to be pedestrian friendly, requires either a train or car to move between precincts.

SENTIMENT OVERVIEW

Currently, Sydney Airport plays a significant transport gateway role in the region, as well as across Metropolitan Sydney and for NSW. As Australia’s premier international gateway, Sydney Airport acts as a major generator of a wide range of economic activities. The precinct is home to some 80
individual businesses, comprising commercial offices; retail; car rental; ground transport; aeronautical services and facilities; security; ground handling; engineering and freight and logistics. There are also several government agencies located here, including Customs and Border Protection and Australian Federal Police.

ECONOMIC OPPORTUNITIES

Over the next 20 years, the number of airline passengers passing through Sydney Airport is projected to increase from 38.5 million in 2014 to more than 74 million in 2033. It is projected that the economic activity generated or facilitated by Sydney Airport will increase from $30.8 billion in 2014 to over $54.5 billion in 2034.

This growth will create demand for more onsite retail and commercial businesses, as well as precinct wide retail, commercial and industrial development.

BARRIERS TO ECONOMIC GROWTH

Interviews with government and the market sounding identified the following barriers to growth in the precinct:

Lack of coordinated approach to planning and infrastructure (Commonwealth and State jurisdictions)

In Australia, there is no national framework for the delivery of public infrastructure in areas where there is an overlap Commonwealth and State infrastructure responsibilities. Invariably, each jurisdiction takes a different approach to the delivery of significant infrastructure within its remit. In the Sydney Airport precinct, there is a need for integrated land use and transport planning approaches to ensure the whole precinct grows in a coordinated way. For example, any growth in commercial and retail businesses on Airport land should consider Sydney’s transport infrastructure and servicing capacity to cater to such growth. Alternatively, new residential development across the Sydney region must consider the important commercial and flight operation context within which Sydney Airport operates.

High demand for carparking requires a review of carparking capacity

There is an increasing demand for additional car parking at Sydney Airport, which is related to increased passenger growth and the lack of attractive alternative transport options to and from the Airport to cater to such growth. As well, there is a limited ability to increase car parking capacity at Sydney Airport and, alternatively, on surrounding peripheral sites.

Expansion of curfew restrictions due to additional residential development in some areas

The future commercial viability of Sydney Airport is constrained due to the inability to increase the number of flights into and out of Sydney due to current curfew restrictions. Increasing inner urban residential development creates the prospect of even more restrictive curfew conditions.

Increased residential development along Airport to Sydney CBD corridor creating transport capacity issues

Increased inner urban growth between the CBD and Airport via Green Square has generated increased transport trips, which is placing increasing pressure on transport infrastructure capacity (particularly the M1, Botany Road, O’Riordan Street and the Macarthur/Airport railway Line).

Residential height perceived as a risk to existing and potential flight paths

Threat of the height of new residential development impacting on current or future flight paths is a potential risk that requires monitoring (e.g. 40 to 50 storey buildings). For example, there is a potential for increase in residential development in Kurnell that compromises the ability to utilise the only runway that operates during the curfew hours of 11pm to 6am.

Employment Land Availability

For Sydney Airport to grow, there needs to be a sufficient pool of employment/industrially zoned lands in the vicinity of the airport (including Port Botany). This allows airport-related businesses and industries to be able to locate in areas that have convenient access. Urban encroachment and pressure from high value land uses (such as high density residential) impact on the supply of industrial lands close to Sydney Airport and Port Botany.
Congestion surrounding the airport impacting accessibility

Local road congestion around the airport and limited public transport connections is perceived to be impacting its accessibility. Surrounding roads appear to be at capacity during peak periods, and increasing congestion in surrounding local roads driven by increasing commuter traffic will continue to be a key constraint for the centre unless addressed. An increase in residential development along the Airport to the City corridor is adding to this issue.

Limited public transport modes

There are limited public transport options to the airport, which contribute to congestion in local roads and detract from the airport’s accessibility.

ENABLERS

The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Integrating NASF within planning policy

Integrating the NASF (National Airport Safeguarding Framework) within state and local planning laws and regulations will create greater certainty for the future growth of Sydney Airport and Port Botany.

