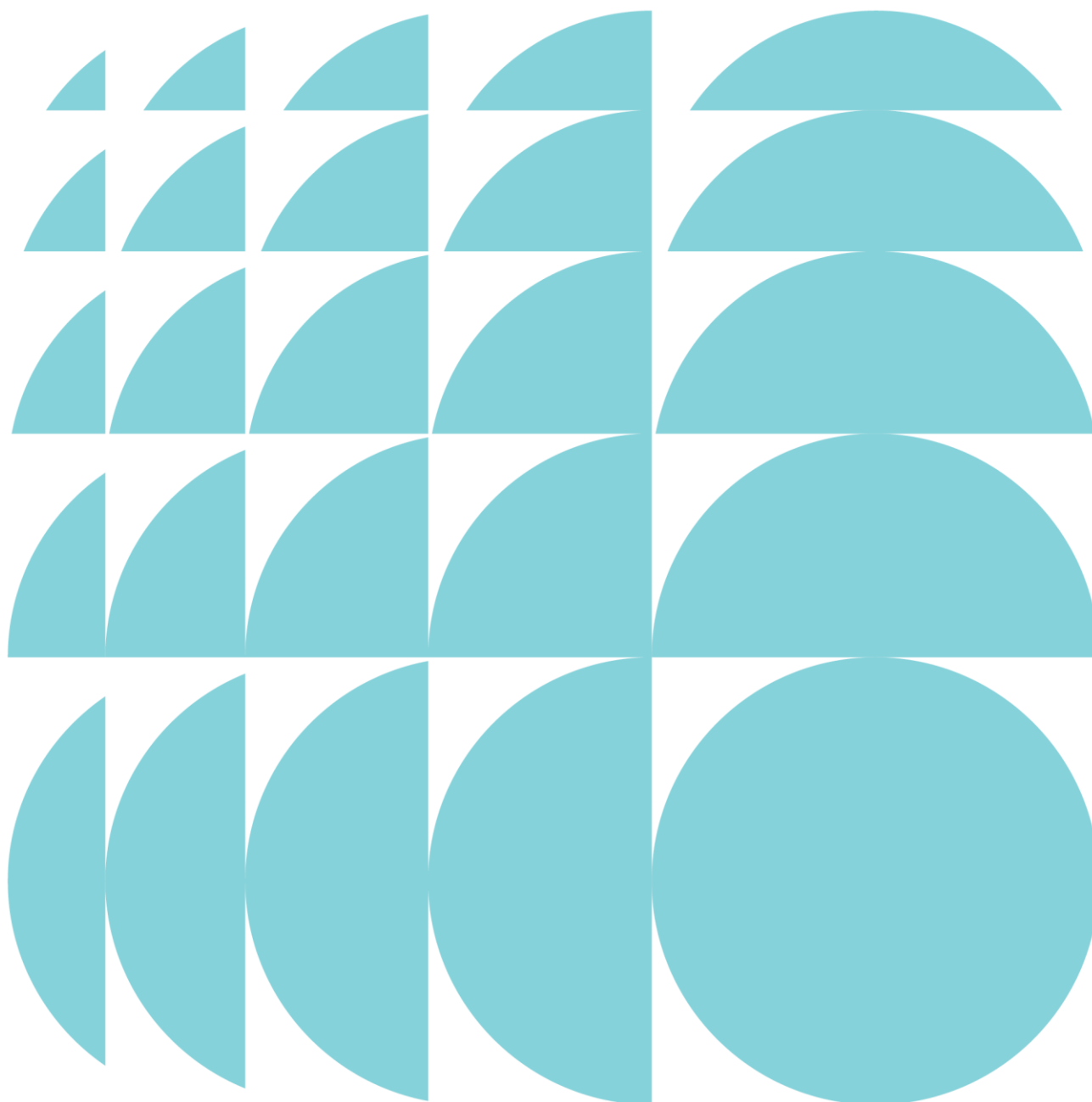


ESR Kemps Creek Logistics Park

290-308 Aldington Road and 59-62 and 63
Abbotts Road, Kemps Creek

Prepared for ESR

08 April 2022 | 2200446



COVID-19 is an unprecedented global health crisis and economic event that is rapidly evolving. In these circumstances the short-term economic environment is extremely uncertain, especially where the forecasting of economic trends is involved. At the current time, the research and analysis of economic data – such as forecasts of economic activity, population, employment growth, and so on – reflects a return to “business as usual” scenario, while also noting the potential impacts that may be associated with the COVID-19 virus and the anticipated return to growth in economic indicators. Where required, we will be clear where a specific consideration of the implications of COVID-19 is being provided outside a business as usual scenario.

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08.04.2022

The Social Impact Assessment (SIA) component of this report contains all relevant information, has been prepared as per legal and ethical obligations, and is not false or misleading (under the assumption that the key findings of the background studies and technical reports are accurate).

The lead authors meet the qualifications and experience criteria outlined in the SIA Guideline (NSW DPIE 2021) – i.e. have qualifications in relevant social science disciplines and/ or proven experience over multiple years and competence in social science research methods and SIA practices:

Allison Heller - Director, Social Strategy

- Bachelor Town Planning (Hons. 1), Post Graduate Diploma History of Architecture and Art
- Practicing urban and social planning/ policy across the private and public sectors since 2000.
- Member of Planning Institute of Australia, Member of Sustainability Committee - Property Council of Australia, Member of Sustainability & Smart Cities Committee and Social Sustainability Working Group - Urban Development Institute of Australia

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VERSION NO. FINAL

DATE OF ISSUE 08.04.2022

REVISION BY: SS

APPROVED BY: AH/LC

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Executive Summary

Ethos Urban has been engaged by ESR to undertake a Social and Economic Assessment in relation to the redevelopment of the site at 290-308 Aldington Road and 59-62 and 63 Abbots Road, Kemps Creek (the Site) for industrial purposes. The assessment has been undertaken in accordance with the Secretary's Environmental Assessment requirements dated 30 September 2020.

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 17,000 jobs and 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 805 FTE jobs during the construction phase, and 780 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 of 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 to undertake a Social and Economic Assessment in relation to the redevelopment of the site for industrial purposes located at 290-308 Aldington Road and 59-62 and 63 Abbots Road, Kemps Creek.

The Site is located within the Mamre Road Precinct which sits within the Western Sydney Employment Area (WSEA). As the development has a Capital Investment Value of more than \$50 million it is classified as a State Significant Development under Schedule 1 Clause 12 of the State Environmental Planning Policy (Planning Systems) 2021 (PS SEPP).

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 issued for the development, in the context of a holistic appraisal of the social and economic value of the scheme.

1.2 Structure of this report

This report is structured as follows:

- Chapter 1:** Introduction
- Chapter 2:** Purpose, objectives and scope of this assessment
- 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 for the proposed development. This report has been prepared having regard to the SEARs as follows:

Table 1 SEARs requirements

SEARs	Where addressed in this report
Social impact – including the preparation of a Social Impact Assessment which:	<i>Section 7.0</i>
<ul style="list-style-type: none"> • Identifies and analyses the potential social impacts of the development from the point of view of the affected communities and other relevant stakeholders (i.e. how they experience the development) 	<i>Section 7.0</i>
<ul style="list-style-type: none"> • Considers how potential environmental changes in the locality may affect people’s way of life including community, access to and use of infrastructure, services and utilities, culture, health and wellbeing, surroundings, personal and property rights, decision making systems, and fears and aspirations, as relevant and considering how different groups may be disproportionately affected 	<i>Section 7.0</i>
<ul style="list-style-type: none"> • Assesses the significance of positive, negative and cumulative social impacts considering likelihood, extent, duration, severity/scale, sensitivity/importance and level of concern/interest(s) 	<i>Section 7.0</i>
<ul style="list-style-type: none"> • Includes mitigation measures for likely negative social impacts and any proposed enhancement measures 	<i>Section 7.0</i>
<ul style="list-style-type: none"> • Details of how social impacts will be adaptively monitored and managed over time. 	<i>Section 7.4</i>

2.0 Purpose, objectives and scope of this assessment

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 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.

