

Social Impact Assessment

Modification of the Barangaroo
Concept Plan – Central
Barangaroo (MOD 9)

Infrastructure NSW

15 November 2021

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Acknowledgement of Country

We acknowledge the Gadigal People who are the Traditional Custodians of this land. We also pay our respect to the Elders, both past and present, of the Eora Nation and extend that respect to all Aboriginal people.

Executive Summary

The ongoing development of Central Barangaroo presents a significant opportunity to enable the realisation of benefits across the entire Barangaroo site. The application to modify the Barangaroo Concept Plan, Modification 9 (Mod 9), aims to maximise these benefits by creating a framework to develop a world class mixed use precinct.

MOD 9 provides a flexible approach to the future mix of land uses at Central Barangaroo comprised of commercial office, retail, residential, community uses and public open space. Specifically, MOD 9 proposes:

- 1) An increase in total permissible gross floor area (GFA) from 602,354 m² to 708,041 m², with the following within Central Barangaroo and Barangaroo Reserve:
 - a) up to 116,189 m² of above ground GFA within Blocks 5, 6 and 7
 - b) up to 28,166 m² of below ground GFA within Blocks 5, 6 and 7
 - c) a minimum of 2800 m² of Community uses GFA within Blocks 5, 6 and 7
 - d) a minimum of 6000 m² and up to 18,000 m² of Community uses GFA within the RE1 Zone of Barangaroo Reserve, to allow for future community/cultural facilities located in the Cutaway.
- 2) An increase in the overall provision of new public open space/public domain, including three new publicly accessible spaces within the development blocks and a new pedestrian bridge over Hickson Road.
- 3) Modifications to the Central Barangaroo building envelope that allow for greater variation in building heights across Blocks 5, 6 and 7 to enable building form, massing and modulation that is responsive to context and adjusts the development boundary for Block 5.
- 4) Introduction of Design Guidelines for Central Barangaroo.
- 5) Consequential amendments to the State Significant Precincts State Environmental Planning Policy (SEPP).
- 6) Revisions to the Barangaroo Concept Plan Statement of Commitments.

The Central Barangaroo Developer has generated a range of mixed-use reference schemes to inform the preparation of this social impact analysis (SIA). All schemes have included residential, retail, commercial and community/cultural gross floor area (GFA). Out of the reference schemes generated, the scheme which produces the largest future economic/social impact has been used as the basis of this report.

As the final piece of Barangaroo, this development of Central Barangaroo provides the opportunity to develop a new precinct linking the commercial areas of Barangaroo South to the dedicated naturalistic public spaces of Barangaroo Reserve and ensure the necessary design and development principles are imbedded.

The result of MOD 9 is the creation of a new precinct that provides:

- a new gateway to the CBD through the Sydney Metro' Barangaroo Station. This opens up Central Barangaroo as an entry into the CBD for people travelling from the North, and enables easy access to Central Barangaroo from people near the Metro in the CBD.
- a new mixed-use centre serving:
 - the residents, workers and visitors to Barangaroo
 - people from the adjacent Millers Point and Walsh Bay areas, who have been relatively underserved by existing local retail offerings.
- increased public domain/open space, providing large areas designed to suit a variety of potential users.

- new flowing and connected public spaces. For example:
 - at its core, Central Barangaroo’s Harbour Park will create a major western harbour public open space that seamlessly integrates with the Wulugul Walk along the entire Barangaroo waterfront
 - to the south, Central Barangaroo will shape and activate Hickson Park as a city park.

The extent to which the social benefits of MOD 9 can be compared to the approved Concept Plan is restricted as limited baseline benefit data is available (either because the project is incomplete, the area under review is a subset of a larger and more diverse area, etc). In specific cases where a baseline is available, we have made use of this, and where one doesn’t exist, we have described trends and magnitudes of social impacts.

Our analysis identified limited potential for change in the likelihood and level of identified negative social impacts as a result of MOD 9. Social dis-benefits identified in the analysis mainly relate to housing and environmental indicators, which are covered more comprehensively in other reports and therefore not explored in detail in this report. This report also identifies the overall benefits as a result of MOD 9 in relation to social cohesion, driving cultural enrichment and contribution to the overall communities who will enjoy Barangaroo.

The social benefits of MOD 9 are summarised in Figure 1.

Figure 1: Summary of the MOD 9 social impact assessment

| Mod 9 can enhance the social benefits of Central Barangaroo through... | | |
|---|--------------------------------|--|
| Way of life | <i>Improving daily life</i> | <ul style="list-style-type: none"> • Increased quantity and access to employment & training activities • Social inclusion through employment, education & training • Additional residential housing to meet market demands • Housing proximity benefits |
| Community & culture | <i>Social cohesion</i> | <ul style="list-style-type: none"> • Social cohesion through inclusive public space, community events & activities • Social programs • Community participation through public safety • Encouraging the night-time economy • Promotion of the site’s cultural heritage |
| Infrastructure access | <i>Strategically connected</i> | <ul style="list-style-type: none"> • Transport infrastructure contributing to a better-connected Sydney • Access to childcare services • Access to services & facilities |
| Health & wellbeing | <i>Sustainable living</i> | <ul style="list-style-type: none"> • Provision of a large public realm • Encouragement of active transport & exercise • Potential to reduce carbon emissions • Flexible facilities to meet changing social needs and the provision of community-based programs |
| Surroundings | <i>Enjoyable environment</i> | <ul style="list-style-type: none"> • Environment considerations & greenspace • Improved safety in public areas • Greater public domain and open space • Increased amenity of the public domain through decreased car use • Potential reduction in carbon emissions |

The benefits described in Figure 1 are generated from three key sources:

- **Connectivity:** MOD 9 focuses on Central Barangaroo being the heart of Barangaroo and builds on the guiding principles from the Concept Plan. Connectivity between precincts and adjacent historic areas are key considerations throughout the proposed changes. Significant space has been set aside for public infrastructure and active transport options which are key contributors to accessibility measures, as well as a cultural focus for the Central Barangaroo precinct integrated with the broader Sydney CBD context.

MOD 9 proposes material changes which are tailored to accommodate the new Sydney Metro which had not been announced when the initial Director General Requirements (DGRs) were issued. MOD 9 has shaped community, retail, residential and commercial space in response to the proposed metro station to maximise social benefits for residents and visitors and ensure connectivity to the broader metropolitan Sydney.

- **Diversity:** MOD 9 proposes a greater mix of floor space usage to help create a vibrant mixed use precinct where people can live, work, shop, play and engage in a rich mix of recreational and cultural activities. MOD 9 has allocated space for a diverse range of activities and facilities including public domain, walkways, dramatic arts, commercial, cultural, retail and residential housing.

Maintaining provision for the site's cultural heritage, both maritime and indigenous, through artworks, events and signage is a key component of MOD 9. By combining this with a unique mix of uses and activities, MOD 9 can help Barangaroo form its own cultural identity which respects the past while positioning Barangaroo for the future.

- **Scale:** MOD 9 proposes an increase in commercial, residential, retail and cultural and community floor space in Central Barangaroo. By expanding useable floor space in the precinct, MOD 9 aims to increase the number of residents, office workers, visitors and community groups which can utilise and benefit from the Barangaroo precinct facilities and infrastructure. MOD 9 could further contribute to the NSW economy by expanding Barangaroo as a base for professional services and firms as well as enhancing the city's visitor economy by providing retail, hospitality and recreational facilities.

This could lead to a multiplication of social benefits, which are experienced by a larger group of stakeholders. By increasing the scale of the development, MOD 9 could increase the social benefits of Central Barangaroo and make it more inclusive for a wider range of stakeholders.

1 Introduction

1.1 Purpose of report

As the final stage of the Barangaroo renewal project, Infrastructure NSW (INSW) has identified the potential for significant unrealised economic, social and placemaking benefits that are achievable both within Central Barangaroo precinct and Barangaroo Reserve.

Modification 9 (MOD 9) for Central Barangaroo proposes to amend the Barangaroo Concept Plan to enable these benefits to be realised. Further detail on the proposed scope of MOD 9 is provided in section 3.

This Social impact Assessment (EIA) forms part of INSW's MOD 9 proposal to the NSW Department of Planning, Industry and Environment (DPIE).

1.2 Approach

This is one of two reports, which together provide a holistic assessment of the economic and social impacts associated with MOD 9.¹ The approach taken is outlined in Table 1.

It is worth noting that we have considered the potential impact of COVID-19 in our project but have not made any specific allowances in either the EIA or the SIA. This is because:

- construction has not generally been affected by social distancing obligations,² and in any case is due to commence after all Australians have been provided access to a COVID-19 vaccine (i.e. 2022)
- while it is difficult to definitively say the degree to which flexible working will affect Australia's CBDs, the impact is most likely to be a financial one (i.e. lower rents) rather than an economic one (i.e. as activity will still be occurring in CBDs).³ Given that the construction is expected to be completed well after COVID-19 has been addressed by a vaccine (i.e. construction completing in 2029) we do not consider it likely to be a constraint on the projected operational benefits identified in this report
- while population growth is projected to slow due to restrictions on the international movement of people and lower fertility rates, we suspect that this will reduce population growth by two years over the next five years. We do not consider this a meaningful impact on the development of Barangaroo.

Table 1: Our approach

| Economic Impact Assessment | Social Impact Assessment |
|--|--|
| <p>MOD 9's contribution to the NSW economy has been estimated using the Victoria University Regional Model (VURM). The VURM is a multi-regional CGE model.</p> <p>CGE models such as VURM simulate the effects on the economy in each year caused by a policy change or new development – known as an economic shock. The model takes into account</p> | <p>We have assessed the social impact of MOD 9 against criteria drawn from the international</p> |

¹ Also see PwC (2020) *Economic Impact Assessment Modification of the Barangaroo Concept Plan – Central Barangaroo (Modification 9)*.

² We note that the July 2021 lockdown has been extended to include construction activities.

³ See PwC (2021), *Changing Places: how hybrid working is reinventing the Australian CBD*, available at <https://www.pwc.com.au/important-problems/future-of-work-design-for-the-future/changing-places-australian-cbd.html>

| Economic Impact Assessment | Social Impact Assessment |
|---|--|
| <p>indirect and substitution effects for example, the impact a development or activity might have on prices or resource constraints.</p> <p>Relative to more simplistic input-output modelling, this type of model is preferred by governments and treasuries because they have been peer reviewed, meaning the inputs and assumptions are fully and publicly documented.</p> <p>The model simulated the economic impacts of MOD 9 in two distinct phases, during construction and operation. The modelling captured:</p> <ul style="list-style-type: none"> • <i>Direct effects</i>: as a result of MOD 9, largely driven by construction expenditure and increased employment. • <i>Indirect effects</i>: the flow-on impacts throughout NSW include the impact of a change in consumer spending in the economy from additional employees and additional spending by businesses that supply goods and services to MOD 9 inhabitants. • <i>Tax and visitation</i>: changes to tax contributions and visitation numbers to Barangaroo. | <p>literature on social impact assessment which are used elsewhere by the NSW DPIE.^{4 5}</p> <p>We have described how the proposal has been designed to maximise social benefits and minimise social dis-benefits in terms of peoples:⁶</p> <ul style="list-style-type: none"> • <i>Way of life</i>: factors such as residential housing, employees' working conditions, access to employment and recreation activities. • <i>Community</i>: including its composition, cohesion, character, how it functions and sense of place. • <i>Access to and use of infrastructure, services and facilities</i>: whether provided by government or other organisations, for example public transport. • <i>Culture</i>: including shared beliefs, customs, connections to land places and buildings (including Aboriginal culture). • <i>Health and wellbeing</i>⁷: including mental and physical health. • <i>Surroundings</i>: including access to and use of ecosystem services, public safety and security, access to and use of the natural and built environment, and its aesthetic value and/or amenity. • <i>Other impacts</i>: any other project specific social impacts. |

Note: The modelling is done on a state-wide basis and so captures the net impacts of the Barangaroo development (i.e. the impact reported is net of any substitution impacts from surrounding retail and commercial areas).

