ELECTRONIC ATTACHMENT

for

BUSINESS PAPER

6.30PM, TUESDAY, 8 SEPTEMBER, 2020

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REPORTS WITH STRATEGIC IMPLICATIONS

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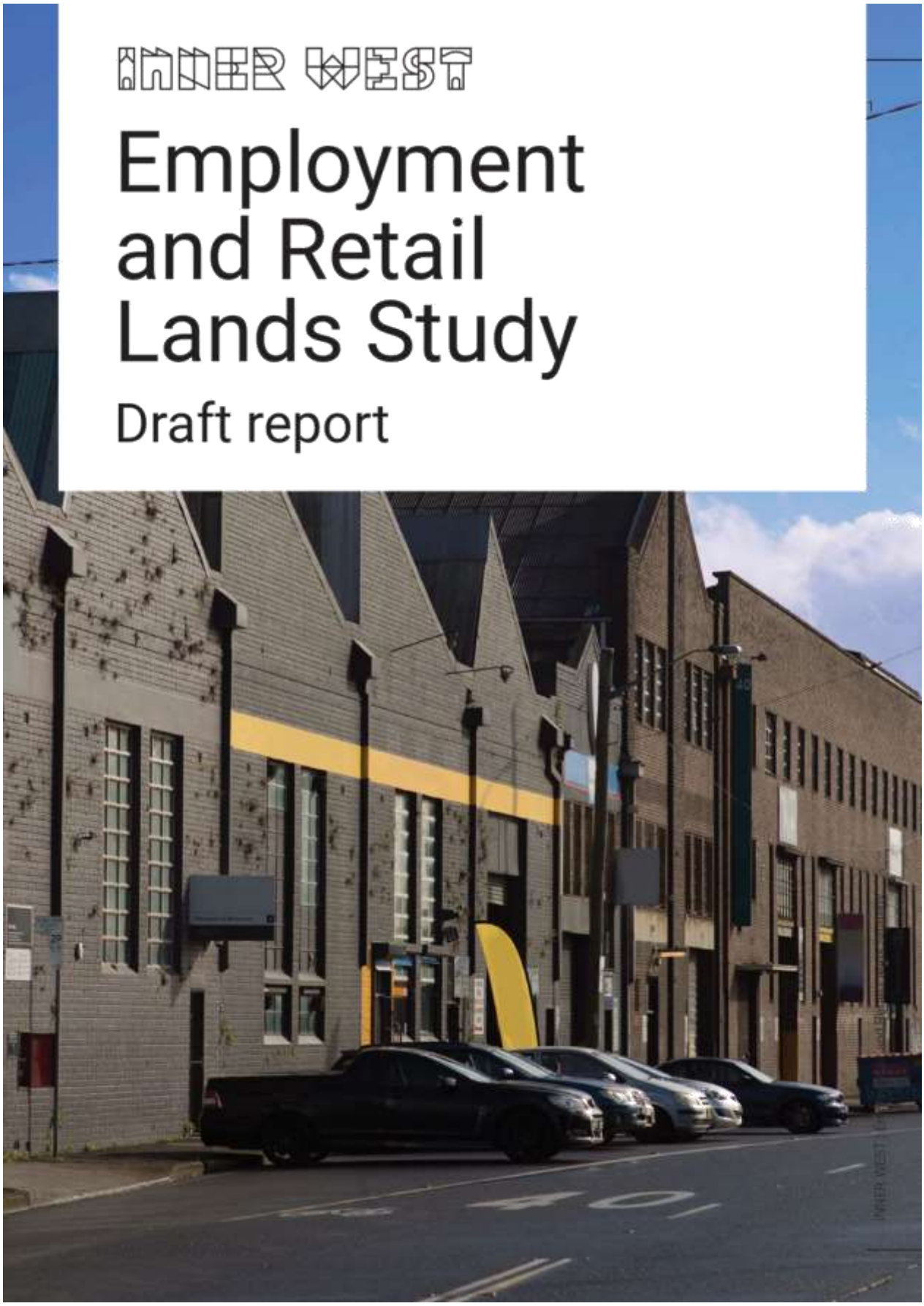
INNER WEST
Employment and Retail Lands Study
Draft report

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Terminology

Term	Definition
GFA	Ground Floor Area in square metres
GRP	Gross Regional Product in $AUD
GLA	Gross Leasable Area in square metres Can also be referred to as retail floorspace
Retail Floorspace	Total area of a structure leased for the selling of goods (food, personal and household goods) and services (hair and beauty, optical dispensing, dry cleaning) excludes non-retail commercial services such as real estate, financial, travel and medical services. Can also be referred to as gross leasable area
Non-retail floorspace	Non-retail commercial floorspace in the commercial centres refers to floorspace that is used for businesses and other employment uses other than retail e.g. finance, insurance, taxation, real estate, medical, travel, education, recreation, administration and support, government administration/services.
Employment Precinct	Areas of zoned industrial land (or similar) land which forms the basis of data collection for the Employment Lands Development Monitor (Greater Sydney Commission). Precincts range from less than 1.0 hectare to over 500 hectares.
Employment Area	Area of concentrated employment outside of Business and Industrial zones
PRCUTS	Parramatta Road Corridor Urban Transportation Strategy
TPA	Transport Performance and Analytics
TPW	Transport, Postal and Warehousing
ANZIC	Australian and New Zealand Standard Industrial Classification
ABS	Australia Bureau of Statistics
NLA	Net Leasable Area
LEP	Local Environment Plan
GSC	Greater Sydney Commission
IWC	Inner West Council
FGL	Food, Groceries and Liquor

Attachment 1

Executive summary



This report presents an evidence base for the Inner West Employment and Retail Lands Strategy. It aims to provide a comprehensive review of the current state of play in the centres and employment precincts in the Inner West LGA. It considers the factors that are likely to influence employment related activity in the LGA in the foreseeable future and provides projections of jobs and floorspace demand for precincts and centres.

The Inner West LGA – A strategic and important location

The Inner West LGA is strategically positioned between Sydney CBD and key regional service areas including Sydney Airport and Port Botany. The close proximity of the LGA to this key trade gateway has influenced and shaped the south -eastern area of the LGA for employment and service industry land uses.

The LGA's employment precincts and centres have grown as industry and retailing has evolved, and as a consequence, each precinct and centre has developed a unique character and built form which has become integral to local identity. Decisions about the future of the employment lands and centres have implications for the Inner West community as well as the business and industry that operate in the LGA.

A number of major infrastructure projects in progress (WestConnex motorway and Sydenham to Bankstown metro) and in planning stages (Western Harbour Tunnel motorway and West Metro) will impact on the Inner West LGA. There a number of State Government led renewal projects either already underway or planned to occur through parts of the Inner West LGA including the Parramatta Road Corridor Urban Transformation Strategy, Camperdown – Ultimo Collaboration Area and the Bays Precinct. Over time, these projects will have significant impacts on business activity in the LGA

The working population

In 2016, the LGA had a population of 182,043 people. Population projections suggest that by 2036 an additional 50,000 people will be living in the LGA – and average of an additional 2,500 people per annum over the 2016 population.

In 2016, there were around 99,573 people living in the LGA who were employed. The population in the working years, aged 15-64 years, is above average at with 72.5 per cent of the population in this age category compared to 67.4 per cent in Greater Sydney. Overall, the LGA has a relatively young workforce and workforce participation

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in the LGA was highest for those aged 25-34 years (23.1 per cent), with that age bracket having grown the fastest in terms of people between 2011 and 2016 (2,197 persons).

Economic strengths

In June 2018, the Gross Regional Product (GRP) for Inner West LGA was $10.41 billion, representing a 23 per cent increase from that generated in June 2008 ($8.48 billion).

The largest employing industry is health care and social assistance (14.3 per cent), followed by retail trade (11 per cent) and construction (10.4 per cent). In 2017/18, the largest industries, by industry value added were professional, scientific and technical services ($771.4 million), health care and social assistance ($759.8 million) and manufacturing ($651.9 million). The LGA has a high and growing number of small businesses. Changes in business numbers suggest a repositioning of the LGA in favour of professional types of businesses and services.

Stakeholder views

Targeted stakeholder engagement occurred prior to public exhibition of the strategy. Local business people demonstrated a strong commitment to the Inner West noting the local character, availability of suitable space, proximity to home and relationships with other businesses in the LGA as reasons for choosing their location. There is strong concern in the community at the continuing pressure to rezone employment land to allow residential developments. Some fear that a continuation of the loss of employment land will have serious impacts on the livelihood and character of the LGA. The declining availability of suitable spaces for creative industries was a key concern. There are concerns that parking constraints in local centres are impacting on businesses.

Protecting employment land for the future

Employment precincts comprise land zoned IN1 - General Industry, IN2 - Light Industry, B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park and the Canal Road precinct currently zoned as Infrastructure. Industrial and urban service land plays an important role in providing goods and services to meet local community needs.

Combined, the employment precincts currently accommodate around 1.77 million square metres of occupied employment floorspace. Over the next few decades, this is forecast to increase to around 1.99 million square metres across the precincts.

While there is capacity to accommodate demand overall across the LGA, there will be a clear deficit of supply in some employment precincts. In particular, there will be an undersupply of land zoned for industrial purposes.

It is critical that future development proposals respect how important the LGA's industrial and urban service lands are for job creation and meeting the needs of local residents. An overarching policy position of protecting employment lands is proposed, consistent with the directions of the Greater Sydney Commission in the Eastern City District Plan. In particular, protection of land zoned IN1 - General Industrial or IN2 - Light Industrial for employment uses is supported. Land used for urban services in the B5 - Business Development and B6 -Enterprise Corridor zones could also be protected from encroachment of residential, serviced apartment and tourist accommodation uses to create more capacity for employment activities in the LGA.

Uses in industrial zones, particularly in the IN1 - General Industrial zone, such as retail, office and business premises could be restricted in order to maximise the potential of the limited supply of land suited for industrial activities.

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Urban services

'Urban Services' refer to a range of industries that typically operate in employment precincts and provide services that are important to the day to day functioning of the city. Urban services include:

- Rental and Hiring Services (except Real Estate)
- Building Cleaning
- Pest Control and Other Support Services
- Motor Vehicle and Motor Vehicle Parts Retailing Repair and Maintenance
- Printing (including the Reproduction of Recorded Media)
- Electricity Supply, Gas Supply and Water Supply
- Sewerage and Drainage Services
- Waste Collection, Treatment and Disposal Services Basic
- Material Wholesaling, Road Transport, Postal and Courier Pick-up and Delivery Services
- Transport Support Services
- Warehousing and Storage Services Building Construction
- Heavy and Civil Engineering Construction[1].

The nature of urban services operations requires a location in industrial, B5 -Business Development or B7 - Business Park zones to minimise land use conflict. Urban services also need to be located close to the populations they service to benefit businesses and residents.

Increasing pressure to rezone urban services land must be carefully managed. Recognising the value of urban services and protecting the land they use will support the continued operation of urban services close to Inner West's residents and businesses, minimising the need for travel across the metropolitan area and ensuring a range of complementary services are available throughout the LGA.

Creative industries

Research found several significant issues associated with creative industries and how they operate in areas zoned IN1 - General Industrial and IN2 - Light Industry. While data on creative industries is limited, this group is known to be a significant economic force in the LGA. Originally attracted to the area due to the suitability of space at relatively cheap rents, the sector has grown and important synergies between business entities have emerged making the Inner West a primary location for creative industries. The economies of scale realised by sharing equipment and ancillary spaces, such as meeting rooms and kitchenettes, also benefits the industry.

The encroachment of residential and other higher order uses in industrial land is having a direct effect on the supply of land and space available for creative industries. Short term leases and building stock compliance issues are also impacting on creative industries.

Recent development of spaces targeted to creative industries has had mixed success with these spaces commonly not delivering the types of spaces needed, while rents in these new spaces can be prohibitive. Allowing creative industries to locate in areas outside the industrial zones, subject to environmental considerations, would increase the accommodation options open to the industry and potentially prevent the industry from being 'pushed out' of the LGA as employment precincts gentrify.

[1] SGS Economics (2017) *Sydney's Urban Services Land – Establishing a baseline provision* at https://gsc-public-1.s3.amazonaws.com/s3fs-public/sydneys_urban_services_land_-_establishing_a_baseline_provision_-_sgs_-_July_2017.pdf cited 6 September 2019

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A new medical and biotech hub

The establishment of a medical and biotech hub at Camperdown is supported by the Greater Sydney Commission. Over time the hub could develop into a world leading location for medical research, supported by co-location with existing health and education facilities. Allowing collaborative work places that are appropriately serviced by infrastructure, digital connections and specialised platforms will encourage opportunities to bring together research, education and health care. The proposal will significantly increase the diversity of jobs in the LGA and grow specialist medical employment.

