

Keyhole Site

Horsley Drive, Horsley Park

Economic Impact Assessment

PREPARED FOR Frasers Property Australia

October 2023



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Executive Summary

Macroplan has been engaged by Frasers Property Group (i.e., applicant) to undertake an economic impact assessment (EIA) of a proposed rezoning of the 'Keyhole Site' Horsley Drive, Horsley Park, and its subsequent industrial development. This updates an assessment which was completed in 2021.

The proposal is to develop the 65.6-hectare site for industrial warehousing in two stages. Stage 1 has a total Industrial GFA of 204,620 m² to be developed by 2028, while Stage 2 will deliver an additional 111,200 m² by 2036. The total investment to develop the site and construct the buildings is estimated at \$549.1 million (in 2023 dollars).

Over the estimated 5-year construction period, the investment in the Stage 1 development will directly generate 151 FTE jobs per annum and indirectly generate an additional 203 FTE jobs per annum via suppliers to the project, industry input requirements and spending by workers in local businesses. A further 95 direct FTE jobs per annum and 129 indirect FTE jobs per annum have been estimated to be generated over the 5-year construction period for the Stage 2 development.

The longer-term benefit is the on-going operational jobs that the developed site will directly and indirectly support. It is estimated that the Keyhole site will directly support about 2,100 FTE jobs upon completion. In addition, the activity it generates for a range of other businesses will indirectly support an additional 1,760 jobs. This will generate significant benefits for workers, as well as increased economic activity that will support local businesses operating in the area.

That employment contribution also needs to be seen in context of Fairfield's projected growth over the next 20 years. Department of Planning and Environment (DPE) has its population projected to grow by 18% by 2041 which, with an aging population translates to a still substantial rise in its working population of about 9,200 or 13%. Fairfield has a significant industrial workforce which represents 41% of its total workforce as of 2021. While the industrial sectors share is expected to marginally decline, the Transport for NSW projections have the number of industrial jobs growing by 3,900 or 13% over the next 20 years. If that growth is to be accommodated, it is estimated that the stock of developed industrial land in Fairfield LGA will need to rise from its current 919 hectares by close to 160 hectares. It is apparent that there will be a large shortfall of suitable industrial land, as there is only 107 hectares of undeveloped industrial land remaining, of which a large proportion is not suitable for development due to a lack of infrastructure servicing.

The rezoning and development of the Keyhole site can play a significant role in filling that shortfall and ensuring that jobs are there for Fairfield's growing workforce. The benefit of local jobs is less need for long commutes to work, higher population and greater economic stimulus.

The development at the Keyhole site also has the potential to make a contribution to addressing the (well documented) significant shortfall of industrial land in the Sydney market.

For Fairfield Council, there is also a revenue benefit. The Keyhole site, if zoned and developed for industrial uses, will net an additional \$1.36 million per annum in rate revenues. With minimal additional costs to Council for servicing that industrial land, other ratepayers will benefit.

In short, the economic benefits of the rezoning and development of the Keyhole site are substantial.

In addition to examining the economic benefits, a social infrastructure needs assessment indicates that, given the scale and nature of the proposal, it will have a minimal impact on existing community and social facilities and that there is no requirement to provide for or contribute to new social infrastructure in the local area.

Section 1: Introduction

Macroplan has been commissioned by Frasers Property Group (i.e., the applicant) to undertake an economic impact assessment of a proposed rezoning of the 'Keyhole site' at Horsley Drive, Horsley Park (i.e., subject site). In particular, our assessment considers the employment generation potential arising from a future industrial warehousing estate on the subject site.

The application seeks to develop the subject site for a future industrial warehousing estate, encompassing associated office floorspace, car parking, vehicle unloading and loading areas, landscaping, and supporting infrastructure within the future estate.

The estate comprises a total of 315,840 m² of industrial floorspace, to be developed over 2 stages. The Stage 1 development comprises 204,620 m² of industrial floorspace over 9 lots, with an estimated completion in 2028. The Stage 2 development comprises 111,220 m² of industrial floorspace over 6 lots, with an estimated completion in 2036.

The capital investment value of the potential development is estimated to be \$336.3 million for the Stage 1 development and \$212.8 million for the Stage 2 development, totalling \$549.1 million for the entire development¹.

In this report, the focus is on the Fairfield LGA. We note that the development at the Keyhole site also has the potential to make a valuable contribution to addressing the (well documented) significant shortfall of industrial land in the Sydney market. That will be the subject of a separate report.

This report is structured as follows:

- **Section 2** identifies key business/industry trends which are expected to influence employment generation in Fairfield. It also looks at projected growth in Fairfield, implications for demand for industrial space and the adequacy of supply.
- **Section 3** examines the benefits of introducing new industrial warehousing estate on the subject site including direct and indirect jobs created.
- **Section 4** considers any other economic and community impacts as a result of development. This includes the positive impact on Fairfield revenues.
- **Section 5** provides an inventory of existing, socially oriented infrastructure, and assess the demand for community infrastructure in the area in the subject locality.
- **Section 6** concludes the assessment.
- **Section 7** comprises of appendices & references.

¹ Source: Frasers Property Group

1.1 Regional and Locational Context

Figures 1 to 2 illustrate the land's location and general layout (see location below).

Figure 1 Locality



Source: Metromap, Macroplan

The subject site is 65.6 ha in area and located adjoining The Horsley Drive, Redmayne Road and Chandos Road, approximately 1km from the slip road onto M7. It appears mainly used for extensive agriculture (i.e., grazing) and is also occupied by a few dwelling houses along with various outbuildings, and outdoor recreation facilities.

The area is zoned RU2 (Rural Landscape) under Fairfield LEP 2013. Under the regime of current planning controls this area is restricted to a minimum subdivision size of 10 hectares and permits a range of agricultural activities (including farming and market gardens) as well as a restricted range of commercial activities such as food and drink premises, function centres, registered clubs, and outdoor recreation facilities. The redevelopment potential of this area has been constrained due to the lack services and facilities (particularly sewer), undulating terrain and location within the Western Sydney Parklands.

The large lot size, visual exposure and excellent position on the regional road network provide an excellent location for general industrial, light industrial and warehouse and distribution centre land uses. The proposed land uses will complement the existing industrial uses contained in the nearby Smithfield-Wetherill Park Industrial Area.

Figure 2 Overall Master Plan & Development Schedule



DEVELOPMENT AREAS - STAGE 1	
TOTAL SITE AREA	415378 SQM
ACCESS ROAD 1	13340 SQM
ACCESS ROAD 2	11631 SQM
DEDICATION ZONE - REDMAYNE RD	587 SQM
DEDICATION ZONE - THE HORSLEY DR	6996 SQM
WATER COURSE	7565 SQM
ACCESS 1	2517 SQM
ACCESS 2	1484 SQM
NET DEVELOPABLE AREA	371258 SQM

DEVELOPMENT AREAS - STAGE 1			
	LOT AREA	GFA	EFFICIENCY
LOT 1	34593	20780	60.1 %
LOT 2	62575	36000	57.5 %
LOT 3	41499	24650	59.4 %
LOT 4	49784	29735	59.7 %
LOT 5	31284	16340	52.2 %
LOT 6	75955	34820	45.8 %
LOT 7	16734	7615	45.5 %
LOT 8	33641	21120	62.8 %
LOT 9	25193	13560	53.8 %
TOTAL	371258	204620	

SETBACKS	
BUILDING SETBACKS	LANDSCAPE SETBACKS
MIN 20m THE HORSLEY DRIVE	20m THE HORSLEY DRIVE (ALL OF WHICH TO BE LANDSCAPED)
MIN 20m CHANDOS RD	10m ALONG CHANDOS RD
MIN 10m REDMAYNE RD	10m ALONG REDMAYNE RD
MIN 10m TO NEW INTERNAL ROAD	10m TO NEW INTERNAL ROAD