1.3 Limitations

The approach to this report has been prepared as outlined in Section 1.2. Limitations of this Social Impact Assessment report (SIA) include:

- The scope of the SIA was limited by the availability of project information and the extent to which the approved Concept Plan and concept for the proposed modification (MOD 9) were completed. The development and modification are 'incomplete' as they are not yet fully constructed. This means they are not currently being actively used by the community and therefore PwC was unable to determine the full extent of 'realised' social impacts. In

⁴ NSW Department of Planning and Environment (2017) *Social Impact Assessment Guideline (2017) for extractive industries* – in place for use in respect of State significant mining, petroleum production and extractive industry development. These guidelines were created to improve the quality and utility of social impact assessments for major mining, petroleum and extractive projects. They draw from internationally recognised principles – see Vanclay, F, 'International Principles for Social Impact Assessment' *Impact Assessment & Project Appraisal* 21(1): 5-11 (2003), which have also been adopted in other Australian jurisdictions.

⁵ Subsequent to the analysis being prepared in this report, in July 2021 DPIE released *Social Impact Assessment Guideline: For State Significant Projects*. The analysis of MOD 9 is considered a 'transition project' and hence this new Guideline has not been applied in this instance. Nevertheless, we consider the approach adopted to be broadly consistent with the new Guideline's spirit.

⁶ Some extractive-industry specific criteria have been adapted to better suit the Barangaroo development context.

⁷ The World Health Organization (WHO) defines health as a state of complete physical, mental and social wellbeing and not merely the absence of disease or infirmity. For this guideline, wellbeing is a state in which people have their basic needs met, can realise their potential, can cope with the normal stresses of life, can work productively and fruitfully, and can participate in their community.

this case the communities' anticipated experience of the development and proposed modification was documented.

- The extent to which the social benefits of MOD 9 can be compared to the approved Concept Plan is restricted as limited baseline benefit data is available (either because of the project is incomplete, the area under review is a subset of a larger and more diverse area, etc). In specific cases where a baseline is available, we have made use of this, and where one doesn't exist, we have described trends and magnitudes of social impacts.

1.4 Scope

We prepared this social impact assessment report in accordance with the agreed scope. This report built on and developed existing research and data provided by INSW, provided additional impact assessments and applied a best practice framework to the analysis. This report was designed to be one of a suite of documents provided to the New South Wales Department of Planning and Environment as part of INSW's application to amend the Barangaroo Concept Plan. As such, specific areas of analysis may be covered in greater detail in other reports. For example, the Environmental Impact Statement (EIS) should be referred to for detailed analysis of environmental impacts.

2 The Barangaroo Development

2.1 Background to Barangaroo

Barangaroo is a globally recognised 22 hectare urban renewal project located on the western harbour foreshore of Sydney's CBD.

As Australia's first carbon neutral urban precinct, Barangaroo showcases world-class sustainability, whilst delivering extensive new foreshore public spaces on Sydney Harbour, international design excellence, the implementation of leading technologies and public art and cultural programs.

The *Barangaroo Act 2009* was established in March 2009 to ensure management and compliance of Barangaroo in achieving the following objectives:

- encourage the development of Barangaroo as an active, vibrant and sustainable community and as a location for national and global business
- create a high-quality commercial and mixed-use precinct connected to, and supporting, the economic development of Sydney
- facilitate the establishment of Barangaroo Reserve and public domain land;
- promote the orderly and sustainable development of Barangaroo, balancing social, economic and environmental outcomes
- create in Barangaroo an opportunity for design excellence outcomes in architecture and public domain design.

INSW was established in July 2011 to assist the NSW Government in identifying and prioritising the delivery of critical public infrastructure for NSW.

On 1 July 2019, the *Barangaroo Act 2009* was transferred to INSW as the State Government agency responsible for the development of Barangaroo and management of its public spaces.

2.2 Barangaroo Concept Plan

The original environmental assessment requirements for the overall Barangaroo renewal project were issued in June 2006 (Ref MPO6_0162) and the original Concept Plan for the redevelopment of Barangaroo was approved in February 2007, by the then Minister for Planning.

The Barangaroo Concept Plan creates a development framework of streets and development blocks that can deliver a future mix of commercial, residential, tourist, retail and community uses, whilst dedicating approximately 50 per cent of the 22 hectare site for new public open space or public domain, on or close to the harbour foreshore. The approved Barangaroo Concept Plan has since been modified a number of times and the most recent approved modification is MOD 11.

The Barangaroo Concept Plan defines three distinct precincts referred to as Barangaroo South, Central Barangaroo and Barangaroo Reserve. These three precincts together form the overall mixed use development framework as approved under Modification 10 to Barangaroo Concept Plan comprise the following:

- (1) A mixed use development involving a maximum of 602,354 m² GFA, comprised of:
 - (a) a maximum of 191,031 m² of residential GFA of which a maximum of 162,031 m² will be in Barangaroo South
 - (b) a maximum of 76,000 m² of GFA for tourist uses of which a maximum of 59,000 m² will be in Barangaroo South

- (c) a maximum of 34,000 m² of GFA for retail uses of which a maximum of 30,000 m² will be in Barangaroo South
- (d) a maximum of 5000 m² of GFA for active uses in the Public Recreation zone of which 3500 will be in Barangaroo South
- (d) a minimum of 12,000 m² GFA for community uses.
- (2) Approximately 11 hectares of new public open space/public domain, with a range of formal and informal open spaces serving separate recreational functions and including an approximate 2.2 km public foreshore promenade.
- (3) Built form design principles, maximum building heights and GFA for each development block within the mixed use zone.
- (4) Public domain landscape concept, including parks, streets and pedestrian connections.
- (5) Alteration of the existing seawalls and creation of a partial new shoreline to the harbour.
- (6) Construction, operation and maintenance of a concrete batching plant to supply concrete for construction of future development under this Concept Plan at Barangaroo South.
- (7) No approval is granted or implied for the future use of a heliport and/or a helipad.

2.3 Master Planning of Central Barangaroo

Central Barangaroo is located between the Barangaroo Reserve, Barangaroo South and the nearby historic suburbs of Miller Point and Walsh Bay and adjacent to Barangaroo Station.

As Barangaroo's keystone project, Central Barangaroo will complete the sweep of city and foreshore experiences along the western waterfront of Sydney's CBD to become the vibrant civic and community heart of Barangaroo.

As a dynamic mixed-use foreshore precinct, Central Barangaroo will draw together and integrate high quality foreshore public spaces with city living, next generation workspace, community and cultural uses, a bustling shopping and dining precinct, all easily connected to Sydney's new metro network.

As a key part of Sydney Metro's city shaping network, Barangaroo Station will significantly improve access for visitors, residents, workers and shoppers alike and transform how people arrive in Sydney CBD and on the harbour foreshore. As part of this transformation, Central Barangaroo will connect seamlessly to the new metro station and create the new place to arrive in and experience the city.

Comprising the remaining development blocks 5, 6 and 7 of the approved Barangaroo Concept Plan, Central Barangaroo's built form will create an appropriately scaled visual transition between the natural setting and scale of Barangaroo Reserve and Nawi Cove in the north, to the bustling, high rise central business district scale of Barangaroo South.

The recently completed Wulugul Walk now extends along the entire Barangaroo waterfront as a vital section of the 14km Woolloomooloo to Glebe foreshore walk. Central Barangaroo's Harbour Park will create a major western harbour public open space that seamlessly integrates with Wulugul Walk, to diversify and enhance the city's waterfront experience. To the south, Central Barangaroo will shape and activate Hickson Park as a city park and to the north, help create Nawi Cove as the new place to arrive in the city.

In enabling the completion of Barangaroo as the world-class urban renewal precinct, MOD 9 for Central Barangaroo presents the opportunity to deliver the major social, economic and environmental outcomes envisaged from the outset.

Work on the master planning vision and framework for Central Barangaroo originally commenced in 2013 with the appointment of a world-renowned team of international and

local professionals, Skidmore, Owings & Merrill LLP and Andersen Hunter Horne (SOM and AHH).

As part of this early process, in 2013, several rounds of public consultation were undertaken to inform the master planning framework of Central Barangaroo. The consultation comprised a public workshop, followed by a four week, interactive, on-line conversation, in addition to direct engagement with key stakeholders.

Building from the then approved Concept Plan (MOD 6), in 2014, SOM and AHH finalised a draft Central Barangaroo Master Plan framework that explored opportunities to enhance the built form and public domain outcomes, as well as ensure connectivity and access across the whole Barangaroo precinct.

SOM's master planning work for Central Barangaroo recommenced in 2019 and reviewed the changed circumstances affecting the Central Barangaroo and the broader Barangaroo precinct. The objectives developed for Central Barangaroo were reviewed and largely re-affirmed, as well as the built form and public domain outcomes.

The overall objectives for Central Barangaroo are to:

- deliver an innovative, creative and dynamic waterfront destination that is permeable and connected with the city
- ensure the delivery of design excellence in the planning and built form of the precinct, creating a diverse community of architectural expression within an overall coherent urban structure
- deliver diversity of products and uses integrating commercial, residential, retail, community, education, civic, cultural and entertainment activities which contribute to a vibrant and active identity
- create and deliver a public domain that is distinct, unique and innovative and allows for range of passive and active outdoor spaces and uses that together create a new iconic visitor attraction, consistent with INSW's Activation Framework
- deliver a balance of financial return and public benefit and amenity across the precinct
- deliver a culturally distinctive, locally relevant and internationally appealing canvas for appropriate facilities, experiences and public art
- ensure high levels of public attraction, operational serviceability, amenity and security across the precinct and during staging
- extend the principles and networks of the climate positive promise in line with current world's best practice to deliver a whole of Barangaroo outcome and create projects that respond visibly to the sustainable needs of people and the planet.

SOM's revised Master Plan framework for Central Barangaroo gives effect to these objectives and provides a cohesive design identity for Central Barangaroo within the context of the Barangaroo precinct and the broader city. The core principles and key considerations of the Central Barangaroo Master Plan framework include:

- ensuring the 50 per cent public domain across the Barangaroo site, is maintained
- development to occur generally within existing development zones, footprints and with moderated height controls
- provision of alternate sites outside the development zone for the future delivery of a cultural venue
- connection and integration with Barangaroo South, Barangaroo Reserve, the Harbour and CBD precincts
- a high level of flexibility allowing the range of uses to evolve over time
- contribution to the existing Barangaroo sustainability targets

- design excellence in the Master Plan framework that provides opportunities for design excellence in development of built form and public domain outcomes
- ensuring appropriate commercial returns are delivered to the NSW Government across the Barangaroo project
- provision for staging of the development including consideration of effective staged opening and operation of completed development parcels.

2.4 Alignment with social and economic needs

2.4.1 Strategic alignment

The Barangaroo development fits within the greater agenda of the New South Wales Government to promote a variety of social and economic planning objectives. These occur at both a state and local government level, seeking to boost business activity, living standards and accessibility of Sydney's CBD. Barangaroo offers the NSW Government and the City of Sydney an opportunity to foster development to meet social and economic objectives.