New enterprises

Facilitating change and evolution of employment precincts will support the establishment of new enterprises. Inner West LGA is strategically located adjoining the Harbour CBD and Sydney Airport Trade Gateway. This provides an opportunity associated with the transport, freight and logistics industry. It also creates an opportunity to support the growth of entrepreneurialism and the small business sector seeking more affordable office space near their homes or the Harbour CBD.

There is a growing demand for flexible working spaces in inner ring locations that are closer to people's homes. More affordable, generally older, industrial, retail and office stock can also be attractive to start-up businesses looking for a pathway into the market. Inner West LGA is strategically positioned to provide for this niche market, particularly if coupled with business networking infrastructure that offers private, collaboration and event spaces, as well as fast internet.

Accommodating growth in centres

Projected demand in centres suggests that an additional 60,000sqm of retail floorspace (GFA) should be planned for in the LGA. The area with the strongest need will be in Marrickville. This is understandable given the current strong trading levels for Marrickville Metro and forecast population growth. Steady growth is also forecast for Leichhardt and Ashfield. Up to three additional full line supermarkets should be planned for in Newtown, the Balmain Peninsula and the Ashfield / Dulwich Hill / Summer Hill area. A further discount department store could be supported either in the Marrickville or Leichhardt.

Jobs in office space in the commercial centres have been forecast to increase from around 30,010 in 2019 to 34,860 in 2026, a net increase of around 4,850 jobs. By 2036, the number of workers in office space is expected to reach around 38,390, a net increase of around 8,380 jobs. Assuming 20sqm GFA per worker and 5 per cent vacancy, an additional 102,000sqm of commercial floorspace will be needed by 2026 and around 176,000sqm by 2036. Some centres have established clusters of standalone office buildings and this existing supply should be protected to support future demand.

Future development in centres will need to balance the need for residential dwellings while protecting existing supply as well as increasing the supply of appropriate retail and office floorspace. This will need to occur whilst protecting the heritage character of these centres.

Mainstreet and town centres

The inherent functions of main streets and town centres is to provide convenience, social engagement and trade opportunities for the local catchment and business community.

Centres need to respond to both the commercial realities of the market and economic trends and shifting lifestyle, social and recreation expectations. More people are choosing flexible work options such as working from home or lifestyle choices such as living in higher density residential development that has strong access to

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services in a walkable catchment. Increased density within the walkable catchment, including more people living and working in these spaces strengthens a centre's performance.

While most centres in the Inner West have a unique and established identity, there are areas that would benefit from intervention to boost vitality and appeal. People with a disability are a growing cohort. To improve access to employment and services the built form and public domain of our centres needs to be accessible for all.

Further opportunities to expand and grow centres in line with future population projections and associated residential and commercial demand would be beneficial, contributing to more lively and active places.

Centres hierarchy

Research demonstrates a need to establish a clear hierarchy of centres. The retail hierarchy below has been determined having regard for the mix of existing uses in centres, the scale of the centres and outlook for future growth. All development proposals should support the recommended retail hierarchy

Recommended centre hierarchy

Hierarchy	Centres	Future role
Major centre	Ashfield	The major centre is the highest order centre in the Inner West LGA, comprising the largest mix of retail, commercial, administrative and community facilities. The centre will emerge into an employment and economic generator servicing an LGA wide catchment. Ashfield has the best public transport access in the LGA, both on the rail line and with feeder buses.
Town centre	Balmain Marrickville Newtown -Enmore Norton Street Rozelle	These town centres provide essential access to goods and services close to where people live. They are serviced by good public transport which increases their accessibility from the surrounding community. The town centres provide a mix of retail, commercial and community space with retail space and are usually anchored by a supermarket of 1,000sqm or over. They generally contain over 10,000sqm of retail, business premises and office premises.
Local centre	Annandale Croydon Dulwich Hill Dulwich Hill Station Haberfield Marion Street Norton Street North Petersham Summer Hill Stanmore Balmain East	Local centres provide a range of business, retail and community uses that serve the local community. The centres generally range in size from 3,000sqm to 10,000sqm of floorspace associated with retail, business premises and small-scale office premises.
Neighbourhood centre	Addison Road Rozelle West (Terry Street) Lewisham West Lilyfield Road Orange Grove Catherine Street Dulwich Hill West Lewisham	Neighbourhood centres provide a range of small-scale retail and other services that serve the convenience needs of people that live and work in the surrounding neighbourhood. Higher order retail and commercial uses that serve the wider community are not located in neighbourhood centres. Neighbourhood centres generally comprise less than 3,000sqm of overall floorspace associated with retail, business premises and office premises.

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Hierarchy	Centres	Future role
	Sydenham	Note: All other existing B1 - Neighbourhood Centre zoned centres not listed
Stand Alone Shopping Centre	Marrickville Metro	Stand-alone centres provide for the weekly or monthly shopping needs of the local community. They generally serve a broader catchment and provide a diversity of retail uses including department and grocery stores. The size and offering of stand alone shopping centres needs to be carefully managed to avoid adverse impacts on nearby street- based centres.

The planning framework

The current local planning framework is complex with four local environmental plans which adopt inconsistent approaches to zoning and permissibility of land uses. This study is concerned with all land zoned for retail or employment in the Inner West LGA. This report includes recommendations to guide the consolidation of the multiple LEPs into a single planning instrument.

A detailed set of strategic directions arising from a consideration of this evidence base is provided in a separate document.

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INTRODUCTION

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1.0 INTRODUCTION

This report presents the findings from research into the use, demand and supply of retail and employment land in Inner West Local Government Area (LGA). It includes an assessment of the forces that are likely to influence retail and employment activity in the LGA in the future and includes projections of future demand for retail and employment land. This comprehensive evidence base has informed the development of a strategy to attract and accommodate employment growth, while maintaining the character and integrity of the Inner West's suburbs.

The strategy includes recommendations and actions to assist Council in planning and facilitating future retail and employment growth in the Inner West LGA.

1.1 Inner West LGA

The Inner West LGA is located around five kilometres from the Sydney CBD. It is framed by the Parramatta River and Sydney Harbour to the north, King Street Newtown and the Princes Highway to the east, Cooks River to the south and Croydon to the west (Figure 1).

Inner West LGA has a population of approximately 198,024 (ABS 2018). Overall, the LGA has a similar age profile to that of Greater Sydney, but with higher proportions of 'young workforce', parents and homebuilders., 80 per cent of employed residents worked outside the LGA (2016), mostly in the Sydney CBD.

Traditionally industrial and working class, and subject to several waves of immigration, the LGA is still ethnically diverse although the place of origin is shifting. In 2016, 34.2 per cent of all residents were born overseas. The average household income and level of tertiary education is now higher than that of Greater Sydney, with significant spatial differences across the LGA.

> I want to be able to live and work here. I like walking or cycling to work.
>
> – an Inner West business operator

Within the LGA, there are over 25 centres providing a range of retail and personal services. These centres are important to the local economy, providing employment opportunities that build on the distinctive local character and heritage of the neighbourhoods they are a part of. Some of the more notable local centres in the LGA include Marrickville, Newtown, Summer Hill, Haberfield, Balmain, Dulwich Hill, Ashfield, Leichhardt and Rozelle.

The LGA has a mix of large and small industrial clusters that accommodate a broad range of industries and user groups across the employment land precincts. The most significant of these, when considered in terms of area, are within Tempe, near Sydney Airport and Marrickville/Sydenham. The employment land precincts in the LGA have a reputation for diversity and innovation.

There are several notable parks, open spaces and waterways within the LGA including:

- The Cooks River Foreshore which extends from Tempe Reserve along the Cooks River to Strathfield South and Botany Bay

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- The GreenWay corridor connecting the Cooks River to Iron Cove
- The 7 kilometre Bay Run walking and cycle route at Iron Cove
- Callan Park, a 60 hectare parkland located at Iron Cove, Lilyfield.

The LGA is relatively well served by east/west transport infrastructure including heavy rail, buses, light rail and ferry services. The T2 Inner West and Leppington and T3 Bankstown heavy rail lines connect the LGA to the Sydney CBD and Western Sydney. Sydenham provides access to the T4 Illawarra Line to Sydney's Eastern and Southern Suburbs. The L1 Inner West light rail line from Dulwich Hill to Central Station connects Lewisham West, Taverners Hill, Lilyfield and Rozelle Bay. F3 Parramatta River and F8 Cockatoo Island ferry services connect Balmain, Balmain East and Birchgrove to Circular Quay and Parramatta.

As identified in the Future Transport Strategy 2056, Parramatta Road public transport improvements are noted as key infrastructure to be upgraded over the next 10 years by NSW State Government. The Eastern Suburbs to Inner West Rapid Bus Links and the Light Rail to Bays Precinct initiatives are also noted for further investigation.

Road transport routes including Parramatta Road, the City West Link, the Hume Highway (Liverpool Road) and Victoria Road, connecting the Sydney CBD with Western Sydney. Consequently, some parts of the LGA experience significant volumes of traffic. The Princes Highway links eastern parts of the LGA with southern Sydney and the Sydney CBD.

The Inner West LGA is strategically positioned between Sydney CBD and key regional service areas including Sydney Airport and Port Botany. The proximity of the LGA to this key trade gateway has influenced and shaped the south-eastern area of the LGA for employment and service industry land uses.

Planned infrastructure delivery will impact the LGA, including WestConnex, a motorway linking Sydney CBD, Port Botany and Sydney Airport. The associated M4 – M5 Link, Rozelle Interchange and Iron Cove Link will connect the existing road network and proposed Western Harbour Tunnel via underground tunnels. Stage 3 of the project comprises the M4 – M5 Link from Haberfield to St Peters and will consist of twin mainline tunnels between the M4 East at Haberfield and the new M5 at St Peters, which passing under Haberfield, Leichhardt, Camperdown, Newtown and St Peters.

In addition, a West Metro project has been confirmed, with stations at Bays Precinct and Five Dock (in Canada Bay LGA). This has the potential to enhance connectivity considerably but could also put pressure on existing employment precincts for residential rezoning.

There are several key State Government led renewal projects either already underway or planned to occur through parts of the Inner West LGA. Projects of note include:

- The Parramatta Road Corridor Urban Transformation Strategy
- The Sydenham to Bankstown Urban Renewal Area
- Camperdown – Ultimo Collaboration Area
- The Bays Precinct.

The current local planning framework for the LGA is governed by separate Local Environmental Plans (LEPs) and Development Control Plans (DCPs). The relevant LEPs are Ashfield LEP 2013, Marrickville LEP 2011, Leichhardt LEP 2013 and Leichhardt LEP 2000. The zones, especially the business zones, are quite different in their uses across the different LEPs. This strategy will recommend a pathway for Council to consolidate and refine its current planning controls.

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Figure 1: Inner West Influences



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1.2 Retail and employment land

This study is concerned with all land zoned for retail or employment land in the Inner West LGA. This includes land zoned:

- IN1 - General Industrial
- IN2 - Light Industrial
- B1 - Neighbourhood Centre
- B2 - Local Centre
- B4 - Mixed Use
- B5 - Business Development
- B6 - Enterprise Corridor
- B7 - Business Park
- Certain lands zoned SP1 - Special Activities and SP2 - Infrastructure (eg Canal Road precinct).

The Bays Precinct is partially located within the Inner West LGA but is currently subject to SREP 26 (City West). The precinct is undergoing significant change, with considerable portions of the precinct being used for the construction of the WestConnex motorway interchange and light rail stabling yards. Other parts of the precinct contain existing and proposed employment uses (eg proposed concrete batching plant). The NSW Government has recently announced its intention to locate a Metro Station in the Bays Precinct. Due to lack of Council control over land use planning in the precinct and the high level of uncertainty around its future, the Study does not include this land as part of land available for future retail and employment uses.

Land within the above zones is the primary location for economic activity in the LGA. Some employment and economic activity also occurs outside these zones through home businesses and a broad range of activities that are located, through historical or special circumstances, on other land.

1.3 Purpose

Council requires an understanding of the current and future retail, commercial, industrial and urban service needs of the LGA in order to appropriately deliver more sustainable local employment opportunities, economic productivity and convenient access to population services for an increasing and evolving population. The Inner West Employment and Retail Lands Strategy (Strategy) is to meet the following objectives:

- Research and document existing retail, commercial, urban services and industrial employment capacity and type in the Inner West LGA
- Research and evaluate demographic, social and economic data and trends that are related to retail services, jobs, and employment lands
- Forecast retail, commercial, urban services and industrial demand and supply over the next 5, 10 and 20 years
- Analyse any potential gaps between supply and demand for each of the business and employment types
- Having regard to key trends and influences on business and employment lands:
    - Develop a precinct based strategy for managing Council's urban services and industrial lands
    - Develop a hierarchy for the retail/commercial centres in the LGA
    - Identify the potential impacts of the recent introduction of the 'artisan food and drink industry' on competing land uses within industrial zones as well as the performance of retail/commercial areas

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- Prepare and evaluate options for the harmonisation of relevant land use zones and LEP clauses (including cl. 5.4) for the new Inner West comprehensive LEP
- Provide recommendations for key guidelines, principles and strategies for future retail, commercial, urban services and industrial lands in the Inner West LGA.

