

Social and Economic Impact Assessment

Westlink Industrial Estate – Stage 2

1030-1048 & 1050-1064 Mamre Road, 59-62 & 63 Abbots Road, 290-308 Aldington Road, Kemps Creek



ESR Developments (Australia) Pty Ltd



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

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

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

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This report has been updated with the latest plans prepared by Nettleton Tribe as of September 2023. All other figures and data remain as per the previous October 2022 version.

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Executive Summary

Ethos Urban has been engaged by ESR to undertake a Social and Economic Impact Assessment in relation to the redevelopment of the site at 1030-1048 & 1050-1064 Mamre Road, 59-62 & 63 Abbotts Road, and 290-308 Aldington Road, Kemps Creek (the site) for the purposes of an industrial logistics and distribution warehousing estate known as Westlink Stage 2.

The assessment has been undertaken in accordance with the Secretary's Environmental Assessment Requirements (SEARs) dated 10 August 2022.

The following key policy drivers have been identified for the development:

- The supply of industrial and urban services land is in high demand and is necessary to support Greater Sydney's long-term freight, logistics, industrial needs.
- The site forms part of the Mamre Road Precinct which is expected to support in-demand industrial land supply. The amendments to the Industry and Employment SEPP have rezoned the site to IN1 General Industrial and the proposed development will assist in achieving the Mamre Road Precinct Structure Plan objectives which envisions 850 hectares of industrial land to support approximately 5,200 construction and 17,000 ongoing jobs, as well as the delivery of the Western Sydney Intermodal Terminal.
- The proposed development supports state and local government priorities for increased job employment opportunities closer to where people live.

The assessment has concluded that there are no significant or detrimental social or economic impacts anticipated to arise as a result of the development, which cannot be effectively mitigated and managed.

The proposed development will result in significant positive social and economic benefits for the local and broader community, noting additional employment opportunities will be created along with growth in private business investment to create a sustainable funding base and employment precinct for the Western Sydney Employment Area in perpetuity.

Importantly, the proposed development will deliver a modern and integrated industrial facility within a strategic employment precinct that will accommodate and encourage the growth of higher order jobs and attract high value tenants and business to Western Sydney. Specifically, **the proposed development will accommodate up to 90 Direct FTE jobs during the construction phase, and 200 direct FTE jobs once complete and fully operational.** The project will stimulate local investment and contribute significant economic output and value add to the economy each year and support the role of the Mamre Road Precinct as a key industrial and employment precinct.

The development will impact upon the way of life for existing and nearby residents both in positive and negative ways. This is due to the change in use of the land from rural to industrial uses, the increase in density of development on the site and the upgrade and introduction of new roads within the existing network. All these social impacts were previously considered in the rezoning of the land from rural to industrial and are inevitable with the strategic direction to introduce industrial development in the area.

During the construction and operation of the development there is the potential for adverse social impacts due to the noise, acoustic and air quality impacts. However, these are proposed to be managed in accordance with the relevant legislation and regulations and as such the impacts can be mitigated.

Overall, it is considered that there are overwhelming positive benefits likely to result from the development, specifically in relation to the provision of additional employment opportunities for the local and regional community.

The proposal is consistent with aims and objectives of the Mamre Road Precinct and the broader WSEA, facilitating the development of a new industrial precinct, and creation of employment generating land uses. In addition, the development will contribute to the upgrade and provision of state infrastructure for the precinct, including new open space, recreational facilities and shared cycle/pedestrian paths.

The proposed development would result in a net benefit to the local and regional community, creating a major employment precinct that will support growth and development in Western Sydney well into the future.

1.0 Introduction

1.1 Background

Ethos Urban have been engaged by ESR Developments (Australia) Pty Ltd to undertake a Social and Economic Impact Assessment (SEIA) in relation to the redevelopment of the site to accommodate two warehouses located at 1030-1048 & 1050-1064 Mamre Road, 59-62 & 63 Abbots Road, and 290-308 Aldington Road, Kemps Creek

Development for the purpose of warehouse and distribution centres with a Capital Investment Value (CIV) of more than \$30 million is identified as SSD by virtue of Clause 12 of Schedule 1 of *State Environmental Planning Policy (Planning Systems) 2021* (Planning Systems SEPP). Since the proposed development has a CIV of greater than \$30 million, it is classified as State Significant Development (SSD).

This report outlines those factors underpinning the proposed scheme from an economic and social perspective and considers likely impacts and benefits (tangible and intangible). The assessment is intended to satisfy the Secretary's Environmental Assessment Requirements (SEARs) issued for the development on the 10 August 2022, in the context of a holistic appraisal of the social and economic value of the scheme.

1.1 Background to the Development

The proposed development forms part of the staged delivery of the 'Westlink Industrial Estate,' which is envisaged to be an integrated, world-class industrial estate providing innovative warehousing and distribution solutions for a wide variety of high-profile tenants with international operations. The estate is to be delivered over 3 stages, which will result in a total provision of over 200,000m² of warehousing floor space, complemented by an integrated internal road network, landscaping elements, as well as lot and estate wide signage. The overall masterplan of the site is detailed below in **Figure 1**. Of note, the broader masterplan encompasses additional lots of land that are not subject to this State Significant Development Application (SSDA), these are noted where relevant below.

Each stage is currently progressing with respective SSDA applications, the progress of which is summarised below in **Table 1**. Noting that the procurement, design and delivery of each stage is inherently co-dependent on each other, the structure and layout of the masterplan has been designed so as to facilitate synergies between each stage, principally, with regards to site subdivision, earthworks and the internal road network.

This SEIA relates to Stage 2 of the Westlink Industrial Estate.

Table 1 Status of each stage of the Westlink Industrial Estate

Stage	Subject Land	Description of Proposal	Current Status
Stage 1	<ul style="list-style-type: none">290-308 Aldington Road59-62 Abbots Road63 Abbots Road	<ul style="list-style-type: none">Site preparation works;Subdivision into 5 lots;Construction of 2 warehouses of approximately 78,056m²; andAncillary landscaping, roads and signage.	Under Assessment
Stage 2	<ul style="list-style-type: none">1030-1048 Mamre Road;1050-1064 Mamre Road;59-62 Abbots Road;63 Abbots Road; and290-308 Aldington Road.	<ul style="list-style-type: none">As described in Section 4.0 of this report	Prepare Environmental Impact Statement (EIS)

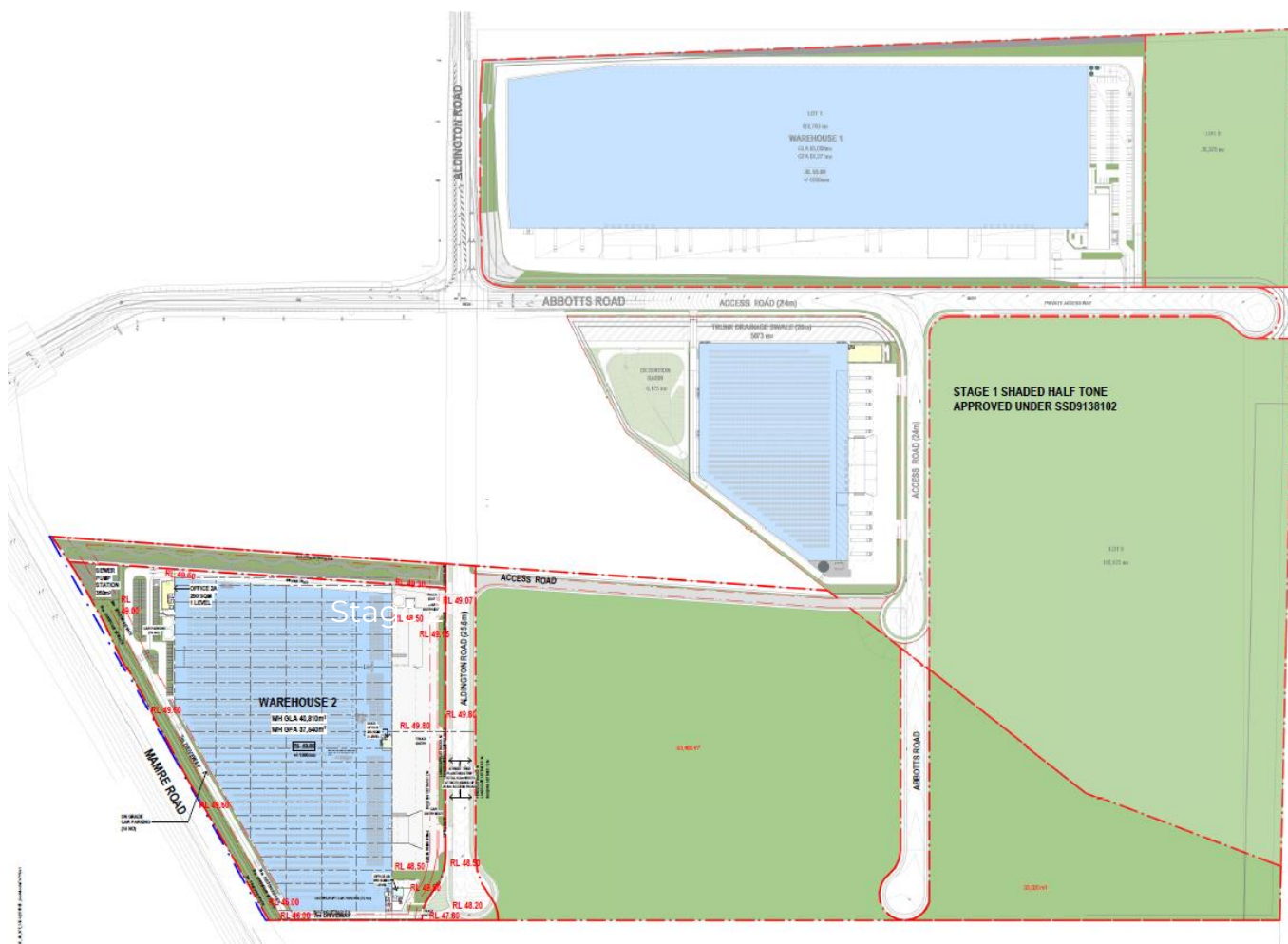


Figure 1 Westlink Industrial Estate Masterplan

Source: Nettletontribe Architects

1.2 Structure of this report

This report is structured as follows:

- Chapter 1:** Introduction
- Chapter 2:** Purpose, objectives and scope
- Chapter 3:** Site context and description
- Chapter 4:** Proposed development
- Chapter 5:** Strategic policy context
- Chapter 6:** Local economic and social context
- Chapter 7:** Social impact assessment
- Chapter 8:** Economic impact assessment
- Chapter 9:** Concluding comments

1.3 Secretary’s Environmental Assessment Requirements

The Department of Planning, Industry and Environment has issued Secretary's Environmental Assessment Requirements (SEARs) to the applicant for the preparation of an Environmental Impact Statement (EIS) for the proposed development. This report has been prepared having regard to the SEARs as follows:

Table 2 SEARs requirements

SEARs	Where addressed in this report
2. Capital Investment Value and Employment Provide an estimate of the retained and new jobs that would be created during the construction and operational phases of the development, including details of the methodology to determine the figures provided.	Section 8.0
20. Social Impact Provide a Social Impact Assessment prepared in accordance with the <i>Social Impact Assessment Guidelines for State Significant Projects</i> .	Section 7.0

2.0 Purpose, objectives and scope

The purpose of this Social and Economic Impact Assessment (SEIA) is to assess the impacts of the development, both positive and negative, for all stages of the project lifecycle for the community and stakeholders.

2.1 Methodology and assessment framework.

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

2.1.1 Social Impact Assessment

The assessment of social impacts in this report has been based on *Social Impact Assessment Guideline for State Significant Projects* (SIA Guideline) released by the NSW Department of Planning Environment in July 2021. The SIA Guideline is considered by NSW Government to represent best practice in social impact assessment processes and provides a consistent framework and approach to the assessment of social impacts associated with all state-significant projects and developments in NSW.

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

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

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

2.1.2 Social factors for assessment

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

- **Way of life:** *how people live, get around, work, play and interact with one another each day*
- **Community:** *its composition, cohesion, character, how it functions, resilience, and people's sense of place*
- **Accessibility:** *how people access and use infrastructure, services and facilities (private, public, or not-for-profit)*
- **Culture:** *both Aboriginal and non-Aboriginal - people's shared beliefs, customs, practices, obligations, values and stories, and connections to Country, land, waterways, places and buildings*
- **Health and wellbeing:** *people's physical, mental, social and spiritual wellbeing – especially for people vulnerable to social exclusion or substantial change, psychological stress (from financial or other pressures), access to open space and effects on public health*
- **Surroundings:** *access to and use of natural and built environment, including ecosystem services (shade, pollution control, erosion control), public safety and security, as well as aesthetic value and amenity*
- **Livelihoods:** *including people's capacity to sustain themselves through employment or business*
- **Decision-making systems:** *the extent to which people can have a say in decisions that affect their lives, and have access to complaint, remedy and grievance mechanisms.*

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

2.1.3 Economic Impact Assessment

In the absence of formal guidelines available from the NSW DPE for economic impact analysis, the methodology for this economic assessment has been developed with consideration of socio-economic assessment practices.

Key steps in undertaking the economic assessment have included: analysis of the existing locality and the community, including its economic profile; identification and assessment of potential impacts (both direct and indirect) as a result of the proposed development.