As outlined below, the Barangaroo development and MOD 9 specifically aligns with and supports achievement of the objectives of a number of plans and strategies for Sydney and New South Wales, including:

Table 2: Strategic alignment

| NSW Premier's Priorities | |
|---|--|
|  | <p>The Barangaroo development and MOD 9 support a number of the priorities and strategies of the NSW Premier:</p> <ul style="list-style-type: none"> • delivering public transport infrastructure to enable the community to move around the city with greater ease • creating jobs, at both the construction and operational stages • building facilities that could encourage broad cultural participation. |
| Greater Sydney Regional Plan – A Metropolis of Three Cities | |
|  | <p>The Barangaroo development and MOD 9 supports a number of the objectives of the <i>Greater Sydney Region Plan</i>:</p> <ul style="list-style-type: none"> • providing services and infrastructure that meet communities' changing needs • delivering spaces that support healthy, resilient and socially connected communities such as parks, boardwalks and bikeways • the inclusion of facilities for the arts and creative industries • providing public open space that is accessible, protected and enhanced. |
| Eastern City District Plan – Connecting Communities | |
|  | <p>The Barangaroo development and MOD 9 supports a number of the objectives of the <i>Eastern City District Plan</i>:</p> <ul style="list-style-type: none"> • providing services and infrastructure that meet communities' changing needs • fostering healthy, creative, culturally rich & socially connected communities • providing housing supply, choice ... with access to jobs, services and public transport • creating and renewing great places and local centres, and respecting the District's heritage |
| Sustainable Sydney 2030 | |
|  | <p>The Barangaroo development and MOD 9 support a sustainable Sydney as per <i>Sustainable Sydney 2030</i>:</p> <ul style="list-style-type: none"> • providing new commercial space to support the development of financial services industries as an 'Asia Pacific Hub' • stringent environmental controls and building design standards • integration with new and additional public transport services • a pedestrian link and shoreline promenade to encourage active transport • use of open space to encourage activity and vibrancy. |

2.4.2 Economic and demographic alignment

The Barangaroo development and the proposed changes under MOD 9 support the economic and demographic needs of Sydney by providing space for residential development, opportunities for employment, a retail shopping centre and a range of drawcards for tourism activities. The alignment of MOD 9 with the economic and demographic needs of Sydney are outlined below. (For further details on the economic and demographic profile of Sydney, see Appendix A).

Population

The population of the Sydney local government area (LGA) is projected to grow at approximately twice the rate of NSW as a whole. The Sydney-Haymarket-The Rocks SA2 (the Sydney CBD) in which Barangaroo is located has a relatively high proportion of residents between the ages of 15 and 34 years when compared to the rest of NSW. This is reflective of a prominent young adult working population. Between 2016 and 2036 the age groups projected to have the highest amount of growth in the Sydney LGA are those above 75 years, reflecting the broader national trend of an ageing population.

MOD 9 proposes an increase in residential floor area in Central Barangaroo, providing more homes for the growing local population. The inclusion of community and cultural facilities will also assist in ensuring residents and visitors to the precinct can participate in new cultural programming.

Labour force

In 2016 the Sydney LGA had a labour force of 124,746 persons. 65 per cent of the workforce were full-time employees, 25 per cent part-time, 4 per cent away from work, and 6 per cent unemployed. Employment in the Sydney LGA is concentrated in the professional, scientific and technical services (17 per cent of total employment), accommodation and food services (12 per cent) and the financial and insurance sectors (9 per cent).

When compared to the NSW population, residents in the Sydney CBD are significantly more likely to have either income greater than \$3000 per week or no income at all. This indicates the area has relatively high income inequality and a demographic which may contain an above-average proportion of vulnerable individuals.

MOD 9 proposes an increase in commercial/office and retail floor area in Central Barangaroo; a key driver of this uplift is the arrival of the Sydney Metro and the importance of capitalising upon this opportunity for broader economic benefits. These increases can provide space for a broad range of businesses which could result in significant employment opportunities. These opportunities are likely to vary from business services to retail, which could assist low socioeconomic individuals and families and contribute to a reduction in local unemployment.

Tourism

Tourism represents a significant part of both the Sydney and NSW economies. In 2016-17 tourism contributed over \$40.5 billion to the NSW economy. Visitors to the Sydney Tourist Region formed a significant part of this contribution, with the city receiving approximately 34 million visitors out of a total of 94 million visitors to NSW in 2017. The number of visitors to Sydney has increased 3 per cent from 2016, and by 31 per cent since 2009.

An important segment of tourists to Sydney are those from overseas. International overnight tourists accounted for half of the total number of visitors to Sydney in 2017. The most common countries of origin of international overnight tourists to Sydney are China (20 per cent), the USA (11 per cent), New Zealand (9 per cent) and the UK (9 per cent).

MOD 9 can enhance the attractiveness of Central Barangaroo to tourists by significantly increasing cultural and retail space, while maintaining a large proportion of inclusive public domain accessible through an integrated public transport system. It is envisaged that these cultural spaces will host festivals and celebrations attracting visitors from Sydney and further afield.

3 *Modification 9 Proposed Changes*

Director General's Requirements (DGR's) were issued for draft MOD 9 to Barangaroo Concept Plan in March 2014. This request and the proposed Central Barangaroo modification (MOD 9) was informed by early design guidance in SOM's Central Barangaroo Master Plan Framework. Simultaneously, the NSW Government commenced a competitive bid process commenced for the development of Central Barangaroo and the draft Central Barangaroo Master Plan Framework supported this process.

In June 2015, as part of the Sydney Metro City & Southwest project, the NSW Government confirmed a strategic alignment option to build a new metro station at Barangaroo. In November 2015, the location of Barangaroo Station was confirmed as beneath the northern end of Hickson Road in Millers Point, with direct pedestrian access into Nawi Cove and Central Barangaroo. The station is currently being constructed beneath Hickson Road and is due to be operational in 2024 when the City & Southwest line opens.

When operational in 2024, Barangaroo Metro Station will be one of four key underground CBD stations on the Sydney Metro City and Southwest line and with easy access via Central Barangaroo and Nawi Cove. Barangaroo Metro Station will significantly improve public transport access to the Barangaroo precinct and adjacent areas and enhance development opportunities for Central Barangaroo.

SOM has refined the Central Barangaroo Master Plan Framework to reflect the enhanced opportunities created by the improved transit infrastructure. The integration of Barangaroo Metro station into Central Barangaroo underpins the requirement to modify the approved Barangaroo Concept Plan and refine the proposed framework to develop the precinct. SOM's Master Plan establishes a design and development framework for Central Barangaroo that enables an increase in density of mixed-use development that can ensure the precinct can create its own distinct identity, character and experiences. However, in doing so it is also seeking to ensure that it is integrated with Central Barangaroo and with the wider precinct. SOM's role in providing design guidance recommenced in 2019. Mod 9 incorporates significant further master planning work and public consultation to realise the delivery of the final stage of the Barangaroo renewal project.

The public benefits of a new metro station at Barangaroo and the opportunities identified in the Central Barangaroo Master Plan Framework are unable to be met within the existing Barangaroo Concept Plan approval, but can be realised in the proposed MOD 9 for Central Barangaroo.

To allow for development within the Central Barangaroo precinct and below Barangaroo Reserve, Modification 9 to the Barangaroo Concept Plan (MP06_0162 MOD 9) proposes:

- 1) An increase in total permissible GFA from 602,354 m² to 708,041 m², with the following within Central Barangaroo and Barangaroo Reserve:
 - a) up to 116,189 m² of above ground GFA within Blocks 5, 6 and 7
 - b) up to 28,166 m² of below ground GFA within Blocks 5, 6 and 7
 - c) a minimum of 2800 m² of Community uses GFA within Blocks 5, 6 and 7
 - d) a minimum of 6000 m² and up to 18,000 m² of Community uses GFA within the RE1 Zone of Barangaroo Reserve, to allow for future community/cultural facilities located in the Cutaway.
- 2) An increase in the overall provision of new public open space/public domain, including three new publicly accessible spaces within the development blocks and a new pedestrian bridge over Hickson Road.
- 3) Modifications to the Central Barangaroo building envelope that allow for greater variation in building heights across Blocks 5, 6 and 7 to enable building form, massing and modulation that is responsive to context and adjusts the development boundary for Block 5.

- 4) Introduction of Design Guidelines for Central Barangaroo.
- 5) Consequential amendments to the State Significant Precincts SEPP.
- 6) Revisions to the Barangaroo Concept Plan Statement of Commitments.

The proposed GFA and maximum building heights for each Central Barangaroo development blocks are shown in Table 3.

Table 3: MOD 9 GFA and building heights

| Block | Total GFA (m ²) | Residential GFA (max) (m ²) | Height (m) |
|-------------------------------|-----------------------------|---|------------------------------------|
| Blocks 5,6 & 7 (above ground) | 116,189 | 28,000 | Block 5 & 6: 42.0 Block 7: 71.2 |
| Blocks 5,6 & 7 (below ground) | 28,166 | 0 | n/a |
| TOTAL | 144,355 | 28,000 | |

MOD 9 for Central Barangaroo will enable the completion of Barangaroo as the world-class urban renewal precinct that had been envisaged from the outset, delivering major social, economic and environmental outcomes for the State of NSW.

4 Approach to Social Impact Assessment

4.1 What are social impacts?

While there is an established best practice modelling approach to undertaking economic impact assessments, social impact assessments lack the same level of precision. This reflects the fact that social impacts are more likely to be presented as a mix of qualitative and quantitative analysis, and that social impacts are less likely to be reflected in consistent dollar measures (although this is not always the case). There are, however, a number of frameworks which can be applied to guide social impact assessments.

We have assessed the social impact of MOD 9 against criteria drawn from the international literature on social impact assessment and which are used elsewhere by the NSW Department of Planning and Environment.⁸

We have described how the proposal has been designed to maximise social benefits and minimise social dis-benefits in terms of people's:⁹

- *Way of life*: factors such as residential housing, employees' working conditions, access to employment and recreation activities
- *Community*: including its composition, cohesion, character, how it functions and sense of place
- *Access to and use of infrastructure, services and facilities*: whether provided by government or other organisations, for example public transport
- *Culture*: including shared beliefs, customs, connects to land places and buildings (including Aboriginal culture)
- *Health and wellbeing*: including mental and physical health¹⁰
- *Surroundings*: including access to and use of ecosystem services, public safety and security, access to and use of the natural and built environment, and its aesthetic value and/or amenity
- *Other impacts*: any other project specific social impacts.

4.2 Social impact assessment structure

Section 5 outlines the potential social impacts generated through the MOD 9 development. This is structured using the framework and categorised by the broad range of consequences described above. Within each of these consequence categories, there are three distinct sections:

- *Benefits*: Social impacts which result in a *positive* consequence experienced by people due to changes associated with the implementation of the approved Concept Plan and MOD 9.

⁸ NSW Department of Planning and Environment (2017) *Social Impact Assessment Guideline* for extractive industries – in place for use in respect of State significant mining, petroleum production and extractive industry development. These guidelines were created to improve the quality and utility of social impact assessments for major mining, petroleum and extractive projects. They draw from internationally recognised principles – see Vanclay, F (2003) 'International Principles for Social Impact Assessment' *Impact Assessment & Project Appraisal* 21(1): 5-11, which have also been adopted in other Australian jurisdictions.

⁹ Some extractive-industry specific criteria have been adapted to better suit the Barangaroo development context.

¹⁰ The World Health Organization (WHO) defines health as a state of complete physical, mental and social wellbeing and not merely the absence of disease or infirmity. For this guideline, wellbeing is a state in which people have their basic needs met, can realise their potential, can cope with the normal stresses of life, can work productively and fruitfully, and can participate in their community.

- *Dis-benefits*: Social impacts which result in a *negative* consequence experienced by people due to changes associated with the implementation of the approved Concept Plan and MOD 9.
- *Managing benefits and dis-benefits*: Actions which have the ability to maximise potential benefits and reduce potential dis-benefits experienced by people due to changes associated with the implementation of the approved Concept Plan and MOD 9.

Throughout, impacts are considered at both a local (adjacent historic areas of Millers Point and Walsh Bay, and then the Sydney CBD) and broader (NSW) level where applicable. Impacts present during the construction, operational or both phases of the development cycle have been considered also.