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STRATEGIC CONTEXT

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2.0 STRATEGIC CONTEXT

This section reviews current strategic planning policy at a metropolitan and local level and highlights the implications of each for this Strategy.

2.1 NSW Government Strategic Planning

There are several NSW State Government policies, studies and strategies that require consideration in the development of a retail and employment land strategy for Inner West LGA. These are briefly outlined below.

2.1.1 Greater Sydney Region Plan



In 2018 the Greater Sydney Commission implemented the *Greater Sydney Regional Plan – Metropolis of Three Cities* (Region Plan) a regional plan to respond to new challenges for planning Greater Sydney to 2056. The Region Plan establishes 10 directions for Greater Sydney and sets objectives and strategies for integrated government land use, transport and infrastructure planning.

The Region Plan highlights the importance of urban services; light industry, mixed light industry, new economy or creative uses and industrial and urban services wholesale. As such, Strategy 23 and Action 11 are centred around safeguarding industries from encroachment from sensitive uses, stating:

> *approaches, including buffers, can protect the operations of various industries (including concrete batching plants, waste handling facilities, freight activities) and should not be compromised by encroachment from sensitive land uses like residential, which are impacted by noise, light and odours. These tensions between uses have the potential to restrict the operation of existing industrial and urban services activities and thus have a negative impact on the productivity of Greater Sydney.*

In this context, the protection of employment land in the Inner West LGA is critical to local and regional productivity. The location of future residential development should not cause land use conflicts that impact on the operations on employment land.

In Inner West LGA, smaller industrial precincts and urban services precincts are identified as being of particular importance. The Region Plan states that while these areas may be physically small, and often isolated parts of the industrial land supply, they are important for providing spaces for essential urban services and sometimes, particularly within Inner West, creative industries.

The Region Plan clearly articulates that the Inner West LGA contains regionally significant employment land. The industrial areas of Marrickville, the proposed collaboration precinct in Camperdown and pockets of land that deliver essential urban services to the local population, will need to be recognised in this Strategy.

The Region Plan identifies principles on how to 'retain and manage' industrial and urban services land, the approach specified for the Inner West LGA. Effectively, '*all existing industrial and urban services land should be safeguarded from competing pressures, especially residential and mixed-use zones*' and that '*the number of jobs should not be the primary objective, rather a mix of economic outcomes that support the city and population.*' An example of where this is particularly relevant is where industrial land has a strategic role to service trade gateways rather than other job dense employment uses.

Notably, the Region Plan highlights the importance of supporting creative industries and innovation (Objective 9), with Strategy 9.1 aiming to facilitate opportunities for creative and artistic expression and participation,

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wherever feasible with minimum regulatory burden. This is supported by a number of recommendations in this study (refer to the 'current issues' section, Chapter 8.1).

Objective 16 of the Region Plan discusses freight and logistics networks, highlighting the need to manage interfaces of industrial areas, trade gateways and intermodal facilities. This has particular importance for land near Sydney Airport and Port Botany, on the south-eastern edge of the Inner West LGA. Strategy 16.1 clearly articulates the need to retain *'industrial lands for port, intermodal and logistics uses as well as the landside transport network from the encroachment of commercial, residential and other non-compatible uses.'*

Further strategies within the Region Plan that may have an impact on the direction for employment and retail lands in the Inner West LGA include:

- Objective 15: The Eastern, Greater Parramatta to the Olympic Peninsula and Western Economic Corridors are better connected and more competitive. The Plan recognises the Eastern Economic Corridor as an area of national significance for economic opportunities, with the industrial areas in Marrickville being a major asset of the corridor providing essential trades and services that support specialised economic activities.
- Action 8: Support the growth of the Camperdown-Ultimo Collaboration area to further develop the health and education precinct to grow jobs and business opportunities.
- Objective 22 highlights the importance of planning for new office and retail floor space within Centres. Notably it states that, *'planning for new and existing centres is to be informed by council growth strategies, which should consider the network of centres, retail, commercial and industrial supply and demand and local housing strategies.'* This Strategy represents one of the documents referred to in the Region Plan.

The Strategy recommendations and actions enable Inner West Council to facilitate delivery of a number of objectives and actions in the Region Plan in relation to protecting and managing employment lands, supporting creative industries and innovation.

The Strategy actions Strategy 23.1 of the Region Plan with a series of recommendations to *'retain, review and plan industrial and urban services land in accordance with the principles for managing industrial and urban services land.'*

2.1.2 Eastern City District Plan



The *Eastern City District Plan* (District Plan) is a 20-year planning document that contains the planning priorities and actions from the Region Plan, as they relate to the Eastern City District (District). It is the bridging document between regional and local planning and aims to inform local strategic planning statements and LEPs, as well as local planning proposals and Community Strategic Plans.

The District Plan outlines an overall 0-5 year housing supply target for the Eastern District of 46,550 additional dwellings over 2016-2021, of which 5,900 are targeted at Inner West LGA. The District Plan emphasises the importance of local centres as areas of employment, identifying that they house 14 per cent of employment within the District, with Industrial Centres providing 10 per cent of overall employment. The District Plan also notes the significance of local centres' thriving night-time economies, citing Newtown, Marrickville and Balmain as such areas in the Inner West LGA.

A place-based planning principle, identified by the District Plan is to 'protect or expand retail and/or commercial floor space.' (p50) This Strategy identifies the projected additional capacity of retail and office floor space required within centres and subsequently, has actions to protect and grow the supply of retail and office floor space within Centres. Action 22 of the District Plan is to *'use flexible and innovative approaches to revitalise high*

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streets in decline.' This Strategy will also make recommendations for innovative approaches to address any challenges identified in centres.

While investment, business opportunities and jobs growth targeted within the District Plan are specifically aimed at strategic centres outside Inner West LGA, Planning Priority E13, *Supporting growth of targeted industry sectors* identifies the visitor economy as a current and future key source of employment for the District. Within this planning priority, visitor economy assets are identified as attracting global talent and investment. The District Plan cites Newtown as a centre of vibrant urban, heritage, creative and night-time activities; Ashfield as an established cultural centre; and Marrickville as examples of centres that are assuming unique identities and reputations through bespoke retail, food and beverage offerings, as well as small-scale cultural and arts experiences, adding a new and unique face to the tourist economy.

The District Plan recognises the importance of the Camperdown-Ultimo collaboration precinct as a key area for developing employment lands, particularly in the innovation, biotech and creative industries, as well as start-ups. The Inner West LGA is also recognised as playing a key role in facilitating 'trade gateways,' including WestConnex, Sydney Airport, Glebe Island and the Bays Precinct. These trade gateways support industrial precincts, essential transport connections and economic growth.

The District Plan also recognises the need to retain employment lands and that future demand will increase for industrial and urban services land. The Bays Precinct, and Marrickville are recognised as some of the largest precincts of this kind in the District. An action specifically identifies the safeguarding all industrial zoned land from conversion to residential, including conversions to mixed-use zones.

The District Plan acknowledges that PRCUTS, a strategy that relates to the area surrounding Parramatta Road, may conflict with the retain and manage policy. In areas where PRCUTS applies, the District Plan specifies that the land subject to the Corridor Strategy is not subject to the industrial strategies and actions of the District Plan.

The planning priorities for productivity include:

- E7: Growing a stronger and more competitive Harbour CBD (including Glebe Island, parts of Camperdown, Rozelle, and Balmain)
- E8: Growing and investing in health and education precincts and the Innovation Corridor (the Camperdown – Ultimo Biotechnology hub)
- E9: Growing international trade gateways (with the airport directly adjoining the LGA to the east, refer to Sections 9.1.1, 9.1.2, 9.4.3 and)
- E11: Growing investment, business opportunities and jobs in strategic centres. (this Priority also provides principles for local centres)
- E12: Retaining and managing industrial and urban services land (including, but not limited to, key industrial lands in the Marrickville and Sydenham areas)
- E13: Supporting growth of targeted industry sectors, including industries that support a circular economy. Target industries for the Inner West include:
    - Urban services
    - Specialised food manufacturing
    - Logistics and other uses associated with the airport and Port Botany
    - The cultural and arts sector
    - Night-time economies in centres like Newtown-Enmore, Marrickville and Balmain
    - Council depot/s and the establishment of an organic recycling centre
    - Biotechnology industries in Camperdown.

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The above planning priorities inform this Strategy and are discussed in further detail.

The Strategy will need to address the key priorities and actions of the District Plan, in particular those related to 'Productivity'.

2.1.3 Future Transport Strategy 2056

The *Future Transport Strategy 2056* sets the 40-year vision, directions and outcomes for customer mobility in NSW, which will guide transport investment over the longer term. The plan sits in concert with the Region Plan, The State Infrastructure Strategy and the District Plan.



The vision is built on six outcomes, two of which are relevant to planning for employment and retail lands: 'successful places' and 'a strong economy.' Connecting people to goods, jobs, and services is core to the strategy in being able to achieve the 30-minute city.

The Strategy proposes a 'Movement and Place Framework,' which will allow a collaborative and integrated approach to road planning. By engaging across government with those bodies responsible for transport, land use and roads in NSW, desired street environments can be agreed upon and the Movement and Place Framework can become a common platform for road planning, based on an integrated view of the strategic significance of:

- Roads and streets in their role in moving people and goods
- Land use adjacent to roads and streets.

Inner West LGA has a number of classified roads, which will be reviewed under this framework. It includes a number of centres (e.g Ashfield) and enterprise corridors (e.g. Princes Highway). There is an opportunity to strengthen employment outcomes in the Inner West through this process.

Parramatta Road public transport improvements are identified as a key infrastructure upgrade over the next 10 years. Eastern Suburbs to Inner West Rapid Bus Links and the Light Rail to Bays Precinct initiatives are noted for further investigation.

The 'movement and place framework' provides Council with an opportunity to revitalise key centres and to support development for employment uses along key enterprise corridors.

2.1.4 Greater Sydney Services and Infrastructure Plan

The *Greater Sydney Services and Infrastructure Plan* builds on the metropolitan-wide outcomes identified in *Future Transport Strategy 2056*. It considers the direction for managing growth and development set in the Greater Sydney Regional Plan with a focus on transport and movement.



The document references the city-serving network including extension to the Bays Precinct with the Inner West Light Rail will be investigated in the next 20 years to support urban renewal.

Table 1: Greater Sydney Services and Infrastructure Plan -Initiatives relative to the Inner West LGA

Initiative	Description	Timeframe
Committed Initiatives		
Priority Cycleway links in inner Sydney	Priority Cycleway links in inner Sydney including the Inner West Greenway and Sydney Harbour Bridge cycleway	0-10 years committed

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Initiative	Description	Timeframe
	connections, to be developed and delivered in partnership with the local councils where appropriate.	
Sydney Metro City and Southwest	A 30km extension of metro rail from the end of Sydney Metro Northwest at Chatswood under Sydney Harbour, through new CBD stations and south west to Bankstown.	0-10 years committed
Initiatives subject to further investigation		
Eastern Suburbs to Inner West rapid bus links	Eastern Suburbs to Inner West rapid bus links: Randwick to Sydney University to the Bays Precinct; Maroubra Junction to Sydney Airport to Marrickville	0-10 years investigation
Light Rail to Bays Precinct	A proposed loop from the existing Inner West Light Rail connecting the existing line at North Leichhardt and at Pyrmont via the Bays Precinct and Old Glebe Island Bridge.	10-20 year investigation

Over the next 10 years, major upgrades identified for investigation include the Eastern Suburbs to Inner West Rapid Bus Links. Commitments to the Inner West Greenway are also mentioned in terms of upgrading connectivity via the Greater Sydney Bicycle Network.

2.1.5 Camperdown-Ultimo Collaboration Area Place Strategy



The Camperdown-Ultimo Collaboration Area is one of five key areas that the Greater Sydney Commission has identified to develop place-based, multi-stakeholder driven outcomes. The Collaboration is partially within the Inner West LGA and currently hosts a mix of innovative activities, in amongst an established urban hub. The *Camperdown-Ultimo Collaboration Area Place Strategy* (Collaboration Strategy) seeks to build on this innovation and facilitate collaborative partnerships for growth, particularly in areas of employment, investment, research (and related economic and social contributions in NSW) and liveability.