The baseline profile for current residents, businesses and the economy within the defined study area was developed using published data sources, including the Australian Bureau of Statistics (ABS), with this data supplemented by additional information where available.

Economic impacts were then evaluated in terms of direct impacts and indirect impacts. In the case of both direct and indirect effects, the key metric for the analysis is an estimate of jobs and value added.

2.2 Information sources and assumptions

Following are the key information sources used to prepare this SEIA:

- ABS Census of Population and Housing, 2021
- Transport for NSW Population and Employment Projections, 2019
- ABS National Accounts 2020/21
- ABS Consumer Price Index
- Greater Sydney Commissions Employment Lands Analysis
- Greater Sydney Regional Plan – Metropolis of Three Cities (Greater Sydney Commission 2018)
- Greener Places (NSW Government Architect 2020)
- Local Strategic Planning Statement – Planning for a Brighter Future City (Penrith City Council 2020)
- Mamre Road Precinct Rezoning – Exhibition and Discussion Paper and Structure Plan (Department of Planning, Industry and Environment 2019)
- Penrith City Council Community Strategic Plan (Penrith City Council 2017)
- State Environmental Planning Policy (Industry and Employment) 2021 (I&E SEPP)
- Western Sydney Aerotropolis Plan (DPE 2020)
- Western City District Plan (Greater Sydney Commission 2018).

3.0 Site context and description

3.1 Site Context

The site is located at 1030-1048 & 1050-1064 Mamre Road, 59-62 & 63 Abbotts Road, and 290-308 Aldington Road Kemps Creek, within the Penrith City Council Local Government Area (LGA) (refer to **Figure 2**). The site is approximately 15km southeast of the Penrith CBD and approximately 40km west of the Sydney CBD. It also forms part of the Mamre Road Precinct which sits within both the Western Sydney Employment Area (WSEA) and the Western Sydney Aerotropolis (refer to **Figures 3 and 4**).

The site was rezoned in 2020 as part of the gazettal of the *State Environmental Planning Policy (Western Sydney Employment Area) 2009*, now known as *State Environmental Planning Policy (Industry and Employment) 2021* (Industry and Employment SEPP), which rezoned the site to IN1 – General Industrial as part of the broader Mamre Road Precinct rezoning.

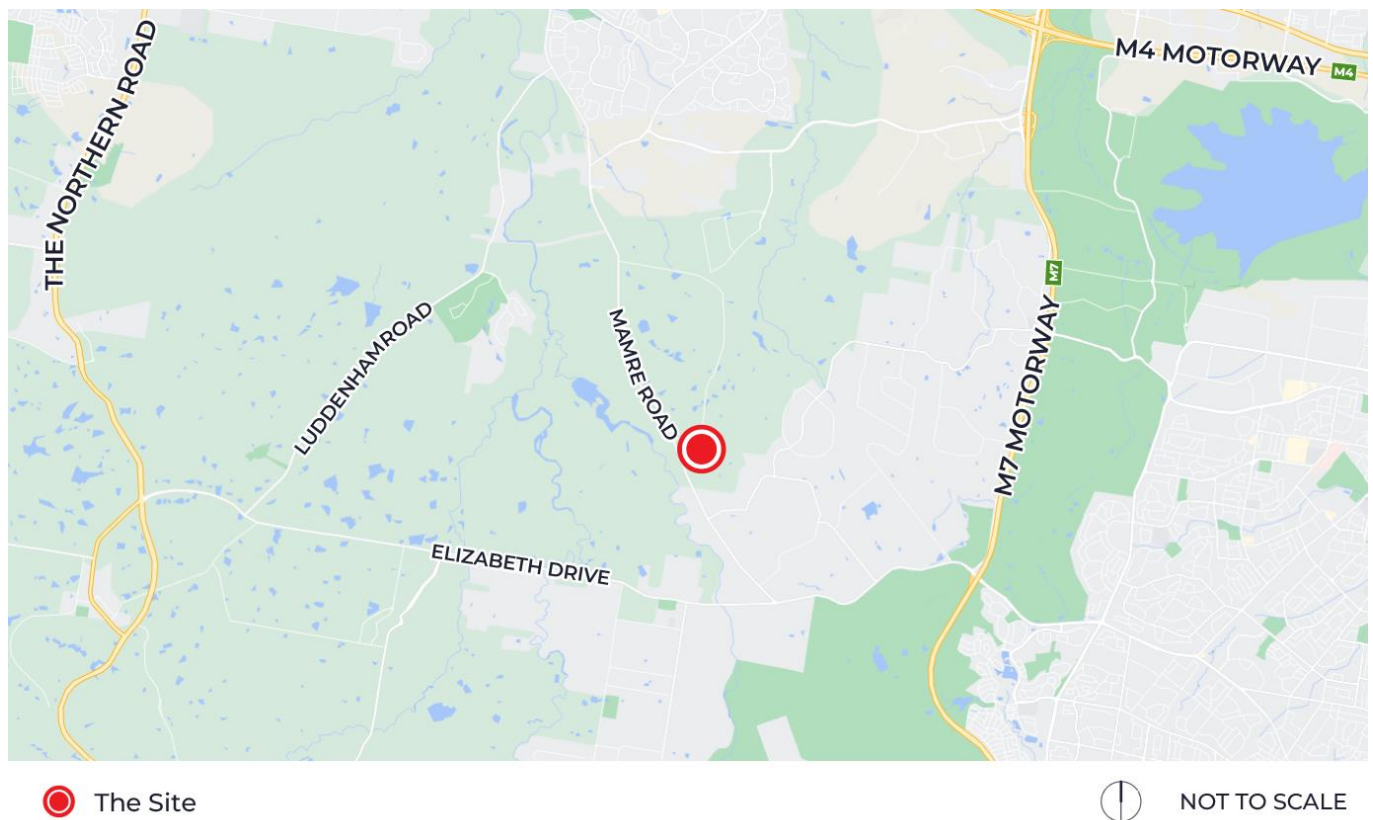


Figure 2 Site location

Source: Google Maps, edits by Ethos Urban

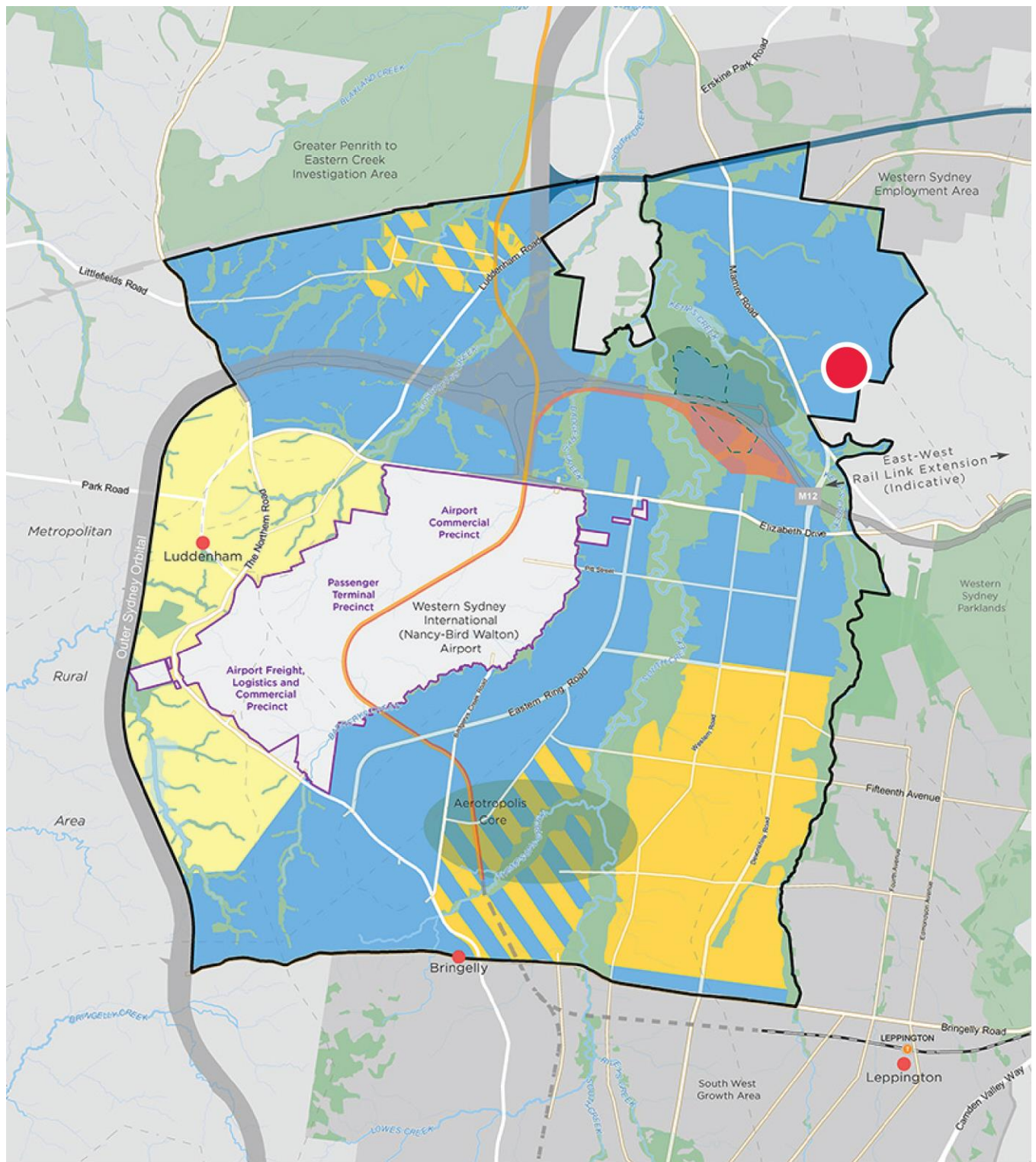
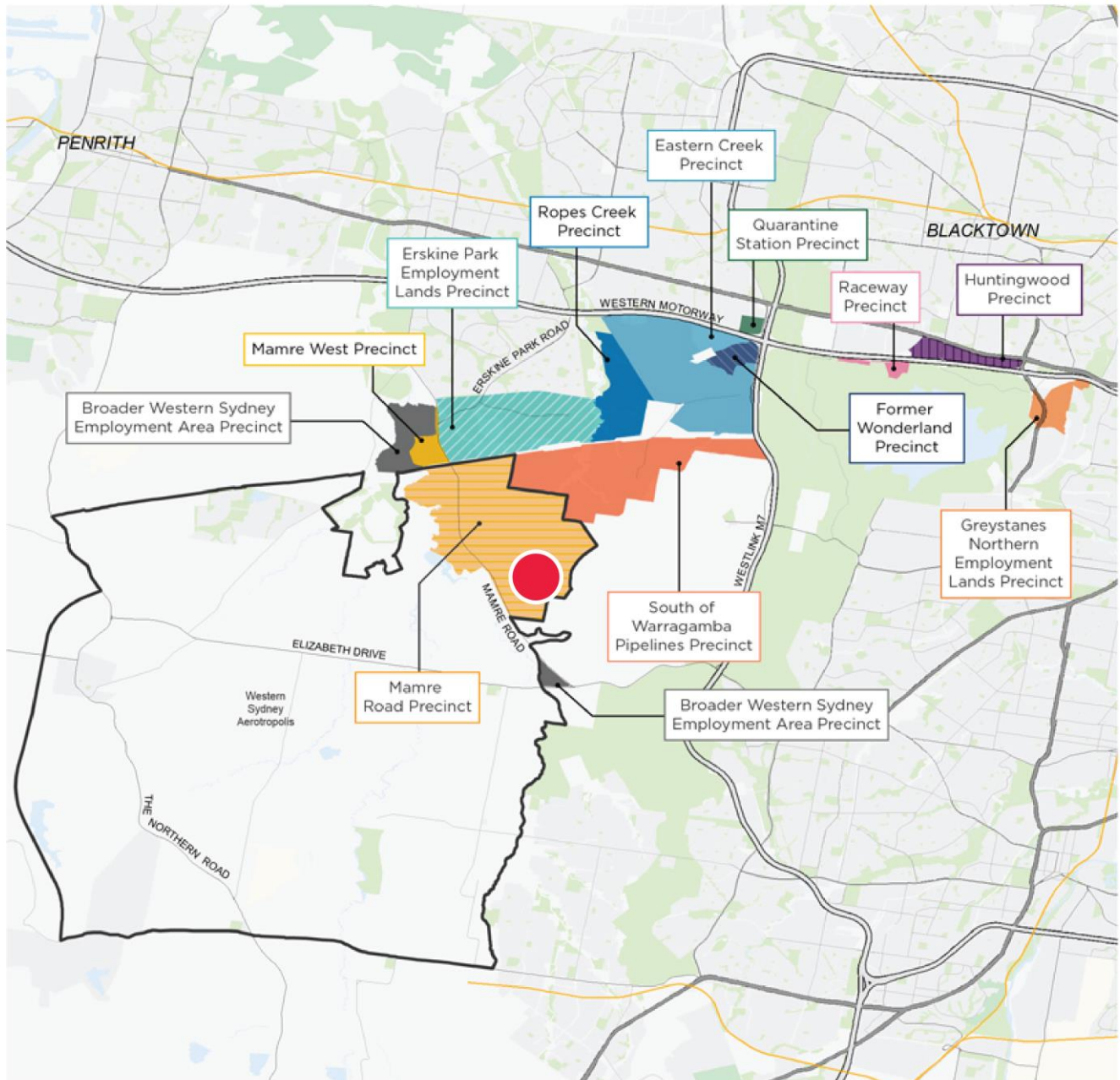


Figure 3 Western Sydney Aerotropolis Structure Plan (with the approximate location of site identified with red circle)

Source: Western Sydney Aerotropolis Stage 1 Land Use and Infrastructure Implementation Plan, 2018



 **The Site**

Figure 4 Location of the site within the Western Sydney Employment Area Structure Plan

Source: DPE, edits by Ethos Urban

3.2 Site description

The site is located at 1030-1048 & 1050-1064 Mamre Road, 59-62 & 63 Abbotts Road, and 290-308 Aldington Road Kemp's Creek. The extent of the site is shown in **Figure 5**, and currently comprises undulating rural land with a combination of residential dwellings, and undeveloped farmland.



