

3 EMERALD HILLS BOULEVARD, LEPPINGTON

Economic Impact Comment



Prepared for The Planning Hub

March 2023

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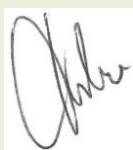
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Dated

22/05/23

Report Details

Job Number C23070

Version Final

File Name 3 Emerald Hills Boulevard

Date Printed 22 May 2023

1.0 INTRODUCTION

HillPDA was commissioned by The Planning Hub on behalf of Macarthur Developments (the Client) to provide an Economic Impact Comment (EIC) in relation to 3 Emerald Hills Boulevard, Leppington (Lot 11 DP 858293) (subject site hereafter).

It is understood that the Client is in the process of preparing a planning proposal to amend the Camden Local Environmental Plan (LEP) 2010 to include the additional permitted use of a vehicle repair station at the subject site. To support their case, Council has requested that the Client prepare an EIC to demonstrate the economic viability of the area will not be impacted by the proposed uses on site, which is the subject of this Report.

1.1 Subject site

The subject site, which spans 2,613sqm, is situated at 3 Emerald Hills Boulevard in Leppington, some 6km south of Leppington Station and 5km north of Gregory Hills. It can be accessed via Emerald Hills Boulevard and falls within the Emerald Hills Local Centre precinct.

The subject site is adjacent to the Emerald Hills Shopping Village, which is a 9,000sqm neighbourhood centre anchored by a full line Woolworths supermarket and ALDI foodstore, four food outlets and 15 specialty tenants. A detached medical centre of around 1,600sqm is also provided for various health professionals and includes a chemist as an ancillary provider of the health services.

Fast food restaurants including McDonalds, Taco Bell and KFC and a 7-Eleven service centre also provided immediately to the east of Emerald Hills Shopping Village and the subject site.

A development application for Stage 2 of Emerald Hills Shopping Village has also been submitted at 5 Raby Rd, Leppington adjacent to the existing traditional retail and in the vicinity of the subject site. Stage 2 development will provide a further 4,500sqm of specialised retail such as bulky goods, showroom and/or large format retailing.

As such approximately 12,000sqm of retail and commercial floorspace is currently provided in Emerald Hills Local Centre, with a further 4,500sqm potentially to be delivered within the next year. It should also be noted contextually (and is evident in the figure below) the subject site sits within a fringe location to the precinct's core retail and does not represent a significant landholding of the Emerald Hills Local centre.

Figure 1: Local context



Source: MetroMaps, HillPDA

Beyond the Emerald Hills Local Centre, newly built low density residential extend north of the Emerald Hills Shopping Village, with Lakeside Golf Course immediately to the south.

In terms of planning controls, the subject site is zoned as B2 Local Centre under the Camden LEP 2010. This zoning includes specific Centres Development Controls (5.2) and Schedule 8 Emerald Hills under the Camden DCP 2019. A vehicle repair station is currently prohibited under the B2 zone of the Camden LEP 2010.

1.2 Planning Proposal

The planning proposal seeks to facilitate the development of vehicular repair station and ancillary car wash such as a My Car Tyre and Auto on the site as shown in the indicative concept plans below.

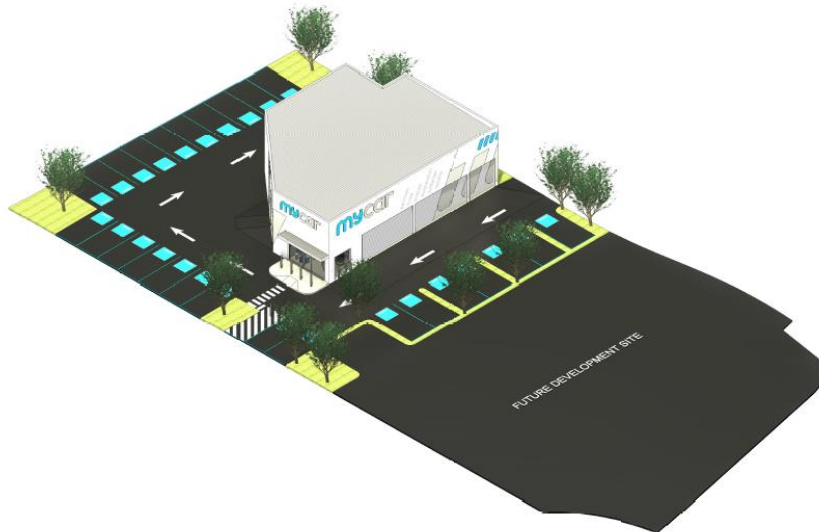
Figure 2: Concept plans of planning proposal