The Strategy includes a specific priority to 'support the role and function of employment lands.' The strategy recognises the 'potential for high growth and new investment through continued growth in jobs, new industries, innovation enterprises and tech start-ups, and service industries.'

The Collaboration Strategy includes the following actions:

- Action 26: Retain and manage commercial and business activities, particularly small businesses and teach start-ups, by safeguarding business-zoned land from conversion that allows residential development.
- Action 27: Establish a biotechnology hub in Camperdown activity node (Parramatta Road, Mallet Street and Pyrmont Bridge Road area), and safeguard innovative, incubator and research activities from unrelated commercial land uses through planning controls.
- Action 28: Advocate for and deliver a minimum per centage requirement for affordable space in developments for tech start-ups, innovation, creative industries, cultural uses, community uses and artists within and beyond the Collaboration Area.

Other actions identified in the Collaboration Strategy that are relevant to planning for employment and retails lands include:

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- Action 1: Develop a Strategy for transport investigations and initiatives, underpinned by the principles of movement and place, to enhance safety, accessibility and permeability within and surrounding the Collaboration Area by prioritising pedestrian safety and amenity, encouraging cycling, and planning for public transport, freight movements and parking.
- Action 3: Advocate for a mass transit system that strengthens connections between the Collaboration Area and Greater Sydney's economic corridors.
- Action 17: Foster vibrant places by activating night-time precincts, activating ground floor areas, and developing and promoting meeting places and cultural assets.
- Action 21: Develop an Infrastructure Strategy that identifies the open space, social and civic infrastructure needed for growing resident, worker, student and visitor populations.
- Action 22: Prepare and implement an economic development strategy that reinforces the strengths and local identity of key local areas. The strategy will retain existing and attract new businesses and industries by supporting start-ups, investors, researchers and entrepreneurs to collaborate, leading to commercialisation and jobs growth.
- Action 35: Establish a Collaboration Area Leadership Group to strengthen and promote the Camperdown-Ultimo Collaboration Area.
- Action 38: Identify funding sources and advocate for funding (such as sponsorships, grants, contributions, planning agreements, value capture and agency budgets) to deliver Place Strategy actions.

Planning for this precinct is being expedited by the State Government through the Innovation Corridor Taskforce. The Taskforce includes representation from Greater Sydney Commission, Jobs for NSW, University of Technology Sydney, University of Sydney, Sydney Business Chamber, Atlassian, Fishburners and other start up representatives. With a strong focus on boosting employment and investment, the initiative is expected to create 36,000 new jobs by 2036. Irrespective of the imminent recommendations of the Taskforce, the core public sector stakeholders of Inner West Council, City of Sydney, Sydney Local Health District, universities, and Ultimo TAFE are collaborating to establish and lead implementation of the Collaboration Strategy.

2.1.6 Parramatta Road Corridor Urban Transformation Strategy

The State Government has adopted a long-term strategy to regenerate the Parramatta Road Corridor. The *Parramatta Road Corridor Urban Transformation Strategy* (PRCUTS) and Implementation Toolkit and sets out the vision and land use and transport principles to accommodate 27,000 new homes and 50,000 new jobs across the corridor over the next 30 years[2].

PRCUTS is given effect by a Ministerial Direction in place under Section 9.1(2) of the Environmental Planning and Assessment Act 1979.

PRCUTS identifies eight precincts for urban growth and renewal within the corridor. Four of the eight precincts are wholly or partly contained within the Inner West LGA being:

- Kings Bay: proposed for rezoning to enable an additional 2,510 dwellings and 4,400 jobs by 2050
- Taverners Hill: proposed for rezoning to enable an additional 1,350 dwellings and 4,110 jobs by 2050
- Leichhardt: proposed for rezoning to enable an additional 1,100 dwellings and 3,602 jobs by 2050
- Camperdown: proposed for rezoning to enable an additional 700 dwellings and 2,285 jobs by 2050.

[2] Landcom, 2016.

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Actions from the Implementation Plan propose a series of target floor areas by 2023 for each of the precincts.

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Table 2: Gross floor area targets for selected precincts

Precinct	Actions -Strategic Land Uses
Kings Bay	• Maximum of 139,000sqm residential gross floor area • Minimum of 30,000sqm employment gross floor area of predominantly retail, enterprise, and business, commercial uses
Taverners Hill	• Maximum of 47,000sqm residential gross floor area • Minimum of 35,000sqm employment gross floor area of predominantly light industrial, enterprise, commercial, and community uses.
Leichhardt	• Maximum of 121,000sqm residential gross floor area • Minimum of 71,000sqm employment gross floor area of predominantly retail, enterprise, and business, commercial, and community uses.
Camperdown	• Maximum of 105,000sqm employment gross floor area of predominantly light industrial, enterprise and business, commercial, and community uses.

Source: Parramatta Road Corridor Urban Transformation Strategy

The *Parramatta Road Corridor Planning and Design Guidelines* (PRCUTS Design Guidelines) (2016) recommends planning controls, including land use, building heights, and densities.

A detailed review of PRCUTS, in relation to employment lands and centres is provided in Section 9.3.

2.1.7 Callan Park (Special Provisions) Act 2002

The *Callan Park (Special Provisions) Act 2002* (Callan Park Act) was introduced in 2002 to govern licencing and uses of the spaces at Callan Park.

Section 7, clause 3 of the Act specifies that health facilities and educational or community facilities may be carried out at Callan Park, with development consent. The Act defines educational facilities 'a university or any other facility providing educational services on a not-for-profit basis.' Other employment uses that do not fall under these definitions are not permitted.

Notably the Greater Sydney Region Plan (p57) highlights the importance of collaboration between creative industries and health and education institutions:

Creative industries have a growing role in the region's productivity, with creativity, entrepreneurship, technical ability and collaboration being essential skills for the future workforce. Providing better and more opportunities for creative industries to collaborate with health and education institutions can facilitate local innovation.

Callan Park provides an opportunity to support Strategy 9.1 and Objective 9 of the Greater Sydney Region Plan.

The range of uses permitted under the Callan Park Act 2002 allows for 'educational facilities' which can enable some creative hubs to operate. An example of this is Writing NSW, which provides a hub for writers across New South Wales. Locating specialised educational facilities within Callan Park can influence the growth of certain industries within the Inner West.

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2.2 Local plans

The LEPs for the Inner West LGA are reviewed in detail in Section 8.

2.2.1 Community Strategic Plan (Our Inner West 2036)



Our Inner West 2036 (endorsed June 2018) is the Inner West LGA's Community Strategic Plan (CSP). It identifies the community's vision for the future, long term goals, strategies to get there and how to measure progress towards that vision. It guides all of Council's plans, policies and budgets.

Strategic Direction 3, 'creative communities and a strong economy,' is relevant for employment and retail lands. Relevant outcomes and strategies for this direction are identified in Table 3:

Table 3: Relevant strategies in Our Inner West 2036

	Outcome	Strategy
Strategic Direction 3: Creative Communities and a Strong Economy	3.4 Employment is diverse and accessible	1. Support local job creation by protecting industrial and employment lands
	3.5 Urban hubs and main streets are distinct and enjoyable places to shop, eat, socialise and be entertained	1. Promote unique lively, safe and accessible urban hubs and main streets – day and night. 3. Pursue a high standard of planning, urban design and development that supports urban centres.

2.2.2 Our Place Inner West – Local Strategic Planning Statement (LSPS)



The Our Place Inner West – Local Strategic Planning Statement (adopted in April 2020), sets out the vision for the area in 2036 and the actions that will be taken to achieve this vision. It provides the land-use planning framework for the Inner West, providing a link between the Greater Sydney Commission's Eastern City District Plan and the priorities of Our Inner West 2036 – A Community Strategic Plan for the Inner West Community.

Objectives and actions in the LSPS in relation to productivity have been substantially drawn from Council's Employment and Retail Lands Strategy. Specifically, an action in the LSPS is to 'Implement the Employment and Retail Lands Strategy.'

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2.3 Implications

Strategic planning by the NSW Government has set a framework that will guide the future directions of Inner West. This includes the following:

- A requirement to protect employment land in the Inner West LGA as these lands are critical to local and regional productivity
- A requirement to locate future residential development so that it does not cause land use conflicts that impact on the operations on employment land
- The need to protect the significant industrial areas of Marrickville and Sydenham
- A need to protect the pockets of land that deliver essential urban services to the local population.

Priorities in the strategy should seek to capture and leverage the benefits from State Government investment in the following:

- Growing and investing in health and education precincts and the Innovation Corridor (the Camperdown – Ultimo Biotechnology hub)
- Growing international trade gateways (with the airport directly adjoining the LGA to the east).
- Supporting growth of targeted industry sectors, including industries that support a circular economy
    - Specialised food manufacturing
    - Logistics and other uses associated with Sydney Airport and Port Botany
    - The cultural and arts sector
    - Night-time economies in centres like Newtown-Enmore, Marrickville and Balmain
    - Council depot(s) and the establishment of an organic recycling centre
    - Biotechnology industries in Camperdown.

Opportunities may arise from potential future investment in the transport network including:

- Parramatta Road public transport improvements upgrades over the next 10 years
- Eastern Suburbs to Inner West Rapid Bus Links
- Light Rail to Bays Precinct initiatives are noted for further investigation.
- the Inner West Greenway upgrading connectivity via the Greater Sydney Bicycle Network
- Metro West between Westmead and Sydney CBD via Kings Bay and Bays Precinct.

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LITERATURE REVIEW

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3.0 LITERATURE REVIEW

This section reviews available literature that is relevant to this strategy at a national, metropolitan and local level and highlights the implications of each for this Strategy.

3.1 Sydney Airport Master Plan 2039



Sydney Airport Master Plan 2039 (Master Plan 2039) aims to 'provide the community and all levels of government with an understanding of future activities that could be located on different parts of the airport site.'

The Australian Noise Exposure Forecast (ANEF) contained in Master Plan 2039 covers a large proportion of the Inner West LGA. The National Airport Safeguarding Framework, which applies to the airport and surrounding areas, and provides a national land use planning framework to minimise noise-sensitive developments near Sydney Airport and communicate noise metrics and improve safety outcomes by ensuring aviation safety requirements are recognised in land use planning and development decisions. Master Plan 2039 encourages councils to implement the NASF.

Master Plan 2039 includes a 20-year development plan by each sector of the airport. The northern lands sector falls within the Inner West LGA and the key initiatives are listed below:

- Locate new freight facilities in the northern lands sector (near Canal Road)
- Recognise the lands within the northern lands sector to be lost as a result of Gateway
- Retain existing industrial land in close proximity to the airport.

The Sydney Airport Master Plan informs the future use of airport owned land located within the Princes Highway and Airport Enterprise Corridor, which is discussed in Chapter 9.1.1.

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3.2 Inner West Council Land and Property Strategy

The Inner West Council Land and Property Strategy provides directions to ensure the community's assets are being properly managed and protected for the long-term best interests of the community, as well as provide a sound basis to achieve a sustainable property portfolio, generating positive community outcomes by developing and enhancing community capacity. It will also serve to guide future investment and resource allocation decisions associated with Council-owned and operated property assets to meet the diverse and evolving needs of the local community.

The key principles and actions relevant to this study are described below:

- Optimise benefits to the community, are sustainable and equitable
  - Review and identify opportunities including reuse and disposal.
  - Manage property portfolio to sustain value and Heritage significance.
  - Responsibly represent Council as the owner including on strata boards and reviewing development applications.
  - Deliver multiple benefits from each property including diversity of services operating from hubs.
- Demonstrate industry "Best Practice": be transparent, consistent, manage risk and demonstrate best value for money
  - Maintain a land & property register for Council controlled, managed and owned properties.
- Meet the needs of our Community now and in the future
  - Undertake service needs analysis such as community services, cultural spaces, recreation and aquatics.
  - Develop an integrated 10-year strategic property program
  - Develop a 10-year program for new and renewal of plans of management for community and crown lands.
  - Develop and implement a prioritised schedule for acquisition, consolidation or amendment of land and property.
  - Develop a list of land parcels such as laneways or road closures for reuse or sale.
  - Manage the property portfolio to meet the needs of Council.
  - Manage the buildings portfolio to maintain agreed service levels for capacity, utilisation, risk, condition & function.
- Optimise Council revenue to support services delivery and community capacity
  - Identify the priorities for application to property investments.
  - Benchmark costs versus benefits to identify opportunities for improvement.

This Strategy will provide recommendations and actions to maximise employment and public domain outcomes from the renewal of Council assets within Centres. This Study identifies the need for Council to grow public domain space within and adjacent to centres. When Council assets are considered for disposal, their redevelopment could offer opportunities for new employment floor space.