Figure 5 Site aerial

Source: Nearmaps, edits by Ethos Urban

3.3 Surrounding development

Surrounding land uses currently comprise a predominantly rural typology, with a variety of rural dwellings, rural land, farm dams and scattered vegetation. Beyond this, the established large lot residential community of Mount Vernon is located approximately 500-600m to the South and East of the site, whilst the Oakdale West Industrial Estate lies approximately 3.5km to the North of the site, which provides a gateway to further industrial development in the suburbs of Kemp's Creek and Erskine Park. The following surrounding uses are worth noting:

- The site is located at the southern extent of the Mamre Road Precinct, with a series of other developments currently planned within the broader Mamre Road Precinct predominately to the north of the site.
- Approximately 700m to the northeast, a Hindu temple (Bochasanwasi Akshar Purushottam Sanstha or BAPS) is currently under construction, with Stage 1 of the development set to be completed in 2023. Once completed, the BAPS temple will be the largest of its kind in Sydney, and feature a 25-metre tall temple, two community buildings, carparking, gardens, playgrounds, as well as barbeque and leisure areas for the general public. The site will continue to be accessed throughout construction, due to a staged approach, and to celebrate various milestones.
- The existing residential housing community at Mount Vernon is located around 600m east of the site.

4.0 Proposed development

The proposed development is for a warehouse and distribution centre including ancillary office space with a total gross floor area (GFA) of approximately 38,640m². It also includes earthworks and the completion internal road network across the Westlink Industrial Estate. Specifically, the proposed development seeks approval for: Site preparation works, including demolition, clearing of all vegetation, bulk earthworks and construction of retaining walls;

- Site servicing and infrastructure including construction of new internal roads and stormwater infrastructure.
- Subdivision of the site;
- Construction of an industrial warehouse buildings with ancillary office space comprising a total GFA of approximately 38,640m², including:
- Loading docks and hardstand area, on-lot car parking and on-lot accessways;
- Associated landscaping and signage; and
- Hours of operation of 24 hours, 7 days a week.

A proposed Stage 2 Site Plan prepared by Nettletontribe Architects is shown in **Figure 6**, and a Westlink Industrial Estate Masterplan is shown in **Figure 7** over the page.



Figure 6 Proposed Stage 2 Site Plan

Source: Nettletontribe Architects

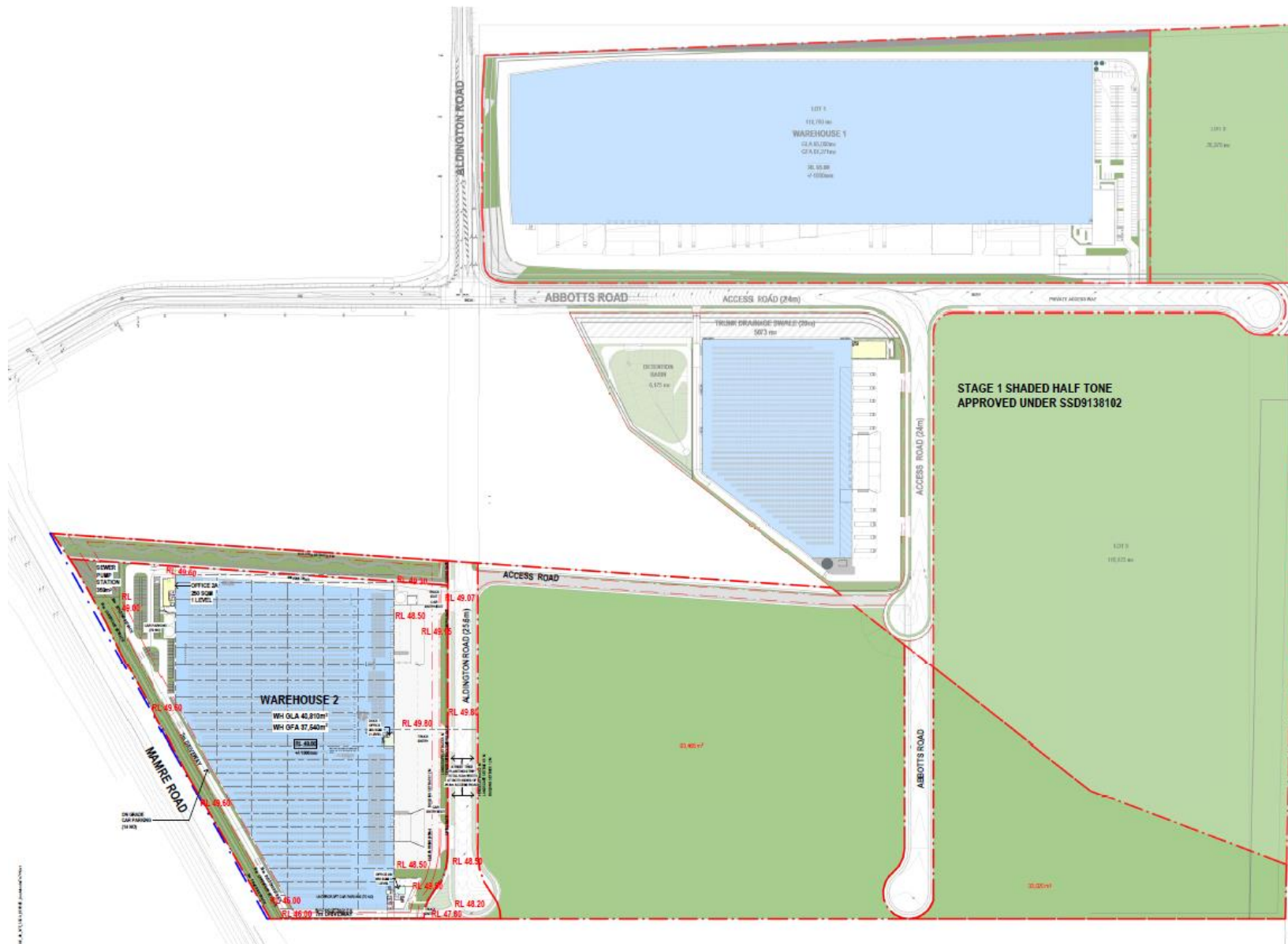


Figure 7 Westlink Industrial Estate Masterplan

Source: Nettletontribe Architects

5.0 Strategic policy context

The following section identifies the key social and economic drivers for this site, based on a review of the key state and local policies and strategies relevant to the proposed development.

Key policy drivers

- Increased supply of industrial and urban services land is required to support Greater Sydney's long-term freight, logistics and industrial needs.
- The proposed development would contribute towards delivering on the vision for the Western Sydney Employment Area. The site forms part of the Mamre Road Precinct, which is expected to contribute towards meeting current and future demand for industrial land supply. The amendments to the I&E SEPP have rezoned the site to IN1 General Industrial, and the proposed development will assist in achieving the Mamre Road Precinct Structure Plan objectives which envisions 850 hectares of industrial land to support approximately 5,200 construction and 17,000 ongoing jobs, as well as the delivery of the Western Sydney Intermodal terminal.
- The proposed development supports state and local government priorities for increased job employment opportunities closer to where people live, contributing to the delivery of a "30-minute city".
- The Western Sydney Airport and the Western Sydney Aerotropolis will require industrial lands to support both airport and employment activities that serve the needs of Western Sydney.

5.1 Key policy themes and directions

The following section identifies the key social and economic drivers for this site, based on a review of the key state and local policies and strategies. A summary of the key themes of this review is provided in **Table 3** below. The following documents have been reviewed:

- Greater Sydney Regional Plan – Metropolis of Three Cities (Greater Sydney Commission 2018)
- Greener Places (NSW Government Architect 2020)
- Local Strategic Planning Statement – Planning for a Brighter Future City (Penrith City Council 2020)
- Mamre Road Precinct Rezoning – Exhibition and Discussion Paper and Structure Plan (Department of Planning, Industry and Environment 2019)
- Penrith City Council Draft Community Strategic Plan (Penrith City Council 2022)
- State Environmental Planning Policy (Industry and Environment) 2021
- Western Sydney Aerotropolis Plan (DPE 2020)
- Western City District Plan (Greater Sydney Commission 2018).

The comprehensive strategic policy analysis is provided in **Appendix B**.

Table 3 Key policy themes and implications

Policy theme	Key implications for impact assessment	Source
Increase supply of industrial land in Western Sydney	<ul style="list-style-type: none">It is a state and local priority for the increase provision of industrial, freight and logistic opportunities, as existing sites face residential rezoning pressures.There is growing demand for industrial and warehousing space in the Western Parkland City, specifically with the development of the Western Sydney Airport and Badgerys Creek Airport. There is also growing demand for industrial service land supply in the	<ul style="list-style-type: none">Western City District Plan (GSC 2018)Greater Sydney Regional Plan – Metropolis of Three Cities (GSC 2018)Mamre Road Precinct Rezoning Exhibition

	<p>Penrith LGA due to its close proximity to Sydney Airport and Badgerys Creek Aerotropolis.</p> <ul style="list-style-type: none"> To meet forecast demand for industrial land, NSW DPE has amended the <i>State Environmental Planning Policy (Industry and Employment) 2021</i> to rezone the Mamre Road Precinct primarily for industrial purposes. This will ensure land availability to support the growing demand and existing shortfall of available industrial land in Western Sydney. Rezoning of the Mamre Road Precinct will supply additional industrial land for Western Sydney to meet projected demand. The rezoning will deliver industrial land that can be readily serviced and developed, integrated with the existing WSEA. The precinct will provide for jobs closer to people's homes and contribute to the NSW economy more broadly. The NSW Department of Industry is leading the development of a world class aerospace and defence industry precinct adjacent to the Western Sydney airport. It will cluster defence and industry facilities with advanced technology hubs. 	<p>Paper and Structure Plan (NSW DPE 2019)</p> <ul style="list-style-type: none"> Mamre Road Precinct Finalisation Report (NSW DPE, June 2020) State Environmental Planning Policy (Western Sydney Employment Area) 2009
<p>Proximity to the Western Sydney Airport and Badgerys Creek Aerotropolis driving demand for freight and logistics</p>	<ul style="list-style-type: none"> There is an unprecedented opportunity for the Western City District to provide a national freight and logistics hub, as Western Sydney Airport and Badgerys Creek Aerotropolis will transform the Western Parkland City into a thriving, productive and sustainable area, with the Western Sydney Airport as the economic catalyst. This will drive increased population growth and emerging economic opportunities. Western Sydney Airport and Badgerys Creek Aerotropolis will depend on the Penrith LGA to support airport and employment activities and service the need of the Western Parkland City. Strategic plans have identified over 6,000 hectares for industrial activity which is proposed to support the Western Sydney Airport. The proposed development's proximity to the Western Sydney Airport and Badgerys Creek Aerotropolis will catalyse increased job opportunities in infrastructure, advanced manufacturing, freight and logistics over the long term. 	<ul style="list-style-type: none"> Western City District Plan (GSC 2018) Greater Sydney Regional Plan – Metropolis of Three Cities (GSC 2018) Mamre Road Precinct Rezoning Exhibition Paper and Structure Plan (NSW DPE 2019) Penrith's Local Strategic Planning Statement – Planning for a Brighter Future City (Penrith City Council 2020)
<p>Increase local jobs and employment opportunities to achieve the "30-minute city"</p>	<ul style="list-style-type: none"> It is a state and local priority to provide job diversity and growth to encourage local workforce skills. The proposed development will contribute to increased job opportunities in construction activities as well as ongoing operation jobs in transport, storage and warehousing related industries for local residents. Penrith's community has expressed a desire to live and work within the LGA, and to have "diverse work opportunities close to home". This "dramatically improves your feeling of being a part of and desire to support your local community" (Draft Community Strategic Plan, pg. 22). Over 60% of Penrith's residents travel to work outside of the local government area. As population growth increases at a faster rate than the number of jobs available in the region, the provision of local employment opportunities is demanded. It is an objective of the Western Sydney Aerotropolis Plan to create high-value jobs growth and enhance existing employment, underlining the need for employment spaces and economic development in the Aerotropolis. Supporting the Greater Sydney Commission's "30-minute city" aspiration, the site forms part of the South West Sydney Growth Corridor, in which the proposed development will support the provision of jobs within an active employment district that is located close to existing homes, and emerging activity centres. 	<ul style="list-style-type: none"> Penrith's Local Strategic Planning Statement – Planning for a Brighter Future City (Penrith City Council 2020) Penrith City Council Draft Community Strategic Plan (Penrith City Council 2022) Western Sydney Aerotropolis Plan (DPE 2020)
<p>Contribute to Sydney's 'Green Grid'.</p>	<ul style="list-style-type: none"> It is a vision of the Greener Places framework to "create a network of attractive, new, and upgraded environments, routes, and spaces" to help adapt and mitigate the effects of climate change". It is a principle of the NSW Government to retain and enhance natural features to be retained and enhanced within the Western Sydney Aerotropolis. 	<ul style="list-style-type: none"> Greener Places, NSW Government Architect (2020) Western Sydney Aerotropolis Plan (DPE 2020)

6.0 Local social and economic context

6.1 Study area definition

For the purposes of this assessment, a study area has been defined to assess the local social and economic context within which the subject site will operate. The Primary Study Area has been defined using Australian Bureau of Statistics (ABS) Statistical Area 1 (SA1) boundaries that best align with the overall Mamre Road Precinct. The Mamre Road Precinct is considered of most relevance to the proposed project in informing the socio-economic context of the local area and objectives for the precinct. For much of the analysis undertaken, the relevant characteristics of the primary Study Area are compared to the broader Greater Sydney region. This is considered appropriate given the nature of the proposed development as a major industrial and warehousing precinct, which will also serve a large regional catchment.