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, Industry and 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.

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.

Economic Impact Assessment

In the absence of formal guidelines available from the NSW DPIE 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 economic output.

2.2 Information sources and assumptions

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

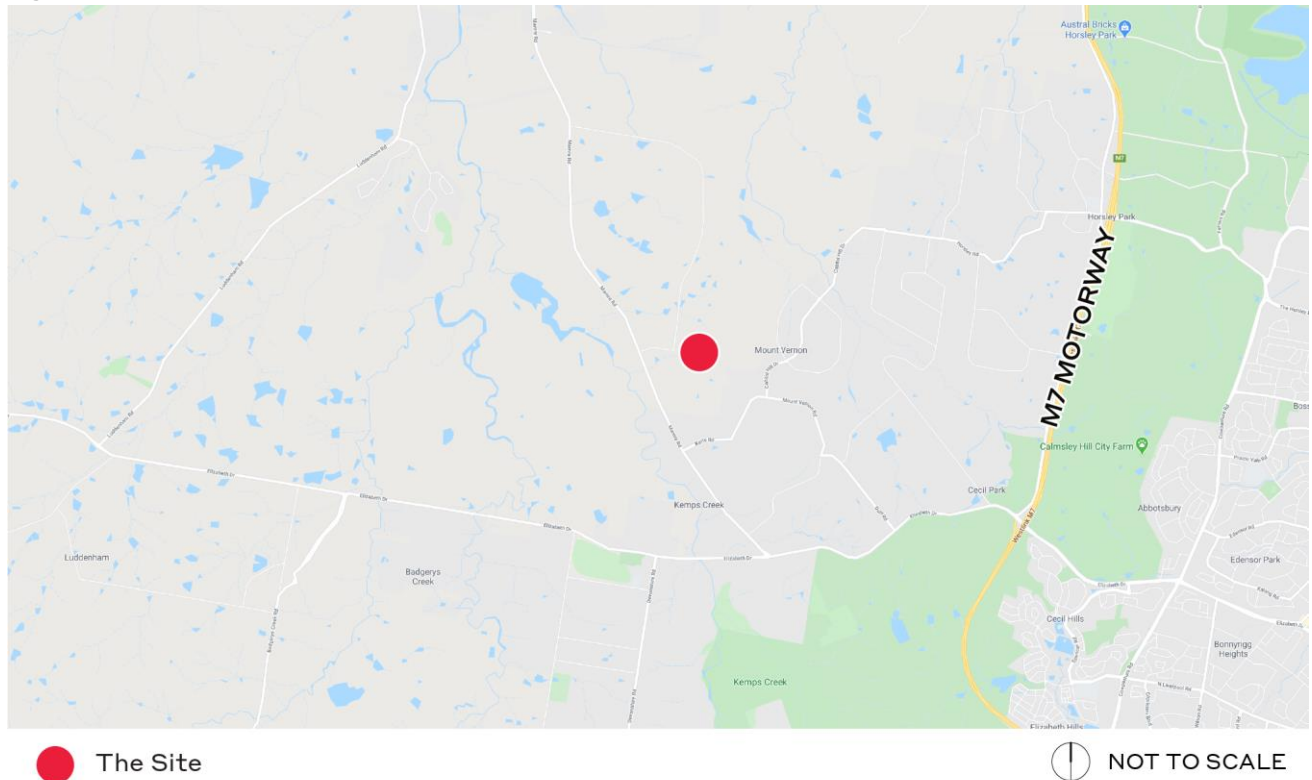
- ABS Census of Population and Housing, 2016
- Transport for NSW Population and Employment Projections, 2019
- Greater Sydney Commissions Employment Lands Analysis
- City of Sydney Floorspace and Employment Survey (2017)
- Greater Sydney Regional Plan – Metropolis of Three Cities (Greater Sydney Commission 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 (DPIE 2020)
- Western City District Plan (Greater Sydney Commission 2018).

3.0 Site context and description

3.1 Site context

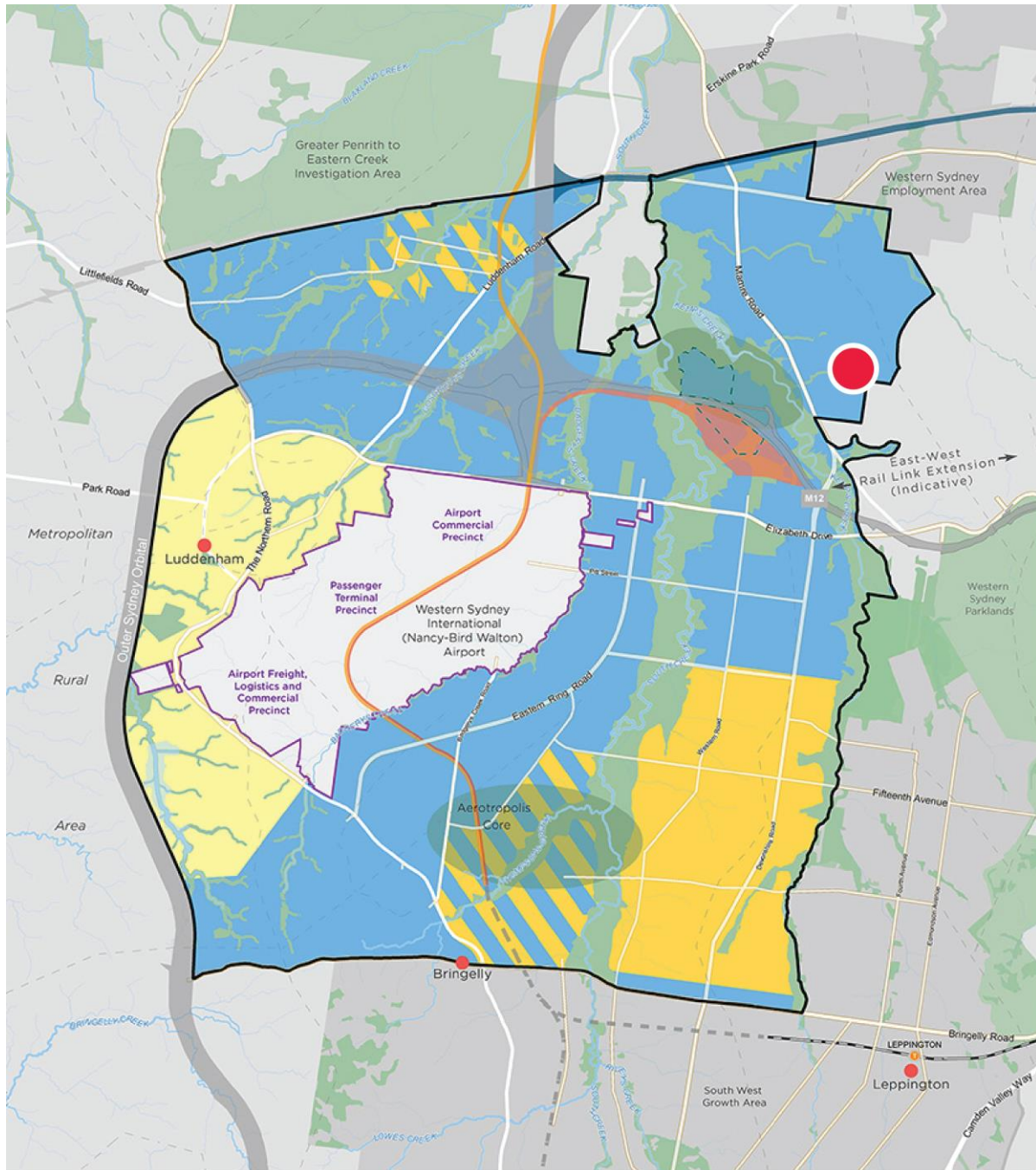
The site is located at Kemps Creek, within the Penrith Local Government Area (refer to **Figure 1**). It also forms part of the Mamre Road Precinct which sits within both the Western Sydney Employment Area (WSEA) and the Western Sydney Aerotropolis (refer to **Figures 2 and 3**).