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3.3 Creative Industries

3.3.1 Futuring Inner West Arts and Culture 2036

The Inner West has a strong identity as a creative hub, evident through the CSP's vision and strategic directions. Engagement with creative industries undertaken for the project found a common concern:

> *People are proud of the Inner West and consider it a leading cultural and arts hub in Australia. There is a clear desire to protect and celebrate the diverse independent arts organisations and spaces that exist here, while creating a sustainable future focus to retain and grow this sector. Multi-use creative spaces where people can produce, rehearse, engage, teach, live and learn are in high demand, as is the need to be heard in terms of social and cultural influence on local policy development.*[3]

Futuring Inner West Arts and Culture 2036 demonstrates the value arts and culture plays in the economic and social vitality of the Inner West Community. Relevant recommendations from this "futuring" series of workshops visioning arts and culture in 2036 are:

- The night-time economy is recognised and supported. Encourage thriving performance cultures. Live bands have more options for places to play.
- Consider that the Inner West LGA has many small businesses that are at the fore of new, ethical exchange and new social contraction, growing investment in alternative systems of exchange education and resourcing: 'skill-sharing,' 'circular economy,' 'bio-regionalism' and the 'gift-economy.' Space, skill and tool sharing platforms are necessary.
- That Council discourages practice of 'landbanking' by developers, introduces prohibitive taxes – empty buildings taxation contributes to local arts, culture, living stories.

3.3.2 Cultural Creation and Production in the Inner West LGA



Cultural Creation and Production in the Inner West LGA, by University of Western Sydney, analyses the needs of creative industries in the Inner West LGA. The methodology was based on a similar project in the City for Sydney The previous studies highlighted: the lack of affordable creative spaces in the inner city, concerns about the suitability of existing creative spaces and their temporary tenures, and the threat posed by the disappearance of industrial building stock to the survival of artistic creation and production in the inner city.

Building on those findings this study investigated 11 case study cultural venues located in the Inner West. Each case study individually provides insights into the operations of creative industries in the LGA. Some of the common themes to emerge were:

- The unaffordability and insecurity of tenure of creative space
- Disappearance of industrial building stock
- Rezoning as mixed-use industrial precincts without making provision for existing creative venues
- Unsuitability of creative spaces within major re- and new developments
- Neglect of existing creative networks when assessing rezoning and redevelopment applications by property developers
- Inflexibility in regulating creative land use.

[3] Futuring Inner West Arts and Culture 2036 cited at https://yoursay.innerwest.nsw.gov.au/26956/documents/68390 on 1 August 2019.

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Recommendations in the report advocate for a whole of community approach to address the issues raised in the case studies, including:

- Preserve the affordability of affordable creative spaces in the inner west, despite the potential short-term benefit alternative land uses (eg commercial or residential) may generate.
- Consider how the space required for cultural creation and production translates to its inclusion in industrial or other zones. Consider how larger multi-purpose space can be incorporated to allow for a wider range of activities, or co-located activities.
- Identify collaborative design solutions to deliver light-industrial creative spaces and venues that manage the mismatch between the spatial needs of messier and noisier forms of cultural and creative production and the 'creative spaces' offered within existing and new mixed use developments.

3.3.3 Made in Marrickville: Enterprise and cluster dynamics at the creative industries-manufacturing interface, Carrington Road precinct (2017)



This report presents findings from comparative international case study research around the changing dynamics of the urban creative economy, particularly the emergent relationships with a rapidly evolving manufacturing sector. The report establishes that creative industries are connected to future urban growth and investment, city marketing and employment generation. While creative industries often fall within the gambit of manufacturing, manufacturing as a sector has become diverse with firms making a spectrum of goods, from technologically advanced products to locally made craft objects involving traditional methods.

International best practice in urban planning and policymaking is looking toward the nexus between creative industries and urban manufacturing. Cities that foster and deepen relationships between creative industries and urban manufacturing industries, especially in distinctive precincts where the two sectors increasingly co-locate organically, are succeeding to stimulate local jobs and enterprise formation and retain local spending.

The study:

- Examined the production relationships between cultural industries and urban manufacturing
- Determined how changing industry, urban development, land use change, technological, and policy dynamics affect cultural production
- Identified lessons for Australian cities to develop new policies around cultural production and manufacturing.

The report identifies the Carrington Road precinct as an economically significant location for creative industries and manufacturing, due to:

- Its location and proximity to transport networks and other network hubs,
- Its mix of older low rent buildings at the right scale that can co-locate with a mix of likeminded microenterprises who cannot afford rents in standalone buildings
- Its existing dense network of enterprises operating at the creative industries/manufacturing interface
- Its existence within a context of declining availability of light industrial lands.

The report is clear that any proposal to rezone this area would threaten a unique creative industries/manufacturing interface precinct and may result in significant loss of jobs and enterprises.

The report recommends:

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- Retaining and updating the industrial zoning – protect rent-sensitive, suitable light industrial space. Balance competing land uses and preserve urban manufacturing.
- Integrate Carrington Road's creative industries – manufacturing clusters into existing strategic plans, planning procedures and relevant policies for NSW, Sydney and the Inner West.

3.3.4 Cultural Infrastructure Discussion Paper

Left bank Co. and JOC prepared a discussion paper for Inner West Council in April 2019. The paper addresses the range of policy levers available to Council to retain, protect and grow creative spaces and employment lands in its LGA. The report recognises how Inner West Council is working on supporting the creative sector through planning and regulatory reform. Initiatives include:

- A review of the planning and regulatory framework that govern music and late-night activities as proposed by the City of Sydney in *An Open and Creative City: planning for culture and the night-time economy, Discussion Paper*. Council is reviewing the package of recommendations and discussing how to adapt these to benefit the Inner West.
- A focus on harmonising proposed regulatory reforms on King St, Newtown and the Newtown/Enmore precinct so that City of Sydney and Inner West Council regulations are consistent
- Council's Live Music Planning Liaison Service has been launched to enable new and established live music venues to navigate planning controls and lodge development applications
- Council has removed red tape for cafes and restaurants in Leichhardt, Annandale, Rozelle, Lilyfield, Balmain and Birchgrove wanting to convert their premises to a small bar. Cafes and restaurants now have a 10-day approval process from Council or a certifier rather than a lengthy DA and a separate application to the NSW Independent Liquor and Gaming Authority. Council advocated with the NSW State Government in order to effect these changes.

While Council has been active in supporting the arts, creativity and live music through a variety of programs, rapid urbanisation and gentrification of the LGA presents a significant risk of loss of local creative spaces, placing the network of cultural and creative venues at risk. Potential flow on impacts may negatively impact the Inner West LGA's rich and vibrant places to live, work and visit.

The discussion paper puts forward a series of actions and strategic objectives. These are considered further in .

3.3.5 Sydenham Station Creative Hub: Economic Impact Analysis

The Sydenham Station Creative Hub is in the Sydenham-Marrickville employment lands. *Sydenham Station Creative Hub: Economic Impact Analysis* (Sydenham Station EIA), prepared by SGS Economics and Planning, dated June 2017, evaluated the potential economic impacts of a proposal to permit additional land uses, including restaurants, cafes and small bars, on land zoned IN1 - General Industrial.

The Sydenham Station EIA concluded that if additional permitted uses are introduced, it could negatively impact on existing industrial uses, potentially pushing the existing businesses out to cheaper land in the west. This, in turn, could create supply chain inefficiencies, driving up production costs and potential job losses. The Sydenham Station EIA indicates employment in manufacturing, whilst previously in decline, will in fact increase over the longer term in the Sydenham Creative Hub, and the broader Sydenham-Marrickville industrial area. The precinct is the last major mixed industrial precinct in inner Sydney and should be preserved.

The existing controls and permissible uses for Marrickville and Illawarra Roads (i.e. Marrickville Town Centre) were considered to be an appropriate location for retail and commercial uses. This is offered as an opportunity to locate businesses or office premises for creative purposes and is also considered an opportunity for urban renewal in this locality.

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3.3.6 Live Music Marrickville Action Plan

Live Music Marrickville Action Plan (Action Plan) was prepared by the former Marrickville Council as part of a commitment to support existing and new live music venues. The Action Plan acknowledges that live music and the development of small bars and ancillary businesses have significant potential in creating economic renewal, aesthetic and amenity improvements and in contributing to the cultural fabric and identity of areas.

Notwithstanding the importance of the Marrickville Sydenham Precinct as noted above, the Action Plan promotes zoning changes to support live music venues in the precinct. The Action Plan recognises Marrickville as an important facilitator of Sydney's Live Music scene. Recommendations for land use include:

- Support for zoning changes to a limited part of the Sydenham precinct to encourage more live music and creative venues
- Review zoning on a targeted area of Parramatta Road to assess implications on live music and creative venues.

3.3.7 Summary of implications

Sydney's Inner West prides itself on the creative and culturally engaged community that live and work in the LGA. The value of cultural venues along with spaces of creation and production are valued for far more than just their economic outputs. Creative industries are valued for their contribution to social cohesion, community development but also as a thriving sector of the local economy.

Heightened concern exists for the sustainability of creative industries. These concerns primarily relate to:

- The relative unaffordability and insecurity of tenure of creative spaces
- The declining availability of industrial building stock arising from:
    - Rezoning former industrial precincts without making provision for existing creative venues
    - Unsuitability of new "creative spaces" within major redevelopments and new developments
    - Insufficient weight being given to the cumulative impacts to creative networks when assessing rezoning and redevelopment
- Inflexibility in regulating creative land use, noting that land use definitions in the planning controls are not easily applied to creative industries
- Vulnerability to change (including relocation) of cultural organisations which have invested in refurbishing or renovating space for co-location.

These issues are explored further in Chapter 8 of the Study.

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3.4 Employment and retail land research

3.4.1 The Ashfield Urban Planning Strategy 2010



The *Ashfield Urban Planning Strategy 2010* informed the former Ashfield Council's LEP and provides long term directions for land use planning decisions within the former Ashfield LGA.

The key directions relevant to planning for encouraging renewal of Ashfield Town Centre are described below:

- Ashfield Central:
  - Promote mixed-use development with ground level active, non-residential uses.
  - Consolidate fragmented miscellaneous zoning into a single B4 - Mixed Use zone.
  - Maintain the existing predominant 6-8 storey height limit across the central area. The building height controls should reflect the 'Street Wall Height Zone' as identified within the Ashfield Development Control Plan -Part C3 Ashfield Town Centre Part 2.
- Ashfield East:
  - Consolidate fragmented zoning and rezone for mixed uses fronting either side of Liverpool Road.
  - Rezone No. 7 – 9 Victoria Street (Ashfield West car park) from Residential to B4 - Mixed Use.
- Ashfield West:
  - Consolidate fragmented zoning and rezone for mixed uses fronting either side of Liverpool Road.
  - Establish a predominant building height of 6 storeys fronting Liverpool Road, stepping down to 4 storeys away from the Liverpool Road.
  - Rezone land at the corner of Liverpool Road (Nos. 361 – 391) and Thomas Street (Nos. 2 – 8) to permit mixed uses with ground level active, non-residential uses (see figure overpage).
- Broader Catchment:
  - Maintain the predominant existing low-density residential zones.
  - Retain the existing FSR in the 2B and 2C residential zones to the south of Parramatta Road.
  - Consolidate the existing 2(b) and 2(c) Residential zones into a single R3 - Medium Density Residential zone with differential height limits and floorspace ratio controls where required.
- Parramatta Road Corridor refocused as an Enterprise Corridor:
  - Rezone land along the Parramatta Road Corridor to B6 -Enterprise corridor. Permit a wide range of competitive business, retail, light industrial and employment generating uses.
  - Prohibit further residential and seniors living development along the road corridor.
- Encourage new business opportunities in Ashfield Town Centre:
  - Promote new retail and business opportunities as part of mixed use developments within the town centre and within the western and eastern fringes of the centre
  - Simplify the planning controls for Ashfield Town Centre to facilitate more opportunities for standalone and mixed use business development

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- Ensure that planning controls within town and village centres provide opportunities for new small businesses to occupy the ground level of buildings and to ensure that parking requirements are not overly onerous.

3.4.2 Ashfield Town Centre Strategy 2013

Ashfield Town Centre Strategy 2013 (Town Centre Strategy) presents a series of strategic principles for the town centre together with actions. Relevant actions for employment and retail lands are presented in Table 4.