DEVELOPMENT AREAS - STAGE 2	
TOTAL SITE AREA	241041 SQM
DEDICATION ZONE - REDMAYNE RD	407 SQM
DEDICATION ZONE - THE HORSLEY DR	3836 SQM
WATER COURSE	20631 SQM
NET DEVELOPABLE AREA	216167 SQM

DEVELOPMENT AREAS - STAGE 2			
	LOT AREA	GFA	EFFICIENCY
LOT 10	29368	13920	47.4 %
LOT 11	63237	32840	51.9 %
LOT 12	34268	19530	57.0 %
LOT 13	34062	16460	48.3 %
LOT 14	17273	7970	46.1 %
LOT 15	37959	20500	54.0 %
TOTAL	216167	111220	

*LOT 11 SITE AREA EXCLUDES WATERCOURSE (115 748 SQM)



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KEY HOLE SITE
HORSLEY DRIVE, HORSLEY PARK

MASTER PLAN

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↑	SCALE	1:1500 @ A1
	JOB	MP - HP - PS - 717
	DATE	25.06.23
	MP	B

Source: Frasers Property Group

1.2 Background

Fairfield Council has previously received representations from Frasers Group (i.e., the applicant), requesting Council canvas the re-zoning of the Keyhole lands for general industrial purposes in its submission to the draft District Plan.

Now, the applicant seeks consent to rezone the site from RU2 Rural Landscape to E4 General Industrial to facilitate an industrial estate comprising warehousing and logistics facilities. Macroplan understands that the development will subsequently involve clearing, bulk earthworks, and engineering works to facilitate a future industrial warehousing estate.

1.3 Scope of Work

Macroplan has assessed the value of construction and infrastructure associated with the potential development of a future industrial warehousing estate on the subject site (after a proposed rezoning), which will include:

- Assessing the potential economic benefit during development phase (i.e., direct, indirect, and induced employment generation and value-added estimation)
- Assessing the projected benefit of the potential development following completion of construction
 - Projections of total ongoing jobs created as a direct result of the development.
 - Projections of total full-time equivalents generated as an indirect and an induced result of the development.
- Considering any other economic/community benefits (e.g., more local spending from residents and workers, employment self-containment etc.)
- Providing an inventory of existing, socially oriented infrastructure, and assessing the demand for community infrastructure in the area in the subject locality.

1.4 Data and Information Sources

Our research draws on a wide range of information sources including: various planning and strategic documents (Local, State and Federal), NSW Department of Planning and Environment Projections, Department of Jobs and Small Business data, TPA Population & Employment Projections; Australian Bureau of Statistics - Australian National Accounts: Input-Output Tables (2020-21); Australian Bureau of Statistics – Census data (2016, 2021) and various latest statistics; and relevant experience throughout NSW and Australia, with particular reference to socio-economic profiles, industry trends, and recent property market trends in Western Sydney and Greater Sydney generally.

1.5 Limitations

The information in this report has been obtained from, and opinions herein are based on, sources believed to be reliable. Although great care has been taken to ensure accuracy and completeness in this report, macroplan has not independently verified and does not accept responsibility for its completeness and accuracy of the information on which its opinions and assumptions are based. Further, as the report involves future forecasts, it can be affected by a number of unforeseen variables. It represents for the party to whom or which it is addressed the best estimates of macroplan, but macroplan can give no assurance that any forecasts will be achieved.

Section 2: Employment Growth – past and future

In this section of the report, we review employment trends that have been observed in the Fairfield LGA, then look at projected growth and the implications for the supply of industrial land in Fairfield.

2.1 Historical Trends

As set out in Table 1 below, there were approximately 71,000 jobs in the Fairfield LGA as at 2021. The largest employing industries were 'Manufacturing' (about 11,100 jobs or 15.7% of total jobs), 'Retail Trade' (7,800 jobs or 11.0% of total jobs), 'Construction' (8,100 jobs or 11.4% of total jobs), 'Health Care and Social Assistance' (7,800 jobs or 11.0% of total jobs), 'Education and Training' (6,540 jobs or 9.2% of total jobs) and 'Transport, Postal and Warehousing' (5,800 jobs or 8.2% of total jobs).

In aggregate, the industrial sector – comprising manufacturing, construction, wholesale and transport/warehousing - accounted for approximately 29,000 jobs in the Fairfield LGA as at 2021, which (Table 2) equates to 40.8% of total employment in the area. This high share of industrial activity reflects the significance of the Fairfield LGA as a major industrial/logistics hub for Greater Sydney and distinguishes the industry profile for the Fairfield LGA from that of Greater Sydney, for which the industrial sector only accounts for 23.4% of employment.

Table 1 Number of Jobs by Industry, Fairfield LGA (ANZSIC Digit 1, Place of Work), 2021

Industry	Fairfield LGA
Agriculture, Forestry and Fishing	313
Manufacturing	11,114
Electricity, Gas, Water and Waste Services	475
Construction	8,084
Wholesale Trade	3,982
Retail Trade	7,809
Accommodation and Food Services	5,053
Transport, Postal and Warehousing	5,788
Information Media and Telecommunications	315
Financial and Insurance Services	851
Rental, Hiring and Real Estate Services	946
Professional, Scientific and Technical Services	2,535
Administrative and Support Services	2,551
Public Administration and Safety	2,677
Education and Training	6,540
Health Care and Social Assistance	7,785
Arts and Recreation Services	705
Other Services	3,379
Subtotal (Industrial)	28,968
Total	70,980

Source: TPA (TPZ22), macroplan

Table 2 Jobs Composition (%), Fairfield LGA & Greater Sydney (ANZSIC Digit 1, Place of Work), 2021

Industry	Fairfield LGA	Greater Sydney	% difference (compared to GS)
Manufacturing	15.7%	6.3%	9.3%
Electricity, Gas, Water and Waste Services	0.7%	1.0%	-0.3%
Construction	11.4%	9.0%	2.4%
Wholesale Trade	5.6%	2.9%	2.7%
Retail Trade	11.0%	9.9%	1.1%
Accommodation and Food Services	7.1%	6.8%	0.4%
Transport, Postal and Warehousing	8.2%	5.2%	3.0%
Information Media and Telecommunications	0.4%	1.9%	-1.4%
Financial and Insurance Services	1.2%	5.1%	-3.9%
Rental, Hiring and Real Estate Services	1.3%	1.7%	-0.4%
Professional, Scientific and Technical Services	3.6%	10.4%	-6.9%
Administrative and Support Services	3.6%	3.4%	0.2%
Public Administration and Safety	3.8%	5.8%	-2.1%
Education and Training	9.2%	8.4%	0.8%
Health Care and Social Assistance	11.0%	13.6%	-2.6%
Arts and Recreation Services	1.0%	1.8%	-0.8%
Other Services	4.8%	3.8%	1.0%
Subtotal (Industrial)	40.8%	23.4	17.4%
Total	100%	100%	-

Source: TPA (TPZ22), macroplan

Table 3 Number of Jobs by Industry, Fairfield LGA (ANZSIC Digit 1, Place of Work), 2016 & 2021

Industry	2016	2021	2016 – 2021 Change
Manufacturing	11,908	11,114	-794
Electricity, Gas, Water and Waste Services	462	475	13
Construction	7,282	8,084	802
Wholesale Trade	4,506	3,982	-524
Retail Trade	7,411	7,809	397
Accommodation and Food Services	4,963	5,053	90
Transport, Postal and Warehousing	5,521	5,788	267
Information Media and Telecommunications	347	315	-32
Financial and Insurance Services	737	851	114
Rental, Hiring and Real Estate Services	923	946	23
Professional, Scientific and Technical Services	2,088	2,535	447
Administrative and Support Services	2,418	2,551	133
Public Administration and Safety	2,251	2,677	426
Education and Training	5,660	6,540	880
Health Care and Social Assistance	6,747	7,785	1,038
Arts and Recreation Services	644	705	61
Other Services	3,242	3,379	137
Subtotal (Industrial)	29,218	28,968	-250
Total	67,472	70,980	3,508

Source: TPA (TPZ16 & TPZ19), macroplan

2.2 Historical Trends and Industrial Jobs

During the 2016 to 2021 period, the Fairfield LGA experienced an employment increase of just over 3,500 jobs. As has been the trend more broadly (Table 3), Health, Education and Professional, Scientific and Technical Services have been major sources of growth.