Figure 1 Site Context



Source: Google and Ethos Urban

Figure 2 Western Sydney Aerotropolis Structure Plan (with the approximate location of site identified with red circle)



Structure Plan
Western Sydney Aerotropolis

- Western Sydney Aerotropolis
- Western Sydney International (Nancy-Bird Walton) Airport
- Topographic Ridgeline
- Key Network Upgrades
- Regional Parkland (Investigation)
- Critical Utility / Infrastructure (Investigation)
- Proposed Sydney Metro Greater West
- Potential East-West Rail Link, Stabling and Critical Infrastructure
- Proposed Future Rail Links (Investigation)
- Proposed Transport Corridor
- Potential Western Sydney Freight Line Corridor
- Centre
- Agribusiness
- Environment and Recreation
- Flexible Employment
- Urban Land
- Mixed Flexible Employment & Urban Land

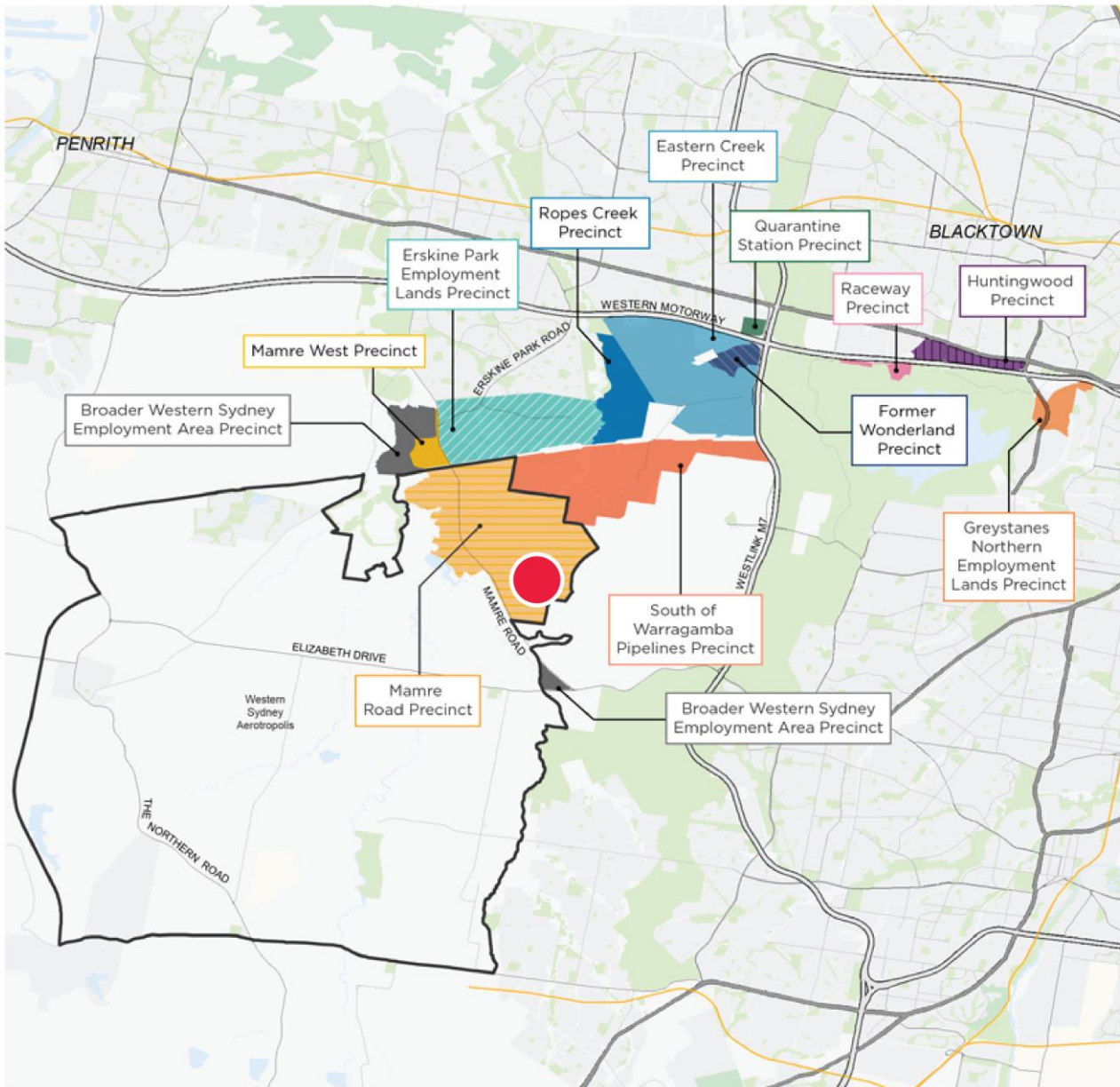
The Site

0 0.5 1 2 Kilometres

N

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

Figure 3 Location of the site within the Western Sydney Employment Area Structure Plan



 The Site

Source: DPIE, edits by Ethos Urban

3.2 Site description

The site is located at 290-308 Aldington Road, 59-62 Abbots Road, and 63 Abbots Road as shown in **Figure 4**. The land is approximately 320,000m² and is irregular in shape. The site comprises 3 separate allotments and is legally described as Lots 11, 12 and 13 in DP253503. The site currently comprises undulating rural land with a combination of residential dwellings, farm sheds, and miscellaneous agricultural greenhouses and structures.

Figure 4 Site Aerial



Source: Nearmap, Ethos Urban

3.3 Surrounding development

Land surrounding the site is generally rural in nature, comprising a variety of rural dwellings, rural land, farm dams and scattered vegetation. Beyond this, the following 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;
- The Oakdale South industrial estate is located to the north-east of the Mamre Road Precinct;
- The existing Catholic Healthcare Emmaus aged care and retirement village, Little Smarts Early Learning Centre, Trinity Primary School and Emmaus Catholic College are located north west of the site; and
- The existing residential housing community at Mount Vernon is located immediately adjacent to the eastern boundary of the site.

4.0 Proposed development

The SSDA will seek concept approval (in accordance with Section 4.22 of the *Environmental Planning and Assessment Act 1979* (EP&A Act) to facilitate the future development of the site for warehousing and distribution purposes.

The proposed works seek consent for the staged construction of 5 separate lots into warehouse and distribution facilities. The proposed works will include earthworks, infrastructure and roads, the construction and fit out and operation of each building and the associated car park. Other works relating to on site utilities and the construction of an internal access road will also be required.

Specifically, the SSDA will seek consent for:

- Site preparatory works, including:
 - Demolition and clearing of all existing built form structures and vegetation;
 - Bulk earthworks including 'cut and fill' to create flat development platforms for the proposed buildings, and topsoiling, grassing and site stabilisation works;
- Subdivision of the site into 5 individual lots;
- Construction of a new industrial estate at the site comprising 5 allotments and a total GFA of 150,577m², including:
 - 6 new industrial warehousing buildings with ancillary offices, comprising:
 - o 144,482m² of warehousing floorspace; and
 - o 5,895m² of ancillary office floorspace;
 - 1 new on-site retail café building comprising 200m² of floorspace;
- Construction of a new internal road layout and parking for 658 vehicles;
- Associated site servicing works and ancillary facilities, including OSD detention basin;
- Associated site landscaping; and
- Works-in-kind (WIK) arrangements through a Voluntary Planning Agreement (VPA) for external road upgrades including to Aldington and Abbots Road, and a new signalised intersection at Mamre and Abbots Road.

For the purposes of this analysis, Gross Lettable Area (GLA) is considered, which is of most relevance for the social and economic analysis, and is summarised as follows:

- The industrial estate will comprise a total GLA of 159,895m², including:
 - 153,800m² of warehousing floorspace
 - 5,895m² of ancillary office floorspace
 - 200m² café

The proposal will be undertaken in accordance with the Architectural Plans prepared by ESR, an excerpt of which is shown in **Figure 5** below.