MY CAR - EMERALD HILLS

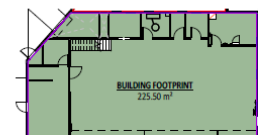
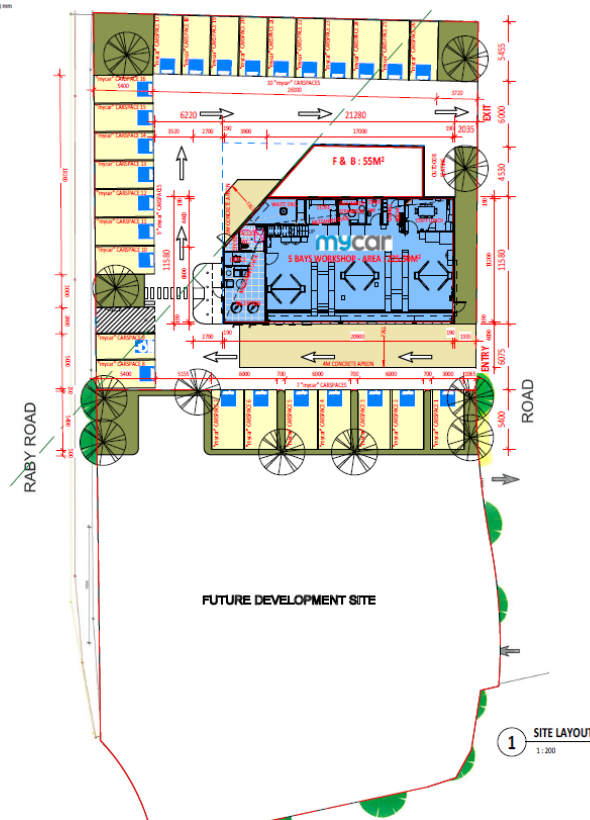
EMERALD HILLS SHOPPING VILLAGE
Cnr Raby Rd & Emerald Hills Blvd, Leppington NSW 2179

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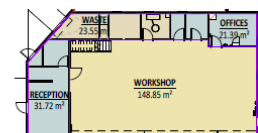
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| A01 | SITE LAYOUT & AREA ANALYSIS | 0 | 04/01/2023 |
| A02 | STORE LAYOUTS | 0 | 04/01/2023 |
| A03 | ELEVATIONS | 0 | 04/01/2023 |
| A04 | PERSPECTIVES | 0 | 04/01/2023 |
| A05 | ACCESS ANALYSIS PLAN AND SIGNAGE SCHEME | 0 | 04/01/2023 |



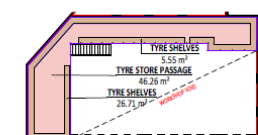
A2 Sheet - 5946x4100 (mm)



2 BUILDING FOOTPRINT
1:200



3 GROUND AREAS
1:200



4 MEZZANINE AREAS
1:200

BUILDING FOOTPRINT
BUILDING FOOTPRINT

AREA LEGEND
OFFICES
RECEPTION
TYRE SHelves
TYRE STORE PASSAGE
WASTE
WORKSHOP

| AREA SCHEDULE | |
|--------------------|-----------|
| Name | Area |
| WORKSHOP | 148.85 m² |
| WASTE | 23.55 m² |
| RECEPTION | 31.72 m² |
| OFFICES | 23.55 m² |
| GROUND LEVEL | 225.50 m² |
| TYRE SHelves | 26.71 m² |
| TYRE STORE PASSAGE | 46.25 m² |
| TYRE SHelves | 5.35 m² |
| MEZZANINE LEVEL | 78.31 m² |
| | 304.02 m² |

| LEGEND | |
|------------------------------------|--|
| PROPOSED "MY CAR" AREA = 225.50 m² | |
| EXIST. CAR PARKING | |
| EXIST. CAR PARKING | |
| EXIST. CAR PARKING | |
| EXIST. CAR PARKING | |

Source: Bellevue Architects 2022

The auto and tyre facility will occupy some 304sqm of Gross Floor Area (GFA), with a detailed schedule of areas provided in the table below.