Table 4: Relevant Ashfield Town Centre Strategy 2013 Actions

Community Vision	Action
Provide recreation and quality open space	Developments are to be required to have active street frontages, transparent windows facing the street in in order to have passive surveillance of lanes, streets and open spaces.
Renewed and diverse retailed opportunities	Require in a DCP minimum amounts of ground level commercial floorspace
	Encourage commercial and mixed development proposals by applying development incentives
	Identify key potential development sites for additional commercial/retail uses, including new retail frontages along The Esplanade.
Appropriate height and built form	Carefully control building form to achieve high quality architectural outcomes

The Town Centre Strategy presents a series of spatial actions on maps, most of which are more appropriate for DCP development, including a street wall height zone to ensure the existing scale of the street is maintained.

3.4.3 Marrickville Employment Lands Strategy 2014

Core to the strategic directions presented in the *Marrickville Employment Lands Strategy 2014* (Marrickville ELS) is the recognised need to have a coordinated and strategic approach to planning inner Sydney employment lands. The Marrickville ELS considers the context of the former Marrickville LGA in its strategies and actions.

- Strategy 1: Protect subregionally significant industrial lands
  - Actions in this strategy focus on the importance of the Marrickville-Sydenham precinct as a sub regionally significant industrial precinct, and to zone accordingly, including to prevent the spread of retailing and services into the precinct core, and restrict subdivisions and/or strata titling to prevent fragmentation.
- Strategy 2: Ensure sufficient stocks of industrial land to meet requirements of local population.
  - Population serving industry is expected to increase as the population grows. Land use planning should consider the local service industry needs of residents.
- Strategy 3: Explore economic development opportunities in some industrial precincts
  - Actions relevant to this strategy recognise the role creative industries play in the economic activities of the LGA. Rezoning of selected lots to B7 -Business Park as 'live-work' space targets some business activities in this industry but should not jeopardise existing industrial activity. A live music hub is also considered.
- Strategy 4: Consider residential conversion opportunities

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- Opportunities to include some mixed-use zones in Carrington Road and selected sites converted to B4 -Mixed Use are recommended.

- Strategy 5: Encourage the development of Princes Highway strategic corridor.
  - B6 - Enterprise Corridor zoning is considered appropriate for the corridor general, however IN1 -General Industrial and IN2 - Light Industrial zones should be retained.

The Marrickville ELS presents a number of localised rezoning proposals, and future land use scenarios. Forecasts indicate demand for the former Marrickville LGA is modest when compared with the existing capacity. However, the report indicates that Marrickville hosts some of the subregions most significant industrial demand and that the Marrickville-Sydenham precinct should be protected.

3.4.4 Rezoning Study: Lewisham Industrial Precinct (2017)

SGS Economics and Planning were commissioned by Inner West Council to undertake *Rezoning Study: Lewisham Industrial Precinct* (Rezoning Study), reviewing the IN2 - Light Industrial zoned properties at 135-203 and 180-218, New Canterbury Road and 1 Wardell Road, known as Lewisham industrial precinct. The Rezoning Study forecasts a deficit of 375,900sqm of industrial zoned floorspace in the Inner West LGA by 2036.

The Rezoning Study recommends the lands within the Lewisham Industrial Precinct retain their current industrial zoning, and carefully considers the impacts of loss of cumulative industrial lands through multiple small rezonings elsewhere throughout the LGA.

3.4.5 Leichhardt High Street Vacancy Study (2013)

The *Leichhardt High Street Vacancy Study* (Vacancy Study), prepared by HillPDA, reviewed vacancy rates within non-residential premises located on Parramatta Road, Norton Street, Darling Street Rozelle, Darling Street Balmain and Annandale Village. The study provided baseline data to assist Council to track vacancy trends over time. The Vacancy study informed the *Leichhardt Employment and Economic Development Plan*.

The best performing high streets surveyed were the neighbourhood centres of Rozelle and Annandale, which are noted to have adapted to meet the changing needs of their respective communities (for example, adapting to the trend of consumers spending less on fashion and more on cafes, restaurants, takeaway foods, groceries and personal services), as well as a limited supply of retail floorspace. Parramatta Road had the highest vacancy rate, with barriers to renewal including poor amenity, traffic congestion, poorly maintained and unattractive buildings, tired public domain, low rental yields and a lack of convenient parking.

3.4.6 Leichhardt Industrial Land Study 2014

Forecasts undertaken by SGS Economics in *Leichhardt Industrial Land Study 2014* (Industrial Land Study 2014) indicate an undersupply of industrial lands is expected by 2036. Relevant recommendations and actions put forward in Industrial Land Study 2014 are detailed in Table 5.

Table 5: Recommendations, Leichhardt Industrial Lands Study

Recommendation	Action
Recommendation 1: Protect Leichhardt's industrially-zoned precincts for their important employment and service functions.	
Action 1.1	Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts.
Action 1.2	Protect the industrial nature of the key precincts of Moore Street South, White Bay and Camperdown from rezoning and non-industrial redevelopment that may be a permitted use within IN2 - Light Industrial zoning.

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Recommendation	Action
Action 1.3	Rezone the key industrial precinct of Moore Street South from IN2 - Light Industrial to IN1 - General Industrial to maximise its industrial nature.
Action 1.4	Amend the clause within the Leichhardt LEP that allows for the continued provision of creative industries within any IN2 - Light Industrial land and identify specific precincts in which it is permitted.
Recommendation 2: Develop a profile and plan for each industrial precinct	
Action 2.1	Develop a profile of each precinct to assist in planning for their future function, including: i. Precinct context and current mix of land uses ii. Physical characteristics of precincts & lots (size, configuration etc) iii. Available floorspace and development potential.
Action 2.2	Develop a coherent vision for each precinct, as part of a broader industrial land strategy, which: i. Considers the pressures and potential demands the precinct may face ii. Considers each precinct's ability to support particular industrial uses or mix of uses iii. Includes specific detail on zoning, controls and permitted uses iv. Can be incorporated into the Development Control Plan or similar policy document.
Action 2.3	Facilitate intensification of existing precincts, where possible, to make better use of the LGA's existing industrial land supply.
Action 2.4	Develop an LGA-wide industrial land strategy that encapsulates the findings of precinct plans and provides a clear position with regards to Council's approach to industrial land protection and development.
Action 2.5	Consult with industry groups to ensure future precinct development meets the needs of users.
Recommendation 3: Develop clear vision for the future of the Camperdown precinct and maintain industrial zoning	
Action 3.1	Maintain current IN2 - Light Industrial zoning for Camperdown precinct
Action 3.2	Permit no further retail use (including large-format retail) within Camperdown precinct
Recommendation 4: Ensure adequate provision of industrial land for population-serving industries	
Action 4.1	Maintain current provision of IN2 - Light Industrial -zoned land
Action 4.2	Provide an additional 33,909 sqm of IN2 - Light Industrial floorspace by 2036
Action 4.3	Prohibit large-format retail in industrial zones
Action 4.4	Consider the establishment of a B5 - Business Development and/or B6 - Enterprise Corridor zone along major arterial roads to accommodate the demand for large-format retail
Recommendation 5: Ensure the vision for Leichhardt's industrial lands considers possible impacts of the Bays Precinct redevelopment	
Action 5.1	Advocate as a key stakeholder on behalf of the Leichhardt LGA community, including local businesses, to protect and enhance their interests
Action 5.2	Adopt urban design/strategic plan framework to respond to the Bays Precinct redevelopment
Action 5.3	Ensure Council is a key stakeholder in discussions regarding the redevelopment of the Bays Precinct
Action 5.4	Maintain industrial zoning of White Bay industrial precinct
Recommendation 6: Work with neighbouring councils to ensure a sub-regional approach to industrial land provision	
Action 6.1	Engage with Marrickville Council and state agencies on Parramatta Road-focused renewal schemes

Source: SGS Economics

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3.4.7 Leichhardt Industrial Precinct Planning 2016

Following on from Industrial Lands Study 2014, *Leichhardt Industrial Precinct Planning 2016* provides recommendations for future planning of Leichhardt's industrial precincts based on different land use scenarios.

A review of industry and lot size profiling found that:

- There is a shortage of industrial land at a subregional level
- There is a shortage of local services within Leichhardt (industrial uses that service a local market)
- There is a need to provide sufficient floorspace and appropriate built form configurations to support emerging uses
- Industrial precincts are under threat from other uses.

SGS Economics looked at a number of development scenarios to address these issues and found that industrial development alone will not provide additional industrial floorspace, that the addition of commercial floorspace brings the result closer to feasible but comes with some risk, and that residential is the easiest way to generate additional industrial floorspace but comes with significant risk.

Given the level of risk, two options were provided to Council:

- Option 1: Business as usual. Recommends protection of the remaining industrial precincts.
- Option 2: Policy change approach (introduce other uses). Makes recommendations based on the scenario that there is continued pressure on Leichhardt Council to redevelop its precincts, persuaded by such drivers as the development aspiration for the Parramatta Road Corridor.

A summary of Option 2 is presented in Table 6.

Table 6: Leichhardt Industrial Precinct Planning 2016 Recommendations (Option 2)

Strategy /Action	Recommendations
Strategy 3a: Development of Camperdown as a distinct commercial precinct	
Action 3.1	Introduce B5 -Business Development zone into the LEP and prohibit 'Residential Accommodation'
Strategy 3b: Development of Camperdown as an industrial mixed-use precinct (an alternative to Strategy 3a)	
Action 3.2	Introduce B5 -Business Development into LEP 2013 and include 'Residential Accommodation' as a permitted use with consent.
Action 3.3	Provide additional direction with regards to floorspace proportions and height of buildings for the B5 Business Development zone in either the LEP or Development Control Plan (DCP) if they are unable to be included in the LEP. This would limit the total amount of residential GFA to approximately 20 per cent to 30 per cent of total GFA for individual development and control the minimum ceiling height on the ground floor of buildings in the B5 -Business Development zone to at least 4 metres.
Strategy 4: Re-configure the zoning of the Camperdown precinct	
Action 4.1	Re-zone the outer fringe of the precinct to B5 -Business Development (see map in Recommendations section).
Action 4.2	Retain existing IN2 - Light Industrial zone in core of precinct (see map in Recommendations section).
Action 4.3	Set a clear vision for the future industry identity of the Camperdown Precinct
Strategy 5: Be proactive in aligning Tebbutt Street/Parramatta Road precinct with the future of the Parramatta road strategy	
Action 5.1	Re-zone eastern edge of Tebbutt Street to B4 -Mixed Use north of Number 7 Tebbutt Street (see map in Recommendations section).
Action 5.2	Re-zone IN2 - Light Industrial zoned land in precinct between Tebbutt Street and Hathern Street and between Flood Street and Elswick Street to B6 -Enterprise Corridor (see map in Recommendations section).

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Strategy /Action	Recommendations
Action 5.3	Retain IN2 - Light Industrial zoning between Flood Street and Upward Street (see map in Recommendations section).
Strategy 6: Retain and protect all other industrial precincts	
Action 6.1	All other precincts, with the exception of Camperdown and Tebbutt Street/Parramatta Road will be retained as per Strategies 1 and 2 under Option 1.

3.4.8 Leichhardt Urban Design Study for Industrial Precinct Planning 2016

Following on from the recommendations of Industrial Land Study 2014, *Leichhardt Urban Design Study for Industrial Precinct Planning 2016* was developed to profile and plan for particular industrial precincts in the former Leichhardt LGA: Camperdown, Moore Street South, and Tebbutt Street and Parramatta Road Precincts.

Overall recommendations for land uses across the precincts are:

- The amount of industrial floorspace should increase across each Precinct
- Any alternative land uses, such as retail, commercial or residential, should be located to minimise the impact of strata ownership on the redevelopment potential of industrial lots (including amalgamation)
- Alternative land uses should be tied to the delivery of public benefit or used to encourage the redevelopment of challenging sites, such as those with existing heritage buildings. Other uses may be used to increase the development feasibility of these projects.

Regarding densities, the report recommends that for zones B5 - Business Development, B6 - Enterprise Corridor and B4 - Mixed Use sites to typically achieve an FSR of 2.5:1, assuming ground +1 industrial and a mix of commercial and/or residential.

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3.5 Previous Parramatta Road studies

3.5.1 Parramatta Road and Norton Street Urban Design Study 2016

Parramatta Road and Norton Street Urban Design Study 2016 recognises the historical shift in character of the precinct. Changing shopping behaviours, a decline in the cultural character of the precinct and the rise of competitive neighbouring centres has triggered the need to review the livelihood and character of the precinct.

The following recommendations were made regarding land use to improve the offer and position of Norton Street and the wider study area:

- Increase FSRs in the Norton Street Precinct to between 2 and 2.5:1 to encourage shop top residential development
- Identify a second generation of uses to drive the precincts future – retail focus should be on specialty stores, including food retailing
- Encourage a range of streetscape and character improvements, as well as traffic and parking management strategies
- Encourage night-time activities and uses with extended trading hours
- Creation of a central and community 'heart' of Norton Street (close to Norton Plaza and Norton Street cinema)
- Relocated community facilities closer to Norton street and the Forum
- Implement planning controls or incentives to amalgamate and redevelop key sites along Norton Street (notably 39-51 and 63-97)
- Encourage redevelopment in the Forum through increased FSRs, height limits or higher density zonings
- Allow for new retail floorspace to meet demand, and in particular, encourage new mixed use developments to include a significant retail component on the ground floor.