Figure 5 Proposed concept masterplan



Source: ESR

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 17,000 jobs and 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 2** 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 Community Strategic Plan (Penrith City Council 2017)*
- *State Environmental Planning Policy (Industry and Environment) 2021*
- *Western Sydney Aerotropolis Plan (DPIE 2020)*
- *Western City District Plan (Greater Sydney Commission 2018)*

The comprehensive strategic policy analysis is provided in the Appendix.

Table 2 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 Penrith LGA due to its close proximity to Sydney Airport and Badgerys Creek Aerotropolis. • To meet forecast demand for industrial land, NSW DPIE has amended the <i>State Environmental Planning Policy (Industry and</i> 	<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 DPIE 2019)

Policy theme	Key implications for impact assessment	Source
	<p><i>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.</p> <ul style="list-style-type: none"> 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. 	<ul style="list-style-type: none"> Mamre Road Precinct Finalisation Report (NSW DPIE, 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 DPIE 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 LGA currently has 56,400 local 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 Community Strategic Plan (Penrith City Council 2017) Western Sydney Aerotropolis Plan (DPIE 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" which "improve the quality of our urban and rural environments as well as 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 (DPIE 2020)

6.0 Local social and economic context

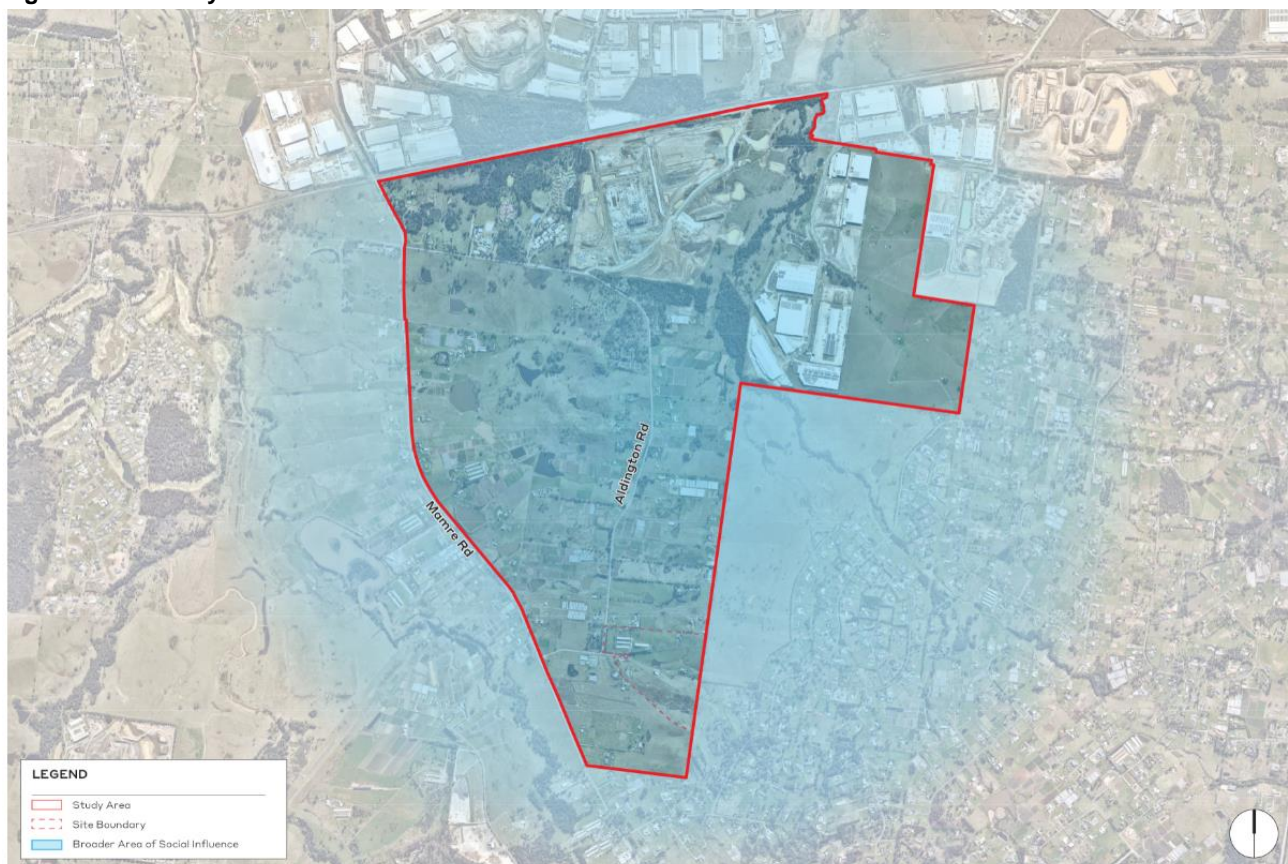
6.1 Study area definition

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 Aldington Road connecting to Mamre Road, which provides access the motorway network including the M4 and M7, as well as the future M12.

A map outlining the Mamre Road Precinct and primary Study Area for this analysis is shown in **Figure 6**. 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 south east of the site.

Figure 6 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) 2016 Census of Population and Housing. Resident and worker population forecasts have been estimated taking into account data sourced from the ABS, .id Consulting and the NSW Government.

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 2016 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 2020 the Study Area had an Estimated Resident Population (ERP) of 316, representing a decrease from the 2011 Census when the population was 343. 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 59.7 years, well above the Greater Sydney average of 36.4 years. The largest age group are residents aged 70 years and over, who account for 38.8% of the Study Area population.
- **Income:** The median annual household income for households in the Study Area is \$97,740, slightly higher than the Greater Sydney average of \$92,200.
- **Household composition:** The dominant household composition in the Study Area are family households, which account for 87.9% of all housing types. Within family households, 41.4% are couple families with children. While lone person households represent a smaller share of household types at 5.2%.
- **Dwelling type:** All dwellings within the Study Area are classified as 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 (65%), with a smaller share of residents (26.7%) who rent and 8.3% of homes that are owned on a mortgage.

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 own their own homes.

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 2016, 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 5,500 workers during construction.

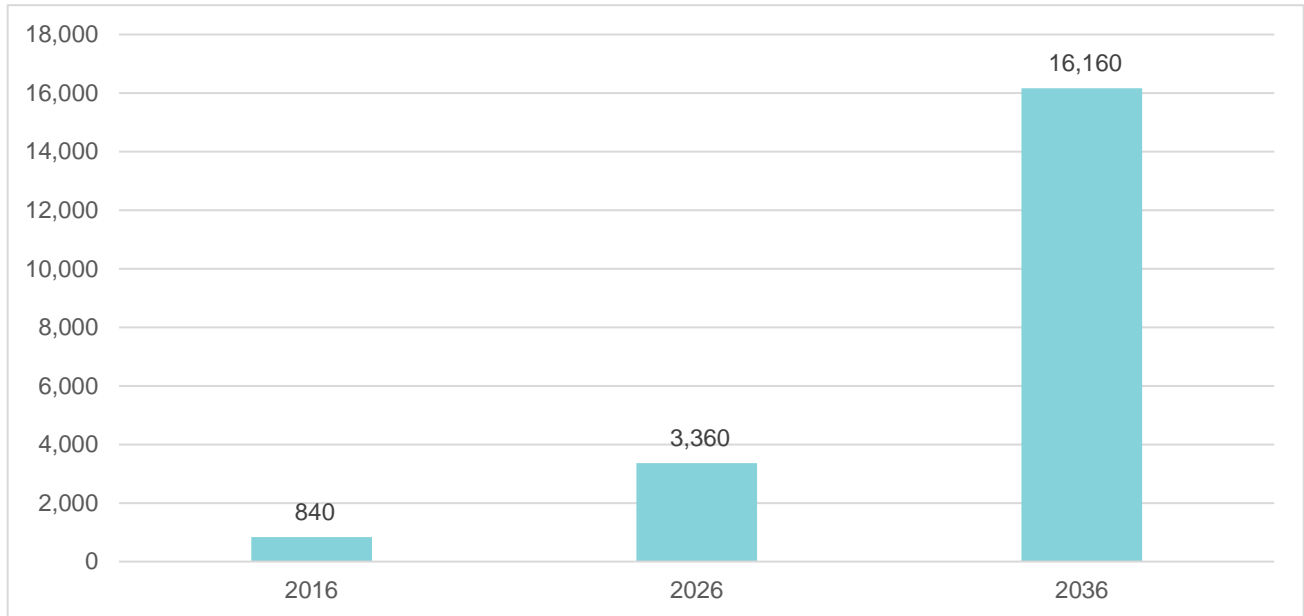
Currently the existing profile reflects the semi-rural businesses that operate in the Study Area as well as the provision of social infrastructure, such as the educational facilities. Over time, however, it is expected that the employment profile will change substantially as the Mamre Road Precinct is developed into a major industrial and employment area.