Table 1: Planning Proposal schedule of areas

| Land use | GFA (sqm) |
|--------------------|---------------|
| Workshop | 148.85 |
| Waste | 23.55 |
| Reception | 31.72 |
| Offices | 21.39 |
| Tyre shelves | 32.26 |
| Tyre store passage | 46.26 |
| Total | 304.01 |

Source: Bellevue Architects 2022

1.3 Report structure

To meet the requirements of the brief and address Council's concerns, this report is set out in the following manner:

- **Chapter 2 | Planning context:** evaluates the pertinent statutory instruments and case studies to provide insights on how the proposed usage would reinforce rather than impede the strategic intent for Emerald Hills Local Centre.
- **Chapter 3 | Economic impact assessment:** assesses the economic impact of the proposed development both during and post construction. This Chapter also considers the impacts that the planning proposal would have on the existing and planned retail within Emerald Hills Local Centre.

2.0 PLANNING CONTEXT

The Chapter evaluates the pertinent statutory instruments and case studies to provide insights on how the proposed usage would reinforce rather than impede the strategic intent for Emerald Hills Local Centre.

2.1 Review of the supply of retail premises at Emerald Hills Local Centre

Schedule 8 Emerald Hills under the Camden DCP 2019 stipulates that Emerald Hills Centre (i.e. boundary shown in figure below) will form part of the Emerald Hills Urban Release Area and will have a maximum lettable floor area of 10,000sqm for 'retail premises' excluding 'food and drink' premises.

Figure 3: Emerald Hills DCP Indicative Masterplan



Source: Schedule 8 – Emerald Hills

The existing Emerald Hills Shopping Village currently provides around 8,400sqm of lettable floor area (GLA) for retail premises. The adjacent medical centre building which forms part of Emerald Hills Shopping Village also includes a Chemist Warehouse of around 400sqm GLA which serves as an ancillary provider of the health services and operates as a retail premises. As such Emerald Hills Local Centre currently provides almost 9,000sqm GLA of retail floorspace.¹ This 9,000sqm does include some food and drink retail premises.

Notwithstanding the above, located at the entrance of Emerald Hills Local Centre, there is an additional 1.35 hectares of vacant land at 5 Raby Road. This site, positioned adjacent to the existing shopping centre and in close proximity to Camden Valley Way, is superior to the subject site for any possible expansion of retail space to meet growth in demand.

Therefore, there is no need for the subject site to accommodate additional retail premises on site since the existing floorspace at Emerald Hills Local centre and remaining B2 vacant lots have the capacity to accommodate additional retail space that would achieve maximum retail floorspace provisions stipulated in the statutory instruments. There is more than eight hectares of B2 Local Centre zoned land net of internal roads which is an ample amount of land to accommodate 10,000sqm of retail space plus food and medical services.

The proposed uses at the subject site, on the contrary, will enable the development of a commercial establishment that complements the existing Emerald Hills Shopping Village and caters to community needs, whilst also helping to activate a more challenged site of the Emerald Hills Local Centre.

2.2 Vehicle service and repair stations in the area

According to the Emerald Hills Masterplan, the intent is to provide up to 1,340 dwellings. Assuming 3.2 persons per household, the 1,340 dwellings could accommodate around 4,300 persons.² The closest vehicle repair station for this community is currently located either 5km south at Gregory Hills or 5km north towards Leppington Station. Therefore, the proposed planning intends to establish a conveniently located vehicle repair station providing services to the local community. Additionally, the proposed uses are expected to expand and enhance the retail and commercial offerings of the Emerald Hills Local Centre, ultimately benefiting the local community and broader catchment.