Monitor the impacts of residential development with Sydney Airport in mind

It will continue to be important to protect existing flight path operations from being compromised by the height new residential development (e.g. protecting flight path that services limited landing slots that operate within the curfew).

Additional land in the Sydney Airport and Port Botany precincts

A commitment by the state government and the local councils to provide sufficient supply of appropriately zoned land that permits the airport or aviation-related operations to consolidate and grow. This should be a key component of the Structure Plan for the precincts.

Improve transport accessibility

Deliver an integrated transport solution for Sydney Airport that could be a combination of both upgrades to local roads and/or improve the public transport to and from the airport.
PORT BOTANY PRECINCT

CONTEXT

Port Botany contains Australia’s premier land/sea freight gateway. It has a number of associated industrial precincts which connect to Sydney’s transport and freight system. Consequently Port Botany precinct contains a significant amount of existing industrial land.

INFRASTRUCTURE:

Train station: Metropolitan Goods Line and Sea Terminal
Road: Access to the M1 via Botany Road

AMENITIES:

Hospital: None
University: None
TAFE: None
Convenience retail: Southpoint Shopping Centre
Discretionary retail: None
Dining/entertainment: Limited to Southpoint Shopping Centre, and isolated cafes servicing industrial precincts

CATCHMENT MAP

KEY STATISTICS

<table>
<thead>
<tr>
<th>Catchment population:</th>
<th>Sydney Metro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
</tr>
<tr>
<td>Growth prospects</td>
<td>Strong</td>
</tr>
</tbody>
</table>

Investment in centre:

| Value of building approvals 2012-14 ($ Million) | $477.1 |
| Current private investment pipeline ($ Million)  | $1,627.4 |

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

The Port Botany precinct provided employment for some 13,100 people in 2011. By 2031, the Bureau of Transport Statistics (BTS) projects that this will increase to 16,900 people by 2031.

The catchment area of where this centre’s workers reside is one of the broadest of all strategic centres, with a relatively limited proportion of workers living within 10 km of the centre.

Private motor vehicles were the most common mode of travel to and from work in 2011, the majority of which live in the areas around Botany Bay and the Georges River.

The lack of a train station within this centre restricts the train patronage by workers and as a result, buses are the second most common mode of transport. Of those that catch a bus to and from work, there is a high concentration who live within suburbs surrounding the centre including Mascot, Rosebery and Maroubra.

EMPLOYMENT BY INDUSTRY

Due to the nature of this specialised precinct, it is unsurprising that the transport, postal and warehousing industry was the largest sector in 2011. It is projected that this industry sector will grow 45% to 2031, to a total of 6,570 workers.

Despite manufacturing being the second largest industry sector in 2011, the employment number is projected to remain relatively unchanged to 2031.

Other common industries of employment within this specialised precinct in 2011 include wholesale trade, construction and retail trade.

Despite not being in the top five industries of employment in 2011, some industries are projected to undergo significant growth to 2031, including public administration and safety (59%), health care and social assistance (59%) and information media and telecommunications (52%).

All remaining industry sectors in this centre are expected to expand over the period.

WORKERS PLACE OF RESIDENCE BY MODE (2011)

MAP 1.58

EMPLOYMENT BY INDUSTRY

Due to the nature of this specialised precinct, it is unsurprising that the transport, postal and warehousing industry was the largest sector in 2011. It is projected that this industry sector will grow 45% to 2031, to a total of 6,570 workers.

Despite manufacturing being the second largest industry sector in 2011, the employment number is projected to remain relatively unchanged to 2031.

Other common industries of employment within this specialised precinct in 2011 include wholesale trade, construction and retail trade.

Despite not being in the top five industries of employment in 2011, some industries are projected to undergo significant growth to 2031, including public administration and safety (59%), health care and social assistance (59%) and information media and telecommunications (52%).

All remaining industry sectors in this centre are expected to expand over the period.