5 Social Impact Identification, Assessment and Mitigation

5.1 Way of life

5.1.1 Benefits

Increased quantity and access to employment and training opportunities

On completion, it is expected Barangaroo will support 23,000 permanent jobs and contribute more than \$2 billion to the NSW economy annually.¹¹

Our economic modelling shows MOD 9 specifically could generate an additional 1143 jobs annually during construction (2022 to 2029) and an additional 1176 jobs annually once construction is completed (see Table 5).¹²

Table 4: Summary of economic impacts

| | Approved Concept Plan | Proposed MOD 9 | Net impact of MOD 9 |
|--|-----------------------|----------------|---------------------|
| Average annual impact during the construction phase (2022-2029) | | | |
| Employment (jobs) | 504 | 1647 | 1143 |
| Average annual impact during operational phase (2030-2039) | | | |
| Employment (jobs) | 317 | 1493 | 1176 |

Source: PwC

The operational estimate jobs estimate shown in Table 4 is conservative in that it focuses on the marginal benefit that MOD 9 brings that is additional to the community because of the nature of the Central Barangaroo precinct in attracting international tourists. This is something that just building shops, offices or apartments would not normally do; this is the real unique value generated by MOD 9.

However, there is also benefit in understanding the gross economic activity supported by the MOD 9 development in Central Barangaroo. On this basis we expect, in terms of total annual jobs supported by Central Barangaroo:

- 7062 direct jobs in Central Barangaroo
- 3355 jobs supporting businesses in Central Barangaroo
- 3814 jobs due to higher wages in the community.

Barangaroo has already attracted global commercial employers operating in International Towers and International House, along with many retail and hospitality providers throughout Barangaroo South. Post-construction phase, MOD 9 aims to optimise its close proximity to Sydney's CBD and provide additional employment and training opportunities. We estimate that MOD 9 could support approximately 7062 full time equivalent (FTE) jobs in Central Barangaroo on completion; this includes over 5865 commercial and 1043 retail

¹¹ Barangaroo Delivery Authority (2018-19) *Annual Report*.

¹² PwC (2021) *Economic Impact Assessment Modification of the Barangaroo Concept Plan – Central Barangaroo (Modification 9)*.

positions.¹³ These are expected to be predominantly ‘white collar’ services jobs which are new to the area and will provide a demand base for the surrounding businesses and service providers. MOD 9’s expanded floor space could facilitate more competition between businesses, contributing to the viability of surrounding business and the retail sector particularly. Combining the proposed improvements in public transport infrastructure (see below) with MOD 9’s proposed expansion in floor area and mixed-use space, could lead to increased access to employment opportunities resulting in positive social and economic outcomes.

Social inclusion through employment, training and education

Businesses across the three completed Barangaroo precincts are expected to maintain approximately 23,000 permanent jobs. As well as the economic and way of life benefits, employment has been shown to be linked to individual self-worth, sense of dignity and social ties within communities.¹⁴ For a more detailed assessment of economic impacts, please refer to the separate economic impact assessment report.¹⁵

Additional residential housing to meet market demands

Increasing levels of demand, both domestic and foreign, have contributed to a highly competitive Sydney housing market. While the Sydney (and Melbourne) property markets have seen some pull-back in the past year, Sydney’s residential prices and rent values continue to far exceed State and National averages (see Appendix A for further details).

MOD 9 proposes the construction of up to 40,000 m² of residential GFA, increasing by 11,000 m² from the current approval.

The expansion of residential floor area in the MOD 9 proposal addresses anticipated population growth and housing demand projections. Specifically, the Department of Planning, Industry and Environment (DPIE) projects that:

- Greater Sydney’s population will increase from 5,746,821 at the end of 2026 to 7,103,091 at the end of 2041 (i.e. a 23.6 per cent increase)
- the Greater Sydney Commission’s (GSC’s) Eastern City District’s population will increase from 1,126,259 at the end of 2026 to 1,388,071 at the end of 2041 (i.e. a 23.2 per cent increase).

This proposed Barangaroo development contributes to the collective need to positively address housing availability and market pressures in the future.

Housing proximity benefits

Barangaroo plays host to large commercial employers in International Towers and International House, along with many retail and hospitality providers throughout Barangaroo South. This is only likely to increase before completion in 2024, when the Barangaroo precinct will be complemented by improved transport infrastructure in the form of a new metro station and large foreshore parklands. MOD 9 proposes residential development in Central Barangaroo to deliver increased housing in close proximity to Barangaroo South and Barangaroo Station, which can lead to benefits such as:

- *Improved quality of life through shorter commute times:* Businesses within the Central Barangaroo precinct could employ workers in a variety of fields, a proportion of whom may also live in the precinct. Living in close proximity to their workplace can give workers the opportunity to enjoy low commuting times, low transport costs and greater free time.

¹³ For assumptions see PwC (2021) *Economic Impact Assessment Modification of the Barangaroo Concept Plan – Central Barangaroo (Modification 9)*. Clearly, given the part-time nature of the retail industry this estimate of FTE employment will in practice mean many more people employed.

¹⁴ Dudwick, N. (2013) “The relationship between jobs and social cohesion” *World Development Report 2013*.

¹⁵ PwC (2021) *Economic Impact Assessment Modification of the Barangaroo Concept Plan – Central Barangaroo (Modification 9)*.

- *Increased mobility from closer access public transport:* The Central Barangaroo precinct has facilities for a large number of public and active transport options including Wynyard train station, pedestrian walkways and bike paths. Easily accessible public transport close to home could decrease reliance on cars, reducing traffic congestion and carbon emissions (see section 5.4.1), and increase social cohesion driven by equality of access to employment and social services in Barangaroo.¹⁶
- *Increased social inclusion from participation in community events:* More convenient access to the activities, facilities and public domain in the Central Barangaroo precinct could increase civic participation and social inclusion. Barangaroo has been designed to be a vibrant mixed-use precinct with a diverse range of facilities (further detailed is outlined in section 5.2) aimed at residents, locals and global visitors.

5.1.2 Potential dis-benefits

Overdevelopment risks

The Barangaroo precinct is forecast to provide space for 23,000 permanent jobs, homes for 3500 residents and attract 33,000 visitors each day.¹⁷ Since the Barangaroo Reserve opened in 2015, more than 2.5 million visitors have enjoyed its natural beauty.¹⁸ Overdevelopment risks remain a potential dis-benefit in all locations where a large influx of people occurs into a high-density area, such as the Sydney CBD. For example, greater car traffic could result in increased congestion, greater parking scarcity and contribution to carbon emissions. Despite extensive public and active transport infrastructure, there may exist a risk that these are underutilised.

Imbalanced housing stock

There is a risk that the balance of housing types provided is not at an optimal level. A lack of diversity in housing stock within Barangaroo could result in the exclusion of particular demographics who have varying demand preferences. For example, senior citizens and families often have differing demand preferences in terms of housing type, size and number of stories. Sydney CBD is one of the most expensive localities to own or rent premises in Australia, and not all residential apartments within the Barangaroo precinct may be suitable in terms of size, accessibility and amenity for particular demographics.

5.1.3 Managing benefits and dis-benefits

Encouraging public transport use

The already approved plans for a publicly accessible metro station and other active transport network should mitigate against overdevelopment risks. These provide individuals with opportunities to use means other than a private car to get in and around the precinct.

Use of public transport has been encouraged through the:

- design and construction of quality connections between key activity centres and public transport stations. The site has extensive active transport connections, including pedestrian bridges, dedicated bikeways and high quality end of trip facilities.

¹⁶ World Bank (2013), *World Development Report 2013*. Available at: [Siteresources.worldbank.org/EXTNWDR2013/Resources/8258024-1320950747192/8260293-1322665883147/Chapter-4.pdf](https://siteresources.worldbank.org/EXTNWDR2013/Resources/8258024-1320950747192/8260293-1322665883147/Chapter-4.pdf) (accessed on 27 March 2020).

¹⁷ NSW Department of Planning and Environment (2018) *Major Projects: "Barangaroo"*. Available at: <https://www.planning.nsw.gov.au/Assess-and-Regulate/Projects/Barangaroo> (accessed on 27 March 2020).

¹⁸ Barangaroo Delivery Authority (2017) *Annual Report 2016-2017*. Available at: <https://resource.barangaroo.com/hc/en-us/articles/333757024296-Annual-Report-2016-2017> (accessed on 27 March 2020).

- relatively limited provision of on-site parking, which naturally encourages people to find other transport modes to journey to Barangaroo.

A large number of transport infrastructure projects have already been completed in and around the Barangaroo precinct. These include the Wynyard transport hub, the George Street light rail, a new ferry wharf, widening of pedestrian walkways and the creation of the waterfront promenade. The delivery of Barangaroo Station will continue to augment the precinct's public transport connectivity to wider metropolitan Sydney and (re)affirm the global standing of Barangaroo.

5.2 Community and culture

5.2.1 Benefits

Social cohesion through inclusive public space, community events and activities

The approved Concept Plan makes provision for the combination of business, workplace and retail, residential, tourist, community and cultural uses. The proposed retail and residential expansion in MOD 9 enhances this by providing the population thresholds to group specialist services, facilities, amenities, recreational and cultural opportunities in Central Barangaroo.

MOD 9 commits to building social linkages and social capital through the public domain is space. This is supported by 2800 m² of community use GFA, complemented by the potential provision of approximately 2200 m² of 'outdoor rooms' in the form of covered outdoor facilities, rooftop terraces, community spaces and community gardens, which are not defined as GFA. In addition, MOD 9 includes an allocation of a minimum of 6000 m² and up to 18,000 m² of community use GFA within the RE1 Zone of Barangaroo Reserve, to allow for future community/cultural facilities located in the Cutaway.¹⁹ Associated open spaces and community hubs can empower residents and visitors to develop social networks, community bonds and ties which raise the cultural profile of the area.

Inclusively designed public domain spaces throughout the precinct that provide civic focus and encourage interaction between diverse groups, catalysing an increase in social cohesion. In keeping with the founding design principles, MOD 9 will maintain 50 per cent public domain/open space across the entire development. These areas will be designed to suit a variety of potential users of diverse backgrounds, ethnicities, age groups and interests. Research has shown that public domain in cities (particularly parks and other greenspace) can promote social cohesion.²⁰

Major events have already attracted hundreds of thousands of visitors including Sculpture at Barangaroo in the Reserve, Barangaroo Street Fair, Sydney Festival's and Vivid Sydney in the southern precinct. MOD 9 can enhance these benefits by increasing residential and cultural floor area within Central Barangaroo. This could allow more and larger cultural events to be held, catering to a greater variety of people and enabling more residents and visitors to enjoy them. The provision of a cultural facility that would provide a space for civic engagement and community use as set out in MOD 9 could play a key role in creating a societal identity and strong ethos.

Social programs

MOD 9 provides support for social programs to drive social cohesion and benefit the residents of Central Barangaroo. This includes MOD 9's financial commitment to the social enterprise Homes for Homes scheme (see Box 1, next page), which aims to increase the supply of social and affordable housing for homeless and vulnerable Australians. This commitment to support Homes for Homes in MOD 9 could support social inclusion within

¹⁹ The Cutaway should be an additional drawcard to the precinct, bringing both economic activity and broader community benefits as a cultural institution, but as it is being completed by others this impact is not included in our analysis

²⁰ Peters, K. (2010) "Social interactions in urban parks: Stimulating social cohesion" *Urban Forestry & Urban Greening*

the local Sydney community and potentially assist the large segment of the local population with very low or no income (see Appendix A).

Box 1 Homes for Homes

Supported by the Australian Government, Homes for Homes, is an independent, not-for-profit organisation established by The Big Issue. It aims to bring about an innovative and scalable approach to raising private funds to support the development of social and affordable housing.

Under the Homes for Homes initiative, homeowners voluntarily agree to a caveat on their property and make a tax-deductible donation at the time of sale of 0.1 per cent of the sale price (e.g. a \$1000 donation on a \$1 million sale). As a voluntary initiative, the homeowner can opt-out of Homes for Homes at any time.