2.3 Case studies

There are many shopping centres and neighbourhood centres, that provide a vehicle repair station either within or adjacent to the main retail premises. On reviewing the portfolio of My Car Tyre and Auto³, we identify more than 40 My Car Tyre and Auto stores located within or near shopping centres in NSW alone, including centres that share a similar profile or are similar in scale to Emerald Hills Local Centre, including Narellan Town Centre, Ashfield Mall, Casula Mall and Kellyville Village Shopping Centre. Additionally, we have identified many other independent vehicle repair stations that have been successfully incorporated into several local neighbourhood centres (eg Malton Road North Epping and Blaxcell Street, South Granville). Since this arrangement has proven to be successful in other locations without adversely impacting the viability of the retail premises, it is reasonable to assume that it can also work at this location.

¹ This excludes any GLA associated with: the fast food outlets provided on the pad sites; the 7-Eleven convenience service station / convenience store; GLA floorspace occupied by health services in the Emerald Hills Shopping Village Medical Centre building GLA was estimated using DA concept plans, aerial imagery as sourced from MetroMaps 2023

² Average number of people per household for Leppington as sourced from ABS Census 2021

³ My Car website

2.4 Impacts on retail premises

Any impacts on the existing retailers would be positive and not negative. This is because a car service centre does not sell retail goods and services that are sold in the shopping centres, nor does it provide food and drink services. Therefore there is no competition with existing or proposed retailers. Existing retailers may even benefit from having a car service and repair station adjacent because of dual purpose trips. Customers can dine, shop or have their hair done while waiting for their car to be serviced.

2.5 Key findings

The above analysis has identified that the subject site represents an insignificant landholding, with the existing floorspace at Emerald Hills Local centre and the remaining B2 vacant lots having the capacity to accommodate the maximum retail floorspace provisions stipulated in the statutory instruments. There is vacant land at the entrance of Emerald Hills Local Centre (i.e. 5 Raby Road) which is a superior location to accommodate future expansion of retail space than the subject site. Therefore, there is no need for subject site to be quarantined for retail purposes. The proposed uses at the subject site will enable the development of a commercial establishment that will help to activate a more challenged site of the Emerald Hills Local Centre.

Moreover, with the nearest vehicle repair station around 5km from Estate, the planning proposal will also facilitate the development of a convenient vehicle repair station to cater to the needs of the local community, which in turn will expand and enhance the retail and commercial offerings of the Emerald Hills Local Centre, ultimately benefiting the local community and broader catchment.

Finally, our review of other local centres reveals that incorporating a vehicle repair station within or near a shopping or neighbourhood centre has worked well in similar locations to Emerald Hills Urban Release Area. Therefore, it is reasonable to assume that this arrangement will work at this location without compromising the viability of the existing retail premises.

3.0 ECONOMIC IMPACT ASSESSMENT

The following Chapter assesses the economic impacts of the planning proposal during and post-construction. Economic impacts include employment generation, wages and gross value added (GVA). This Chapter also considers the impacts that the planning proposal would have on the existing and planned retail within Emerald Hills Local Centre.

3.1 Proposed land uses

A concept plan (refer to Section 1.2) has been prepared for the proposed My Car Tyre and Auto premise on site, which encompasses a gross floor area of 304sqm⁴.

This concept plan was utilised to evaluate the economic impacts of the planning proposal. It should be noted that the aforementioned may be susceptible to modifications in the event of alterations to the floor area or scheme.

3.2 Approach to estimating the economic impacts

To derive employment support and economic activity estimates, HillPDA has developed an input-output (IO) model which applies industry specific employment, output and gross value-added multipliers (refer to Section 3.2.1) to spending and/or capital investment estimates (detailed in Section 3.3.1) to formulate:

- gross output estimates
- gross value added estimates
- employment estimates

supported by constructing the proposed uses on site.

The IO modelling for this report is based on the Australian National Accounts which calculates the indirect and induced effects from construction on job creation and contribution to the State economy.

The ABS notes that “Care is needed in interpreting multiplier effects; their theoretical basis produces estimates which somewhat overstate the actual impacts in terms of output and employment.” In particular it may leave the impression that resources used for production would not have been utilised elsewhere in the local economy. Nevertheless, the estimates illustrate the high flow-on effects of construction activity.

3.2.1 Economic multipliers

The construction industry is a significant component of the economy, accounting for 5.96% of Gross Domestic Product (GDP) and employing just over one million workers across Australia⁵. The industry has strong linkages with other sectors, so the impacts on the economy go further than the direct contribution of construction. This is known as the multiplier effect. Multipliers refer to the level of additional economic activity generated and/or supported by a source industry.