Employment forecasts for Mamre Road Precinct are presented in **Figure 7** and show a with a further +15,323 workers projected by 2036, reflecting an average annual growth rate of 15.9% over a 20 year period. 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 projections for the precinct have taken into consideration current proposals, and assumes that majority of Mamre Road Precinct will be fully developed by 2036.

Employment generated by the proposed development at the 290-308 Aldington Road 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**.

Figure 7 Employment forecasts (total) 2016-2036



Source: Transport for NSW, DPIE

6.3 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 (**Table 3**), 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:

- Net absorption of 548,000m² of industrial stock was recorded across the Sydney industrial market for the 6 month period from H1 2021 to H2 2021 (*CBRE 2021*).
- 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 755,000m² of new industrial supply is estimated to be delivered in 2022 across Sydney (*Knight Frank 2021*), including some 280,000m² of speculative space to be completed in Western Sydney.
- Very low levels of vacancy recorded at 0.4% across Sydney (2021), down from 1.4% recorded in H1 – 2021, and 2.8% in early 2020. This includes a 0.1% vacancy rate in the Outer Northwest market, which captures the Mamre Road Precinct (*based on the CBRE market definition, 2021*). This low vacancy highlights the strong demand for industrial space, even in light of the COVID-19 pandemic.
- 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.

A summary of rent and land values in the Sydney western industrial markets (excluding South Sydney) is outlined below, highlighting the relative affordability in the western parts of Sydney.

Table 3 Sydney industrial market – key indicators (Q2, 2021)

	North West	Central West	South West	Outer South West	Western Sydney
<u>Land Value (\$/sqm)</u>					
3,000-5,000m²	\$800-1,000m ²	\$1,000-\$1,500m ²	\$750-\$1,000m ²	\$700-\$800m ²	\$850-950m ²
10,000-50,000 m²	\$650-\$750m ²	\$800-\$1,000m ²	\$650-\$750m ²	\$600-\$700m ²	\$700-850m ²
10ha and above	\$600-\$700m ²	\$800-\$1,000m ²	\$600-\$700 m ²	\$500-\$600m ²	\$700-800m ²
<u>Net Fact Rents (\$/sqm)</u>					
Prime	\$115-\$150m ²	\$140-\$185m ²	\$110-\$135m ²	\$105-\$115m ²	\$115-\$135m ²
Secondary	\$95-\$110m ²	\$125-\$140m ²	\$100-\$115m ²	\$95-\$105m ²	\$100-\$110m ²

Source: Savills Research

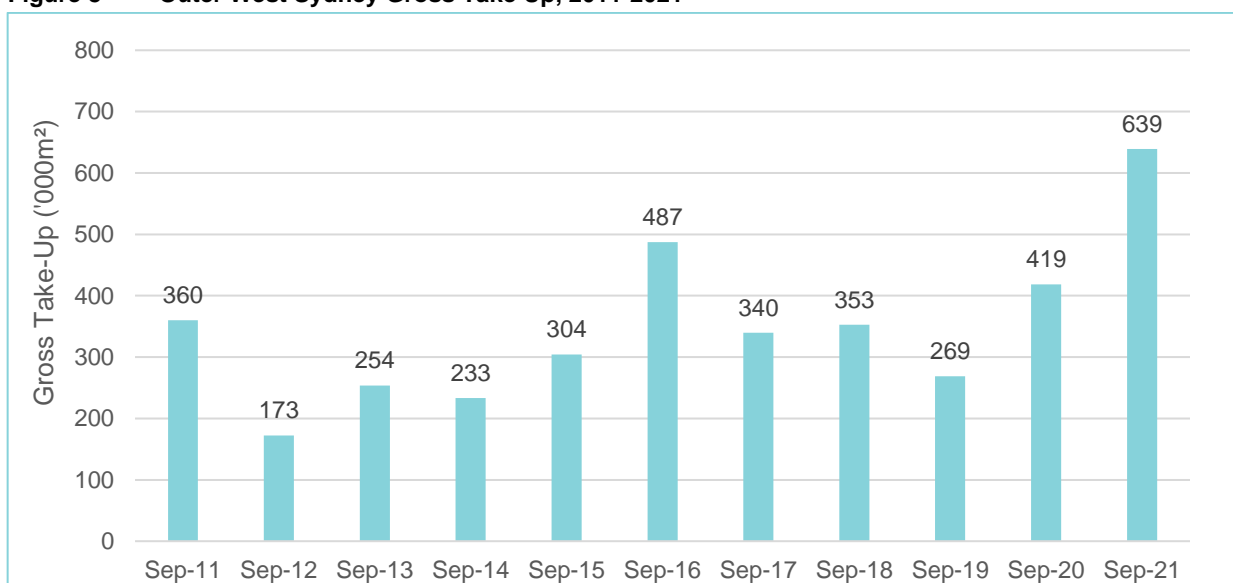
Overall land availability for industrial development remains competitive. This has, in part, prompted the release of new industrial lands in recent years, including the Mamre Road Precinct, which will support the continued demand for industrial space within the Western Sydney area.

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 8 shows the increase in industrial take up recorded across the Outer West market in the past decade, and illustrates the increase in activity since 2011. The year to September 2021 reflects the largest take up of industrial floorspace recorded in the past 10 years within the Outer West market.

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.

Figure 8 Outer West Sydney Gross Take Up, 2011-2021



Source: Ethos Urban, 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.

Recent trends such as ecommerce is 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 efficiency 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**.

6.4 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 DPIE 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 SIA has been prepared based on the *Social Impact Assessment Guideline for State Significant Projects* (NSW DPIE 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 construction activities and the future operational impacts, as well as the broader area of social influence as defined in **Chapter 6.0** and further areas that may experience the resulting benefits from the operational phase of the project.

Based on the social baseline analysis undertaken, the key communities to experience social impacts and/ or benefits of the project can be grouped as follows:

- Local residents
- Local workers
- The cluster of community infrastructure located to the south of the site, including:
 - Emmaus Catholic College
 - Catholic Healthcare Emmaus aged care and retirement village,
 - Little Smarts Early Learning Centre,

- Mamre Anglican School
- Trinity Primary School.

These community infrastructure facilities would be considered as sensitive receivers for the purposes of the Social Impact Assessment.

- Neighbouring businesses
- Users of the Aldington Road
- Broader local community
- Temporary construction 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 DPIE 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 DPIE, 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:

- The proposed development will have amenity impacts on surrounding development during construction, in relation to dust, vibration and construction noise. These will mainly affect surrounding workers, along with some residents located to the east of the site at Mount Vernon.
- With respect to cumulative impacts, the broader redevelopment of the Mamre Road Precinct has the potential to affect the amenity of nearby residential areas 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.
- Views will be affected during the construction phase of the development, which will realise the transition of the Mamre Road Precinct (the Study Area) from rural to industrial development.
- Potential traffic generation amenity impacts will arise during the construction phase of the development given the increased presence of vehicles. This has the potential to affect properties located along Aldington Road, including the existing schools and day-care centre.

During operation:

- Views will 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. The transformation of this area is aligned with NSW Government strategic policy directions for the area, including the Mamre Road Structure Plan and associated rezoning. This impact will primarily be experienced by residents, whose outlook and views will change as a result.
- Potential traffic generation amenity impacts will arise during the operational phase of the development given the increased intensity of use of the site. This has the potential to affect properties located along Aldington Road, including the existing schools and day-care centre.
- There would be long term positive impacts to surroundings and amenity during the operational phase, as it is noted that the broader Mamre Road Precinct will result in the delivery of new open space, recreation facilities, cycling and walking paths which will positively impact local amenity. The proposed development will contribute towards these amenities through State Infrastructure Contributions.