Over the same period, there was a slight decline in the number of industrial jobs. This reflected a decline in manufacturing and wholesale trade largely offset by growth in construction and transport/warehousing.

The past declines in manufacturing jobs reflect a combination of factors. In part, it reflects the tail end of what has been a long-term structural adjustment of the sector in response to the withdrawal of industry assistance in about 1990 and to broad global trends. This has seen significant parts of manufacturing shifting offshore. Importantly, the sectors of manufacturing that remain are generally well able to compete with imports and this has seen the sector stabilise and shows signs of growth. The disruption to global supply chains wrought by COVID-19 and other global factors has also favoured local production. These more recent positive signs are factored into the Transport for NSW projections which have growth in the sector in the period ahead (see below). Another factor is the productivity growth achieved in manufacturing which typically runs well ahead of the service sectors such as health. In terms of industrial space, those labour productivity gains partly reflect increased capital intensity which also leads to larger amounts of floorspace per worker.

While manufacturing has experienced decline, the transport and warehousing (logistics) sector – which has handled the growth in import volumes - has experienced significant growth. In this sector, productivity gains (eg increased automation in goods handling) are also a significant factor tending to lead to larger amounts of floorspace per worker.

From the perspective of Fairfield, the other global trend has been for the industrial sector to shift out of inner-city locations, to locations with greater access to major arterial road networks. This has, for example, seen manufacturing consolidate in areas of Sydney such as Fairfield and also seen logistics drawn to it.

2.3 Population and Employment Projections

Fairfield LGA is a relatively established area but nonetheless has seen its population grow by 12% over the period 2001-21 and the latest projections by DPE (Table 4) has its population projected to grow at a greater rate of 18% over the next 20 years from 2021 to 2041. In terms of its working age population, that higher growth will be partly offset by an ageing of the population but nonetheless, over the period 2021 to 2041 the working age population (i.e., 16-64) of Fairfield LGA is expected to increase by 12,800 people or 9% and, with an increase in the participation rate (including older workers), the workforce is projected to increase by a substantial 9,200 workers (13%).

Table 4 Population, working age population and projected workforce, Fairfield LGA

	2001	2011	2021	2031	2041	2001-21	2021-41	Growth 21-41 (%)
Population	187,900	196,500	210,900	222,500	247,900	23,000	37,000	18%
Working Age Population (16-64)	127,800	134,100	138,600	138,900	151,400	10,800	12,800	9%
Workforce	65,900	69,400	72,100	74,300	81,300	6,200	9,200	13%

Source: TPA (TPZ22), DPE, macroplan

Transport for NSW (TPZ22) employment projections – which are aligned with the DPE projections - have the number of jobs within the Fairfield LGA projected to increase from about 71,000 jobs in 2021 to 80,800 jobs in 2041, representing an increase of almost 10,000 jobs. This would broadly match the projected workforce growth.

By sector, consistent with recent trends broadly across Sydney (and Australia) employment growth will be highest in Health Care (about 3,300 additional jobs). However, significantly from the perspective of industrial land supply, the TPZ22 projections have an increase of about 3,900 jobs in the industrial sector.

Table 5 Employment Projections by Industry, Fairfield LGA (ANZSIC Digit 1, Place of Work), 2021-2041

Industry	2021	2026	2031	2036	2041
Agriculture, Forestry and Fishing	313	310	388	448	514
Mining	78	83	86	85	81
Manufacturing	11,114	10,557	11,430	12,176	12,799
Electricity, Gas, Water and Waste Services	475	515	494	498	457
Construction	8,084	8,407	8,301	8,811	9,190
Wholesale Trade	3,982	4,129	4,198	4,358	4,495
Retail Trade	7,809	8,398	8,528	8,797	8,858
Accommodation and Food Services	5,053	4,702	4,704	4,901	4,949
Transport, Postal and Warehousing	5,788	6,226	6,297	6,339	6,402
Information Media and Telecommunications	315	286	257	257	242
Financial and Insurance Services	851	880	824	840	817
Rental, Hiring and Real Estate Services	946	984	936	934	893
Professional, Scientific and Technical Services	2,535	2,800	2,740	2,747	2,662
Administrative and Support Services	2,551	2,593	2,544	2,592	2,565
Public Administration and Safety	2,677	2,857	2,716	2,660	2,506
Education and Training	6,540	7,088	6,930	7,390	7,678
Health Care and Social Assistance	7,785	8,712	9,180	10,069	11,118
Arts and Recreation Services	705	743	669	690	663
Other Services	3,379	3,634	3,613	3,815	3,940
Subtotal (Industrial)	28,968	29,319	30,226	31,684	32,887
Total	70,980	73,905	74,835	78,407	80,831

Source: TPA (TPZ22), macroplan

The Transport for NSW projections are premised on supply – including supply of industrial land - accommodating that growth. Assuming an average employment density of 5 FTE jobs per 1,000 m² GFA (i.e., 200m² per employee) in industrial sectors, the Fairfield LGA will require the provision of an additional 783,000 m² GFA of industrial floorspace between 2021 and 2041. At a plot ratio of 0.5, there will be a demand for about 157 hectares of industrial-zoned land by 2041.

Based on the latest Employment Lands Development Monitor (ELDM), as of January 2022, there are 1,026 hectares of employment zoned land in the Fairfield LGA. Of this, approximately 919 hectares or more than 89.6% was developed and in use, and 107 hectares or 10.4% was undeveloped. Of the 107 hectares of zoned and undeveloped employment land in the Fairfield LGA, approximately 19 hectares is serviced, and the remaining 87 hectares is un-serviced (i.e. does not have access to water / other utilities infrastructure).

When comparing it with the potential demand for 157 hectares, it also needs to be noted that not all that undeveloped land may prove suitable to meet industry needs due to a variety of reasons which includes but is not

limited to lot size, road network access and planning constraints. However, even if all was suitable for development, it will fall well short of meeting the demand projected by Transport for NSW.

On this basis, there appears to be an immediate shortage of industrial land supply in the Fairfield LGA in the short to long term.

Table 6 Employment Projections by Industry, Fairfield LGA (ANZSIC Digit 1, Place of Work), 2021-2041

	2021-26	2026-31	2031-36	2036-41	Total
Additional industrial workers	351	907	1,458	1,203	3,919
Total additional demand for industrial space (m ²)	70,202	181,404	291,558	240,641	783,804

Source: TPA (TPZ22), macroplan

2.4 Summary

The Fairfield LGA is set to grow in population. It has the potential to continue to grow its employment base to accommodate the growth in its workforce but this will require the delivery of additional employment space. Horsley Park (and the subject site) is well-placed to respond to this need. Hence, the rezoning of the subject site (and its subsequent industrial development) would assist in providing new employment opportunities.