Revenue from the caveats is aggregated by Homes for Homes in the state or territory in which they were raised to fund social and affordable housing projects via a competitive selection process. The caveat mechanism is a new approach to generating capital for social and affordable housing, which Homes for Homes estimates has the potential to generate more than \$1.8 billion over 30 years.

Homes for Homes has established housing and investment advisory groups to support their business model.

Improved public safety by design and participation

‘Crime prevention through environmental design’ (CPTED) is an agenda for manipulating the built environment to create safer neighbourhoods and is at the heart of MOD 9. Design principles have sought to embed public safety through the design that stresses:

- active streets
- clear connections and sightlines
- well-defined and activated spaces
- good lighting, etc.

Complementing the CPTED, the increased residential and commercial population proposed in MOD 9 has the potential to increase patronage of the precinct and surrounding public transport infrastructure, providing an additional level of perceived security.

Encouraging the night-time economy

In late 2020 the NSW Government unveiled its *24-Hour Economy Strategy* in order to provide a unified vision to transform Greater Sydney into a 24-hour economy centre that is vibrant, diverse, inclusive and safe. The *Strategy* comprises five strategic pillars, each of which address a distinct opportunity area in Greater Sydney’s 24-hour economy:

- Provide more integrated planning and place-making which will see increased state and local government and industry collaboration to build an environment in which the 24-hour economy can thrive
- Encourage the diversification of night-time activities by supporting a wider variety of businesses at night
- Support industry and cultural development to help businesses and cultural entrepreneurs access and thrive in the 24-hour economy
- Explore ways to enhance mobility and improve connectivity between 24-hour hubs through safe and reliable transport
- Change the narrative for Sydney to bring locals and outside visitors into Sydney at night, observing and encouraging healthy behaviours.

These five pillars are reflected in both:

- Barangaroo generally - Barangaroo already has an array of restaurants, bars, clubs and cultural facilities located in a high-quality public precinct, which may contribute to the vibrancy of the City of Sydney's nightlife.
- Central Barangaroo – The MOD 9 development of Central Barangaroo should boost the night-time economy by providing retail, hospitality and cultural outlets in a safe, central location serviced by an integrated public transport network.

Strengthening the Cultural Ribbon – Part of the city's cultural network

The Barangaroo development seeks to respect and respond appropriately to the site's cultural heritage and historical importance. The land on which Barangaroo is located has rich maritime and indigenous heritage. Indigenous culture is currently celebrated in Barangaroo through artworks, events commemorations and tours. For example, a team of Aboriginal Visitor Services Guides conduct regular tours throughout Barangaroo Reserve, educating visitors about the native history of Sydney Harbour, the importance of the land to Australia's Aboriginal Heritage and its significance to the clans of the local Eora Nation.²¹

Respecting the site's cultural heritage is central to the Barangaroo precinct, with MOD 9 providing more facilities and spaces, complementing the Cutaway under Barangaroo (which may be used for displaying artworks and events promoting cultural heritage).

5.2.2 Dis-benefits

Potential for anti-social behaviour

The Barangaroo precinct has been designed to accommodate thousands of residents, workers and visitors every day. Any potential imbalance between the numbers of these groups – particularly during the night time economy – could result in anti-social behaviour such as noise and community disturbance impacts. The diverse retail and hospitality outlets at Barangaroo may become popular at night time, such that large numbers of visitors - and the associated noise and activity - disturb the resident population.

5.2.3 Managing benefits and dis-benefits

Designing an inclusive and accessible space for all

Strain on services and facilities, imbalance of user profiles and exclusionary housing are all risks which can be mitigated by encouraging an inclusive and accessible space for all. The management of these risks requires a holistic approach which MOD 9 will contemplate as follows, but is not limited to:

- integration and connectivity to support enhanced utilisation and access to public transport infrastructure. This should provide low cost and accessible transport right to the heart of Barangaroo to those without access to local housing
- the expanded scope and provision of community activities and services
- creating foreshore public open space, providing easily accessible community space to be enjoyed by people of all ages, family status and socioeconomic status.

The risk of anti-social behaviour can be mitigated by placing appropriate management plans and using experienced operators in the precinct.

Preserving the site's history

Careful consideration of the indigenous heritage of the site has been undertaken to avoid negative social impacts resulting from construction and operational works associated with the development. For example, Barangaroo Reserve incorporated local sandstone and over

²¹ Barangaroo Delivery Authority (2020) *Aboriginal Cultural Tours*. Available at: <http://www.barangaroo.com/see-and-do/things-to-do/tours/aboriginal-cultural-tours/> (accessed on 27 March 2020).

75,000 Australian native trees¹⁷ helping to bring the land closer to its natural state – an integral aspect of indigenous culture. The Reserve also seeks to provide an educational experience for those who frequent the park; formal signs describing flora, fauna and history are displayed to give an understanding of the local region’s significant events, history and ecosystems.

The design of Central Barangaroo will create an appropriate balance and interrelationship between the design of its buildings and the landscape. Additionally, MOD 9’s cultural aspirations within Central Barangaroo could be utilised to continue to celebrate, commemorate and pass on knowledge of the site’s history.

Embrace cultural diversity

Central Barangaroo includes the provision of cultural spaces, and MOD 9 proposes to provide significant areas of active, community and cultural uses. These facilities could be used to host a broad variety of events in order to increase cultural awareness and sense of place. This could make a large contribution to encouraging marginalised or minority groups’ participation in community events, drawing in a more diverse community.

5.3 Access to and use of infrastructure, services and facilities

5.3.1 Benefits

Transport infrastructure contributing to a better-connected Sydney

Barangaroo has been designed to be easily accessed and traversed by residents and visitors alike. MOD 9 places high quality public transport infrastructure at the heart of the precinct by providing connections to enable movement throughout, in and out of Barangaroo, along the harbour front and around the adjacent CBD area.

In particular, MOD 9 is the first major modification to take into consideration the Sydney Metro station proposed for Barangaroo. Central Barangaroo strategically locates a significant retail shopping centre with direct and easy access to and from Barangaroo Station. Other examples include:

- significant public parklands with easy access to Barangaroo Station via Nawi Cove
- creation of Wulugul Walk as a harbour promenade, connecting the 14km foreshore walk from Woolloomooloo to Anzac Bridge
- access from the water for both public and private watercraft, including a Barangaroo ferry terminal providing access to Sydney Harbour
- elevated footbridges (and Wynyard walk) connecting Barangaroo with the rest of the CBD
- shared bike paths.

The whole Barangaroo development is expected to provide permanent employment for 23,000 people and play host to an additional 33,000 visitors each day.²² Of these, INSW expects 96 per cent will cycle, walk or use some form of public transport in Barangaroo.²³ While the MOD 9 development is just one contributing component of the anticipated aggregate impact, the general trends should be accounted for in this assessment. By combining the Barangaroo station with other strategically planned public infrastructure, MOD 9 could improve Barangaroo’s overall accessibility and connectivity and increase infrastructure and health and wellbeing related social benefits.

²² NSW Department of Planning and Environment (2018) *Barangaroo*. Available at: <https://www.planning.nsw.gov.au/Assess-and-Regulate/State-Significant-Projects/Barangaroo> (accessed on 27 March 2020).

²³ See MOD 9 Transport Management and Accessibility Plan

Easily accessed and traversed precinct

MOD 9 envisages an increased number and mix of tenants and operators in Central Barangaroo across the arts, cultural, civic, community and educational sectors. The Barangaroo development can increase accessibility (e.g. via a generous public domain, cycleways, footpaths, the future redesigned Hickson Road, etc) to the range of uses within the precinct if they are located on the site or via Barangaroo's high quality transport options.

5.3.2 Dis-benefits

Potential strain on services and facilities due to additional patronage

MOD 9 proposes an increase in floor area, which could result in significantly larger local resident and work force populations. There are precedents that the establishment of higher density dwelling can negatively impact access to existing neighbourhood resources and local facilities such as education, training, employment and the arts.²⁴ Sufficient access to services and facilities is an important contributor to fostering and maintaining social cohesion in the community.

In particular, Inner Sydney has a high degree of cultural diversity and a large number of very low income individuals.²⁵ It is worth noting that these individuals are often more reliant on public infrastructure, which forms an integral part of MOD 9.

5.3.3 Managing benefits and dis-benefits

Adequate provision of services and facilities floor area

The provision of public transport infrastructure mitigates potential patronage issues. Efficient infrastructure can facilitate the movement of people to and from Central Barangaroo, allowing for easier access to a wider geographic range of services. As outlined in section 5.3.1, MOD 9 proposes significant active transport and was designed to leverage and fully utilise the proposed metro station.

MOD 9 proposes a balanced development mix, including cultural and civic facilities within the public domain area. This provides a blend of places and spaces for both public and private uses. The central event plaza provides a spacious outdoor activation opportunity.

Ensure accessibility for disabled and elderly persons

Barangaroo aims to be accessible to all visitors, of all ages, including those with additional mobility requirements. Features such as stair-free access, accessible parking bays, taxi ranks, accessible bathrooms and public transport are prevalent throughout the precinct. The detailed design elements of MOD 9 will align with those of the entire Barangaroo precinct.

5.4 Health and wellbeing

5.4.1 Benefits

Provision of large public domain

Barangaroo includes a significant component dedicated to supporting positive health and wellbeing outcomes for the immediate and broader catchment. Central Barangaroo will include significant waterfront public open space. MOD 9 maintains committed to delivering 50 per cent of the overall Barangaroo area as public domain/open space – allowing residents,

²⁴ The Heart Foundation (2012) *Increasing Density in Australia*. Available at: <https://www.heartfoundation.org.au/images/uploads/publications/Increasing-density-in-Australia-Evidence-Review-2012-trevor.pdf> (accessed 27 March 2020).

²⁵ See Appendix A: Community Profile and Social Baseline

workers and visitors the opportunity to enjoy newly created open spaces such as those at Sydney Harbour.

Health and wellbeing benefits associated with the provision of public open space and parks include better perceived general health,²⁶ reduced stress levels²⁷ and reduced rates of depression.²⁸ Mental health benefits of users are likely to be further enhanced by Barangaroo's specific characteristics including waterfront views of Sydney Harbour.

Encouragement of active transport and exercise

A generous public domain with active transport options, including running paths and cycle ways, connect Barangaroo residents across the three Barangaroo precincts, which further reinforces opportunities to participate in exercise.

As part of the Barangaroo Integrated Transport Plan, appropriate infrastructure has been designed to encourage commuters to take up multiple modes of transport including walking and cycling. Examples of this infrastructure include the Wynyard Walk, the pedestrian bridges over Hickson Rd/Sussex St as well as end of trip facilities in Barangaroo South's International Towers. In addition, the foreshore promenade, Wulugul Walk, provides public access to the Sydney Harbour foreshore. This will span the 2km between Walsh Bay and Cockle Bay. Making active transport more convenient for commuters, as well as providing more homes closer to places of work, could result in increases in exercise levels and overall health. A strong body of evidence confirms the association between higher residential density (and the associated mixed land uses) and increased transport walking across all age groups.²⁹

In addition to health improvements through active transport to and from work, the Barangaroo precinct will encourage physical activity recreationally with inclusively-designed parks, promenades, bikeways and walkways. Offering a diverse range of attractive and convenient spaces for exercise throughout the precinct will encourage physical activity even for users who do not use active transport. It is estimated that up to 10,000 walkers, joggers and cyclists use the Barangaroo waterfront each week³⁰ and approximately 10 per cent of people commuting to Barangaroo are projected to walk, jog or cycle.³¹ It is expected that MOD 9 will positively influence this number by increasing opportunities for people to be outside and active.