Top 5 Industries of Employment, 2011-2031

PORT BOTANY PRECINCT

CHART 1.15

Source: Bureau of Transport Statistics; Urbis
OVERVIEW OF PLANNING CONTEXT

Authorities: Botany Bay Council, Randwick Council, NSW Ports

EPIs: Botany Bay LEP 2013, Randwick LEP 2012, Three Ports SEPP

‘Strategic’ LEP: Botany Bay – 2013
Randwick – 2012

Land constraints: Heritage 1.2%
(\% of centre area) Open space 2%

DIAGNOSIS

Authority: High level of authority and legislative complexity (three EPIs, three authorities) resulting in no one authority/instrument providing for the whole centre

Industrial: Significant industrial lands (3,177,248sq.m/ 45\%) reflecting the role of the centre as an employment precinct, with limited permitted land uses reflecting the industrial nature of the precinct

Zoning: Some 33\% of the centre is zoned SP1 Special Activities which permits port-related uses and some ancillary land uses including neighbourhood shops

Flexibility: Small area of B4 Mixed Use land (11,160 sq.m) with flexible land uses and moderate height and FSR controls reflecting the employment, rather than residential role of this centre

Land constraints: Limited heritage constraints (1.2\%) and moderate open space provision (2\%)

ZONING AND LAND USE

Key Business Zones

<table>
<thead>
<tr>
<th>Zoned Land (selected zones)</th>
<th>Bus.</th>
<th>Resi.</th>
<th>Industrial</th>
<th>SP1/SP2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area (sq.m)</td>
<td>150,030</td>
<td>906,169</td>
<td>3,177,248</td>
<td>2,654,064</td>
</tr>
<tr>
<td>Area (% of centre)</td>
<td>1%</td>
<td>13%</td>
<td>45%</td>
<td>38%</td>
</tr>
<tr>
<td>Weighted Average Height (metres)</td>
<td>12 (B4 Zone)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Weighted Average FSR (X:1)</td>
<td>1 (B4 Zone)</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
**LAND USE FLEXIBILITY IN KEY ZONES**

- **IN1:** Residential prohibited, office and business premises permitted, car sales prohibited, car servicing permitted.
- **IN2:** Residential prohibited, commercial uses prohibited, car sales prohibited, car servicing permitted.
- **B4:** RFBs permitted, shop top housing permitted, key commercial uses permitted, car sales permitted, car servicing prohibited.

**COMMERCIAL AND RETAIL CORE PROTECTION**

- Some retail core protection via prohibition of shops in B5 Business Development and B7 Business Park zones (bulky goods retailing, hardware and building supplies still permissible in B5 Business Development).
- No commercial core protection mechanisms.

**RESIDENTIAL FLEXIBILITY IN KEY ZONES**

- Residential is permitted in 14% of the centre.

**COUNCIL CAPACITY (2013-2014)**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Net DA Time (Botany Bay)</td>
<td>101 days</td>
</tr>
<tr>
<td>Average Net DA Time (Randwick)</td>
<td>36 days</td>
</tr>
<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
</tr>
<tr>
<td>Value DAs determined (Botany Bay)</td>
<td>$613,252,975</td>
</tr>
<tr>
<td>Value DAs determined (Randwick)</td>
<td>$300,528,528</td>
</tr>
<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
</tr>
</tbody>
</table>

**URBAN DESIGN**

The urban design characteristics of this centre can be summarised as follows:

- Potential incompatibility between residential and industrial uses adjacent to the Port.
- There is a need to define the Port Botany and associated industrial lands separately from the surrounding residential area.

**COUNCIL CAPACITY**

Council capacity is low in Botany Bay, with net DA determination times more than double the NSW average (101 days), the second longest in the Sydney Metro area.

Council capacity is moderate in Randwick Council. While the average net DA determination time is 36 days, 25 days shorter than the Sydney Metro average, Randwick City Council determines a lower value of DAs than average for Councils in the Sydney Metro area.
SENTIMENT OVERVIEW

There is awareness of a recent expansion at Port Botany where additional capacity was added to cater for long term trade growth. The strategic planning for Port Botany provides a sound and logical plan for the Port precinct. The concern among some tenants is the ongoing feasibility of being located at the Port when rents are already high. Consequently, tenants will be questioning their long term footprint at the Port.