The proposal includes the rezoning of 65.6 ha of land from RU2 Rural Landscape to a business industrial zone (i.e., employment zone) to facilitate an industrial estate comprising warehousing and logistics facilities, which potentially could provide 315,840 m² of industrial GLA. The proposed development would therefore contribute to providing an adequate provision of floorspace to absorb employment growth for the Fairfield LGA.

Moreover, it will make a valuable contribution to addressing the (well documented) significant shortfall of industrial land in the Sydney market.

Section 3: Employment Generation

In this section of our report, a high-level economic impact assessment has been undertaken in relation to the proposed development, which analyses the proposed development's potential role in contributing to the employment future of the Fairfield LGA and Western Sydney generally by assessing the following key economic indicators:

- Construction Employment & Output;
- Operational Employment & Output; and
- Wider economic benefits.

In order to quantify potential economic impacts from the construction of the project, ABS Input-Output (I-O) tables are used as a basis for calculating the impacts of initial capital expenditure upon local and wider economy in the construction sector both directly and indirectly.

To quantify post-construction / operational phase economic impacts upon project completion, assumptions regarding employment densities are applied as well as ABS I-O multipliers.

There are also a range impacts which cannot be quantified. In this case, a qualitative approach is conducted to assess the impacts potentially generated by the project on the wider economy.

3.1 Construction Phase

3.1.1 Construction Output

The initial construction investment of approximately **\$336.3 million** for the **Stage 1 development** and **\$212.8** for the **Stage 2 development** (totalling **\$549.1 million** initial construction investment) will translate into a first round of benefits, realised as increased construction output and employment during the construction phase.

Output multipliers derived from the ABS Input-Output tables are used for estimating potential economic output of the proposed development within the construction sector. Output multipliers indicate every \$1 of construction investment is likely to generate another approximately \$1.3 production induced indirect economic output during the construction phase.

The production induced impacts include the amount of output required within other industries throughout the economy to support the initial construction investment. This may include the following:

- Manufacturing (e.g. building material manufacturing),
- Professional, scientific and technical services (e.g. professional / technical services in planning, design and other services),
- Financial and insurance services (e.g. project financing services),
- Transport, postal and warehousing (e.g. storing and transporting building materials),
- Wholesale trade (e.g. building materials trade),
- Rental, hiring and real estate services,
- Administrative and support services (e.g. government / Council's support services, development assessment and approvals), and
- Other industries.

Based on output multipliers, the initial construction investment of \$336.4 million for the **Stage 1 Development** at the site is likely to generate an additional \$408.5 million indirect construction output elsewhere in the wider

economy, totalling \$744.9 million construction output (including direct and indirect) to the economy during the construction phase.

Furthermore, the initial construction investment of \$212.8 million for the **Stage 2 Development** at the site is likely to generate an additional \$258.4 million indirect construction output elsewhere in the wider economy, totalling \$372.4 million construction output (including direct and indirect) to the economy during the construction phase.

Table 7 Estimated Construction Output

	Direct Output	Indirect Output	Total Output
Stage 1	\$336.4 M	\$408.5 M	\$744.9 M
Stage 2	\$212.8 M	\$258.4 M	\$372.4 M
Total	\$549.2 M	\$666.9 M	\$1,216.1 M

Source: ABS, Frasers Property, Macropian

3.1.2 Construction Employment

The construction of the proposed facility will also create a significant number of onsite and supporting employment during the construction phase.

Employment multipliers from the ABS Input-Output tables are used for estimating potential employment effects of the proposed facility during construction phase. Employment multipliers for the construction sector indicate an initial impact at approximately 2.3 construction jobs created per \$1 million of investment; plus another 3.2 production induced indirect jobs elsewhere in the economy during the construction phase. All jobs reported in the ABS I-O tables are measured as full-time equivalent (FTE).

The production induced indirect employment involves the additional jobs generated in other industries throughout the economy in order to support the initial construction investment and all the subsequent induced economic growth. This may include manufacturing, professional, scientific and technical services, transport, postal and warehousing, administrative and support services, wholesale trade, retail trade, financial and insurance services, and others.

Based on employment multipliers, the proposed **Stage 1 development** is expected generate approximately 151 direct construction FTE jobs per annum on site and an additional 203 indirect FTE jobs per annum elsewhere in the economy, totalling **354 construction related FTE jobs** per annum over a 5-year construction phase.

Furthermore, the proposed **Stage 2 development** is expected generate approximately 95 direct construction FTE jobs per annum on site and an additional 129 indirect FTE jobs per annum elsewhere in the economy, totalling **224 construction related FTE jobs** per annum over a 5-year construction phase.

Table 8 Estimated Construction Employment

	Direct Employment	Indirect Employment	Total Employment
Stage 1	151	203	354
Stage 2	95	129	224
Total	246	332	578

Source: ABS, Frasers Property, Macropian

3.2 Operational Phase

3.2.1 Direct Employment

The potential development of the subject site as a future industrial warehousing estate will result in additional on-going employment on site, as well as further jobs throughout the supply chain, including those in industries servicing the future tenants at the site, such as transport workers, wholesalers, and the likes.

The following average employment densities are assumed for each of the uses:

- Warehouse / Light Industrial: 1 FTE job per 150 sqm NLA;

Using this assumption, the total direct on-site employment generated during the operational phase is estimated at approximately 1,364 FTE jobs for the **Stage 1 development** and approximately 741 FTE jobs for the **Stage 2 development**.

The direct operational employment generated on-site will also flow through the economy, realised as indirect employment growth elsewhere in the economy supporting onsite employment. The ABS I-O simple employment multipliers indicate the following:

- Every 1 direct warehouse FTE job, which is categorised as Transport, Postal and Warehousing industry, will generate an additional 0.8 indirect supporting FTE jobs elsewhere in the economy, including professional, scientific and technical services, transport, postal and warehousing, rental, hiring and real estate services, administrative and support services, manufacturing, and other industries.

Based on simple multipliers, the total direct and indirect employment generated during operational phase is estimated at approximately 2,505 FTE jobs for the **Stage 1 development** and approximately 1,362 FTE jobs for the **Stage 2 development**, totalling 3,867 FTE jobs of total employment upon completion.

Table 9 Estimated Employment Generation

Land uses	Direct Employment	Indirect Employment	Total Employment
Stage 1	1,364	1,141	2,505
Stage 2	741	620	1,362
Total	2,105	1,761	3,867

Source: ABS, Frasers Property, ABS

As previously observed, the subject site is undeveloped and vacant. There is presently no employment generation at the subject site. If the development does not proceed, the site would be severely underutilized in terms of employment, as it is currently houses a golf driving range and would not provide employment opportunities for the industrial sector which is currently experiencing significant levels of demand.

3.2.2 Operational Output

The operation of the proposed development represents an ongoing generator of economic output, and the extent of this output has been captured in this analysis. Output multipliers from the ABS Input-Output tables have been used to estimate the potential ongoing economic output of the proposed facility during the operational phase. Output multipliers sourced from the ABS indicate the following:

- Warehouse: An initial direct output of \$1 million per 3.1 direct FTE employees, and an indirect output multiplier of 0.9 per \$1 million of direct output.

For the proposed **Stage 1 development**, these multipliers indicate an ongoing total direct output of \$444.4 million, with a total ongoing estimated output of \$843.5 million.

For the proposed **Stage 2 development**, these multipliers indicate an ongoing total direct output of \$241.6 million, with a total ongoing estimated output of \$458.5 million.

Therefore, the overall development will generate an ongoing total direct output of **\$686.0 million** and a total ongoing estimated output of approximately **\$1,302.0 million**.