Responses/ mitigation measures

Potential impacts

During construction:

- Amenity impacts – such as traffic, noise, and air quality – will be managed in accordance with relevant legislation and the Construction Management Plan. 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 noise and vibration (identified in the Noise and Vibration Assessment) and visual amenity during the construction phase. It is also recommended that effective transport plans are prepared to assist the construction workforce to effectively travel to the site for construction shifts to reduce pressure on parking in the area.
- Cumulative impacts will be managed through adaptive monitoring and management over time through the imposition of conditions of consent by the relative consent authorities. These are likely to require the implementation of environmental management plans and compliance with the relevant environmental regulations.

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.
- The provision of new open space within the broader Mamre Road Precinct will help to mitigate visual amenity impacts of the planned industrial development and will contribute to improved amenity for workers and residents in the locality more broadly.

Summary

Overall Social Impact Significance Rating	<p>Low Social Significance Rating – impacts are generally associated with the physical construction and operation of the site and can be appropriately mitigated through environmental management plans.</p> <p>Social impact ratings associated with the change to amenity and surroundings is considered Medium with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Medium (Possible Minor) - Negative • Operation: Medium (Possible Minor) - Negative
Duration	Construction impacts are temporary. Potential for ongoing impacts with the operation of the development.
Extent	Impacts are likely to be experienced predominantly by existing residents in nearby Mount Vernon during construction and operational phases.
Severity/ sensitivity	Low due to the significant distance of the nearest residential accommodation.
Potential to mitigate/ enhance	High 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:

Potential impacts

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

During operation:

- The ongoing operation of the industrial development also has the potential to impact on the wellbeing of the local residential community due to environmental impacts generated by operations, including impacts such as noise and traffic generation.
- There would be long term positive impacts to health and wellbeing associated with the broader development of the Mamre Road Precinct, within which the site is located. The Structure Plan for this precinct identifies the delivery of new open space, recreation facilities, cycling and walking paths which will have a positive impact on the health and wellbeing of local community members – including local residents and the future workforce of the site. The proposed development will directly contribute towards these amenities through State Infrastructure Contributions.
- Being an industrial employment precinct, the development is unlikely to generate any significant impacts in terms of demand for community and health services.

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.
- 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:

- If the development is approved, the applicant will pay SIC towards regional infrastructure – including open space and recreation facilities – which will benefit the local community from a health and wellbeing perspective.
- 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 Significance Rating	Social impact ratings associated with the change to health and wellbeing of local community is considered Low with following overall ratings: <ul style="list-style-type: none"> • Construction: Low (Possible Minimal) - Negative • Operation: Low (Possible Minimal) - Negative
Duration	Construction impacts are temporary, however, care should be given to ensure that construction impacts do not deteriorate the health and wellbeing of those in the immediate vicinity of the site.
Severity/ sensitivity	Not considered to be of significant consequence or severity.
Extent	Impacts are predicted to be felt by users of local area during construction phase and staff during the operational phase.

Potential impacts	
Potential to mitigate/ enhance	High potential to mitigate any negative social impacts and enhance positive contributions, through provision of onsite infrastructure/amenities for staff and implementation of Construction Management Plans and Operational Management Plans.

7.4.3 Community - including its composition, cohesion, character

Potential impacts

During construction:

- 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.
- 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. However, it is noted that this transformation is aligned with strategic NSW Government policy directions.
- 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. Employment opportunities will occur during the construction phase of the development.

During operation:

- 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 the operational stage of the development.
- 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.
- 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.

Responses/ mitigation measures

During construction:

- Strong, 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.

During operation:

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

Summary

Overall Social Impact Significance Rating	<p>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:</p> <ul style="list-style-type: none"> • Construction: High (Likely Moderate) • Operation: Very High (Almost Certain, Transformational), noting cumulative impacts <p>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 social</p>
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Potential impacts	
	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 would be permanent.
Severity/ sensitivity	The change from the existing degree will be substantial but the sensitivity low given that the land has already been zoned for employment purposes and the impact considered.
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/personnel, 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 land and/or place associated with the construction of an industrial development on previously vacant land. This may negatively impact on communities living within the Mamre Road Precinct which have connection to the existing 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 established residential community of Mount Vernon to the east.
- There would also 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:

- Strong, 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.

During operation:

- The changes proposed through this development are consistent with the broader strategic directions of the area to generate significant new employment opportunities and to provide land which can be used by industries to support the Western Sydney Airport.
- It is not possible to entirely mitigate impacts to community character 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.
- If impacts associated with transition are well mitigated, the development for employment uses will ensure positive social outcomes for the community.

Potential impacts

- NSW DPIE has also nominated transition areas within the Mamre Road Precinct. Development applications within that zone will need to demonstrate that suitable outcomes will be achieved in respect of the transition of the built form and landscaping of the site and also that satisfactory operational measures will be in place so as to avoid adverse impacts on the nearby residential communities.

Summary

Overall Social Impact Significance Rating	<p>Social impact ratings associated with the change to the local culture is considered High with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Medium (Possible Moderate) – Negative • Operation: High (Likely Moderate) – Negative, noting cumulative impacts
Duration	Permanent impact
Severity/ sensitivity	<p>The change from the existing will be substantial but the sensitivity low given that the land has already been zoned for employment purposes and the impact already considered and the community already aware.</p> <p>Non-Aboriginal heritage potential on this site is considered nil-low.</p> <p>Due to the scale and pace of development in the area, Aboriginal heritage is a rapidly diminishing resource in the western Sydney region – any destruction of Aboriginal objects, even on a small scale (should this occur), increases the cumulative destruction of Aboriginal heritage</p>
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 Way of life - how people live, get around, work, play and interact with one another each day

Potential impacts

During construction:

- The development will involve upgrades to existing road infrastructure thereby improving mobility within the precinct during operation. However, there may be disruptions to traffic flow and increased traffic generation on local roads as a result of the construction of the development.

During operation:

- The development will involve contributions towards the upgrade of regional infrastructure including open space, recreation facilities and walking and cycling paths.
- Being an industrial development, the development is unlikely to generate any significant demand for new social infrastructure or services – other than amenities that would be likely to be utilised by the local workforce during, before and after working hours. In this regard, open space and recreation infrastructure is to be provided in the precinct, which is expected to meet their needs.
- There would be long term improvements to access to and use of social infrastructure associated with the broader development of the Mamre Road Precinct, within which the site is located. The Structure Plan for this precinct identifies the delivery of new open space, recreation facilities, cycling and walking paths accessible to local residents and the future workforce of the site. The proposed development will directly contribute towards these amenities through State Infrastructure Contributions.

Responses / mitigation measures

Potential impacts

During construction:

- Construction of new roads and implementation of a construction traffic management plan.

During operation:

- Payment of SIC towards the upgrade of regional facilities – including the delivery of new open space, recreation facilities, cycling and walking paths, which are expected to be accessed by workers and local residents.

Summary

Overall Social Impact Significance Rating	<p>Social impact ratings associated with changes to way of life is considered Low to Medium with following overall ratings:</p> <ul style="list-style-type: none"> • Construction: Low (Unlikely Minor) - Negative • Operation: High (Likely Moderate) – Changes could be perceived either as Negative or Positive, depending on the receiver <p>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.</p>
Duration	Most potential negative impacts will occur during the construction phase. Most potential positive social benefits will occur during the operational phase.
Severity/ sensitivity	Severity and sensitivity is considered to be Low to Medium in relation to the Project.
Extent	Construction phase impacts would extend to the locality; operational benefits would extend to Penrith LGA and beyond
Potential to mitigate/ enhance	High – construction impacts can be managed through environmental management plans. Infrastructure enhancements will positively benefit the community in the long term.