There are two types of effects captured by multipliers:

Production Induced Effects: which is made up of:

- *Direct effects:* which constitutes all outputs and employment required to produce the inputs for construction, and

⁴ Includes 148.85sqm workshop, 23.55sqm waste area, 31.72sqm reception, 21.39sqm office space, 33.03sqm tyre shelves space, 45.48sqm tyre store passage space

⁵ Source: IBIS World Construction Industry Report 2018

- *Indirect effects:* which is the induced extra output and employment from all industries to support the increased production of the construction sector.

Consumption Induced Effects: which relates to the demand for additional goods and services due to increased spending by the wage and salary earners across all industries arising from employment.

3.3 Construction impacts

The planning proposal would require capital investment, which would drive economic activity and create employment across the economy. This section considers the economic benefits associated with constructing the planning proposal.

It should be noted that no construction activity is anticipated in the base case scenario. As such all benefits associated with constructing the planning proposal in terms of job creation and increased economic activity represent a net gain.

3.3.1 Capital investment value (CIV)

Based on the concept plan and schedule of areas provided by the Client, HillPDA estimate the design and construction cost for the proposed development to be in the order \$1.06 million, assuming:

- the building is \$760,000 (304sqm by \$2,500/sqm)⁶
- site work and external costs at \$120,000
- contingencies at 10% of above costs
- professional and application fees at 10% of total hard costs.

Note costs have been sourced from Rawlinsons Construction rates.

3.3.2 Gross output

As above the construction of the proposed development will have a direct impact on job creation as well as indirectly stimulating other industries which assist in production or cater to increased consumption.

The table below details the output multipliers and shows the impact of the change in demand generated by the proposed development and the impact on the NSW State economy. These multipliers reflect the size of State industries based on 2021 Census data. Forecast gross output as a result of the planning proposal is estimated at \$3.0 million.

Table 2: Gross output (\$m)

| | Direct effects* | Production induced effect | | Consumption induced effect | Total |
|-----------------------------------|-----------------|---------------------------|----------------------------|----------------------------|-------|
| | | First Round effects | Industrial Support Effects | | |
| Output in the State economy (\$m) | 1.1 | 0.6 | 0.6 | 0.8 | 3.0 |

* Includes design costs and application fees assumed at 8.5% of construction costs

Source: Hill PDA Estimate using data from ABS Australian National Accounts: Input-Output Tables 2020-21 (ABS Pub: 5209.0), ABS Census 2021 Data

⁶ Assumes Gross floor area/ fully enclosed building area of 95%

3.3.3 Gross value added (GVA)

The Gross Value Added (GVA) of an industry refers to the value of outputs less the costs of inputs. It also measures the contribution that the industry makes to the regions' wealth or gross regional product (GRP). The main components of GVA are workers' remunerations, profits and government taxes.

Table 3: Gross value added (\$m)

| | Direct effects* | Production induced effect | | Consumption induced effect | Total |
|------------------------|-----------------|---------------------------|----------------------------|----------------------------|-------|
| | | First Round effects | Industrial Support Effects | | |
| GVA in the NSW economy | 0.3 | 0.2 | 0.3 | 0.4 | 1.2 |

Source: Hill PDA Estimate using data from ABS Australian National Accounts: Input-Output Tables 2020-21 (ABS Pub: 5209.0), ABS Census 2021 Data

As shown in the table immediately above, the planning proposal would directly contribute around \$0.3 million GVA to the State economy. Including the multiplier impacts, the planning proposal would contribute and/or support a total \$1.2 million GVA to the State economy (measured in 2022 dollars).

3.3.4 Job creation

Every million dollars of CIV generates 2.2 job years⁷ directly in design and construction. Based on the estimated design and construction cost, 2.4 job years⁸ would be directly supported during the construction phase of the planning proposal.

Table 4: Construction employment impact

| | Direct effects* | Production induced effect | | Consumption induced effect | Total |
|--|-----------------|---------------------------|----------------------------|----------------------------|-------|
| | | First Round effects | Industrial Support Effects | | |
| Total Job years generated in the NSW economy | 2.4 | 1.9 | 1.8 | 2.6 | 8.7 |

Source: Hill PDA Estimate using data from ABS Australian National Accounts: Input-Output Tables 2020-21 (ABS Pub: 5209.0), ABS Census 2021 Data

Through production induced and consumption induced multiplier impacts a total of 8.7 job years would be generated and/or supported State-wide during the planning proposal's design and construction phase.