Table 10 Estimated Operational Output

	Direct	Indirect	Induced
Stage 1	\$444.4 M	\$399.1 M	\$843.5 M
Stage 2	\$241.6 M	\$216.9 M	\$458.5 M
Total	\$686.0 M	\$616.0 M	\$1,302.0 M

Source: ABS, macroplan

Section 4: Other Considerations

In this section of the report we consider other economic and community impacts that are achievable because of the proposed rezoning (and subsequent development). This includes an assessment of the revenue benefit to the Fairfield Council.

4.1 Employment Containment & Self-sufficiency

Employment containment refers to the proportion of residents who are employed within the LGA in which they reside, to the total number of workers in the area. A high self-containment implies there are many jobs in an area which employ local people – evidence of a strong employment base. As of the 2021 Census, the Fairfield LGA currently achieves an employment self-containment level of 31.9%, noting that a high proportion of local residents travel to work outside of the Fairfield LGA.

Employment self-sufficiency refers to the proportion of workers who live within the same municipality in which they are employed. A high employment self-sufficiency implies that workers employed in an area are able to afford to live in the same municipality. As of the 2021 Census, the Fairfield LGA currently achieves a relatively high employment self-sufficiency level of 35.1%.

While it is the case that large numbers commute outside the LGA for work, nonetheless the substantial employment base in Fairfield does mean that (compared with other LGAs). One of the benefits of working locally is the time and cost saved in travelling to work. The savings to individuals can be a significant benefit.

If the proposed rezoning is not allowed, there will be lower levels of employment growth arising from the potential industrial development and its operation. The effect of lower levels of job creation will result in lower employment self-containment rates in the Fairfield LGA.

Table 11 **Employment containment and self-sufficiency, Fairfield LGA**

Total employed workers	
Resident Workers	63,831
Local Workers	58,067
Local Resident Workers	20,357
Containment rate*	31.9%
Self-sufficiency rate**	35.1%

Source: ABS, macropian

*Refers to the number of resident workers employed in Fairfield (local resident workers) divided by the Fairfield resident workforce (resident workers)

**Refers to the number of local resident workers divided by the total number of workers employed in Fairfield (local workers).

4.2 Additional Council rates

This section assesses the potential for industrial and commercial uses on the subject site to lift the revenue stream of the Fairfield Council, to the benefit of existing ratepayers.

At present, the land is zoned rural landscape. Based on the combined land values for existing lots within the 65.6-hectare subject site, the site has an estimated unimproved land value of about \$289 million². It is noted that lands zoned for rural purposes will typically have a lower Council rate compared to those zoned for residential and business purposes. As such, If the land is zoned for business and redeveloped as proposed, the Fairfield Council will benefit significantly through increased monies for rates and charges.

Based on the Fairfield City 'Rate Calculator' the relevant rate for the subject site (based on its existing value) is estimated at \$313,000 for 2022/23 based on an unimproved land value of about \$289 million. Correspondingly, based on industrial sites in Wetherill Park, the proposed development could potentially lift the subject sites unimproved land value to around \$623 million. This would lift the annual rates payable to around \$1.67 million as per the Fairfield City 'Rate Calculator' for 2022/23 (see Table 10).

At the margin the Council will be incurring some additional expenses in serving this new industrial area, but this will be well short of the additional revenues generated, so that the Council will have additional free funds available to either increase services to the broader Fairfield community or reduce rates applying to all properties – either way, other ratepayers will be the beneficiaries.

Table 12 Rate structure comparison, rural land (existing) versus business land (potential), 2022/23

	Rural Landscape	Business/Industrial
Land value (\$/m²)	\$440	\$950
Subject site area	656,000	656,000
Subject site land value	\$289 M	\$623 M
Adopted rate (2022/23)	\$313,000	\$1.67 M

Source: Fairfield Council, Valuer General NSW, macroplan

² Valuer General NSW unimproved land values for property lots located within subject site boundary as of July 2022.

Section 5: Social Assessment

This section provides an inventory of existing, socially oriented infrastructure in the subject locality. The following facilities have been considered and addressed:

Primary Schools	Secondary Schools	Tertiary: University and TAFE
Community Health Centre	GP medical Centre	Children's Health Services
Hospital	Aged Care	Youth Centres
Childcare facility	After school care facility	Library
Performing Arts / Cultural Centre	Ambulance services	Police services
Local community Centre	Open space and recreation	Swimming pool

The inventory was developed through desktop analysis of the locality. Appendices of this assessment (i.e., Section 7.2) outlines the inventory in both table and map format.

In preparing the inventory, a 'catchment area' with a radius of 2km from the subject site was used. This was thought to be more appropriate given the characteristics of the area. This has been used to determine the current social infrastructure provision and the potential future needs.

Catchment Characteristics

- 2km radius
- Immediate area is primarily Smithfield-Wetherill Park Industrial Area
- Remainder of catchment area is residential i.e., part of Bossley Park.

5.1 Community Infrastructure Approaches

This section provides a theoretical and practical framework to help guide the development of community infrastructure.

In particular, the section discusses:

- Current emerging trends in community infrastructure
- Best-practice examples
- Principles
- Standards of provision

Community infrastructure refers to the civil infrastructure, public domain and physical facilities that support the built environment and benefit the immediate and incoming population as well as the wider population that could be expected to visit an area.

There are various approaches to community infrastructure planning and provision, these include:

- A hierarchical approach (using a regional, local, and state framework) – which allow provision to key market/community catchments; and
- An integrated approach which seeks to combine different facilities, leveraging the benefits and synergies of all uses.

The current study adopts a hierarchical approach recognising the benefits of community infrastructure hierarchy.

Community Infrastructure Principles

Our assessment has regard for benchmark provisions across other Sydney-based urban renewal precincts. A set of principles have been developed to help guide the development of community infrastructure.

These include:

- Hierarchy of facilities/settings: Regional, district and local facilities each perform a different role. As such, sizing and features will differ by the population of the community.
- Hubbing/co-location: Combining facilities helps to leverage the benefits of each, improving activation, product offering and financial viability of provision.
- Multi use: These facilities are dynamic, making them more responsive to the needs and aspirations of the community.
- Flexibility (change function over time): Changing community expectations requires facilities to be flexible and adaptable. Facilities that are responsive will be used more intensively over their lifetime.
- Targeted to local needs/demands: Every community is different and changes over time. Understanding and responding to the unique and individual circumstances of the community increases the appeal of community infrastructure.
- Activity generators (day/night)/active programming: Social and community infrastructure are places of action and activity. These include both passive and active forms of recreation and leisure. People are increasingly attracted to places where they can be active and experience new things and infrastructure that meets these needs will be used more intensively.
- Access (disability access and transport): Providing easy access to facilities (through both better disabled access and transport) helps to ensure that a wider range of people are attracted to and able to visit the facilities.
- Visibility (highly visible location): Visible facilities are more likely to be used and are better able to compete with other forms of leisure, recreation, and social infrastructure.
- Safety/security (passive surveillance): The community expects that they and their children will be safe in their own facilities. Ensuring that this is the case (and perceived to be) will maximise the possibility that these facilities are used effectively and efficiently.
- Avoid duplication: Minimising duplication will ensure that resources are utilised effectively, and that each facility is unique thereby offering a better and attractive product and service to the community.
- Contributions to health, wellbeing, and capacity: Social/community infrastructure fulfils a critically important role in serving the needs and aspirations of the community. Health and well-being are two basic needs. Maximising 'capacity' (or the potential of each person and the community as a whole) will ensure that everyone can be the best they can be.
- Promotion of social equity: A rapidly changing economy and society has meant that the gulf between people and communities has widened in recent years. Social/community infrastructure plays an important role in bridging this gap through a variety of means including through the establishment of networks and collaborative activity, decreasing isolation, and promoting skills and education (through for example the use of the Internet and other technologies which helps to reduce the digital divide).
- Seek sustainable approaches to management, funding, and maintenance (capital and operating) e.g., whole of life costs: Facilities that are sustainable in the long term are more likely to remain as key community assets and provide a better community service.