7.4.6 Livelihoods – people’s capacity to sustain themselves

Potential impacts

During construction:

- Construction and 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:
 - 310 direct and 495 indirect FTE jobs during construction, and
 - 780 FTE jobs during the ongoing operation of the development at full occupancy (including 445 warehousing, 328 office, and seven (7) retail jobs).
- 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.

During operation:

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 WSEA, improving accessibility of employment opportunities close to housing and daily living needs.
- The increased number of workers in the precinct will likely result in increased patronage for local businesses, such as cafes and supermarkets, within the broader area.

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 Significance 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	Low due to zoning of the site and distance from residential zoned areas
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.

7.5 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

- 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 ESR Kemps Creek Logistics Park.

- 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 ESR Kemps Creek Logistics Park over time.

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 290-308 Aldington Road, 59-62 and 63 Abbots 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 Gross State Product and 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 development of a new Amazon distribution centre, located to the north of the subject site. The fulfillment centre will be the largest in Australia at 200,000m² and will be 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 290-308 Aldington 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.

8.3.2 Economic impacts and benefits – local and regional

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.

Employment generation

At 159,895m² of GLA 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, supporting commercial office space and a café is well suited to the future context of Aldington Road and the overall Mamre Road Precinct.

The proposed development will result in additional benefits to the local and regional community through employment generation. Additional jobs supported by the development will accrue through direct and indirect employment generated during both the construction phase, and ongoing employment as part of the operational phase.

The construction and operational phases of the development will generate both direct and indirect employment opportunities. The provision of these employment opportunities is particularly important in the current economic environment and will help to support the local community by stimulating economic activity.

Construction employment

Direct employment in the *construction industry* is expressed as full time equivalent (FTE) job years. A 'job year' is a full-time job for one year.

Indirect, or flow on, employment will also be supported in other industries, for example, suppliers of materials and financial and legal services. Employment estimates in the wider economy are derived from ABS national accounts input-output analysis, specifically, employment multipliers.

Direct employment in the construction industry depends on the nature of the building and in particular the capital intensity of the project. It is estimated 1.96 FTE direct construction industry job years per \$1 million of expenditure (or 1.0 FTE job year per \$510,000) will be generated by the construction activity, based on research and the type of work expected to be undertaken in the construction phase of the site.

In addition, these direct construction industry jobs lead to demand for employment in supplier industries in the wider economy. The ABS construction multiplier is 2.6 - that is, for every single FTE job in the construction industry a further 1.6 FTE jobs are supported elsewhere in the economy.

For the purposes of this analysis, total construction costs (excluding design and fees) for the proposed development are understood to be in order of \$158 million. **This would support 310 jobs in the construction industry and a further 495 jobs in related (supplier) industries over the development period.** In total, the construction phase of the development will support an estimated 805 workers.

Local businesses, workers and jobseekers are likely to benefit from increased employment and contracts afforded by the construction phase of the project.

Table 7 Direct and indirect jobs during construction

Metric	Value
Direct Jobs	
Construction estimate	\$158 million
Estimated direct jobs	310 FTE jobs
Indirect Jobs	
Indirect jobs per construction job	Approximately 1.6
Estimated indirect jobs	495 FTE jobs
Total FTE Construction Jobs	805 FTE jobs

Source: ABS 2016; Ethos Urban

Ongoing employment

The activities and employment supported by the project will generate significant regional economic output. Based on information provided by ESR, it is understood that Lot 1 (of some 61,345m² of gross lettable area) of the development will accommodate some 157 workers once complete and fully occupied. This includes 100 warehouse workers, 10 drivers, and 47 office based workers.

The remainder of the proposed development will support some 93,800m² of gross lettable industrial floorspace. Based on jobs densities for employment lands outlined in the Greater Sydney Commissions Employment Lands Analysis, the Western City industrial employment lands records an employment ratio of one worker for every 280m² of GLA. Accordingly, the remaining industrial floorspace will support an estimated 335 jobs on an ongoing basis once complete and fully occupied.

In addition, the proposed facility is also planned to incorporate an estimated 4,550m² (excluding Lot 1) of supporting commercial office floorspace. For the purposes of this analysis, workspace ratios have been adopted using results from the City of Sydney Floor Space and Employment Survey 2017, which outlines an existing workspace ratio of one worker for every 16.2m² for office uses (City of Sydney LGA). Accordingly, the proposed development is estimated to accommodate a further 281 jobs across the supporting office floorspace, once complete and fully occupied.

Furthermore, the development is also planned to include 200m² of retail floorspace that will accommodate a café. Based on the typical ratio for retail floor space of one (1) worker per 30m², this retail component will support an estimated seven (7) retail workers.

Based on the above, the proposed development is estimated to support some 780 jobs on an ongoing basis once the development is complete and fully occupied. This includes 157 jobs at Lot 1, and 623 jobs across the remainder of the precinct. As such, the proposed development could ultimately account for around 4.6% of total jobs provided within the Mamre Road Precinct (of 17,000 total workers). The project would also align with government objectives to increase the provision of knowledge-based workers in Western Sydney by accommodating over 320 office based workers within the development.

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.

Economic output

Ongoing jobs supported by the proposed development will generate additional economic output, including significant contributions from industry sectors including Transport, Postal and Warehousing services. Total output (GRP) at full occupancy is estimated at **\$329 million per annum** (2021 dollars). Gross value added by industry is an indicator of business productivity, it shows the net economic uplift by excluding the value of production inputs. Gross value added is estimated at around **\$143 million per annum** (2021 dollars) at full occupancy of the development (refer to **Table 8**).

Table 8 Estimated economic output at full occupancy

Activity	Transport, Postal and Warehousing*	Accommodation and Food Services	Total
<i>Economy.id category</i>	<i>Warehousing and Storage Services</i>	<i>Food and Beverage Services</i>	
Employment (jobs)	773*	7	780
GRP per job	\$425,809	\$89,806	
Value added per job	\$185,035	\$38,682	
GRP Total**	\$329,200,000	\$629,000	\$329,800,000
Value added total**	\$143,000,000	\$271,000	\$143,300,000

Source: *Economy.id; Ethos Urban*

*Includes 153,800m² of industrial floorspace and 5,895m² of supporting commercial office floorspace

**Figures rounded

The above analysis has been sourced from *economy.id* (based on modelling by the National Institute of Economic and Industry Research) for Penrith LGA, with 'best fit' industry sectors applied to likely economic activities at the new development. The results of the analysis assume no substitution effects from outside the regional economy, rather, the activities undertaken at the new asset represent increased net demand associated with population, labour force, and industry growth.

Other economic benefits

The proposed development at 290-308 Aldington Road, 59-62 and 63 Abbots Road, Kemp 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 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. 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.

Overall, it is considered that there are significant positive benefits likely to result from the development, specifically in relation to the provision of additional employment opportunities for the local and regional community. As part of the broader Mamre Road Precinct, the proposed development would result in a net benefit, creating a major employment precinct that will support growth and development in Western Sydney well into the future.