The Study Area forms part of the Western Sydney Employment Area (WSEA) and the Western Sydney Aerotropolis, with the area identified to accommodate significant industrial facilities in the future, as informed by the I&E SEPP. The Study Area is well positioned between the established industrial areas at Eastern Creek and Erskine Park to the north, and the future Western Sydney International Airport the south-west. The residential community of Mount Vernon is currently located immediately beyond the defined Study Area to the south-east.

While the Study Area is planned to comprise a major industrial precinct in the future, currently the area consists of predominately semi-rural and rural allotments, with a small number of detached dwellings. The Study Area is easily accessible to the regional road network, with Mamre Road highly accessible to the motorway network including the M4 and M7, as well as the future M12.

A map outlining the Mamre Road Precinct and Study Area for this analysis is shown in **Figure 8**. This also shows a broader area of social influence, which encompasses an area of secondary social impact considered through the analysis, including the Mt Vernon residential area to the southeast of the site.

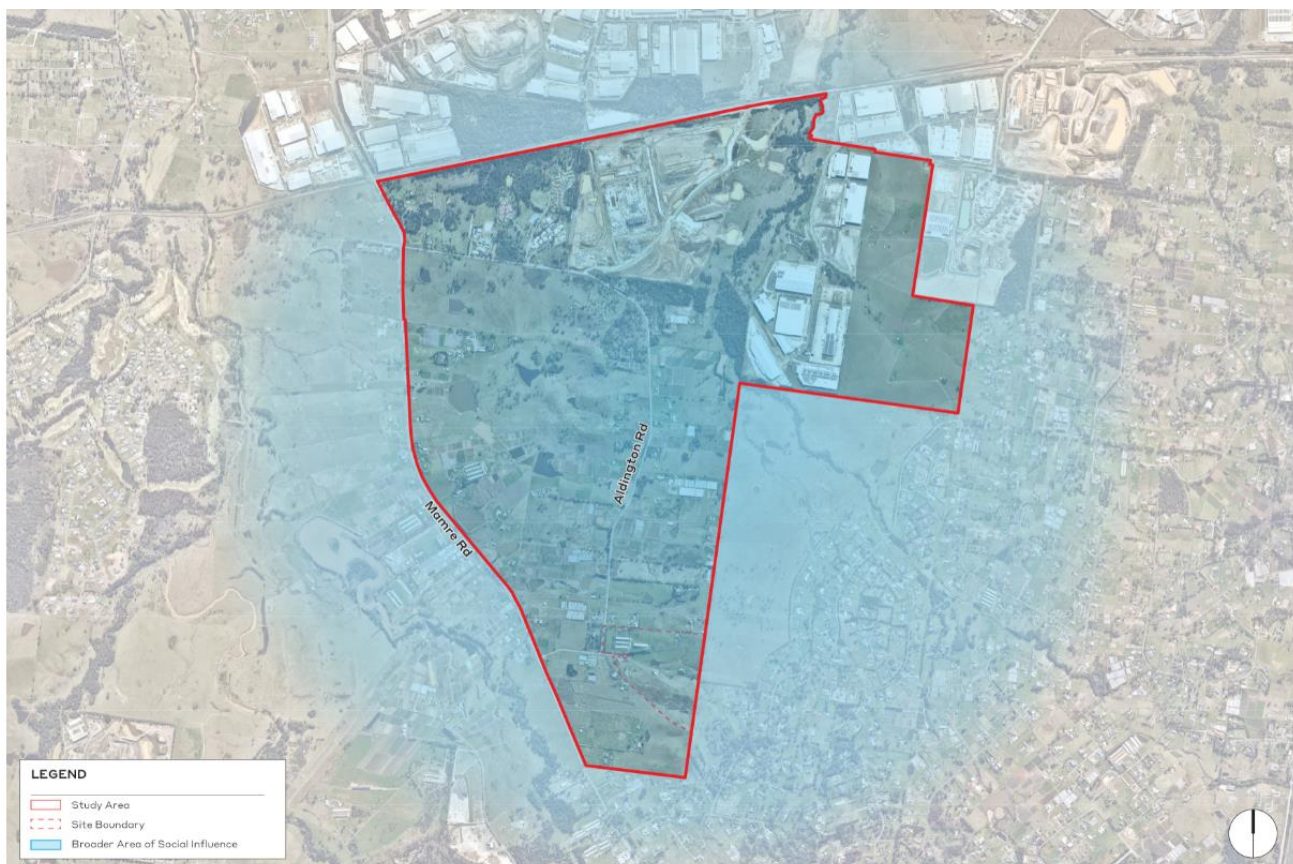


Figure 8 Study Area and Mamre Road Precinct

Source: Ethos Urban

6.2 Key community characteristics

A summary of the local resident and worker population within the Study Area is outlined in the following section. Taking into account the nature of the proposed development, it is likely that the project will provide employment opportunities for both residents in the local area but also more broadly in the surrounding region.

For the purposes of this analysis, demographic data has been sourced from the Australian Bureau of Statistics (ABS) 2021 Census of Population and Housing. Employment forecasts have been estimated taking into account data sourced from the ABS, and consideration to proposed developments and future uplift in the precinct as prescribed by the Mamre Road Precinct Structure Plan.

A summary of the local resident and worker profile is detailed in the following sub-sections.

6.2.1 Local residents

A detailed assessment of the key community characteristics is provided in **Appendix A** and is based on results from the 2021 ABS Census of Population and Housing. The following key demographic characteristics of the Study Area have been benchmarked against Greater Sydney and are identified below:

- **Population:** In 2021, the Study Area had an Estimated Resident Population (ERP) of 246, representing a decrease from the 2011 Census when the population was 349. The resident population of the area is relatively limited and is projected to continue to decline as this precinct is redeveloped and repurposed for industrial and employment uses.
- **Age profile:** The Study Area has an older age profile, with a median age of 66.0 years, well above the Greater Sydney average of 37.3 years. The largest age group are residents aged 70 years and over, who account for 40.0% of the Study Area population.
- **Income:** The median annual household income for households in the Study Area is \$49,500, significantly lower than the Greater Sydney median of \$108,750.
- **Household composition:** The dominant household composition in the Study Area are family households, which account for 64.9% of all housing types. This includes some 20.3% of all households occupied by couple families with children. There is a somewhat higher representation of couple households (31.1%) and single parent families (13.5%) compared to the Greater Sydney average. Lone person households represent a relatively high share of household types at 28.4% compared to the Greater Sydney benchmark of 23.3%.
- **Dwelling type:** Dwellings within the Study Area are predominately separate houses and are mostly situated on large rural or semi-rural allotments.
- **Tenure type:** The majority of occupied private dwellings in the Study Area are owned outright (61.3%), with a smaller share of dwellings (11.3%) that are rented. Notably, 22.6% of dwellings have an 'other tenure type' such as being occupied rent free.

The local resident population is typical of a semi-rural population located on the fringe of a major metropolitan area, including an older population who typically own their home. The profile also reflects the context of the locality in transition from rural land to industrial uses.

It is our view that interpretation of small area data from the 2021 ABS Census – that is any geography smaller than a State – should have due consideration for potential outcomes arising from the COVID-19 pandemic.

6.2.2 Local workers

A review of local workers has been derived taking into account employment estimates from the ABS Census of Population and Housing 2021 and employment projections under the Mamre Road Precinct Structure Plan. The Structure Plan estimates that Mamre Road will support some 17,000 workers upon completion, as well as 5,200 workers during construction.

Employment estimates for Mamre Road Precinct show that as of 2021, there were an estimated 1,202 workers across the precinct (ABS, 2021). Currently the existing profile reflects the semi-rural businesses that operate in the Study Area as well as the provision of social infrastructure, such as the educational facilities. Over time, however, it is expected that the employment profile will change substantially as the Mamre Road Precinct is developed into a major industrial and employment area.

As previously outlined, the Mamre Road Precinct Structure Plan outlines that there will be an additional 17,000 workers within the Precinct upon its completion and full occupancy. It is expected that a large proportion of this growth will be concentrated within tertiary sector activities such as transport, postal and warehousing services, construction and manufacturing. Other ancillary office services will also likely support a share of employment growth within the precinct.

Employment generated by the proposed development at the 1030-1048 & 1050-1064 Mamre Road, 59-62 & 63 Abbotts Road, and 290-308 site will support the strategic direction and jobs targets anticipated for the Mamre Road Precinct, which is expected to accommodate some 17,000 new jobs once fully developed and operational.

Furthermore, the proposed development would also generate local construction jobs during its development phase and support other service sector jobs locally and regionally. These will be explored in more detail in **Section 8.0**.

6.3 Market context

6.3.1 Industrial market context

In recent years, the industrial sector has become increasingly sophisticated with more specialised facilities, driven by technological advancements and the shift from traditional warehousing and manufacturing activities to more advanced and skilled production. This shift has generated an increased demand for larger, modern industrial assets, with Western Sydney a popular location due to land availability, residential growth and access to transport and efficient distribution networks.

A review of key industrial market indicators suggest strong conditions in Sydney in recent years, particularly within the south and western industrial markets (incorporating the subject site). In fact, the industrial sector has proven to be highly resilient during the disruption caused by COVID-19, largely due to the increased demand on supply chains and increase in ecommerce activity, resulting in a need for additional industrial space.

Key highlights of the Sydney industrial market include:

- Gross take-up of 373,500m² of industrial stock was recorded across the Sydney industrial market for the 6 month period for H1 2022 (*CBRE 2022*).
- Strong occupier demand has been driven by consumer and business demand as well as new infrastructure and supply chain requirements. These trends, coupled with strong capital markets, has led to an increase in development activity.
- Around 604,000m² of new industrial supply is estimated to be delivered in 2022 across Sydney (*Knight Frank 2022*).
- Very low levels of vacancy recorded at 0.5% across Sydney (Q3- 2022). This includes a 0.2% vacancy rate in Western Sydney, which includes the Mamre Road Precinct (*based on the Colliers market definition*).
- Of significance, as of August 2022, there was around 99,000m² of vacant industrial space in Sydney, with close to zero available supply in the South, South West and Outer West markets (*Knight Frank, 2022*). This low vacancy highlights the strong demand for industrial space, particularly for larger warehouses in the Western Sydney region.
- In 2021, over 260 hectares of industrial land take up was recorded in Western Sydney, an increase of 86% since 2020 (*Colliers 2022*). This includes some 60 hectares in Mamre Road Precinct, accounting for around 23% of industrial land take up in Western Sydney for 2021.

Overall land availability for industrial development remains competitive. This has, in part, prompted the release of new industrial lands in recent years, including the Mamre Road Precinct, which will support the continued demand for industrial space within the Western Sydney area.

It is clear that the sector has remained strong, even with the uncertainty associated with the COVID-19 pandemic. There has been strong demand for modern, and well-located industrial land in conjunction with Government-led infrastructure projects and elevated demand from key occupiers including the transport and logistics sector.

Figure 9 shows the increase in industrial take up recorded across the Outer West market in the past decade, and illustrates the increase in activity since 2012. The year to September 2021 reflects the largest take up of industrial floorspace recorded in the past 10 years within the Outer West market, with the year to September 2022 trending at the historical average.

In the face of strong demand, industrial land values have continued to rise, particularly in Western Sydney where in 2021, industrial land values increased by 51.0% (*Colliers 2022*). In particular, precincts in the WSEA, including the Mamre Road Precinct, are experiencing land value increases as occupiers and developers compete for sites. This is reflected through the high institutional demand for land in Western Sydney, with \$520 million traded in Mamre Road alone in 2021, accounting for around a third of total trading activity in Western Sydney for the same year (*Colliers 2022*).