Potential to reduce carbon emissions

Implementation of the Barangaroo Transport Implementation Plan could facilitate a decreased dependence on motor vehicles³² for visitors attending events and for residents in Central Barangaroo.³³ The prioritised active transport design in MOD 9 builds on this, and could increase public active transport use which can have positive implications on health outcomes for Central Barangaroo and the broader community visiting Central Barangaroo. Alongside incidental exercise impacts, reducing private motor vehicle dependence can

²⁶ De Vries, S., Verheij, R. A., Groenewegen, P. P., et al (2003) 'Natural Environments - Healthy Environments? An Exploratory Analysis of the Relationship Between Greenspace and Health,' *Environment and Planning A* Vol.35.

²⁷ Grahn, P. and Stigsdotter, Ua (2003) 'Landscape Planning and Stress,' *Urban Forestry Urban Greening* Vol.2.

²⁸ Morita, E., Fukuda, S., Nagano, J., Hamajima, N., Yamamoto, H., Iwai, Y., Nakashima, T., Ohira, H. and Shirakawa, T. (2007) 'Psychological Effects of Forest Environments on Healthy Adults: Shinrin-Yoku (Forest-Air Bathing, Walking) as a Possible Method of Stress Reduction'. *Public Health*, Vol.121.

²⁹ The Heart Foundation (2012) *Increasing Density in Australia*. Available at: <https://www.heartfoundation.org.au/images/uploads/publications/Increasing-density-in-Australia-Evidence-Review-2012-trevor.pdf> (accessed on 27 March 2020).

³⁰ Barangaroo Delivery Authority (2013) *Annual Report*.

³¹ Transport for NSW "Barangaroo Integrated Transport Plan". Available at: <https://resource.barangaroo.com/hc/en-us/articles/115007698487-Barangaroo-Integrated-Transport-Plan> (accessed on 27 March 2020).

³² Tinbergen Institute (2015) *Does improving public transport decrease car ownership?* Available at: <https://papers.tinbergen.nl/15139.pdf> (accessed on 27 March 2020).

³³ The Barangaroo Integrated Transport Plan sets target private vehicle trips to Barangaroo at 5 per cent.

contribute to the overall wellbeing of community members through reduced carbon emissions and positive impacts on air quality.

Flexible facilities to meet changing social needs and the provision of community based programs

Social infrastructure in Central Barangaroo has the potential to provide a quality living and working environment in which the health and wellbeing of workers, residents and visitors are met. This can be achieved through increasing the flexible mix of services, spaces and facilities to accommodate changing needs for social support over time. MOD 9 proposes supports social initiatives as mentioned and provides floor area dedicated to community events. These areas have been designed with multiple civic uses in mind and will be suitably adaptable to and driven by changing social needs in the future.

5.4.2 Dis-benefits

Potential exclusion of certain groups in the public domain

The Barangaroo development has committed to delivering 50 per cent of the area as public domain/open space – allowing residents and visitors the opportunity to enjoy newly created open space on Sydney Harbour. Although a large amount of space has been earmarked for public domain in MOD 9, if these spaces are not designed to facilitate all ability access, there is a risk of excluding vulnerable groups such as the elderly and people with disabilities.

5.4.3 Managing benefits and dis-benefits

Effective public domain design

The design principles for the public domain in MOD 9 reflect the need to ensure the areas are accessible to as broad a range of demographics as possible. This includes the central placement of open space in the heart of Barangaroo and convenient public and active transport links.

5.5 Surroundings

5.5.1 Benefits

Environmental considerations and greenspace

The inclusion of extensive greenspace and environmental initiatives can provide benefits to users of Barangaroo and the environment more broadly. Barangaroo aims to be the first precinct of its size in Australia which is climate positive. The NSW Government has committed to the C40 Cities Climate Positive Development Program which has four key requirements:

- reducing and then offsetting all the energy used on the site
- recycling and exporting more water than the drinking water that is imported
- responsible waste management, diversion from landfill and zero waste emissions
- delivering community wellbeing.

Barangaroo is Australia's first large-scale carbon neutral community and has been set up to operate with zero net carbon emissions. As a result, in December 2019 Barangaroo was announced as the first urban precinct in Australia to be awarded carbon neutral status. The carbon neutral certification, awarded by the Australian Government, reinforces Barangaroo's status as a world-class example of sustainable and climate positive design.

These precinct attributes are maintained through MOD 9 despite increases in floor area and projected visitor and resident numbers, all while maintaining 50 per cent public domain/open space in the Barangaroo Precinct.

Improved safety in public areas

Barangaroo has the potential to have improved safety throughout the active travel network and public spaces. An increased population of visitors and residents, driven by the completion of the Barangaroo precinct, could increase patronage and surrounding transport facilities, particularly during the night time. Greater patronage of public space combined with buildings, connections and public spaces designed with safety in mind can improve casual surveillance and reduce the likelihood of crime. Furthermore, the implementation of pedestrian priority areas and reduced speed limits in areas of high pedestrian activity will contribute to improving the overall safety in public areas.

Greater public domain and open space

In keeping with the vision to be 'recognised globally and loved locally', Barangaroo will include 50 per cent public domain space across the precinct to be enjoyed by locals and visitors. As discussed in section 5.4.1, there are numerous health and wellbeing benefits from utilising open spaces such as parks and other recreational spaces. High density housing stock and commercial spaces in the precinct along with extensive transport infrastructure will help allow people to enjoy the benefits of Barangaroo's newly created public spaces, whether they are residents/workers of Barangaroo or visitors.

Increased amenity of public domain through decreased car use

A reduction of car usage in and around Barangaroo can improve the amenity of the public domain. Barangaroo's extensive public and active transport network can provide residents, workers and visitors with opportunities to use means other than private car transport to get into and around the precinct. Benefits of reduced traffic include reduced air pollution, less noise and lower levels of heat emissions from vehicles. These factors will help the public space within Central Barangaroo more enjoyable for users.

Potential reduction in carbon emissions

High density housing stock and commercial spaces as proposed in MOD 9, along with extensive public and active transport options, may lead to a reduction in carbon emissions

from commuters. Barangaroo includes residential floor space along with commercial office space in Barangaroo South. Residents of Barangaroo who are employed in the precinct could easily walk or ride to work and reduce carbon emissions that would have been produced had they commuted by other means. Additionally, the extensive public and active transport infrastructure connecting Barangaroo to the rest of Sydney will encourage commuters to utilise transport options other than personal car transport. This is likely to also result in lower emissions than would otherwise have been produced.

5.5.2 Dis-benefits

Short term environmental and health impacts

All developments have the potential to cause environmental and health impacts, particularly in the short term. Significant construction works are required to develop the Central Barangaroo area; these works are likely to produce noise, light, dust and air emissions which could have negative impacts on the local community and environment. Consideration to this will be embedded in construction plans for MOD 9.

5.5.3 Managing benefits and dis-benefits

Implement environmental impact mitigation strategies

Implementation of environmental impact mitigation strategies should be considered to reduce the short-term effects of construction. Strategies may include the use of site screening, rumble grids, street sweeping and limiting use of generators and heavy vehicles to regular day time hours.

In delivering MOD 9 the Central Barangaroo Developer has committed to keeping neighbours informed of key activities during construction and of major events within Central Barangaroo up to the achievement of Project Practical Completion.

Utilise effective design to ensure safety of public space

Central Barangaroo's buildings, streets, connections and public spaces should be designed with safety in mind. The precincts urban and architectural design solutions should be utilised in order to maximise the safety of users in public spaces at night-time. Design elements such as street lighting for example should be considered in the design of public spaces in order to increase visibility in otherwise dark areas. Elements such as this will be realised predominantly through Environmental Design (CPTED) principles in the detailed designs.

Design inclusive spaces to reduce risk of antisocial behaviour

Opportunities exist to manage and avoid potential antisocial behaviour occurring in the public domain that is shared with families and children through the appropriate consideration of the needs of different users. Designing spaces that can be used by a variety of users throughout the day and night may reduce the likelihood of anti-social behaviours whilst supporting an active and vibrant precinct.

Appendix A: Community Profile and Social Baseline

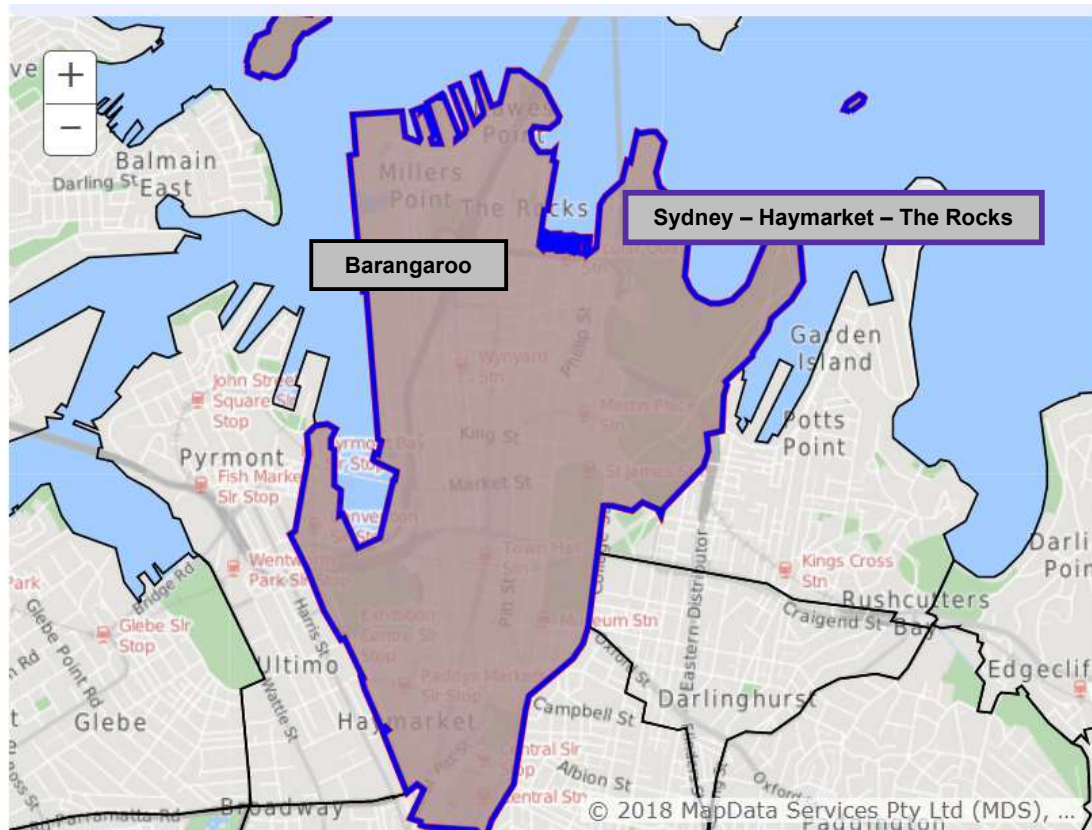
Population

The population of the Sydney – Haymarket – The Rocks region (SA2) was 27,405 at the time of the 2016 Census and was projected to have increased to 32,961 as of 30 June 2019.³⁴

The most recent detailed profile of the community, drawn from the 2016 Census, shows that females represent a slightly larger proportion of the population than males (50.4 per cent). The median age was 30 years and 75 per cent of the resident population were between 15 and 44 years of age. As shown, children under the age of 15 represented only 5 per cent of residents, and people aged 45 or above represented 20 per cent of the resident population.

Over 57.2 per cent of residents had never married and 33.9 per cent of residents were married. The remaining population were either separated (1.9 per cent), divorced (5.6 per cent) or widowed (1.3 per cent).