- Create local competitive advantage, uniqueness, and identity: Reflecting and serving the local community is important in an age where competitive advantage, uniqueness and identity are increasingly found in local things and where regions and areas compete globally for knowledge, resources, and workers. Dynamic and responsive community/social infrastructure can help set a local community apart and provide new opportunities at a state, national and international level.

5.2 Social Infrastructure Demand

To assess the demand for community infrastructure in the area we have considered a range of community infrastructure standards that take into consideration:

- Community infrastructure standards from a range of inner urban projects and the councils in which they are situated, as well as standards developed by the Growth Centres Council (October 2006). The standards relate a range of community infrastructure facilities.
- Estimates of current supply of community/social infrastructure within a 2km catchment area.
- Previous lessons and experience in community infrastructure.

It is noted that the demand/supply balance uses different catchments (with the supply catchment covering a larger area). Hence, care must be taken in interpreting the results as the number of facilities provided by the economic model (the balance between supply and demand) must consider possible usage and travel patterns (which will be determined in part by distance and the nature of the facility). For example, some employees may consider facilities 5km too far. Hence, this may require a smaller facility closer to a local population. This is most evident in the provision of public open space where a small neighbourhood park can meet local needs within a 500m radius, while a regional park will attract users from larger distances.

The table below outlines the specific number of community facilities that would be required to cater to the future employment generated by the proposed rezoning. It also highlights the community infrastructure requirements as determined by simple provision ratios.

Our assessment has revealed that there is no need for additional facilities within the catchment to cater for the future employment needs arising from the proposal. Our findings are discussed further in Section 7.2 (Appendices).

Item/Space/Facility	Urban Renewal Benchmarks*	Comments
Local Government – Open Space & Recreation		
Local open space	2ha: 10,000 persons	Long-term local open space accepted standard Includes passive & active areas
Local parks	1: 3,000 households (Parks and Leisure Australia & SOPA 2008 Facilities Strategy)	For residential areas, all households within 400 metres/5-min' walk to open space. Varied embellishment – court style, seating, active & passive
Playing fields	1: 4,500 households (City of Sydney urban areas) <u>or</u> 1: 10,000 persons (GCC greenfield standard)	Contribution to existing Council facilities if justified. District wide provision to be considered
Indoor sports court	1: 20,000 population (City of Sydney urban areas) <u>or</u> 1: 10,000 persons (GCC greenfield local standard)	Contribution to existing/proposed Council facilities if justified
Indoor swimming pool	1: 50,000-100,000 population (City of Sydney urban areas) <u>or</u> 1: 100,000 population (GCC district standard)	To be considered within a District wide context
Integrated multipurpose facilities	1: 20,000-30,000 population (City of Sydney urban areas)	2,000-2,500m ² per facility, increasing with catchment's population growth. Possible contribution to existing/proposed Council facilities if justified
Local Government – Community Centres and Libraries		
Library (Substantial branch library)	1: 20,000-30,000 population (NSW State Library standards) <u>or</u> , sliding scale m ² /population: - 58m ² /1,000 – up to 20,000p - 39m ² /1,000 – 20,000-35,000 - 35m ² /1,000 – 35,000-65,000 - 31m ² /1,000 – 65,000-100,000 - - 28m ² /1,000 – 100,000+ person	To be considered within district wide context.
Local community centre / multi-purpose facility	1: 20,000-50,000 persons (for large centre, GHD benchmark study) <u>or</u> 3-4: 20,000-30,000 persons (for meeting spaces /activity provisions – based on City of Sydney urban areas standard)	Possible contribution to existing/proposed Council facilities if justified.
Youth facility/centre	1: 20,000 young people	Possible contribution to existing/proposed Council facilities if justified
Cultural space / centre	1: 20,000-50,000 persons (district provision)	Possible contribution to existing/proposed Council facilities if justified.
Local Government – Care		

Childcare	1 place: 2 children aged 0-4 years. (City of Sydney & Sydney Olympic park standard) 1 place: every 75 workers (City of Sydney & Sydney Olympic park standard) OOSH - 1:5 children / 5-11 years	Realistic assumption that service will be required/provided although benchmark standards vary substantially across LGAs. 29-44 places (on average) per centre Typically provided by market per demand Need to consider current local supply/demand situation.
State Government - Education		
Primary schools	1: 500 students (City of Sydney urban areas) 1: 2,000-2,500 dwellings (Sydney Olympic Park standard) 1: 1,500 dwellings (GCC greenfield standard)	Provision in accordance with DET's <i>Planning New Schools, School Safety & Urban Planning Advisory Guidelines</i> 3ha minimum requirement (greenfield standard) 2.3ha if joint use Lesser area required in built-up areas – dependent on land availability and density of site development
Secondary schools	1: 1,200 students (City of Sydney urban areas) 1: 6,000-7,500 dwellings (Sydney Olympic Park standard) 1: 4,500 dwellings (GCC greenfield standard)	Provision in accordance with DET's <i>Planning New Schools, School Safety & Urban Planning Advisory Guidelines</i> 6-10ha minimum requirement (greenfield standard) Lesser area required in built-up areas. Need to consider existing school capacity and/or potential to amalgamate boys/girls or as K-12 provision
TAFE	1: 300,000-500,000 population (City of Sydney urban areas)	Note existence of current TAFE facilities in Wetherill Park – additional provision not required
University	1: 150,000 population (City of Sydney urban areas)	Note existence of Western Sydney University & University of Wollongong - additional provision not required
State Government – Health and Care		
Before and after school care	1: 25 children (5-12 years) (City of Sydney urban areas) <u>or</u> 1: 5 children aged 5-11 years. (GHD benchmark study)	Typically provided by market according to demand
Hospitals	2 beds: 1,000 population (GCC greenfield standard)	Note existence of existing public and private facilities within wider catchment area
Community health centre (primary healthcare, including mental health)	1: 50,000 population (City of Sydney urban areas) 1: 60,000 population (GCC greenfield standard)	Existing facilities within wider catchment area - additional provision not required
GP medical centres	1 (GP): 4,000 population (City of Sydney urban areas)	Typically provided by market per demand
Children's health services	1 nurse: 2,000 children (City of Sydney urban areas)	No specific provision identified
Aged care	88 places: 1,000 (70+ years)	Typically provided by market per demand

	(City of Sydney urban areas) <u>or</u> 40 beds: 1,000 (70+ years) (GCC greenfield standard)	Need to consider existing supply / demand provision
State Government – Emergency Services		
Ambulance services	1 (Station): 105,000 population (City of Sydney urban areas)	Note existence of existing facilities Cnr Cowpasture Rd & Gloucester Rd.
Fire services	1 (Station): 60,000 population (City of Sydney urban areas)	Note existence of existing facilities within the wider catchment area.
Police	1 (Station): 108,000 population (City of Sydney urban areas)	Note existence of existing facilities within the wider catchment area.
<p><i>* All benchmarks subject to discussion/clarification with relevant responsible authorities/agencies. Benchmarks sourced from current literature/studies, including:</i></p> <ul style="list-style-type: none"> <i>- GHD, Parramatta Road Urban Transformation Strategy Social Infrastructure Analysis Report, Vol 1, November 2016</i> <i>- Growth Centres Commission, North West & South West Growth Centres Development Control Plans</i> <i>- Various Studies and Section 94 Plans for City of Sydney (Green Square); Sydney Olympic Park; Rhodes Precinct: Wolli Creek; Ashmore Precinct and Parramatta CBD</i> 		

Section 6: Conclusion

This report has provided a social and economic assessment of the proposed rezoning and development of the 'Keyhole site' at Horsley Drive, Horsley Park.