ECONOMIC OPPORTUNITIES

There is recognition that container freight movements will increase as the population of NSW does creating opportunities for growth at the Port.

The recent expansion has already included the addition of a new terminal, substantial road upgrades. Future expansion projects will include additional wharves; land reclamation to support the terminal expansion; additional deep water berths; and additional rail sidings to facilitate increased rail freight access.

BARRIERS TO ECONOMIC GROWTH

The following barriers were identified by private sector experts and Council on discussions with them:

Infrastructure capacity of roads
The road capacity is limited for load bearing freight vehicles from the Port to M5, M4, and M7 transport corridors. As freight volumes increase there is pressure to increase the volume of freight per vehicle movement.

Road traffic congestion
Additional residential development has resulted in additional pressure on roads around the Port.

Competition from NSW and interstate Ports
While Port Botany and Port Kembla fulfil different roles, in theory they still are competitors as are Port of Newcastle, Port of Melbourne and Port of Brisbane.

Infrastructure capacity of rail
Rail capacity is limited due to the sharing of tracks with passenger trains which are given priority.

Unfavourable leases relative to commercial leases
Rents are reviewed every 3 years at Port Botany and with a ratchet clause compared to every 5 years for commercial leases. This combined with high rents and aggressive rent reviews makes the leases unfavourable compared to commercial leases outside the Port. High cost of rents at Port Botany can make it unfeasible to be located at the Port.

Increasing urbanisation
Increasing urban encroachment near the Port creates conflicting land use tensions.

Relatively low productivity
Port Botany has a relatively low TEU/per hour rate compared to Melbourne (Infrastructure NSW, State Infrastructure Strategy).
Lease expiries discourage redevelopment of lease holdings
Tenants are not motivated to redevelop sites at Port Botany where there is not enough time left on leases to make a return.

ENABLERS

The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

State investment in road infrastructure
Upgrade road access around the ports, increase capacity for high productivity vehicles and increase the container to truck ratios. Ensure direct connections from the port to the WestConnex upgrade.

Improve intermodal infrastructure capacity
Increased rail capacity between Port Botany and Enfield Intermodal.

Investment in operation automation
Introduce more automation to improve productivity and cost efficiency at the Port.

Introduce planning and regulatory framework to protect land
Ensure the continuation of ongoing protection under the current SEPP of the land to the north of the port from residential development to accommodate future demand for industrial, freight and logistics uses; or to accommodate dry bulk port uses current on Glebe Island.

Manage conflicting uses via Planning
Maintain current SEPP to ensure that conflicting uses are minimised in close proximity to the Port.

Increase hours of operation
Avoid imposing 24/7 hour operation restrictions as part of development application conditions.
CONTEXT

The Randwick Education and Health precinct contains both the University of New South Wales (UNSW) and the Prince of Wales Hospital. The mix of education and health uses creates the opportunity for a combination of education, research, science and health related uses. There are a number of other ancillary development opportunities such as short-term accommodation, student accommodation and associated retail / services amenities.

INFRASTRUCTURE:

Train station: None
Road: Access to the Sydney CBD via Anzac Parade

AMENITIES:

Hospital: Prince of Wales Hospital, Prince of Wales Private and Sydney Children’s Hospital
University: University of NSW
TAFE: None
Convenience retail: Adjacent to the Royal Randwick Shopping Centre and Randwick Plaza. There is also food retailing on UNSW Campus, inside the hospitals and adjacent on High Street.
Discretionary retail: None
Dining/entertainment: Limited dining/entertainment, mainly located along Anzac Parade and Avoca Street.

KEY STATISTICS

Catchment population:

<table>
<thead>
<tr>
<th>Total</th>
<th>Specialised</th>
</tr>
</thead>
</table>

Growth prospects: Strong

Investment in centre:

| Value of building approvals 2012-14 ($ Million) | $799.1 |
| Current private investment pipeline ($ Million) | $1,907.9 |

Source: ABS Census, BTS, CordellConnect, Urbis
Note: Catchments are based on drive time analysis with an SA1 (statistical area 1) assigned to the centre that its population centroid is closest to by drive time.
WHERE DO WORKERS COME FROM?