In the longer term:

- Rezone some of Parramatta Road's commercial and retail space to B4 - Mixed Use
- Allow increased residential development (shop top housing) along the southern end of Norton Street.

3.5.2 Parramatta Road and Norton Street Corridor: Commercial and Retail Study 2016

Parramatta Road and Norton Street Corridor: Commercial and Retail Study 2016 was undertaken to determine the existing capacity and future demand for commercial and retail floorspace within the project area and inform the land use future of land zoned B2 - Local Centre. Key constraints identified by the study include a prevalence of underutilised land in the Norton Street area which weakens the centre as a hub, the lack of pedestrian connections between Norton Street and adjacent Renwick Street and Balmain Road, retail decline, poor parking, lack of good amenity, and poorly defined street ends on Norton Street.

Land use principles recommended include:

- Manage interface between zones in precincts and adjoining zones
- Encourage built form that maintains fine grain and relies less on lot amalgamation
- Encourage ground level commercial
- Built form should have a four-storey street wall to Parramatta Road, with upper levels set back 6 to 8m.

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- Allow maximum of three levels to laneway, Parramatta Road side. Set back levels above 3 storeys.

3.6 Other literature

3.6.1 Metropolis that works, Greater Sydney's Commission, 2018

The discussion paper *A Metropolis that Works* is centred on the concept that strategic industrial lands are integral to the 30-minute city. The location and proximity of industrial precincts to local labour markets, a local distribution network, is crucial to making efficient connections between suppliers, employees and end users.

A Metropolis that Works acknowledges the increasing pressure on industrial areas in the Eastern Harbour City to be substituted or developed into other uses, namely residential development. It specifically encourages innovative zoning to adapt to a shift in demand for various uses (eg the growth of the 'maker' economy), but to beware of mixed use and the usurping of industrial land to make way for residential land. Place-based approaches are encouraged to think more about public realm with built form, considering thoughtful transitions between the industrial zones and residential zones to create precincts that have an agglomeration of activities, and the benefits of interdependency (eg transport connectivity, shared public space, proximity to human services).

Some key considerations relevant for Inner West LGA worth highlighting are:

- The value of industrial and urban services land should not be based only on the volume and types of jobs generated, but to the operational role and function it plays throughout the city.
- Industrial precincts should be identified as valuable and strategic places in Region, District and Environment Plans
- Flexible planning controls and increased densities can allow existing industrial sites to evolve to support emerging industries, however caution should be exercised in allowing small-scale live/work uses, or more pervasive actions such as rezoning to B4 -Mixed Use which can act as a stepping stone to uses that are not in the best interests of maintaining a productive industrial and urban services area.

A Metropolis that Works includes consideration of the Victoria Road industrial precinct in Marrickville which has come under significant pressure in recent years from landowners to allow residential development on the grounds that small lot sizes, increased congestion and relocation of traditional industries meant that the area was no longer suitable for modern industrial uses. The former Marrickville Council and the then Department of Planning and Environment undertook a five-year strategic review of the precinct. Counter to prevailing arguments regarding the site's ongoing suitability, *A Metropolis that Works* determined that the large majority of the land was highly valued for its employment purposes and pivotal role it played in servicing the Harbour CBD, Sydney Airport and Port Botany.

In addition, *A Metropolis that Works* considers the impacts of previous decisions by the former Marrickville Council and the Department of Planning and Environment which supported more flexible planning controls and increased densities to allow the precinct to evolve to support emerging industries like the creative arts, microbreweries and populating-service activities. The papers states:

> *While this has in many regards helped cement the 'maker' credentials of the precinct, caution should be noted here. Seemingly minor tweaks – such as adding artisan premises or small scale live/work as permissible uses – or more pervasive actions such as rezoning to B4 -Mixed Use and allowing cafes and restaurants, recasts expectations and can act as a Trojan Horse or stepping-stone to uses which in the longer term are not in the best interests of maintaining a productive industrial and urban services area.*

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Getting a better understanding of this nuance – how to support evolving uses which benefit from, and support, local networks yet which risk 'creative led' gentrification – will necessarily underpin forward strategic thinking. In some circumstances, helping consolidate organically-emerging creative enterprises will be an important planning function; however, it is certainly not a silver bullet for all localities.

The paper concludes better planning and management of these lands is needed, while also being responsive to the market and community needs.

3.6.2 Sydney Urban Services Land

SGS Economics' *Sydney Urban Services Land* (2017) identified the location of urban services jobs and land across Greater Sydney. District specific approaches to managing these industries across Sydney were recommended. It identified a 'Central District' (inclusive of Inner West LGA) as already below the benchmark of three square metres of urban services land per capita, with the provision expected to fall by 2036. Having the second lowest provision of urban services focused industrial land in the metropolitan region, the area is considered to be "under pressure". The report sees there are a significant amount of non-urban services industries that seek proximity to the port and the airport and compete for the areas finite industrial land, and that this requires careful management.

3.6.3 Sydenham to Bankstown Urban Renewal Corridor Strategy

The Sydney Metro City and Southwest project proposes to convert eleven stations between Sydenham and Bankstown to metro standards. The area is identified as an Urban Renewal Area in the District Plan. In June 2015 the NSW Government released the Draft *Sydenham to Bankstown Urban Renewal Corridor Strategy* (Urban Renewal Strategy) to revitalise the precincts along the rail corridor to create additional infrastructure, housing and jobs over the next 20 years. The draft was revised in June 2017 and publicly exhibited.

Proposals from the Urban Renewal Strategy relevant to Inner West Employment and Retail lands are:

Sydenham

- Transformation of part of the Sydenham Industrial area into a creative hub with night-time uses
- Allow residential development to occur with the area bounded by Marrickville Road, Meeks Road and the rail line
- Retain land on Unwins Bridge Road and Mary Street for industrial purposes but over time, permit these sites to transition to other employment and/or recreation uses with greater employment densities
- Diversify employment activities within the Sydenham Enterprise area by permitting business and office premises associated with creative industries
- Ensure that the future development of any surplus land at the Marrickville Dive Site incorporates employment generating uses (such as business, retail and/or light industry) and provides public connections and potential public access to new open space alongside the reservoir
- Identify the land north of Edinburgh Road/Murray Street and Victoria Road, including Marrickville Metro Shopping Centre, as a future opportunity for redevelopment and renewal to be investigated by Inner West Council
- Permit a mix of residential, employment and industrial uses in the Victoria Road and Mary Street Precincts.

Marrickville

- Change of use of for industrial properties along Carrington Road (proposed by former Marrickville Council) to allow residential uses. The future redevelopment of Carrington Road Precinct is to be mixed

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use supporting the retention of smaller scale industrial uses on lower floors in keeping with the existing mixed-use character of the suburb and the precinct. Use ground floor light industrial uses to address the potential negative streetscape impacts of raised ground floor residential levels required to respond to flood levels

- Shop top housing along Illawarra Road incorporates a street wall height that is consistent with the predominant two storey and parapet street wall height with potential for high rise development between Schwebel and Grove Streets subject to addressing overshadowing, NSW Apartment Design Guide requirements and providing some public benefit in the development.

Dulwich Hill

- Allow shop top housing development along Wardell Road directly to the north as far as Keith Street and south to Ewart Street focusing in the area immediately around the train station
- Allow shop top housing along New Canterbury Road and Marrickville Road as far south as the intersection with Macarthur Parade.

In November 2017, Inner West Council made a submission on the revised Urban Renewal Strategy. Council found that the revised strategy imposes unwanted and inappropriate major changes to density and scale, largely destroys historic character and fabric and its dwelling targets are too big to accommodate constraints such as diminishing employment land. Council specifically called for the then NSW Minister for Planning to abandon the Urban Renewal Strategy until Council had an opportunity to prepare an LEP. Council's submission also asked that:

- The Minister restricts the ability of proponents to rely on the strategy in draft form, particularly for the proposed rezoning of Carrington Road, Marrickville
- The revised draft Urban Renewal Strategy be amended to retain all existing land in the precincts zoned IN1 -General Industrial, IN2 - Light Industrial and B7 - Business Park under Marrickville LEP 2011.

Council's submission rejects any notion to amend existing rezoning of industrial land indicating it would have a significant negative impact on employment, availability of industrial floorspace, supply chains, markers and synergies between businesses and Sydney's Creative/Cultural institutions.

The Urban Renewal Strategy received a significant amount of feedback objecting to the proposals and has not been adopted. Control for the Urban Renewal Corridor in the Inner West will now be achieved through a new LEP. On 27 July 2018, the then Minister for Planning announced a new approach to planning for the Sydenham to Bankstown Corridor by confirming that Council would coordinate and lead the process for its part of the Corridor. On 14 August 2018, Inner West Council voted to accept an offer from the then NSW Government Department of Planning and Environment to receive extra funding ($2.5 million) on the condition that the LEP is completed by 30 June 2020.

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3.7 Implications

Long term planning for continued growth at Sydney Airport is expected to attract ongoing strong demand for employment land in the surrounds. It is essential that lands owned by Sydney Airport are developed for the purposes of freight and logistics, given its proximity to the Airport and Port Botany.

Demand for creative spaces is expected to continue to be strong in the employment precincts. Several approaches to supporting creative industries have been tested with varying degrees of success. It will be important to build on past lessons learned in order to develop a holistic approach to meeting the needs of creative industries. Past research suggests that a multi-pronged approach is needed which focuses on:

- Protecting affordable creative spaces
- Increasing the opportunities for new spaces to be built, including larger multi-purpose spaces to allow for a wide range of activities, or co-located activities
- Exploring innovative approaches to deliver light-industrial creative spaces and venues that meet needs to enable creative industries to be accommodated on the ground floor of modern mixed use developments.

Consistent with the strong demand identified above, there is a need to protect employment land in the Inner West LGA. This policy position is consistent with that of the Greater Sydney Commission, which has stressed the importance of maintaining urban services land in areas that are close to the populations they serve. Flexible planning controls and increased densities can allow existing industrial sites to evolve to support emerging industries, however the introduction of non-employment uses into employment lands such as small/scale live/work permissible uses, or rezoning to B4 - Mixed Use, can undermine productive industrial and urban services areas.

Major infrastructure projects, such as the Sydenham to Bankstown Metro, threaten to reduce the available employment lands in the Inner West LGA.

Ashfield Town Centre presents some particular opportunities to attract employment growth and investment, as the major centre in the Inner West LGA. Promoting new retail and business opportunities as part of mixed use developments within the town centre will allow the centre to grow and be supported by population growth. Actions to attract investment in the centre should be implemented including simplifying the planning controls to facilitate more opportunities for standalone and mixed use business development.

Throughout the Inner West LGA there is a growing demand for spaces for small businesses. Ensuring that planning controls within town and local centres provide opportunities for new small businesses to occupy the ground level of buildings and that parking requirements are not overly onerous would assist the Inner West LGA to respond to this demand.

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SOCIO-ECONOMIC SNAPSHOT

Item 1
Attachment 1

4.0 LGA ECONOMIC SNAPSHOT

4.1 Population

In 2016, there were 182,043 people living in the Inner West LGA. Between 2006 and 2016, the population increased by 12,244. The LGA's resident population will continue to increase, with an additional 50,000 persons expected by 2036 (DPE 2016).

Key Population Metrics

POPULATION

2016: 182,043 persons
2036: 232,100 persons
(approx. 2,500 additional persons per year)

MEDIAN WEEKLY INCOMES

$2,048 / household
$957 / person

EDUCATION

41.7 per cent with tertiary/university qualification
19.1 per cent with a trade

In 2016, the Inner West LGA had an above average proportion of population in the working years, aged 15-64 years, with 72.5 per cent of the population in this age category compared to 67.4 per cent in Greater Sydney. The LGA has an average average proportion aged 65 years and over (12.6 per cent) compared to Greater Sydney (12.6 per cent).

Population projections, shown in Figure 2 suggest that by 2036 an additional 50,000 people will be living in the Inner West LGA. This will include a sizeable population outside the working age group with 20,900 residents expected to be 65 years and over (DPE 2016). The projections assume an aging of the existing population and allow for in and out-migration.