The proposal to outlay \$550 million for the development of the site is a significant commitment by the proponent.

The economic benefits it will deliver are significant and this can be seen most clearly in the employment that will be generated.

In the Stage 1 construction phase it will generate 151 direct FTE jobs per annum, and a total of 354 FTE jobs per annum when the indirect impacts are added in. In the Stage 2 construction phase, a further 95 direct FTE jobs per annum will be generated, for a total of 224 FTE jobs per annum including indirect employment. More importantly, as the development is completed and moved into the operational phase, it will directly generate 2,105 FTE jobs and, including indirect jobs, it will account for a total of 3,867 jobs.

For Fairfield LGA, its industrial workforce is projected to grow by 13% over the next 20 years but that will not be achievable with the current stock of industrial land which even with more modest growth will find itself in a shortfall. The proposed development will make a meaningful contribution to addressing that potential shortfall and removing that constraint on jobs in Fairfield.

For the workforce living in Fairfield LGA, the economic benefit of a significant base of local jobs is that the opportunity to both live and work locally is enhanced, with savings in terms of commuting costs, including time.

For Fairfield Council, there is also a revenue benefit to more jobs being based in the LGA. The Keyhole site, if developed for industrial uses, will net an additional \$1.36 million per annum in rate revenues. At the same time the development is expected to have a minimal impact on existing community and social infrastructure in the local area.

In short, the economic benefits of the rezoning and development of the Keyhole site are substantial.

Section 7: Appendices

7.1 Definition of Employment Land

Employment lands are areas zoned for industrial or similar purposes in planning instruments. They are generally lower density employment areas, and provide the essential space for the delivery of:

- Utilities and urban services, including depots, repair trades and service centres, and
- Goods including the research, design and manufacturing of goods through to their warehousing, distribution and sale.

In May 2021, the Department of Planning and Environment proposed that the existing Business (B) and Industrial (IN) zones be replaced with five employment zones and three supporting zones under Standard Instrument (Local Environmental Plans) Order 2006 (SI LEP Order). The new employment zones commenced in April 2023 and are being implemented within Council LEPs in three packages over the following months.

Based on the DPE's 'Equivalent Zones Tables' per Fairfield LEP 2013, the relevant land use zones assessed in the assessment are E3 Productivity Support (previously identified as B5 Business Development and B6 Enterprise Corridor) and E4 General Industrial (previously identified as IN1 General Industrial, IN2 Light Industrial and B5 Business Development)

7.2 IVA Calculation Methodology

The Australian Bureau of Statistics (ABS) constructs estimates of Industry Value Added (IVA) and Gross Regional Product (GRP) for each of the States, but not at a regional or LGA level. There is insufficient data at the regional or LGA level for the ABS to assert a degree of confidence around IVA/GRP estimates, suggesting that estimates of IVA/GRP at the LGA or suburb level need to be treated with some caution.

With that qualification, the Office of the Chief Economist of Department of Industry, Innovation and Science (OCE) published provisional estimates of regional GRP for 2014/15. The methodology used by the OCE is set out broad terms in its 2016 Report. It uses partial data, relative employee compensation (vs Labour Value Added Capital Value Added for State industries) in most instances, to determine ratios and a region's share of State IVA. The methodology is reasonable and defensible but (as the OCE would agree) the results need to be treated with caution.

This report has adopted the OCE methodology, to generate 'estimates' of output by regions in Australia, in this case for the proposed industrial warehousing estate. Taking the estimates of floorspace by industry, we use standard measures of space per worker to derive a potential workforce if the floorspace were fully utilised.

Total factor income measures the total income generated by the production of economic goods and services. In the case of labour this means income from wages, while income from land is rents and income from business is profits. Total factor income by industry looks at the total income generated by an industry. To calculate the Industry Value Added (IVA) by industry, the total factor income per worker by industry for NSW is applied to the number of workers per industry to generate an estimate of total factor income for each industry. Total factor income incorporates income generated from capital (profit) – the methodology incorporates the assumption of the NSW capital/labour ratio for each industry. The aggregate of income (wages) and capital (profit) from each industry is an estimate of industry value added.

The estimates of IVA generate an estimate of gross regional product (GRP) for this small area, i.e., the subject site at Horsley Park, a monetary measure of the market value of all final goods and services produced in a region.

7.3 Current Supply and Opportunity Assessment

This section discusses the required social infrastructure arising from the future industrial development on the subject site in Horsley Park.

Methodology

The requirement for additional social infrastructure has been based on an economic model which seeks to understand the balance between:

- Demand/population projections (using specific groups where required, for example 70+ or children aged 0-4) in the catchment area and.
- Audits of current supply of community /social infrastructure within a 2km catchment.

In addition, a range of other qualitative and quantitative factors are utilised to understand the nature, type, and product requirement for social/community infrastructure.

Our assessment has revealed that there is no need for additional facilities within the catchment to cater for the future employment needs arising from the proposal:

Scope of Community/Supply Facility

The following facilities (consistent with the Urban Renewal Benchmarks³) have been considered and assessed:

- | | |
|---------------------------------|-----------------------------------|
| • Primary Schools | • Childcare facility |
| • Secondary Schools | • After school care facility |
| • Tertiary: University and TAFE | • Performing Arts/Cultural Centre |
| • Community Health Centre | • Ambulance services |
| • GP medical centre | • Fire services |
| • Children's Health Services | • Police services |
| • Hospital | • Local Community Centre |
| • Aged Care | • Open Space and Recreation |
| • Youth Centres | • Swimming Pool |

Youth Centre

There is currently no youth centre in the 2km catchment radius. The Prairiewood Youth and Community Centre is located three kilometres from the site.

Recommendations: The proposal does not generate the need for a new youth centre.

Local Community Centre

There is currently one local community centre in the 2km catchment radius, Horsley Park Hall. There are 2 nearby community halls within the residential areas to the east of the subject site.

Recommendation: The proposal does not generate the need for a new community centre.

Child Care Facility Centre

There are currently 2 childcare facilities located in the 2km catchment, one of which is co-located with Bossley Park Public School and the other in Greenway Plaza. Furthermore there is a significant supply of childcare facilities to

³ All benchmarks subject to discussion/clarification with relevant responsible authorities/agencies. Benchmarks sourced from current literature/studies, including:

- GHD, Parramatta Road Urban Transformation Strategy Social Infrastructure Analysis Report, Vol 1, November 2016
- Growth Centres Commission, North West & South West Growth Centres Development Control Plans
- Various Studies and Section 94 Plans for City of Sydney (Green Square); Sydney Olympic Park; Rhodes Precinct: Wolli Creek; Ashmore Precinct and Parramatta CBD

the east of the subject site, within the residential areas of the Fairfield LGA. In our view, there is sufficient capacity within these to cater for any likely increased demand arising from the proposal.

Recommendation: According to macroplan's community infrastructure standards, there is not considered to be a need for additional childcare/after school care services to cater for the increased employment numbers arising from the proposal.

Library

There is currently no library located in the catchment. Notably, Wetherill Park Library is 4km away from the subject site.

Recommendation: The proposal does not generate the need for a new library.

Performing Arts / Cultural Centre

There is currently no performing arts / cultural centre located in the catchment.

Recommendation: The proposal does not generate the need for a new performing arts / cultural centre.

University and TAFE

There is currently no tertiary facility located in the catchment. There is a TAFE Campus approximately 5km away from the subject site.