As at 2011, the Randwick Education and Health precinct employed some 14,400 people. The Bureau of Transport Statistics (BTS) projects that this will increase to 19,000 by 2031.

The Randwick Education and Health precinct has a relatively localised catchment in terms of the place of residence of the local workers, with a large proportion of workers living within five kilometres of the precinct.

Similar to all other strategic centres, the most common mode of transport for workers travelling to and from work in this centre is private motor vehicle. The majority of these workers live within 5 km of the precinct, primarily in the area between Rozelle and the Sydney Airport, and extending eastwards towards the coastline.

Due to the lack of train station in the precinct, buses are the second most common mode of transport for workers’ commute. The place of residence of these workers is similarly distributed to those who travel by private motor vehicle.

EMPLOYMENT BY INDUSTRY

The Randwick Education and Health precinct was dominated by both the health care and social assistance, and education and training industry sectors in 2011. This is due to the presence of the Prince of Wales Hospital and the University of New South Wales (UNSW), Randwick Girls’ High School, Randwick Boys’ High School and Rainbow Street Public School.

The dominance of these industry sectors is expected to continue to 2031. The health care and social assistance industry is projected to grow 37% to over 9,000 workers, while the education and training industry is projected to grow 29% to almost 7,950 workers.

Employment within other industry sectors within this specialised precinct are expected to remain limited in 2031, such as professional, scientific and technical services (522 workers); and accommodation and food services (249 workers).
OVERVIEW OF PLANNING CONTEXT

Authorities: Randwick
EPIs: Randwick LEP 2012
‘Strategic’ LEP: 2012
Land constraints: Heritage 20.5%
(% of centre area) Open space 3.2%

DIAGNOSIS

Authority: Low level of authority and legislative complexity given that the centre only falls under one local council and one EPI
Flexibility: About 80% of the centre zoned SP2 Infrastructure reflecting the dominant health and education uses in the precinct. This zone permits a wide range of uses associated with the primary health or education purpose of the land, including health worker or student housing.
Land constraints: High level of heritage constraints (20.5% of the land affected by heritage and conservation provisions) and moderate open space provision (3.2%).
LAND USE FLEXIBILITY IN KEY ZONES

- Residential permitted in B2 Local Centre zone (0.5%)
- SP2 Infrastructure zone (80%) allows for a range of land uses associated with education and health facilities
- Residential permitted in 97% of centre.

COUNCIL CAPACITY

Council capacity is moderate. While the average net DA determination time is 36 days, 25 days shorter than the Sydney Metro average, Randwick City Council determines a lower value of DAs than average for councils in the Sydney Metro area.

<table>
<thead>
<tr>
<th>COUNCIL CAPACITY (2013-2014)</th>
<th></th>
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<tbody>
<tr>
<td>Average Net DA Time (Council)</td>
<td>36 days</td>
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<tr>
<td>Average Net DA Time (Sydney)</td>
<td>61 days</td>
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<tr>
<td>Value DAs determined (Council)</td>
<td>$300,528,528</td>
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<tr>
<td>Average value of DAs determined (Sydney)</td>
<td>$474,948,240</td>
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URBAN DESIGN

The urban design characteristics of this centre can be summarised as follows:

- Tentative connection between UNSW and the Prince of Wales Hospital and Children’s Hospital
- Modern and attractive precinct
- Sprawl of uses and topography making it challenging to walk the precinct end to end.
SENTIMENT OVERVIEW

Randwick Council strongly supports the designation of this specialised centre, which is supported by the zonings and development controls in Council’s Comprehensive LEP (2013).

The previous Urban Activation Plan identified potential suitable development sites for the precinct, many on the UNSW campus and within the Hospital precinct. UNSW, in particular, is supportive maintaining the momentum generated by this Plan.