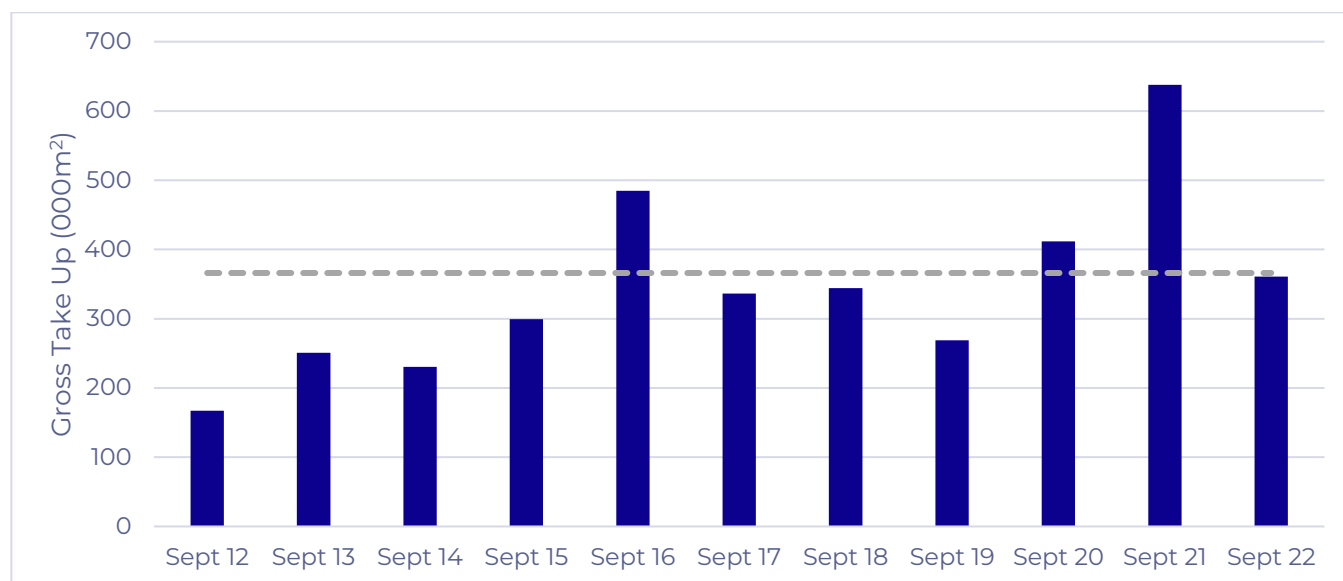


Figure 9 Outer West Sydney Gross Take Up, 2011-2021

Source: Ethos Urban, JLL, Dexus Research

More broadly, Western Sydney is experiencing the emergence of more advanced and integrated business operations including a shift to more specialised, automated facilities, 24/7 operation and a mix of uses supporting a wide range of facilities to support industrial uses including commercial office and community/retail facilities.

Trends such as ecommerce are also having a major impact on the industrial market, with strong growth in the online retail environment leading to the continued development of fulfilment centres, and a focus on 'just in time' or 'last-mile' delivery and distribution centres.

Depending on the operator, these facilities can also use new automated technologies in order to distribute and deliver large volumes of retail and wholesale goods quickly and efficiently across the city. These types of facilities tend to be less labour intensive, however, more specialised in nature. These uses represent the changing nature of the industrial sector, facilitating additional job generation in higher order employment including engineering and IT, compared with traditional manufacturing or industrial jobs, despite the fact that these facilities also locate in industrial areas.

The result of this structural change in the industrial sector, along with the increased pressure from residential development, has resulted in strong competition for land, particularly in inner city markets such as South Sydney and Inner West Sydney. This has resulted in traditional industrial tenants moving out to larger, modern facilities in Western Sydney, while operators who need direct access to the CBD, port, or airport pay increased rents.

This competition has driven industrial vacancy rates to record lows, and rents and land values to record highs. The industrial market is changing rapidly and the provision and use of industrial land in Sydney needs to respond to this shift.

This appropriateness of the proposed development within this context is considered further through the Economic Impact Assessment outlined in **Chapter 8.0**.

6.3.2 Sydney Employment Lands Supply

Employment lands can be classified as either developed lands (occupied) or undeveloped (vacant). In 2021, there was approximately 13,000 ha of zoned industrial land within the Greater Sydney region (CBRE, 2021), with just 5% of this industrial land zoned land being undeveloped. A significant portion of this undeveloped land is within the Western City District.

In 2020, there was a significant increase in undeveloped land primarily driven by rezoning's in the Western City District with these rezoning's primarily concentrated around Western Sydney Airport and the Aerotropolis. Penrith LGA has contributed to 53.0% of this increase in undeveloped land, which includes the 850 ha of rezoned land in Mamre Road Precinct. Overall however, Greater Sydney's existing pipeline is constrained, with a critical shortage of space to support future demand requirements (CBRE, 2021). This is already reflected by the existing low vacancy of just 0.5% in Greater Sydney including being as low as 0.2% in Western Sydney, indicating an immediate need for additional industrial space to support future growth, particularly in response to emerging industry trends such e-commerce.

Taking into account the above, Western Sydney employment lands (including Mamre Road Precinct) is expected to support significant supply requirements for industrial and warehousing space that are vital in serving Greater Sydney. The role of Western Sydney is emphasised by the very limited provision of employment lands in inner city areas. Mamre Road at 850 ha of industrial zoned land forms a critical component of Sydney's employment lands that will unlock necessary supply to support future growth in Sydney, particularly in the medium to long term.

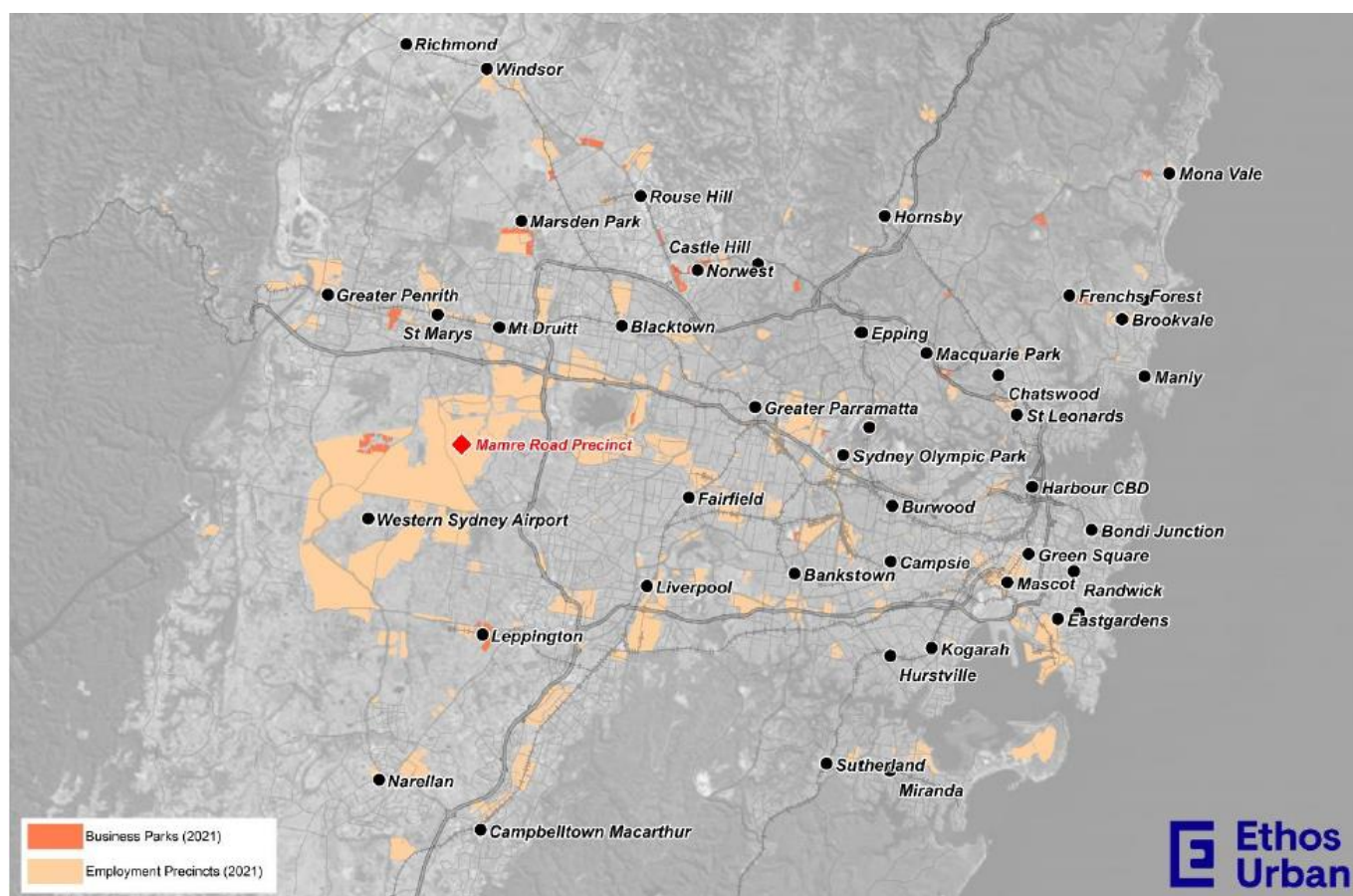


Figure 10 Sydney's Employment Lands (2021)

Source: DPE 2021 ELDM, Ethos Urban, Mapinfo, Bingmaps

6.4 Community and stakeholder perspectives

This section sets out the community perspectives gathered during the public exhibition and associated consultation on the Western Sydney Employment Area – Mamre Road Precinct, by NSW DPE during 2019/20, which has a direct bearing on this proposed development within the precinct.

Extensive engagement was undertaken for the amendments to State Environmental Planning Policy (Industry and Employment) 2021 (I&E SEPP) to rezone the Mamre Road Precinct primarily for industrial purposes.

Given the subject development proposal is fully aligned with the envisaged future of the Mamre Road Precinct set out in the Structure Plan and associated documents – effectively delivering on its planned future state as a thriving industrial precinct – this consultation is directly relevant in the consideration of this development and has informed the preparation of the Social Impact Assessment.

The draft Mamre Road Precinct rezoning package, including exhibition Discussion Paper, draft structure plan and draft WSEA SEPP maps, were exhibited between 20 November and 18 December 2019. A total of 88 submissions were received, including:

- 50 submissions from landowners and the community
- 24 submissions from developers and industry groups
- 14 submissions from Government agencies and utility providers, including Penrith City Council.

The issues – concerns and aspirations – raised by the community and other key stakeholders through submissions are as follows:

- The proposed location and planning controls in relation to the transport investigation areas, including the potential intermodal terminal (IMT).
- The proposed extent and location of the E2 Environmental Conservation, open space and drainage lands.
- The implications of planning controls in relation to flood prone land and planning for probable maximum flood events.
- Clarification on the proposed transitional area between the industrial land and neighbouring residential land uses.
- Proposed location of a potential water reservoir.
- Timing of the road infrastructure including potential Southern Link Road and upgrade of Mamre Road.
- Potential local and State Infrastructure Contributions.
- The refinement of the WSEA boundary, including the exclusion of land to the north and south of the precinct.

Full details of submissions are available in Appendix A of the Mamre Road Precinct Finalisation Report.¹

In addition, consultation has been undertaken with surrounding landowners and other key stakeholders in relation to the proposed development.

¹ https://shared-drupal-s3fs.s3-ap-southeast-2.amazonaws.com/master-test/fapub_pdf/000+-+Mamre+road+/Mamre+Road+Precinct+Finalisation+Report.pdf

7.0 Social Impact Assessment

This Social Impact Assessment (SIA) has been prepared based on the *Social Impact Assessment Guideline for State Significant Projects* (NSW DPE 2021) to address the SEARs.

7.1 Assessment framework and scope

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

The purpose of this social impact analysis is to:

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

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

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

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

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

7.2 Key affected communities

This assessment covers both the Study Area, which is expected to experience social impacts associated with the temporary workers in the area.

7.3 Impact assessment factors and responses

The following section sets out the assessment of social impacts arising from the proposed development and recommended responses, including measures to enhance social benefits and mitigate potentially negative impacts, across the suite of factors set out in the NSW DPE SIA Guideline. The assessment has been based on the information available to date, and is primarily a desktop study, informed by a review and analysis of publicly available documents relevant to the project.

7.3.1 Evaluation principles

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

- **Way of life:** how people live, get around, work, play and interact with one another each day
- **Community:** its composition, cohesion, character, how it functions, resilience, and people's sense of place
- **Accessibility:** how people access and use infrastructure, services and facilities (private, public, or not-for-profit)

- **Culture:** both Aboriginal and non-Aboriginal – people’s shared beliefs, customs, practices, obligations, values and stories, and connections to Country, land, waterways, places and buildings
- **Health and wellbeing:** people’s physical, mental, social and spiritual wellbeing – especially for people vulnerable to social exclusion or substantial change, psychological stress (from financial or other pressures), access to open space and effects on public health
- **Surroundings:** access to and use of natural and built environment, including ecosystem services (shade, pollution control, erosion control), public safety and security, as well as aesthetic value and amenity
- **Livelihoods:** including people’s capacity to sustain themselves through employment or business.

The development’s impact on **decision-making systems** is considered negligible and has not been assessed.

The evaluation includes a risk assessment of the degree of significance of risk, including the envisaged magnitude (duration, extent, severity, sensitivity), likelihood, and potential to mitigate/enhance and likelihood of each identified impact. The social impact significance matrix provided within the SIA Guidelines Technical Supplement (see **Table 6**) has been adapted for the purposes of undertaking this social and impact assessment.