3.3.5 Other construction impacts

The construction process may lead to short-term negative impacts in the locality such as increased traffic, noise, dust and so on. The development would take the necessary steps to mitigate the extent of these impacts which will form part of further approvals. Impacts during construction are short term and can be managed but an improved retail offer with added services and increased activity will benefit the centre in the long term.

⁷ Source: ABS Australian National Accounts: Input – Output Tables 2019-20

⁸ Note: Job years is used to calculate the amount of work needed to complete a construction project. One Job year is one full-time job over one year. Construction projects are not permanent but often span over several years and the number of workers on site vary at any one time. To calculate the average number of jobs on site during construction, divide total job years by the number of years of construction.

3.4 Economic impacts post construction

The following section assesses and where possible quantifies the net potential economic impacts of the planning proposal during the operational phase as measured against the base case.

3.4.1 The base case scenario

The base case is referred to as the do nothing option. The site is currently vacant. It is understood that at the time of this report there has been no interest to include other permissible commercial and retail on site. As such we have assumed that the subject site will remain vacant under the base case scenario and will not support any economic activity. As such all benefits associated with the planning proposal once operational (i.e. job creation, salaries, GVA and increased economic activity) represent a net gain.

3.4.2 Planning proposal scenario

HillPDA estimates that once operational, My Car Tyre and Auto will support up to four new jobs on site. This assumes an average of one employee per 70sqm of Gross Leasable Area (GLA) which is consistent with the industry average⁹.




According to IBIS World averages, these four occupations are expected to contribute a combined annual salary of \$0.22 million and generate approximately \$0.3 million in GVA¹⁰.

3.5 Impacts of planning proposal on existing retail premises

The proposed vehicle repair station provides a unique service that does not compete with the commercial and retail businesses at Emerald Hills Shopping Village, but rather complements them. It is expected that some of the vehicle repair station's patrons may engage in transactions at the other businesses which they otherwise would not have while waiting for their vehicle repairs or services, or after dropping off or picking up their vehicle, resulting in flow-on benefits for the retail and commercial premises. As such the proposed uses will provide an ancillary service which is more likely to improve rather than undermine the viability of the existing retail premises at Emerald Hills Shopping Village.

3.6 Key findings

The economic benefits of the planning proposal as compared to the base case are shown in the table below.

| During Construction* | | Base Case | Planning Proposal |
|---|---|-----------|-------------------|
| Gross output directly generated and supported through multiplier impacts |  | - | \$3.0 million |
| Gross Value added directly generated and supported through multiplier impacts |  | - | \$1.2 million |
| Total job years** generated and supported through multiplier impacts |  | - | 8.7 job years |
| Post construction benefits | | | |

⁹ IBIS World Report, Sydney Employment and Land use Survey 2017 and various employment land studies and audits undertaken by HillPDA

¹⁰ IBIS World Report and ABS

| | | | |
|---|---|---|---------------|
| Job creation |  | - | Up to 4 jobs |
| Staff Remuneration |  | - | \$0.2 million |
| Gross Value Added (contribution to gross regional product) |  | - | \$0.3 million |

* Based on an estimated design and construction cost of \$0.6 million.

** One job year equals one full-time job over one year

As such, it is anticipated that the proposed development would create new local jobs and lead to increased economic activity on the site and would overall lead to a stronger economic outcome. As established above (Section 3.5) it is expected that increased patronage resulting from the proposed vehicle repair station at the subject site would have flow on benefits and will contribute rather undermine the viability of the retail premises at the Emerald Hills Shopping Village.

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5. Due care has been taken to prepare the attached financial models from available information at the time of writing, however no responsibility can be or is accepted for errors or inaccuracies that may have occurred either with the programming or the resultant financial projections and their assumptions
6. This report does not constitute a valuation of any property or interest in property. In preparing this report HillPDA has relied upon information concerning the subject property and/or proposed development provided by the Client and HillPDA has not independently verified this information except where noted in this report
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