Recommendation: According to macroplan's community infrastructure standards, there is not considered to be a need for additional tertiary educational facilities to cater for the increased employment numbers arising from the proposal.

Open Space and Recreation Area

There are a number of open spaces and recreation areas within two kilometres of the subject site. These include the surrounding Western Sydney Regional Park, which includes locations such as the Lizard Log Park, Ginger Meggs Memorial, Moonrise Lookout, The Knoll, The Dairy and Sugarloaf Ridge that are located within 2km of the subject site.

Recommendation: According to macroplan's community infrastructure standards, there is not considered to be a need for additional open space or recreational facilities to cater for the increased employment numbers arising from the proposal.

Swimming Pool

There is currently no indoor swimming pool facility located in the 2km catchment radius. Notably, the nearest swimming pool is in the Prairiewood Leisure Centre, which is about 4km away from the subject site.

Recommendation: There is no requirement for swimming pool facilities in the catchment area.

NSW Fire Station

There is currently one fire station within a 2km catchment radius of the subject site, the Horsley Park RFS Station. There are an additional 5 fire stations within a 10km radius.

- Smithfield Fire Station (875 The Horsley Drive, Smithfield)
- Yennora Fire Station (198 Fairfield Road, Yennora)
- Cabramatta Fire Station (100 St Johns Rd, Cabramatta)
- Busby Fire Station (101 Cartwright Avenue, Busby)
- Bonnyrigg Heights Fire Station (70 Gloucester Street, Bonnyrigg Heights)

Recommendation: In our view, there is already a sufficient service coverage from the existing stations to accommodate growth demand from increasing population.

NSW Ambulance Service

There is currently no ambulance station located in the 2km catchment radius. However, according to the most recent NSW Ambulance Stations register (i.e., List of all Stations, March 2023) – Cecil Hills Ambulance Station (Cnr Cowpasture Rd & Gloucester Rd) is located within a 5km radius.

Recommendation: In our view, there is already a sufficient service coverage from the existing stations to accommodate growth demand from increasing population.

Primary School

There are currently two primary schools located within in the 2km catchment radius, Horsley Park Primary School and Marion Catholic Primary School.

Furthermore, there are several primary schools located within a 3km catchment radius, including Bossley Park Primary School, Mary Immaculate Catholic Primary School and Prairievale Primary School.

Recommendation: The proposal does not generate the need for a new primary school.

Secondary School

There are currently no secondary schools located within in the 2km catchment radius. There are three secondary schools located within a 5km radius, and these include Bossley Park High, St Johns Park High School and Prairiewood High School.

Recommendation: The proposal does not generate the need for a new secondary school.

GP Medical Centre

There is currently a medical centre located in the 2km catchment radius, the Horsley Park Medical Centre. There are also 3 additional medical centres located within a 4km catchment radius.

Recommendations: Based on Macroplan's community infrastructure standards, there is no need for additional medical centres to cater for the increasing population in the area.

Community Health Centre

There are currently no Community Health Facilities located in the 2km catchment radius. There is one community health centre located 4km away from the subject site, the Prairiewood Community Health Centre.

Recommendations: Based on Macroplan's community infrastructure standards, there will not be a need for additional community health centres to cater for the increased employment numbers arising from the proposal.

Hospital

There are currently no hospital(s) located in the 2km catchment radius. However, the Fairfield Hospital is located within a 5km radius of the subject site.

Recommendation: In our view, there is already a sufficient supply of Hospitals and beds to accommodate growth demand from increasing population.

Residential aged care facility

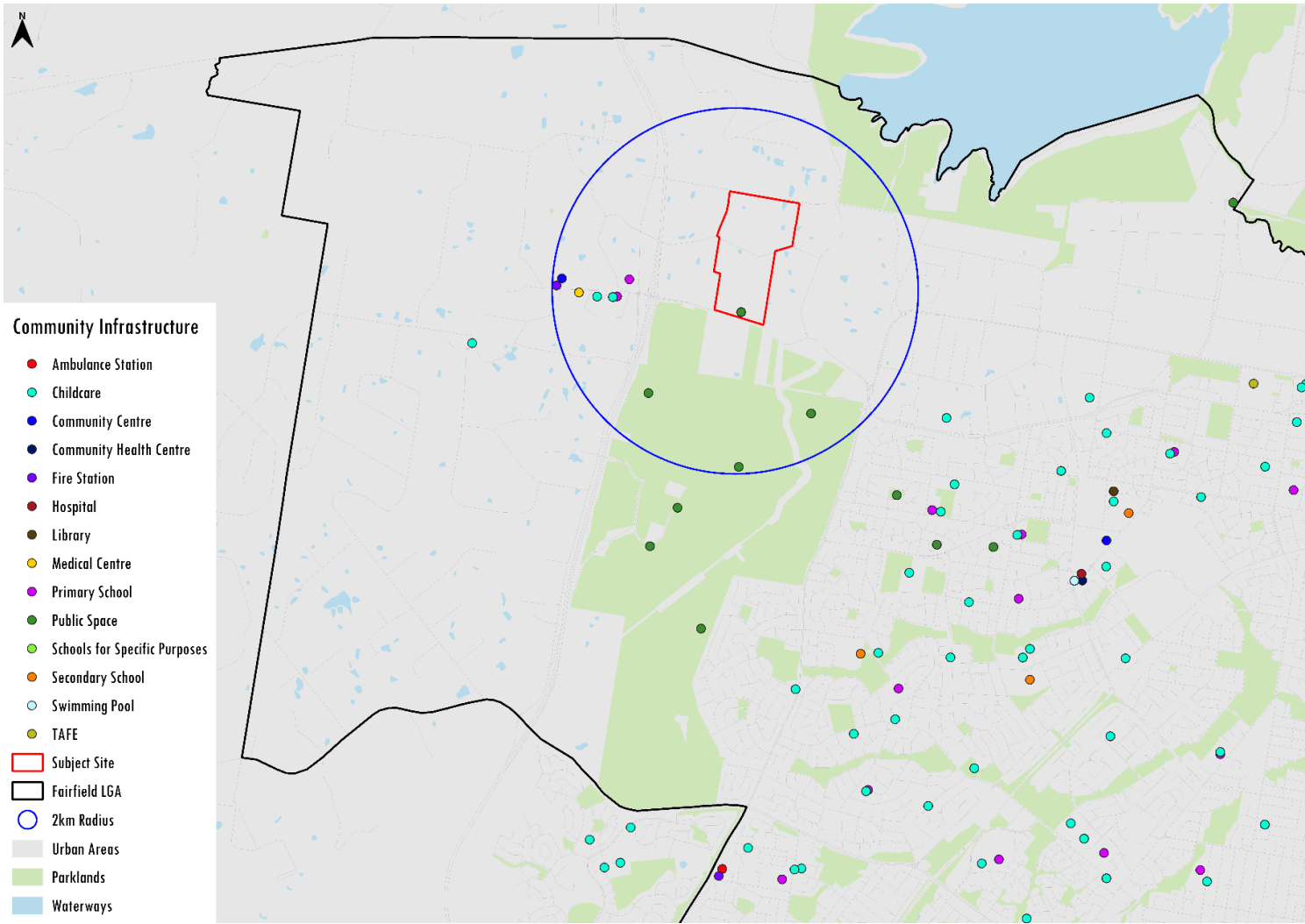
There are currently no existing aged care facilities located in the 2km catchment radius.

Recommendation: The proposal does not generate the need for a new aged care facility.

7.4 Community Infrastructure Map

The following map indicates the location of various existing community infrastructure provisions in proximity to the subject site.

Figure 3 Community Infrastructure Map



Source: macroplan, various

MELBOURNE

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GOLD COAST

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