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

Magnitude of impact generally considers the following dimensions:

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

Table 4 Defining magnitude levels for social impacts

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

Table 5 Defining likelihood levels of social impacts

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

Table 6 Social impact significance matrix

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

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

7.4 Impact assessment and responses by social factor

7.4.1 Surroundings – impacts to amenity and enjoyment of surroundings

Potential impacts

During construction

- Construction of proposed development may have some amenity impacts on surrounding development related to noise, dust and vibration. These will mainly affect surrounding workers and residents, users of local roads, and the users of Hindu Temple located to the northeast, reducing their opportunities for enjoyment of the surroundings that up until recently have primarily been green and rural in nature.

The Noise and Vibration Impact Assessment (SLR, 2023) predicts an exceedance to acceptable noise levels for several residential receivers, which will occur during work which uses noise intensive equipment. It is noted that all work is expected to be completed during standard daytime construction hours. The Air Quality Impact Assessment (SLR, 2023) has predicted a low risk of impact during all phases of construction.

- Impacts on views associated with the establishment of a construction site on previously rural land. This will likely impact surrounding residents, workers, and visitors' enjoyment of surroundings due to alteration of the landscape and natural amenity of the area. The Visual Impact Assessment (Geoscapes, 2023) has judged this stage of the development to be of minor-moderate visual impact.
- Potential impacts on perceptions of safety in the area associated with increased number of construction workers in the area who could be perceived as 'strangers' in the area, noting the rural agricultural character of surroundings and a number of sensitive receivers adjacent the site. It is estimated that the construction of the proposed development support 90 job years.
- Construction of the proposed development may result in cumulative impacts related to vibration, dust, and noise, noting the construction of various other projects in proximity to the site. This is however required in order to achieve the NSW Government strategic objectives for the Mamre Road Precinct and the broader Western Sydney Aerotropolis Employment Area that the site is located within.

During operation:

- Views would also be affected during the operational phase of the development, which will realise the transition of the Mamre Road Precinct (the Study Area) from rural to industrial development and would alter the landscape and natural amenity of the area. Permanent changes to the landscape through the establishment of buildings of different bulk compared to the existing rural agricultural uses surrounding the site are likely to arise. The Visual Impact Assessment (Geoscapes, 2023) has judged this stage of the development to be of minor-moderate visual impact.

It is acknowledged that the transformation of this area is required to meet the NSW Government strategic policy directions for the area, including the Mamre Road Structure Plan and associated rezoning, and properties adjacent the site are likely to also be eventually redeveloped.

- Potential traffic generation amenity impacts will arise during the operational phase of the development given the increased intensity of use of the site (the proposed development will support 200 direct FTE jobs once operational and requires vehicle access to support its operations). This would primarily affect the users of the properties located along Mamre Road. The Transport & Accessibility Management Plan (Ason Group, 2023) indicates that the proposal is acceptable from a traffic generation perspective.
- With respect to cumulative impacts, the broader redevelopment of the Mamre Road Precinct is likely to affect the amenity of nearby residential areas and the neighbouring community infrastructure facilities due to impacts such as increased traffic generation, noise generation, air quality impacts, visual impacts and the like generated by the redevelopment of the broader precinct for use for industrial purposes.

Responses/mitigation measures

During construction:

- Amenity impacts – such as traffic, noise, and air quality – will be managed in accordance with relevant legislation and technical report recommendations. This will ensure appropriate mitigation of impacts on residents in particular.

- Mitigation measures set out in the Construction Management Plan will also be implemented to reduce the impacts associated with the construction phase.
- Cumulative impacts will be managed through adaptive monitoring and management over time through the imposition of conditions of consent by the relevant consent authorities. These are likely to require the implementation of environmental management plans and compliance with the relevant environmental regulations. Collaboration with local Council and other stakeholders may allow for the coordination of works in order to minimise cumulative impacts.

During operation:

- Visual impacts – in terms of views of residents – will be mitigated as far as practicable through design guidance and other visual impact mitigation measures to ensure that the design of the new industrial buildings is of high quality and that appropriate landscaping is introduced on the site to soften the visual impact of the development. Landscaping setbacks around the site's perimeter will help to mitigate visual amenity impacts of the planned industrial development and will contribute to amenity for workers and residents in the locality more broadly.
- Implementation of the Green Travel Plan will lessen the impact of operational traffic on the local road network. (Ason Group, 2023).

Summary

Overall Social Impact Rating	<p>Amenity impacts are generally associated with the physical construction of the site, with some able to be mitigated through environmental management plans. Some noise and traffic impacts may occur, however these would be expected in the context of transformation of the area into an industrial precinct.</p> <p>Social impact ratings associated with the change to amenity and surroundings is considered High to Medium with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: High (Likely Moderate) - Negative • Operation: Medium (Possible Minor) - Negative
Duration	Construction impacts are temporary; however, care should be given to ensure that construction impacts do not deteriorate the amenity of those in the immediate vicinity of the site.
Extent	Impacts are likely to be experienced predominantly by existing residents, workers, and visitors within the precinct, and users of Mamre Road both during construction and operational phases.
Severity/sensitivity	Moderate due to substantial changes in land use from rural to industrial.
Potential to mitigate/enhance	Moderate potential to mitigate negative social impacts through Construction Management Plans, Operational Management Plans and the design and landscaping of the development.

7.4.2 Health and wellbeing – physical, mental, social and spiritual

Potential impacts

During construction:

- The construction phase of the development has the potential to generate temporary environmental impacts which may affect the health and wellbeing of the local community, by impacts such as noise, air quality and similar disturbances.

The Noise and Vibration Impact Assessment (SLR, 2023) predicts an exceedance to acceptable noise levels for several residential receivers, which will occur during work which uses noise intensive equipment. It is noted that all work is expected to be completed during standard daytime construction hours. The Air Quality Impact Assessment (SLR, 2023) has predicted a low risk of impact during all phases of construction.

- Construction of the proposed development may result in cumulative health impacts related to vibration, dust, and noise, noting the construction of other projects in proximity to the site, including the Hindu Temple to the northeast. It is noted that while construction is still ongoing on the temple site, worshippers and visitors are likely to utilise the site throughout construction, due to a staged approach.
- There is a high Aboriginal cultural value and moderate aesthetic value associated with the site. There is potential for artefacts of Aboriginal cultural significance to be harmed, which may negatively impact the health and wellbeing of local communities (Aboriginal and non-Aboriginal) (Biosis, 2023).
- There is potential for increased community sensitivity and impacts to wellbeing due to other recent or future construction impacts in the vicinity of the site – residents, local workers and other users of the area may experience "construction fatigue". Nearby social infrastructure may be impacted in the future as a result of future envisaged new developments in the vicinity.

We note that the various construction projects in the area are required to realise the NSW Government strategic policy directions for the area, including the rezoning associated with the Mamre Road Structure Plan and the area transforming into an industrial precinct.

During operation:

- Delivery of the proposed development has the potential to increase demand for provision of daily needs, local social infrastructure, recreation, and other services in the vicinity of the site.
- Delivery of the proposed development may result in long-term and cumulative physical and mental health impacts associated with the loss of existing ecosystems on the site. There is potential for increased community sensitivity and impacts to wellbeing due to other recent or future developments in the vicinity of the site.
- We note that the various construction projects in the area are required to realise the NSW Government strategic policy directions for the area, including the rezoning associated with the Mamre Road Structure Plan and the area transforming into an industrial precinct.
- Due to the Aboriginal cultural value associated with the site and the likelihood of culturally significant artefacts, operation of the development may limit accessibility to these sites for local Aboriginal communities and inhibit connection to Country. If this was to occur, it is likely to have a detrimental effect on the health and wellbeing of Aboriginal communities.

Responses/mitigation measures

During construction:

- Implementation of environmental management plans during construction and operation to avoid or minimise impacts such as noise, air quality and water quality impacts. These impacts will also be managed in accordance with relevant legislation and Regulations, ensuring impacts on local communities are acceptably managed.
- Meaningful and iterative consultation with Aboriginal communities and stakeholders in relation to the Mamre Road Precinct will be necessary to mitigate negative impacts to cultural sites present on and/or surrounding the site. Similarly, other recommendations in the Aboriginal Cultural Heritage Assessment (ACHAR) will need to be undertaken to reduce or eliminate the risk of harm to Aboriginal objects or cultural heritage in the area.
- It will be important to establish effective communication channels for local residents to find out information about the development and raise any issues or concerns, to mitigate mental health impacts which can arise through uncertainty and the effects of significant changes to a person's local environment.

During operation:

- To contribute positively towards health and wellbeing, each building within the industrial precinct could consider including indoor and outdoor casual seating and passive recreation areas for staff to utilise during breaks, including with appropriate shading and planting.

Summary

Overall Social Impact Rating

Social impact ratings associated with the change to health and wellbeing of local community is considered High to Medium with following overall ratings:

- **Construction: High (Likely Moderate) - Negative**
- **Operation: Medium (Possible Moderate) - Negative**

Duration	Impacts (construction and operation) have the potential to be permanent, depending on the implementation of recommendations outlined within the ACHAR. If these are followed correctly, some long-term impacts on health and wellbeing may be lessened.
Severity/sensitivity	High due to substantial changes in land use from rural to industrial. There is a high Aboriginal cultural value and moderate aesthetic value associated with the site.
Extent	Impacts are predicted to be felt by users of local area during construction phase and workers and users of this site during the operational phase. Local Aboriginal communities may be impacted throughout construction and operation.
Potential to mitigate/enhance	Moderate potential to mitigate impacts and enhance benefits through implementation of Construction Management Plans and Operational Management Plans.

7.4.3 Community - including its composition, cohesion, character

Potential impacts

During construction:

- Potential decline in the existing local population is envisaged, both during construction and operation of the development, leading to potential changes in the community composition and character. However, given the development results in an estimated 200 direct FTE jobs during the construction phase, additional new residents may be relocated to the area. This may impact the composition of the community however (which may have positive or negative impacts depending on the receiver).
- Potential negative impacts associated with the presence of construction workers. Perceptions of safety may decrease due to the increased amount of 'strangers' in the local area. This impact may also be cumulative due to other development in the area.

During operation:

- The residential population within the Mamre Road Precinct has been steadily declining with the introduction of industrial development on what was previously rural residential land. This residential population is expected to continue to decline as more industrial development occurs and the proposed development will result in the loss of some residential dwellings, with associated changes to the composition of the community.
- The former rural residential community of the area will be replaced with a new workforce as a result of the new employment opportunities to be generated on the site. These employment opportunities will occur during both the construction and operational stages of the development and will respectively increase the size and change the composition of the local community. The proposed development will support up to 200 direct FTE jobs once operational and fully occupied. We note that the transformation of the broader area is now underway, with a number of construction workers already present in the locality to facilitate the delivery of various projects across the Mamre Road Precinct and Western Sydney Employment Area.
- The transformation of this area from a rural residential community to an employment precinct has the potential to catalyse new social networks associated with workplaces and workers and users of the area utilising the services of local businesses.
- Some community concerns may arise in relation to the significant change in character of the area from rural and residential to industrial, aligned with broader changes to the precinct and Western Sydney region, as it evolves and transitions into the future. For example, this may lead to potential changes to community connection to and sense of place for past and present residents, workers, and visitors to the area. However, it is noted that this transformation is aligned with NSW Governments strategic policy directions for the area.

Responses/mitigation measures

During construction:

- It is not possible to entirely mitigate impacts to community character and also achieve the broader strategic objective of delivering an employment precinct. Timely, effective, and respectful communications with local residents will help manage the personal impacts of change experienced by those living within this rapidly transforming precinct and region. It is recommended to ensure that community and all stakeholders are made

aware of the timing and likely impact of the construction period. Opportunities for feedback and to ask questions should be provided throughout the operation of the development.

During operation:

- To ensure that that some of the economic benefit of the development also benefits and strengthens the local community, efforts could be made to try and procure local employees for both the construction and operational phases of the development. Procuring local employees may support community acceptance of the development and broader transformation of the area. Further social procurement principles could be considered to amplify social impact (e.g., include and employ trainees, vulnerable backgrounds, underrepresented groups).

Summary

Overall Social Impact Rating

Social impact ratings associated with the change to the size and composition of the local community is considered High to Very High with following overall ratings:

- **Construction: High (Likely Moderate)**
- **Operation: Very High (Almost Certain Transformational), noting cumulative impacts**

Whilst the change would be High to Very High (and would be perceived either negative or positive depending on particular receiver), the change would involve a significant socio-economic benefit in the contribution to significant employment opportunities within the local community, if the change is well mitigated and communicated.

Duration

Changes to the local community composition would be permanent.

Severity/sensitivity

High due to substantial changes in land use from rural to industrial.

Extent

Mamre Road Precinct and the broader WSEA.

Potential to mitigate/enhance

Potential to mitigate impacts by implementing a strategy to source local goods and employment, and ensuring effective communications channels are available to residents to voice concerns, and information on the progress of the development is shared.