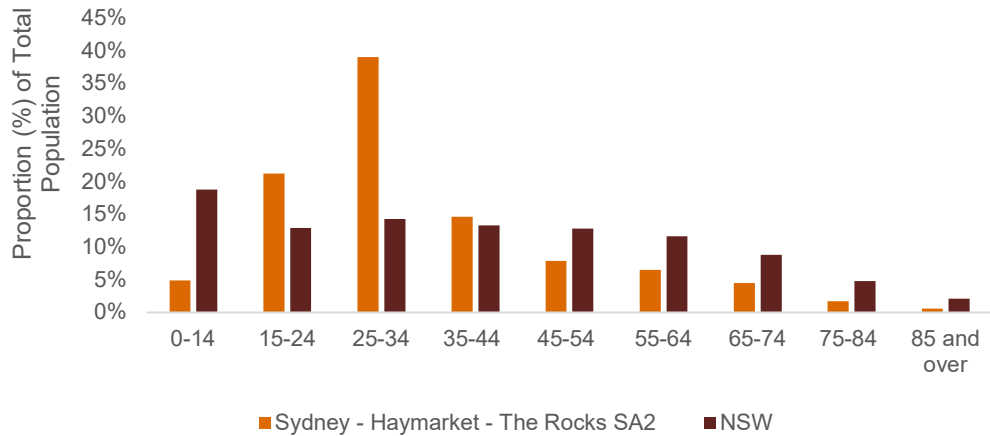
Figure 2: Sydney – Haymarket – The Rocks SA2 map³⁵



³⁴ See projections available at <https://profile.id.com.au/sydney/population-header?WebID=290>

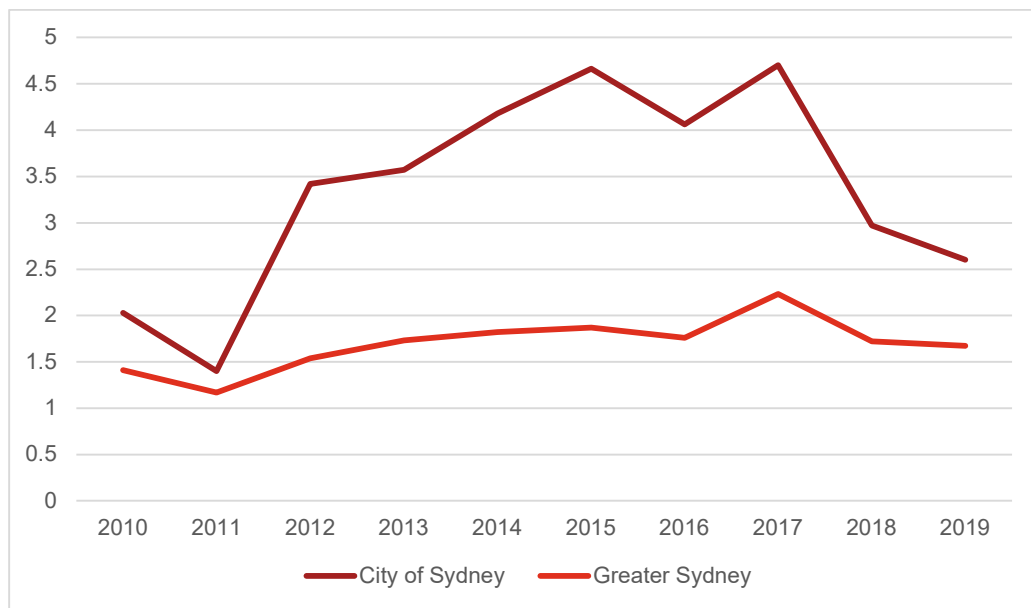
³⁵ Australian Bureau of Statistics, Sydney - Haymarket - The Rocks (SA2) (117031337). Available at: http://stat.abs.gov.au/itt/r.jsp?RegionSummary®ion=117031337&dataset=ABS_REGIONAL_ASGS&geoconcept=REGION&measure=MEASURE&datasetASGS=ABS_REGIONAL_ASGS&datasetLGA=ABS_NRP0_LGA®ionLGA=REGION®ionASGS=REGION (accessed on 1 December 2018).

Figure 3: Sydney – Haymarket – The Rocks SA2 population distribution 2016³⁶



The population of Sydney (LGA) has grown faster than that of Greater Sydney, and is expected to continue to do so, but is expected to be more volatile.

Figure 4: Annual population growth (%) in city of Sydney and Greater Sydney³⁷



The Sydney LGA average household size is two, and is expected to remain relatively constant through 2041 (declining to 1.95). The AAGR for households is projected to decline from 1.2 per cent (2016-21 period) to 0.4 per cent in the 2036-2041 period.³⁸

Figure 5 shows the projected increase in each respective age group within the Sydney LGA area between 2016 and 2041. Consistent with the national trend of an aging population and increased urbanisation, the 75+ age group is expected to experience the greatest increase

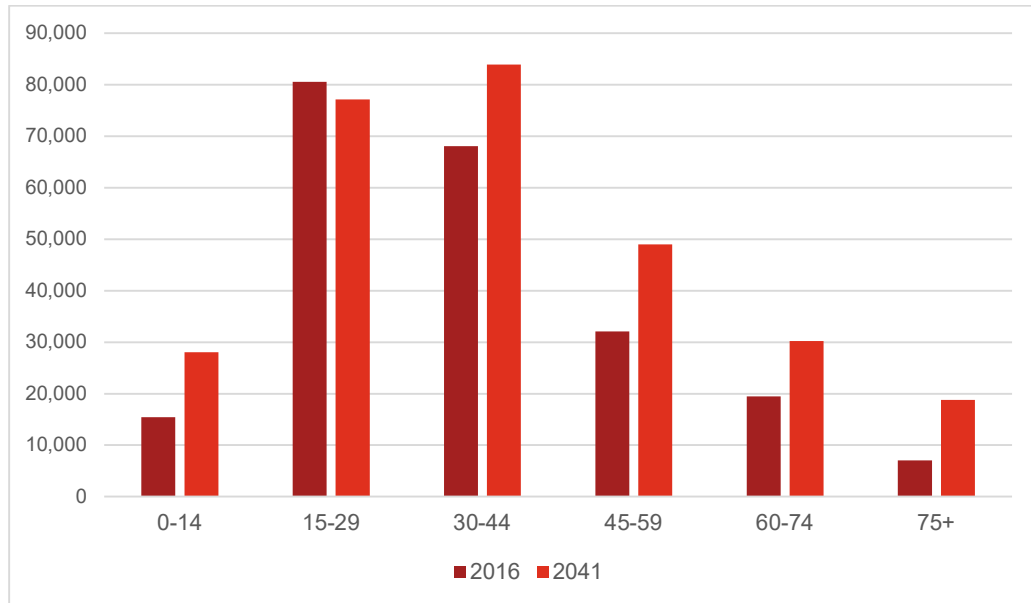
³⁶ ABS, cat. no. 2001.0 General Community Profiles: NSW and Sydney-Haymarket-The Rocks.

³⁷ See <https://profile.id.com.au/sydney/population-estimate?WebID=10>.

³⁸ NSW Government (2020), *City of Sydney Council 2019 NSW Population Projections*.

over the projection period, but all age profiles will grow except 15-29. This will likely shift the Sydney LGA age profile, and will inevitably affect consumer preferences within the community.

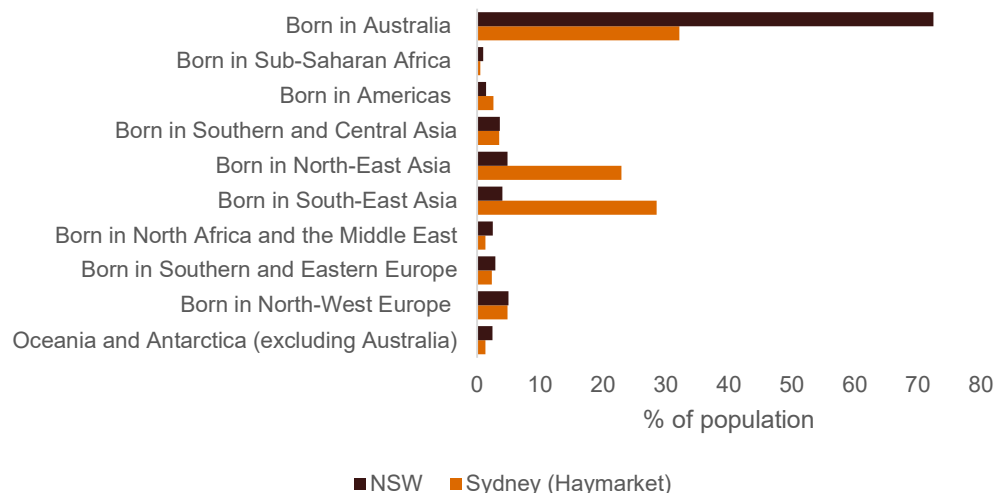
Figure 5: Projected age cohort increases 2016-2036 Sydney LGA³⁹



Culture and Ethnicity

The Sydney – Haymarket – The Rocks SA2 region is culturally diverse, with a wide variety of ethnicities and backgrounds residing in the precinct. Figure 7 provides a detailed breakdown of this. The most common regions of birth (excluding Australia (32.1 per cent)) for Haymarket residents were South East Asia (28.5 per cent) and North East Asia (22.9 per cent).

³⁹ NSW Government (2020), *City of Sydney Council 2019 NSW Population Projections*.

Figure 6: Sydney – Haymarket – The Rocks SA2 region of birth⁴⁰

Religious Affiliations

As expected with a culturally diverse region, the Sydney – Haymarket – The Rocks SA2 precinct contains a variety of religious denominations. As of 2016, Christianity was the most common religious belief and have several designated churches in the immediate Haymarket area. Hindu and Islam followers are also prevalent in the area, however even when combined represent 17.8 per cent of the registered Christian when comparing the two beliefs on a person-by-person basis.

Wealth and employment

The Sydney LGA region had a reported labour force of 124,746 as of 2016.⁴¹ Of this workforce:

- 65.3 per cent were full-time employees
- 24.6 per cent were part-time employees
- 4.1 per cent were away from work
- 6 per cent were unemployed.

Sydney LGA had a higher recorded level of full-time employees when compared to NSW (59.2 per cent) which had higher levels of part-time employees (29.7 per cent), people away from work (4.8 per cent) and unemployed residents (6.3 per cent).⁴²

⁴⁰ ABS, cat. no. 2001.0 General Community Profiles: NSW and Sydney-Haymarket-The Rocks.

⁴¹ ABS, cat. no. 1379.0. Regional profile: Sydney LGA.

⁴² 2016 Census quick-facts available at http://www.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/LGA17200?opendocument (accessed on 1 December 2018).

Table 5: Sydney LGA labour force 2016⁴³

| Employment status | (persons) |
|---------------------------|----------------|
| Full-time Employment | 81,454 |
| Part-time Employment | 30,695 |
| Away from work | 5,104 |
| Unemployed | 7,493 |
| Total Labour Force | 124,746 |

The majority of employed residents in the Sydney LGA region worked more than 35 hours a week (69.5 per cent) which is similar to wider NSW trends. 77.6 per cent of parents in couple families had at least one person employed. Under this, 39.4 per cent of couples had both members working full-time, 15.9 per cent had one employed full-time and one part time, 5.1 per cent had both employed part-time.⁴⁴

Within the Sydney LGA region, the largest sectors which contributed to employment were Professional Technical and scientific services (17 per cent of total employment), accommodation and food services (12 per cent), and the financial and insurance sector (9 per cent). The region's employment by sector distribution differs from NSW which has higher levels of employment in the Health Care and social assistance (13 per cent) and Retail Sectors (10 per cent).

⁴³ ABS, cat. no. 1379.0. Regional profile: Sydney LGA.

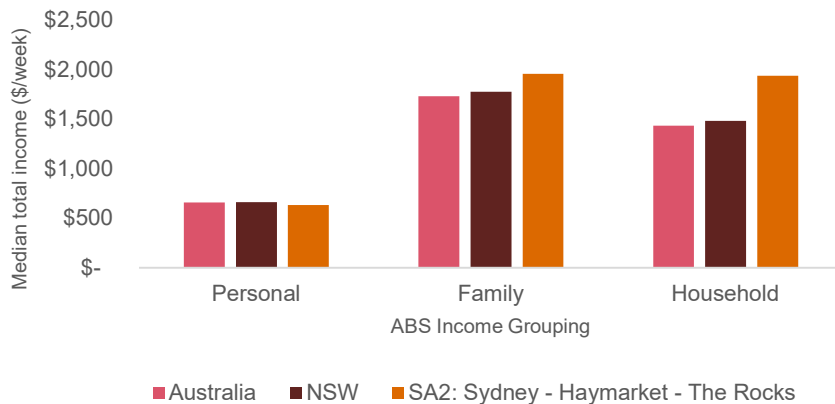
⁴⁴ 2016 Census quick-facts available at http://www.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/LGA17200?opendocument (accessed on 1 December 2018).