UNSW has strong research alliances with the Health precinct and this provides good opportunities for new commercial growth. Council believes that a 25-30% increase in employment in the precinct can be achieved on the back of growth in health and education aligned commercial businesses within the precinct. UNSW believes if the land between the UNSW campus and the hospital can be consolidated for large scale development then the various development and employment targets can be achieved.

Currently, however, the largest demand for redevelopment is from the residential development sector. There is major pressure on Council to facilitate more residential development, possibly in response to the Light Rail development. Whilst Randwick is defined as an education and health specialised precinct, there are also non-health and education investors who would be interested in investing in Randwick. Private sector investors do not necessarily view Randwick as a specialised precinct. They are drawn to Randwick because of the high socio economic profile of residents and access to a significant youth market.

ECONOMIC OPPORTUNITIES

The strong alliance that exists between the Prince of Wales Hospital and its various health and medical specialities and UNSW’s growing medical research focus has created strong demand from medical and research related businesses in the precinct.

The new Light Rail service is also generating developer interest in Randwick, although some of this is focussed on the Anzac Parade corridor.

The Precinct is also of interest to investors as it is well positioned between Airport and the Sydney CBD.

Investors are likely to continue to watch closely for opportunities that may present themselves in Randwick particularly any opportunity within the Randwick Racecourse.

BARRIERS TO ECONOMIC GROWTH

Based on discussions with Council and private sector experts the following barriers were identified:

Poor east-west public transport
The precinct is currently hard to get into and out of due to the limited road capacity and high frequency public transport options, limited to bus until the light rail is completed.

Housing affordability
There is a lack of affordable housing options for hospital employees, students and teachers, which is a disincentive to larger scale employment generating uses.

High land prices
High land prices results in low feasibility for commercial development.

Limited parking
The precinct is currently hard to get into and out of due to the limited number of public off-street parking spaces available.

Restrictive height controls and dominance of R2 zoning
The dominance of Low Density Residential (R2) of sites between the hospital precinct and UNSW limits the extent of employment generating uses that can be supported in the precinct.
Fragmentation of sites
There is a high degree of fragmented ownership in the centre.

Limited land available for additional development
Large scale commercial development in the precinct is unlikely due to fragmented land ownership, small floor plate potential and high land values.

ENABLERS
The following document a range of centre specific actions to address barriers referred to above. These focus on the role of State and local governments that may facilitate potential investments and promote business activity in each centre.

Creating priority east-west transport links
Much of the current student and employment base in the precinct travel east-west from surrounding suburbs in Sydney. The lack of high frequency cross-regional public transport places a great pressure on the road network and parking capacity.

Consider rezoning low residential density (R2) sites to mixed use
Consider rezoning the current low density residential areas between the hospital and the university to mixed use to enough more employment generating uses and better leverage the planned investment in the light rail.

State government commitment to integrated planning for the precinct
State government commitment to the policies contained with the previous Urban Activation Plan, which involved all the key precinct players, should continue.

Commitment to site consolidation
UNSW are a strong supporter of consolidating and redeveloping of the site between UNSW and the Prince of Wales Hospital.
Disclaimer

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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

Acknowledgements
# Acknowledgements
PRIVATE AND PUBLIC SECTOR ORGANISATIONS, BARRIERS AND POLICY LEVERS

## STAKEHOLDERS INTERVIEWED BY URBIS

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<thead>
<tr>
<th>NSW PCA</th>
<th>Alto Group</th>
<th>Sutherland Shire Council</th>
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<tr>
<td>Shopping Centre of Australia</td>
<td>Hays</td>
<td>Penrith City Council</td>
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<td>NSW Business Chambers</td>
<td>JLL</td>
<td>Bankstown City Council</td>
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<tr>
<td>Urban Taskforce</td>
<td>Colliers</td>
<td>Randwick City Council</td>
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<tr>
<td>Clubs NSW (for club view)</td>
<td>Asciano</td>
<td>Blacktown City Council</td>
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<td>Scentre (Westfield)</td>
<td>University of Western Sydney</td>
<td>Sydney Airport Corporation Limited (SACL)</td>
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<td>Mirvac</td>
<td>University of NSW</td>
<td>Sydney Port Corporation</td>
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<td>AMP</td>
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