7.4.4 Culture - shared beliefs, customs, values and stories, and connections to land, places, buildings

Potential impacts

During construction:

- Impacts to connection to place associated with the establishment of a construction site on previously rural land.
- There is a high Aboriginal cultural value and moderate aesthetic value associated with the site. There is potential for artefacts of Aboriginal cultural significance to be harmed, which may negatively impact the health and wellbeing of local communities (Aboriginal and non-Aboriginal) (Biosis, 2023).
- Kemps Creek and the surrounding region is subject to several large development projects which will result in a substantial cumulative impact to the Aboriginal cultural heritage of the region. Due to the scale and pace of development in the area, Aboriginal heritage is a rapidly diminishing resource in the western Sydney region, and destruction of Aboriginal objects, even on a small scale, increases the cumulative destruction of Aboriginal heritage.
- The Heritage Impact Statement/s (Biosis, 2023) indicate a low level of non-Aboriginal heritage significance associated with the site.

During operation:

- The proposed development would change the character of the site from rural residential to industrial land use. This will likely affect the community's sense of place and connection to place, particularly for the past and present local residents, and for the users of the Hindu Temple located northeast of the site.

- Overall, there would be a cumulative impact on the sense of place people have in relation to the broader Mamre Road Precinct (the Study Area), as the broader strategic vision for the Mamre Road Precinct is realised and rural land within the Precinct is developed for industrial purposes. The effects will be felt through the loss of visual connection with the rural setting and the day to day interaction with the precinct's current natural environment.

Responses/mitigation measures

During construction:

- Meaningful and iterative consultation with Aboriginal communities and stakeholders in relation to the Mamre Road Precinct will be necessary to mitigate negative impacts to cultural sites present on and/or surrounding the site. Similarly, other recommendations in the ACHAR will need to be undertaken to reduce or eliminate the risk of harm to Aboriginal objects or cultural heritage in the area.
- It is not possible to entirely mitigate impacts to community connection to place and also achieve the broader strategic objective of delivering an employment precinct. This social impact and the loss of sense of place is not a new issue for the community, given the consultation that was undertaken during the rezoning of the Mamre Road Precinct and as landowners were approached for the sale of their land. However, the impact can be minimised by developing a strong communication program for the project, providing updates, and reducing any potential uncertainty as to the timing and impact on the local community.

During operation:

- Implement recommendations and mitigation measures outlined within the ACHAR (Biosis, 2022; Urbis, 2022).

Summary

Overall Social Impact Rating	Social impact ratings associated with the change to the local culture is considered High with following overall ratings: <ul style="list-style-type: none"> • Construction: High (Possible Major) – Negative • Operation: High (Likely Moderate) – Negative, noting cumulative impacts
Duration	Permanent impact.
Severity/sensitivity	High due to substantial changes in land use from rural to industrial. There is a high Aboriginal cultural value and moderate aesthetic value associated with the site.
Extent	The site, Mamre Road Precinct and the broader WSEA
Potential to mitigate/enhance	Low - ongoing communication with existing residents and the community to minimise disturbance during the transition period.

7.4.5 Access to and use of infrastructure, services, and facilities

Potential impacts

During construction:

- There will be increased traffic generation on local roads as a result of the construction of the development (e.g., due to increased number of (construction) vehicles, contractors and other visitors accessing the site). This could lead to potential negative impacts associated with congestion and increased travel times for users of the local roads. The Transport & Accessibility Management Plan (Ason Group, 2023) indicates that the proposal is acceptable from a traffic generation perspective.

During operation:

- Delivery of the proposed development may generate increased usage of the local road network, as well as demand for daily needs, and new social infrastructure or services, as a result of construction and tenancing of the proposed buildings. The Transport & Accessibility Management Plan (Ason Group, 2023) indicates that the proposal is acceptable from a traffic generation perspective.
- Delivery of the proposed development will result in enhanced connectivity and convenience for workers and visitors using road transport networks in the area. It is noted that the improvements are largely within the site - merely meeting induced demand, not improving on current.

Potential impacts

- Operation of the proposed development is likely to generate local employment opportunities, assisting in the realisation of the NSW Government's vision for the Mamre Road Precinct, improving accessibility of employment opportunities close to housing and daily living needs. The development will support 200 direct FTE jobs during the ongoing operation of the development at full occupancy.

Responses/mitigation measures

During construction:

- In order to account for some demand for social infrastructure generated by the local workforce, the buildings within the site could consider including passive open spaces for staff to utilise during breaks, including with appropriate shading and planting.
- Traffic impacts will be managed in accordance with relevant legislation and technical report recommendations.

During operation:

- Collaborate with the Council, Aerotropolis, TfNSW, DPE etc to ensure sufficient infrastructure provision within the broader precinct, to meet the demand based on the broader jobs' targets for the area.

Summary

Overall Social Impact Rating	Social impact ratings associated with changes related to access and use of infrastructure is considered Medium to High with following overall ratings: <ul style="list-style-type: none">• Construction: Medium (Possible Moderate) - Negative• Operation: High (Likely Moderate) - Positive
Duration	Increased traffic, job opportunities, and potential need for access to daily needs in the local area are long term.
Severity/sensitivity	High due to substantial changes in land use from rural to industrial.
Extent	Impacts would extend to users of the local road network from the Mamre Road Precinct and beyond
Potential to mitigate/enhance	Construction impacts can be managed through construction traffic management plan. Operational impacts can be mitigated by collaborating with relevant stakeholders to ensure sufficient infrastructure provision within the broader precinct.

7.4.6 Livelihoods – people's capacity to sustain themselves

Potential impacts

During construction:

- Construction of the proposed development is likely to generate local employment opportunities, assisting in the realisation of the NSW Government's vision for the Mamre Road Precinct, improving accessibility of employment opportunities close to housing and daily living needs. The development will support 90 direct and 290 indirect FTE jobs during construction.
- The increased number of workers in the precinct, both during construction and operation, will likely result in increased patronage for local businesses, such as cafes and supermarkets, within the broader area.

During operation:

- Operation of the proposed development is likely to generate local employment opportunities, assisting in the realisation of the NSW Government's vision for the Mamre Road Precinct, improving accessibility of employment opportunities close to housing and daily living needs. The development will support 200 direct FTE jobs during the ongoing operation of the development at full occupancy.
- The increased number of workers in the precinct, both during construction and operation, will likely result in increased patronage for local businesses, such as cafes and supermarkets, within the broader area.

- Hence, the new employment opportunities and investment within the local economy will have positive social benefits for both the local community and businesses as a result of new local employment opportunities and workers within the area utilising the services of local businesses.

Responses/mitigation measures

During construction:

- To ensure that that some of the economic benefit of the development also benefits the local community, efforts could be made to procure local employees for the construction phase of the development.

During operation:

- To ensure that that some of the economic benefit of the development also benefits the local community, efforts could be made to procure local employees for the operational phase of the development. Further social procurement principles could be considered to amplify positive social impact, for example, the inclusion and employment of trainees, people from vulnerable backgrounds and/or underrepresented groups.

Summary

Overall Social Impact Rating	The proposed development will have Medium to High positive benefits in respect to livelihoods, associated with the delivery of new employment opportunities in the Precinct: <ul style="list-style-type: none"> • Construction: Medium (Likely Minor) - Positive • Operation: High (Likely Moderate) - Positive
Duration	Construction impacts are short term, operational impacts are long term.
Severity/sensitivity	High due to substantial changes in land use from rural to industrial.
Extent	Both construction and operational phase are likely to draw workers from Penrith LGA and beyond.
Potential to mitigate/enhance	High – benefits to the local community are likely if local and social procurement and staffing principles are applied.

7.4.7 Way of life - how people live, get around, work, play and interact with one another each day

Potential impacts

During construction:

- Potential sense of disruption to way of life and daily routines for residents and users of the area associated with increased traffic and truck movements during construction of the site, that can lead to extended travel times and inconvenience. This would primarily affect the users of the properties located along Mamre Road. The Transport & Accessibility Management Plan (Ason Group, 2023) indicates that the proposal is acceptable from a traffic generation perspective.
- Potential sense of disruption to way of life and daily routines for residents, workers, and visitors of the area, and users of Mamre Road as a result of construction activities.

The Noise and Vibration Impact Assessment (SLR, 2023) predicts an exceedance to acceptable noise levels for several residential receivers, which will occur during work which uses noise intensive equipment. It is noted that all work is expected to be completed during standard daytime construction hours. The Air Quality Impact Assessment (SLR, 2023) has predicted a low risk of impact during all phases of construction.

- There is potential for increased community sensitivity to way of life impacts due to other recent or future construction impacts in the vicinity of the site – residents, local workers and other users of the area may experience "construction fatigue".

We note that the various construction projects in the area are required to realise the NSW Government strategic policy directions for the area, including the rezoning associated with the Mamre Road Structure Plan and the area transforming into an industrial precinct.

During operation:

- Potential sense of disruption to way of life and daily routines for residents and users of the area associated with increased traffic and truck movements during operation of the site, that can lead to extended travel times and inconvenience. The Transport & Accessibility Management Plan (Ason Group, 2023) indicates that the proposal is acceptable from a traffic generation perspective.
- Long term improvements to way of life for residents of the Penrith LGA associated with realising the NSW Government's vision for the Mamre Road Precinct by improving accessibility of employment opportunities close to housing and daily living needs. This is in line with the Greater Sydney Commission's vision for a "30-minute city" where employment and other daily living needs are located close to people's homes and can consequently reduce travel times for workers and increase the amount of time available to spend with friends and family.
- Cumulative benefits for the broader Mamre Road Precinct associated with enhanced convenience and potential improvement to the daily living routines of residents, workers, and visitors to the precinct through the broader development of the area. However, at a cost of loss of the rural way of life in order to make way for strategic objectives for the Mamre Road Precinct.

Responses/mitigation measures

During construction:

- Amenity impacts – such as traffic, noise, air quality – will be managed in accordance with relevant legislation and the Construction Management Plan, and mitigation measures set out in the technical reports prepared to support this SSDA. This will ensure appropriate mitigation of impacts on residents and adjacent sensitive receivers in particular.
- It will be important to establish effective communication channels for local residents to find out information about the development and raise any issues or concerns, to mitigate mental health impacts which can arise through uncertainty and the effects of significant changes to a person's local environment.
- Collaboration with local Council and other stakeholders may allow for the coordination of works in order to minimise cumulative impacts.

During operation:

- To ensure that that some of the economic benefit of the development also benefits the local community, efforts could be made to procure local employees for both the construction and operational phases of the development.

Summary

Overall Social Impact Rating

Social impact ratings associated with changes to way of life is considered High to Medium with following overall ratings:

- **Construction: High (Likely Moderate) - Negative**
- **Operation: Medium (Possible Moderate) - Positive**

The proposed development will have positive benefits in respect to way of life, associated with the delivery of new employment opportunities in the Penrith LGA.

Duration

Most potential negative impacts will occur during the construction phase. Most potential positive social benefits will occur during the operational phase.

Severity/sensitivity

High due to substantial changes in land use from rural to industrial.

Extent

Construction phase impacts would extend to the locality; operational benefits would extend to Penrith LGA and beyond.

Potential to mitigate/enhance

Moderate – most construction impacts can be managed through environmental management plans. Infrastructure enhancements will positively benefit the community in the long term.

7.5 Monitoring and measurement framework

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

During construction

- Implementation of recommendations and mitigation measures outlined within various technical assessments prepared for the proposal.
- Development of a Construction Management Plan that includes a complaint handling procedure for identifying and responding to community issues related to construction impacts.
- Ongoing consultation with relevant stakeholders, including local residents and workers in the emerging Mamre Road Precinct to identify impacts promptly.

During operation

- Continued consultation with relevant stakeholders, including future tenants of the Site.
- Development and implementation of an operational plan of management that mandates data collection (e.g., complaints register) to enable ongoing monitoring of the performance of the Site over time.
- Preparation of a local procurement strategy in order to ensure that some economic benefit from the development is extended to the local community.

8.0 Economic Impact Assessment

8.1 Introduction and approach

An assessment of the economic impacts (and benefits) associated with the construction and operational phases of the 1030-1048 & 1050-1064 Mamre Road, Kemps Creek development is discussed in this section.

8.2 Impact assessment matters

In order to address the market potential and economic impacts, this economic assessment considers:

- Demand for the development taking into account the following:
 - Site suitability
 - Market context
 - Infrastructure and investment
 - Need for modern industrial facilities.
- Local and regional economic impacts and benefits likely to result from the proposed development including:
 - Operational impacts
 - Employment generation – during construction and operation
 - Economic output – increased Value-Added output
 - Other economic benefits from the proposed development.

8.3 Key findings and recommendations

As outlined below, there are no significant or detrimental economic impacts likely to result from the proposed development. Instead, the project is likely to result in significant positive economic benefits including the provision of employment opportunities at the site, while also benefitting from its location within a strategically planned employment precinct, and in close proximity to major infrastructure projects.

8.3.1 Demand for the development

Site suitability

The site is well suited for the development and proposed uses, considering the context of the Study Area and the Mamre Road Precinct as a future industrial and employment centre.

The site is located towards the southern extent of the Mamre Road Precinct and incorporated within both the Western Sydney Employment Area (WSEA) and the Western Sydney Aerotropolis.

The WSEA is the largest employment area in Western Sydney, and has delivered over 1,000ha of industrial land over the past 10 years, which has resulted in a number of national and multinational corporations investing in industrial facilities in the precinct. Demand for industrial space within the WSEA is attributed to the proximity to major road corridors, including the M4 and M7, as well as land availability and price considerations that compare favourably to other industrial areas in Greater Sydney.