Figure 7: Employment by sector Sydney LGA and NSW 2016⁴⁵



The Professional Scientific & Technical services sector contributed \$46.5 billion on a GVA basis to the New South Wales economy; which represented 8.1 per cent of total economic output. While the Financial and Insurance services sector contributed \$68.1 billion on a GVA basis to the NSW economy, which represented 11.8 per cent of economic output. The Health care and social assistance sector contributed \$33.7 billion on a GVA basis to NSW, and this represented 5.8 per cent of economic output.⁴⁶ These are the three most significant sectors, on an expenditure basis, within Sydney LGA employment that contribute to the NSW economy.

Figure 8: Median total income distribution 2016⁴⁷



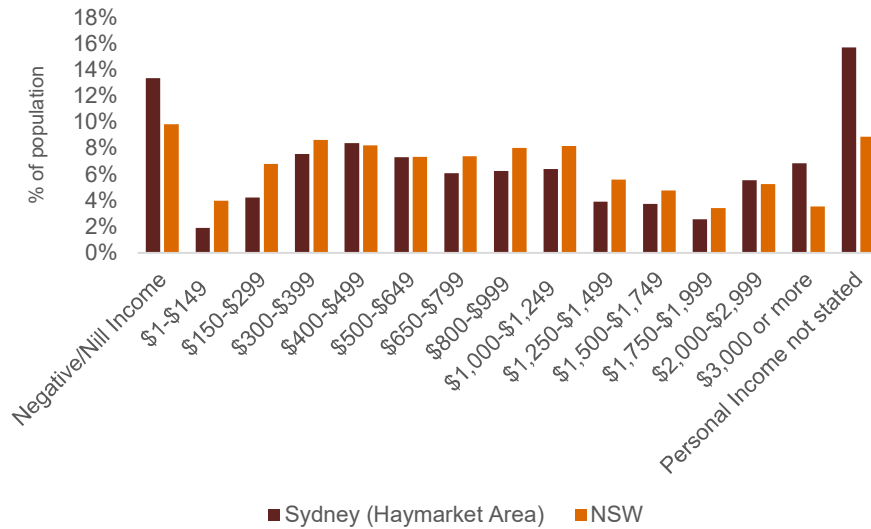
⁴⁵ ABS, cat. no. 1379.o. Regional profile: Sydney LGA.

⁴⁶ ABS 5220.o Australian National Accounts: State Accounts.

⁴⁷ ABS, cat. no. 2001.o General Community Profiles: Australia, NSW and Sydney-Haymarket-The Rocks.

Figure 9 indicates that the median income levels families and households in the Sydney – Haymarket – The Rocks SA2 area exceed those of wider geographic regions. A lower median income at the personal level is representative of a high number of very low-income earners within the area, as depicted.

Figure 9: Income distribution Sydney – Haymarket – The Rocks SA2⁴⁸



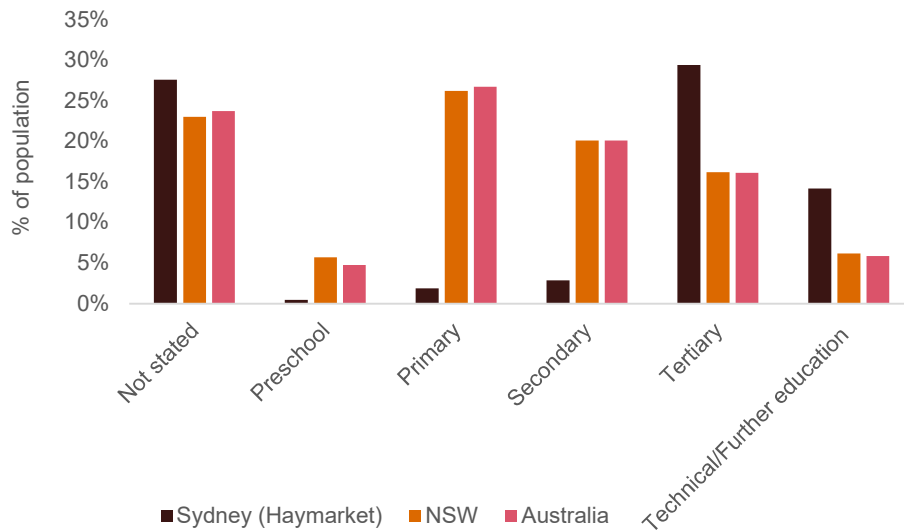
The Sydney-Haymarket-The Rocks SA2 has a distinctly greater proportion of higher income earners (\$3000 or more) than NSW. Additionally, there is a higher proportion of the population with negative or no incomes compared to NSW. This suggests the Haymarket region contains relatively high income inequality and a demographic which contains an above-average proportion of vulnerable individuals.

Education levels

In extension to the age demographics of the area, the Sydney – Haymarket – The Rocks SA2 region exhibits a greater proportion of Tertiary students as well as people undertaking Technical/Further education. As Figure 10 shows, the Haymarket region does not contain many children attending pre, primary or secondary education. Additional data also suggests that people residing within the immediate catchment area exhibit a higher educational attainment level in comparison with NSW and indeed the wider Australian population.

⁴⁸ ABS, cat. no. 2001.0 General Community Profiles: Australia, NSW and Sydney-Haymarket-The Rocks.

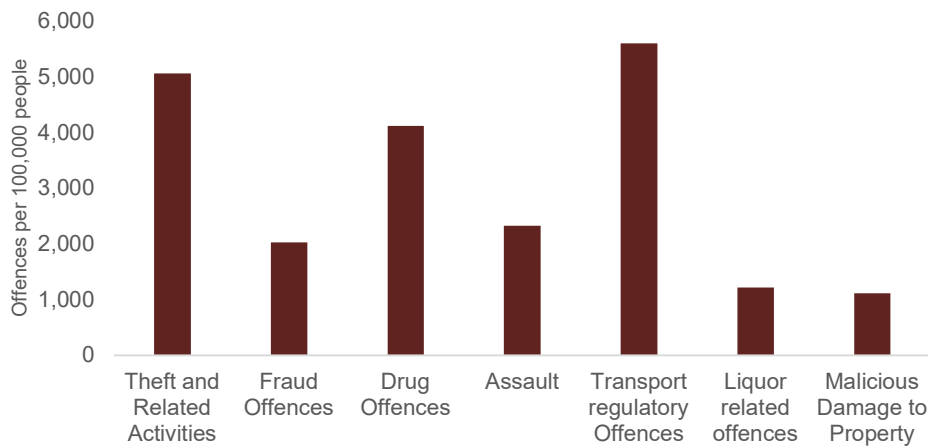
Figure 10: Percentage of population by education level⁴⁹



Community safety

The crime rates as of 2017 within the Sydney LGA area are outlined in Figure 11. Data has been exhibited as offences per 100,000 people. There were 59,124 total recorded crimes and a total crime rate of 26,369 per 100,000 people. These numbers exceed the NSW averages for the year, which is somewhat expected given the urban location of the Sydney LGA. Of particular note are drug related and transport regulatory offences, both of which have risen considerably over a 24 month and 60 month basis.⁵⁰

Figure 11: Crime rates in the Sydney LGA (2017)



⁴⁹ ABS, cat. no. 2001.0 General Community Profiles: Australia, NSW and Sydney-Haymarket-The Rocks.

⁵⁰ Bureau of Crime Statistics and Research. Available at: http://www.bocsar.nsw.gov.au/Pages/bocsar_crime_stats/bocsar_lgaexceltables.aspx (accessed on 1 December 2018).

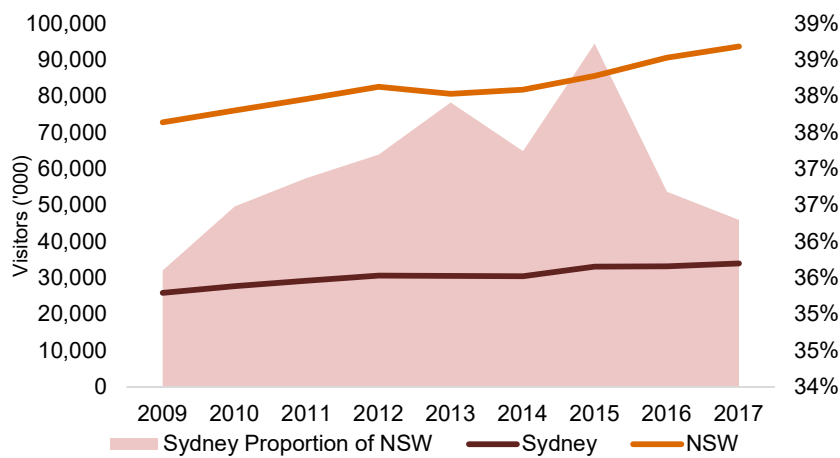
Tourism

Tourism represents a significant part of the Sydney and NSW economy. A total of \$34.2 billion was contributed to the NSW GSP in 2016-17.⁵¹ Sydney by extension is an extremely popular tourist location with over 34.0 m domestic and international visitors in 2017. This was a 2.6 per cent increase from 2016, and a 31.2 per cent increase from 2009.

Figure 12 depicts the increasing trend in visitors. Visitors in 2017 spent over 106 million nights (7.5 per cent increase from 2016) and spent over \$18.8 m (9 per cent increase from 2016). Although slightly more volatile, tourism trends in Sydney largely follow NSW.

Although Sydney tourism has increased, the contribution to NSW tourism (total number basis) has fallen to 36.3 per cent from its peak in 2015 of 38.7 per cent. This is despite a 3.4 per cent increase in tourism numbers (domestic and international combined) for NSW – indicating travellers are expanding their horizons.

Figure 12: International and domestic visitors to Sydney and NSW⁵²



⁵¹ Destination NSW, “Economic contribution of tourism to NSW (2016-17)”, Available at: <https://www.destinationnsw.com.au/wp-content/uploads/2018/04/economic-contribution-of-tourism-to-nsw-2016-2017.pdf> (accessed on 1 December 2018).

⁵² Destination NSW, “Travel to Sydney Time Series – YE Sept 2017”. Available at: <https://www.destinationnsw.com.au/wp-content/uploads/2018/01/travel-to-sydney-time-series-ye-sept17.pdf> (accessed on 1 December 2018).

Housing

High levels of demand, both domestic and foreign, have contributed to an extremely competitive Sydney housing market. While the Sydney (and Melbourne) property markets have seen some pull back in recent months as lending restrictions have tightened for investors in particular, Sydney's residential prices and rent values continue to far exceed state and national averages.

Given its location, these trends are particularly relevant for the Barangaroo development. The local residential prices and rent values must be considered as they directly impact the residential development associated with the project. These relevant prices in relation to NSW and Australia are listed in Table 6. Given high levels of demand for Sydney property, median prices are much higher in comparison to NSW and Australia.

Table 6: Median cost of living⁵³

| Employment status | Sydney LGA | NSW | Australia |
|--|------------|---------|-----------|
| Median Mortgage Repayment (\$/monthly) | \$2,499 | \$1,986 | \$1,755 |
| Median Rent (\$/weekly) | \$565 | \$380 | \$335 |
| Average Household Size | 2.00 | 2.61 | 2.55 |

⁵³ ABS, cat. no. 1379.0. Regional profile: Australia, NSW, Sydney LGA.

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