Appendix A. Socio-economic profile, 2016

Category	Study Area	Greater Sydney
<u>Income</u>		
Median individual income (annual)	\$26,850	\$37,460
Variation from Greater Sydney median	-28.3%	na
% of persons (15 years or older) earning \$1,000pw or more	25.8%	37.3%
Median household income (annual)	\$97,740	\$92,200
Variation from Greater Sydney median	6.0%	na
% of Households earning \$2,500pw or more	30.2%	31.8%
<u>Age Structure</u>		
Median Age (years)	59.7	36.4
<u>Country of Birth</u>		
Australia	65.3%	61.9%
<i>Aboriginal and Torres Strait Islanders</i>	0.0%	1.4%
Other Major English Speaking Countries	8.0%	7.6%
Other Overseas Born	26.7%	30.5%
% <i>speak English only at home</i>	60.2%	62.5%
<u>Household Composition</u>		
<i>Couple family with no children</i>	29.3%	23.8%
<i>Couple family with children</i>	41.4%	37.5%
Couple family - Total	70.7%	61.3%
One parent family	17.2%	11.1%
Other families	0.0%	1.3%
Family Households - Total	87.9%	73.7%
Lone person household	6.9%	21.7%
Group Household	5.2%	4.6%
<u>Dwelling Structure (Occupied Private Dwellings)</u>		
Separate house	100.0%	57.2%
Semi-detached, row or terrace house, townhouse etc.	0.0%	14.0%
Flat, unit or apartment	0.0%	28.2%
Other dwelling	0.0%	0.5%
<i>Occupancy rate</i>	88.4%	92.3%
Average household size	3.2	2.8
<u>Tenure Type (Occupied Private Dwellings)</u>		
Owned outright	65.0%	30.0%
Owned with a mortgage	8.3%	34.2%
Rented	26.7%	35.1%
<i>State or territory housing authority</i>	0.0%	4.2%
Other tenure type	0.0%	0.7%
<u>Attending Education (% of those attending)</u>		
Pre-school	0.0%	6.9%
Infants/Primary Total	51.2%	32.2%
Secondary Total	23.3%	25.0%
Technical or Further Educational Institution	18.6%	7.6%
University or other Tertiary Institution	7.0%	24.2%
Other type of educational institution	0.0%	4.0%
<i>% of total population attending education</i>	14.1%	25.2%
<u>Highest Level of Education Completed (% of population aged 15 years and over)</u>		
Year 12 or equivalent	41.5%	67.5%
Year 9-11 or equivalent	37.2%	26.7%
Year 8 or below	17.0%	4.4%
Did not go to school	4.3%	1.5%
<u>Highest Level of Non-School Qualification</u>		
Postgraduate degree	0.0%	13.9%
Graduate diploma or certificate	0.0%	3.4%
Bachelor degree	29.3%	36.4%
Advanced diploma or diploma	14.6%	17.7%
Certificate	56.1%	28.6%
% of persons with non-school qualifications (persons 15 years and above) - excludes not-stated and inadequately described	29.6%	52.7%
<u>Employment Status</u>		
Unemployed/ looking for work	8.2%	6.0%
Labour force participation rate	47.6%	65.6%

Appendix B. Policy review

Policy	Key implications for impact assessment	Source
Western City District Plan (GSC 2018)	<p>The Greater Sydney Commission’s Western City District Plan is a 20-year plan to manage growth in the Blue Mountains, Camden, Campbelltown, Fairfield, Hawkesbury, Liverpool, Penrith and Wollondilly local government areas. The plan highlights the need to maximise and retain freight and logistic opportunities, planning and managing of industrial and urban services land as existing sites face residential rezoning pressures. Th Western Sydney Airport and Badgery’s Creek Aerotropolis will depend on the Penrith LGA to support airport and employment activities and service the need of the Western Parkland City. The site forms part of the Mamre Road Precinct which is expected to support in-demand industrial land supply.</p> <p>In addition, the plan highlights the unprecedented opportunity for the Western City District to provide a national freight and logistics hub. The following key planning priorities relevant to the site are:</p> <ul style="list-style-type: none"> • W8: Leveraging industry opportunities from the WSA and Aerotropolis • W9: Growing and strengthening the Metropolitan Cluster • W10: Maximising freight and logistics and planning and managing industrial and urban services land • W11: Growing investment, business opportunities and jobs in strategic centres 	<p>https://gsc-public-1.s3-ap-southeast-2.amazonaws.com/western-district-plan-0618.pdf?8n3LXsR7w.By33lfBBDvVY5sv2Le_OOj</p>
Greater Sydney Regional Pan – Metropolis of Three Cities (GSC 2018)	<p>The Metropolis of Three Cities Plan outlines the vision for three, integrated and connected cities that will rebalance Greater Sydney – placing housing, jobs, infrastructure and services within easier reach of more residents, no matter where they live.</p> <p>The Plan sets targets for new housing, with a range of types, tenures and price points to improve affordability. New jobs will be promoted and the plan values Greater Sydney’s unique landscape, natural resources and green infrastructure.</p> <p>Penrith is part of the Western Parkland City. The plan outlines the development of the Western Parkland City and the need to invest a wide variety of infrastructure and services in particular with the development of the Western Sydney Airport. The key objectives related to Kemps Creek and the new warehouse development include:</p> <ul style="list-style-type: none"> • Objective 16: Freight and logistics networks is competitive and efficient • Objective 20: Western Sydney Airport and Badgery’s Creek Aerotropolis are economic catalysts for Western Parkland City • Objective 23: Industrial and urban service land is planned, retained and managed <p>Supporting the 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.</p>	<p>https://gsc-public-1.s3-ap-southeast-2.amazonaws.com/greater-sydney-region-plan-0618.pdf?pMbPYxwen5IHq4GSB6td4yKiKVogFi4c</p>
Mamre Road Precinct Rezoning – Exhibition and Discussion Paper and structure plan (DPIE 2019)	<p>The Mamre Road Precinct discussion paper outlines the proposed amendments to the State Environmental Planning Policy (Western Sydney Employment Area) 2009 (WSEA SEPP) to rezone the Mamre Road Precinct for primarily industrial purposes. This will assist in meeting the growing demand and existing shortfall of available industrial land in Western Sydney and support the development of the Western Sydney Aerotropolis. The structure plan proposes high level land use and infrastructure outcomes for the precinct, including a proposed Western Sydney Intermodal terminal location.</p> <p>The amendments to the WSEA SEPP will rezone the site to IN1 General Industrial and the proposed development will assist in achieving the Mamre</p>	<p>https://shared-drupal-s3fs.s3-ap-southeast-2.amazonaws.com/master-test/fapub_pdf/Exhibition+attachments+/Mamre+Road/Mamre+Road+Precinct+Rezonin</p>

	<p>Road Precinct Structure Plan which envisions 850 hectares of industrial land to support approximately 17,000 jobs.</p>	<p>g+Discussion+Paper.pdf</p>
<p>Penrith's Local Strategic Planning Statement – Planning for a Brighter Future City (Penrith City Council 2020)</p>	<p>The Penrith City Council's LSPS establishes a 20-year vision for a vibrant place for people, that is well connected, celebrates local diversity enriched with job opportunities and is inclusive for all. This is supported through four key themes of connected, healthy, innovative and balanced. The following identified priorities are considered relevant to the site:</p> <ul style="list-style-type: none"> • Planning priority 11: Support the planning of the Western Sydney Aerotropolis • Planning priority 12: Enhance and grow Penrith's economic triangle <p>The plan identifies prospects for industrial lands and employment growth due to the close proximity of the Western Sydney Airport and identified Western Sydney intermodal terminal within the Mamre Road Precinct under the State Environmental Planning Policy (Western Sydney Employment Area) 2009. New Industrial land area has been identified around the Western Sydney Airport to contribute to the demand in medium and long term.</p> <p>The council priorities the status of Penrith as strategic commercial centre of South West Sydney, providing 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.</p>	<p>https://www.youraypenrith.com.au/penrith-LSPS</p>
<p>Penrith City Council Community Strategic Plan (Penrith City Council 2017)</p>	<p>The Penrith City Council Community plan expresses the community's aspirations and priorities focused on promoting Penrith as a dynamic and inclusive regional city offering local jobs, better transport and access, safe and vibrant centre and neighbourhoods with a healthy environment. The plan outlines a number of goals and strategies to achieve the community's vision which was informed by extensive community engagement and consultation process. This plan is guided through 7 key outcomes:</p> <ul style="list-style-type: none"> • Outcome 1: We can work close to home • Outcome 2: We plan for our future growth • Outcome 3: We can get around our city • Outcome 4: We have safe, vibrant places • Outcome 5: We can care for our environment • Outcome 6: We are healthy, and share strong community spirit • Outcome 7: We have confidence in our council <p>Direction 1 'we can work close to home' underlines the need for council to support economic growth</p> <p>The Community Strategic Plan identifies that 56,400 local residents travel to work outside of the local government area. As population growth increases more than the number of jobs available in the region, the provision of more local jobs for local people is a key priority for Council. Outcome 1 'we can work close to home' underlines the need for council to support economic growth through local job opportunities.</p>	<p>https://www.penrithcity.nsw.gov.au/images/document/s/council/our-organisation/Community_Plan.pdf</p>