The Mamre Road Precinct itself includes some 850 hectares of future industrial land and is forecast to accommodate an estimated 17,000 new jobs on completion. The location of the proposed development makes it well suited to the proposed industrial and warehousing related usages. Jobs generated by the development will support growth and development in the precinct overall, and will align with the strategic objectives of the WSEA and Aerotropolis.

This part of Sydney will remain a key focus for employment well into the future, in line with government objectives at all levels, and supported by investment and planning initiatives.

Market context

Sydney is currently experiencing strong demand for larger, modern industrial assets – as is discussed in detail in **Section 6.3**. Western Sydney is a popular location for industrial development due to land availability, residential growth and access to transport and efficient distribution networks.

More broadly, Western Sydney is experiencing the emergence of more advanced and integrated business operations including a shift to more specialised, automated facilities, 24/7 operation and a mix of uses supporting more diverse industrial facilities such as ancillary commercial office and community/retail uses.

The proposed development is aligned to these trends, providing additional industrial and employment floorspace as well as providing a mix of contemporary industrial and supporting uses and amenities such as office facilities and a café within an integrated precinct.

Infrastructure and investment

Continued population growth within Western Sydney, and more broadly within Greater Sydney, will drive strong demand for a range of facilities, including industrial uses. The WSEA is a key industrial market, benefitting from access to land, proximity to major transport infrastructure, and close proximity to a growing residential market. These advantages allow this part of Sydney to play a critical role in serving the local, regional and national economy.

Planned and ongoing investment will support growth and development across Western Sydney and the Mamre Road Precinct, including infrastructure projects such as:

- Western Sydney Airport and Aerotropolis
- New motorways including the M12 and M9 orbital
- Future Western Sydney Freight Line
- Western Sydney Intermodal
- Moorebank Intermodal Terminal.

Significant investment is occurring in the area from government as well as major national and international corporations including owners and occupiers. A recent significant investment includes Goodman and Amazon, with the completion of a new Amazon distribution centre, located immediately north of the subject site. The fulfillment centre is the largest in Australia at 200,000m² and is among the first to roll out the latest advanced robotic technology. There are numerous other examples which demonstrate the strong industrial investment activity occurring in this part of Sydney.

The ongoing investment in infrastructure and higher order industrial facilities within Western Sydney highlights the need and opportunity for a large and contemporary industrial precinct such as that proposed at 1030-1048 & 1050-1064 Mamre Road, Kemps Creek

Need for modern industrial facilities

The industrial sector has become increasingly sophisticated, with more specialised facilities, and increased demand supported by population growth as well as infrastructure investment and technology advancement. This shift has generated an increased requirement for larger, modern industrial assets. Western Sydney is a popular location due to land availability, residential growth and access to transport and efficient distribution networks.

As the industrial sector has evolved, the sector has transitioned away from more traditional primary production and manufacturing activities towards more specialised, knowledge intensive industries and uses. In particular, the emergence and ongoing development in technology and automation, infrastructure investment and supply-chain logistics operations have prompted a shift to a more specialised white-collar workforce.

These highly skilled workers are increasingly required to oversee and manage modern machinery and equipment, with these workers supported by a larger proportion of sales and administration staff. This transition has implications for the types of buildings and uses required in the sector, with a need for more specialised warehouses, but also increased provision of supporting commercial office space and amenities to accommodate the increasingly white-collar workforce.

Modern industrial tenants are focused on specialised and innovative developments that provide facilities that are built to high specifications, allow increased hours of operation, integrate seamlessly with technology and provide quality fit-outs and amenities.

The proposed development will be well suited to meet modern tenant and business requirements, supporting the long-term potential for the Mamre Road Precinct.

8.4 Economic impacts and benefits – local and regional

8.4.1 Input-Output Modelling

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

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

Every industry requires inputs from many other industries, plus the inputs of workers and machinery and equipment to produce output. Input-output modelling uses averages derived from the ABS Input Output Tables to estimate the impact on all industries when one industry expands its production. The modelling used in this report is based on the 2019/20 ABS National Accounts release.

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

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

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

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

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

'Job-years' is defined as the number of full-time equivalent (FTE) jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year. Only applies to construction employment.
- **Ongoing Employment** - direct and indirect FTE jobs supported by the ongoing operation of the project annually.
- **Value Added** - direct and indirect value added generated during the construction and operational phase of the project.

Value Added is defined as the wages, salaries and supplements plus gross operating surplus (income earned by businesses) required in producing the extra output (construction investment and operating output/turnover). This represents the standard measure of economic contribution, that is, the increase in economic activity as measured by gross domestic product (GDP).

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

- **Construction Phase:** Economic activity during the construction phase of the project which will be spread across the construction program.

- **Operational Phase:** Ongoing economic activity once the project is completed.

8.4.2 Operational impacts

Any impact from the proposed development is anticipated to be limited, and will not impact on the viability or continued operation of any facility within the area. The proposed development will result in a redevelopment of the site, consistent with existing government plans and strategic objectives for the precinct.

The precinct has been planned to allow for adequate distance and buffers to surrounding facilities and uses, including residential. Furthermore, modern industrial developments are increasingly efficient, with stricter environmental controls and standards, together with technological advancements in building materials and operations. This is leading to facilities and services that are better designed, quieter, cleaner and have a reduced impact on the surrounding area.

Given the location of the proposed development within a planned industrial precinct, and the provision of sophisticated and modern warehouse facilities, impacts on surrounding operations or uses are anticipated to be limited.

8.4.3 Construction employment

It is estimated the capital investment required to realise the proposed development will be in the order of \$68.8 million. This estimate is based on the Cost Estimate Report prepared by Rider Levett Bucknall and relates to direct construction costs only.

Based on a construction cost of \$68.8 million, the construction phase is expected to directly support employment of 90 job-years and deliver a direct value-add to the economy of \$15.9 million.

When the multipliers are taken into account, total state economy-wide effects over the construction program are forecast to be: employment of 380 job-years and a total direct value-add to the economy of \$56.6 million.

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

	Construction Phase (spread over construction period)		
	Direct	Indirect	Total
Output (\$M)	\$68.8	\$101.0	\$169.8
Employment (job-years)	90	290	380
Value Added (\$M)	\$15.9	\$40.7	\$56.6

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2020/21; ABS, Consumer Price Index

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

8.4.4 Ongoing employment

Providing 38,640m² of GFA, the proposed development would deliver a significant amount of new floorspace to the Western Sydney industrial market. The composition of the development, including multiple warehouses, and supporting commercial office space is well suited to the future context of Aldington Road and the overall Mamre Road Precinct.

The activities and employment supported by the project will generate significant regional economic output. On completion of the proposed development, the operational phase is expected to deliver the following (direct) benefits: FTE employment of ongoing 200 jobs and direct value-add to the economy of \$58.5 million per annum.

When the multipliers are taken into account, total ongoing economy-wide effects are estimated at: FTE employment of 570 jobs supported and a total direct value-add to the economy of \$112.2 million per annum.

Taking into account the above, the proposed development could ultimately account for around 1.2% of total jobs provided within the Mamre Road Precinct (of 17,000 total workers) based on direct FTE jobs of 200.

Jobs supported by the development will provide employment opportunities for both local and regional residents, and support employment in growth industries, particularly in relation to industrial activities and supporting knowledge and service-based jobs.

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

	Operational Phase (annual)		
	Direct	Indirect	Total
Output (\$M)	\$119.2	\$109.0	\$228.1
Employment (FTE)	200	370	570
Value Added (\$M)	\$58.5	\$53.7	\$112.2

Source: ABS, National Accounts 2020/21; Ethos Urban Research

8.4.5 Other economic benefits

The proposed development at 1030-1048 & 1050-1064 Mamre Road, Kemps Creek will deliver an array of economic benefits. In particular, the site will deliver an industrial precinct that will respond to the growing need for modern industrial and employment uses that align with modern tenant requirements and the strategic objectives for Western Sydney. Other benefits associated with the development include:

- The project will act as a catalyst and will support the role of the Mamre Road Precinct as a key industry and employment precinct serving the local area as well as the broader region.
- Contribute to attracting and securing investment and high value tenants and businesses within Western Sydney, by providing a critical mass of modern facilities in an integrated precinct.
- Support Government objectives of delivering higher order employment opportunities across Western Sydney, specifically within the WSEA and Western Sydney Aerotropolis.

The site provides a unique opportunity to deliver a range of benefits through the development of a modern, integrated industrial precinct, within a strategic industrial employment zone. The proposed development will generate significant employment benefits as well as broader benefits to the local and regional community.

9.0 Concluding comments

There are minimal significant or detrimental social or economic impacts anticipated to arise as a result of the development which cannot be effectively mitigated and managed.

The proposed development will result in significant positive social and economic benefits for the local and broader community, noting additional employment opportunities will be created, along with growth in private business investment. This will create a sustainable funding base and employment precinct for the Western Sydney Employment Area in perpetuity.

The proposed development is well-located within the Mamre Road Precinct, which will be well serviced by major roads and supporting transport infrastructure, and is suitably distanced from nearby residential areas with appropriate buffers. It presents a significant opportunity to deliver new employment opportunities including for nearby residents, while minimising amenity impacts to surrounding residents.

The development of this site as an industrial and warehousing precinct will provide significant benefits to the region, including alignment with the future Western Sydney Aerotropolis and the ability to support the growth and development of the broader Parkland City District.

The proposal is consistent with the aims and objectives of the Mamre Road Precinct and the broader WSEA, facilitating the development of a new industrial precinct, and creation of employment generating land uses. In addition, the development will contribute to the upgrade and provision of state infrastructure for the precinct, including new open space, recreational facilities and shared cycle/pedestrian paths.

The development will impact upon the way of life for existing and nearby residents, both in positive and negative ways. This is due to the change in use of the land from rural to industrial uses, the increase in density of development on the site and the upgrade and introduction of new roads within the existing network. All of these social impacts were previously considered in the rezoning of the land from rural to industrial and are aligned with the strategic direction to introduce industrial development in the area.

During the construction and operation of the development there is the potential for adverse social impacts due to the noise, acoustic and air quality impacts. However, these are proposed to be managed in accordance with the relevant regulations and the Construction Management Plan, and as such the impacts can be mitigated.

The site presents a significant opportunity to deliver new employment opportunities including for nearby residents. Amenity and other social impacts can be mitigated through the recommendations in this report and various technical reports, to ensure that the surrounding community is not significantly affected. Economic impacts are considered to be limited.

The development of this site as an industrial and warehousing precinct will provide significant benefits to the region, including alignment with the future Western Sydney Aerotropolis and the ability to support the growth and development of the broader Parkland City District.

Appendix A. Community Profile Summary

Table 9 Community Profile Summary, 2021 Census

Category	Mamre Road Precinct	Greater Sydney
<u>Income</u>		
Median individual income (annual)	\$26,630	\$45,930
<i>Variation from Greater Sydney median</i>	-42.0%	n.a.
Median household income (annual)	\$49,500	\$108,750
<i>Variation from Greater Sydney median</i>	-54.5%	n.a.
<u>Age Structure</u>		
0 years	0.0%	1.2%
1-2 years	0.0%	2.4%
3-4 years	1.1%	2.4%
5-6 years	0.0%	2.5%
7-11 years	2.3%	6.3%
12-17 years	3.4%	7.1%
18-24 years	7.2%	8.8%
25-34 years	7.2%	15.6%
35-49 years	11.4%	21.7%
50-59 years	12.5%	12.0%
60-69 years	14.8%	9.7%
70-84 years	24.0%	8.4%
85 years and over	16.0%	1.9%
Median Age (years)	66.0	37.3
<u>Country of Birth</u>		
Australia	74.1%	61.1%
<i>Aboriginal and Torres Strait Islanders</i>	1.3%	1.8%
Other Major English Speaking Countries	2.4%	7.1%
Other Overseas Born	23.4%	31.8%
<i>% speak English only at home</i>	69.5%	61.0%
<u>Household Composition</u>		
<i>Couple family with no children</i>	31.1%	24.5%
<i>Couple family with children</i>	20.3%	36.1%
Couple family - Total	51.4%	60.5%
One parent family	13.5%	11.0%
Other families	0.0%	1.1%
Family Households - Total	64.9%	72.6%
Lone person household	28.4%	23.3%
Group Household	6.8%	4.1%
<u>Dwelling Structure (Occupied Private Dwellings)</u>		
Average household size	2.6	2.7
<u>Tenure Type (Occupied Private Dwellings)</u>		
Owned outright	61.3%	28.3%
Owned with a mortgage	4.8%	34.0%
<u>Rented</u>	11.3%	36.1%
Other tenure type	22.6%	1.6%
<u>Attending Education (% of those attending)</u>		
Pre-school	0.0%	8.0%
<u>Infants/Primary Total</u>	36.4%	31.4%
<u>Secondary Total</u>	40.9%	24.9%
Technical or Further Educational Institution	22.7%	10.2%
University or other Tertiary Institution	0.0%	21.4%
Other type of educational institution	0.0%	4.2%
<i>% of total population attending education</i>	8.9%	25.8%

Source: ABS Census of Population and Housing 2021

Note: interpretation of small area data from the 2021 ABS Census should consider potential outcomes from the COVID-19 pandemic.