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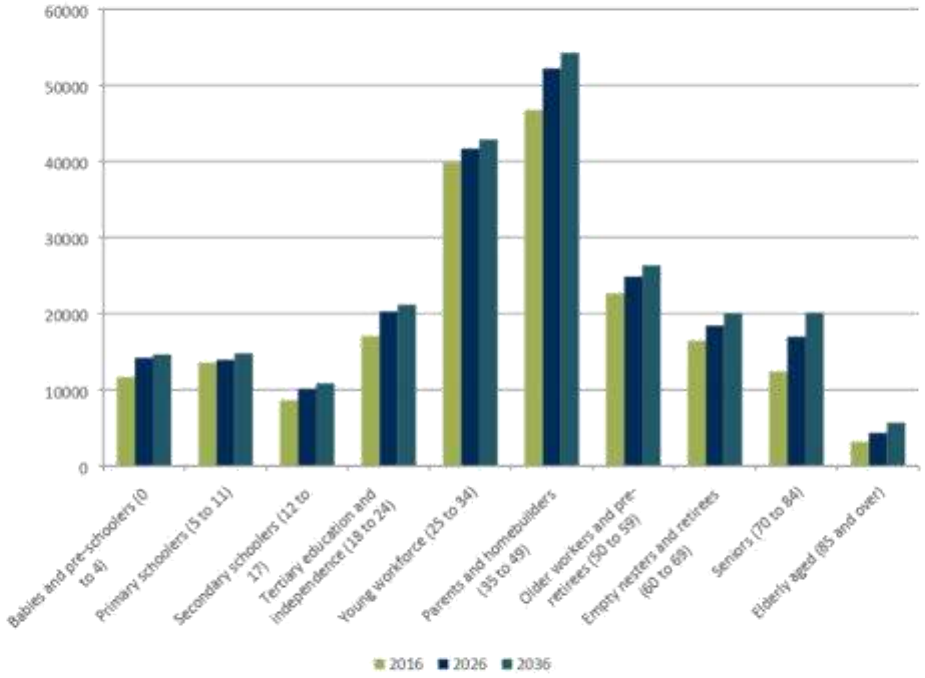
Figure 2: Projected growth in Inner West LGA by service groups

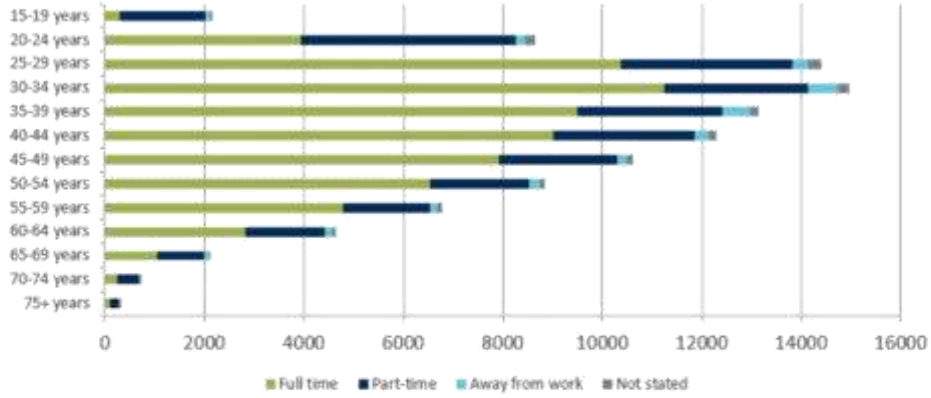


Source: ABS 2016 Census, Time Series Data Community Table 3, and DPE Population Projections (2016)

4.2 Workforce

In 2016, there were around 99,573 people living in the Inner West LGA who were employed. The workforce comprised 64.8 per cent full time and 26.2 per cent part-time employees. Part-time employment was highest for those aged 20-24 years and the highest proportion of people who are 'away from work' were aged between 30-39 years.

Figure 3: Labour force status in Inner West LGA by age group in 2016



Source: ABS 2016

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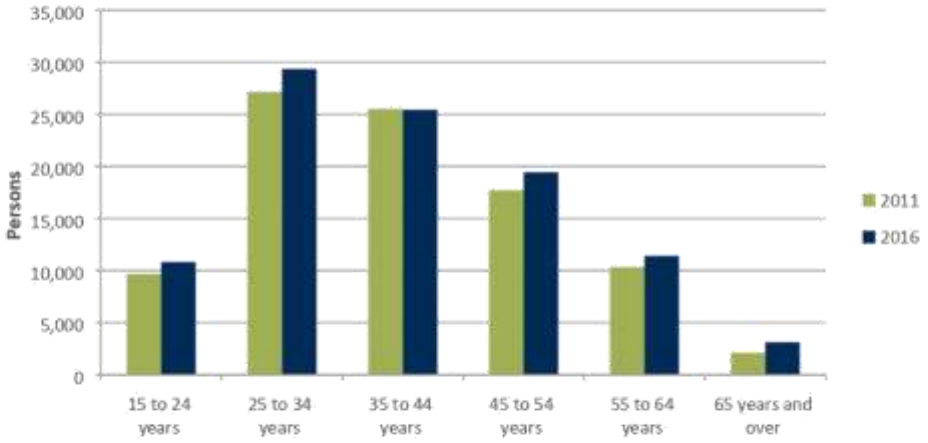
Workforce participation in the Inner West LGA was highest for those aged 25-34 years (23.1 per cent), with that age bracket having grown the fastest in terms of people between 2011 and 2016 (2,197 persons). The fastest growing workforce age group proportionately were amongst residents aged 65 years and over, which increased by 48.7 per cent between 2011 and 2016 (1,022 persons). Overall, the LGA had a younger workforce, with more workers under 45 years of age.

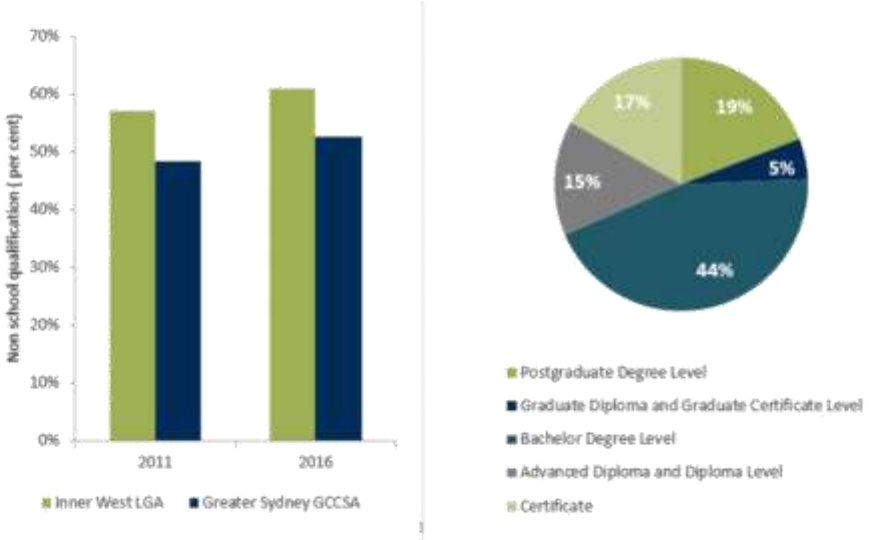
Figure 4: Inner West LGA workforce age structure 2011-2016



Source: ABS 2016

In 2016, 60.9 per cent of the population aged over 15 years had a non-schooling qualification (eg TAFE, University and trade qualifications) which is high compared to 52.7 per cent across Greater Sydney.

Figure 5: Proportion of population of Inner West LGA and Greater Sydney GCCSA aged 15 years and over with a non-school qualification (left); proportion of non-school qualifications in 2016 (right)



Source: ABS 2016

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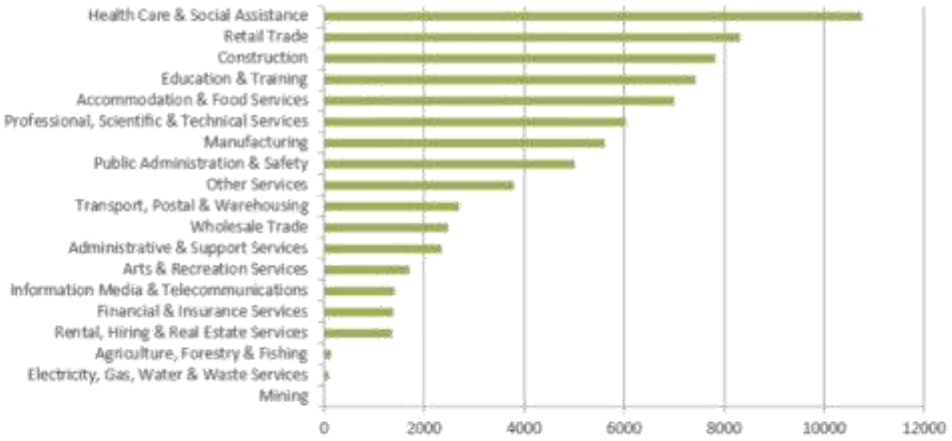
4.3 Employment

The largest employing industry within the Inner West LGA is health care and social assistance (14.3 per cent), followed by retail trade (11 per cent) and construction (10.4 per cent), as shown in the Figure 6. Health care and social assistance is also the largest industry of employment across Greater Sydney, though the proportion is slightly lower (12.3 per cent). Some employment growth in this sector is likely to occur outside retail and employment lands as defined in this study.

Figure 6: Estimated employment in Inner West LGA by industry in 2017-18



Source: economy.id 2018

Inner West LGA is estimated to have had 75,447 jobs as of 2017-18, representing a 9.7 per cent increase in employment generation from that recorded in 2012-13, when the Inner West LGA contained an estimated 68,756 jobs[4]. Over this period, increased employment was generated in the fields of construction, health care, education, public administration and services. Job numbers declined in wholesale trade, logistics, real estate/rental services and manufacturing, as shown in the figure below. Growth industries are generally consistent with the regional trends.

The top four categories (apart from retail trade) are likely to operate largely outside of business and industrial zones. For example, education and health occurs largely in schools and hospitals zoned SP2 – Infrastructure or in residential zones. Construction occurs across the LGA, wherever construction activity is taking place. This is explored further in Section 9.4.1 .

[4] (economy.id, 2018)

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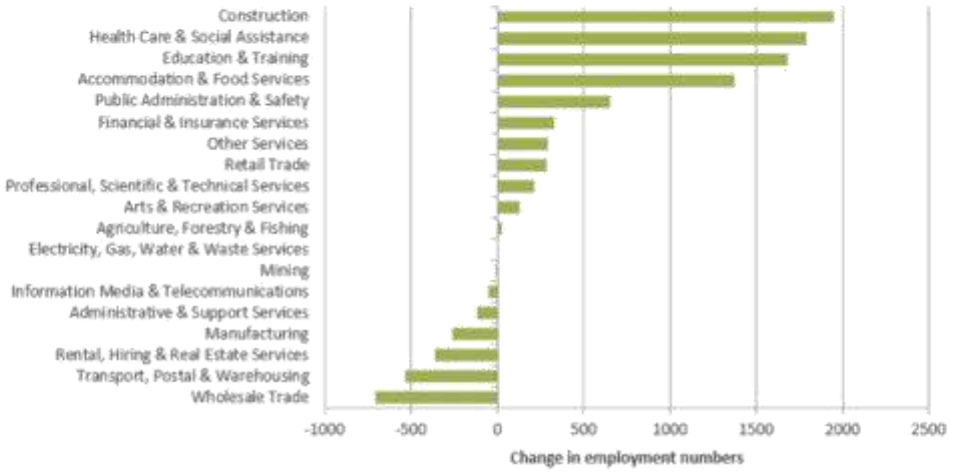
Figure 7: Change in jobs within Inner West LGA 2012-13 to 2017-18



Source: economy.id 2018

4.4 Gross regional product

In the analysis and figure below:

- Headline Gross Regional Product (GRP) refers to what is commonly known as GRP -a measure of size or net wealth generated by the local economy
- Local Industry refers to the GRP of the local economy, generated by the local workers within the area regardless of where they live
- Local Residents refers to the GRP of the residents of the area regardless of where they work. It is best thought of as the income received by people in the Council.

GRP measures the overall output of a given region's economy. In June 2018, the GRP for the Inner West LGA was $10.41 billion, representing a 23 per cent increase from that generated in June 2008 ($8.48 billion). Examining the longer-term breakdown of GRP in Figure 8, it can be seen that the Inner West LGA has a relatively higher local resident GRP compared to the local industry output. This is consistent with a longer-term trend of decline in the ratio of local industry to residents, indicating that residents are contributing less to the Inner West LGA's regional economy and are contributing their economic productivity to other areas (most likely commuting out). This trend is consistent with the Inner West LGA's position in Greater Sydney, between a number of major metropolitan and strategic centres that could be drawing residents in particular industries outside the Inner West LGA.

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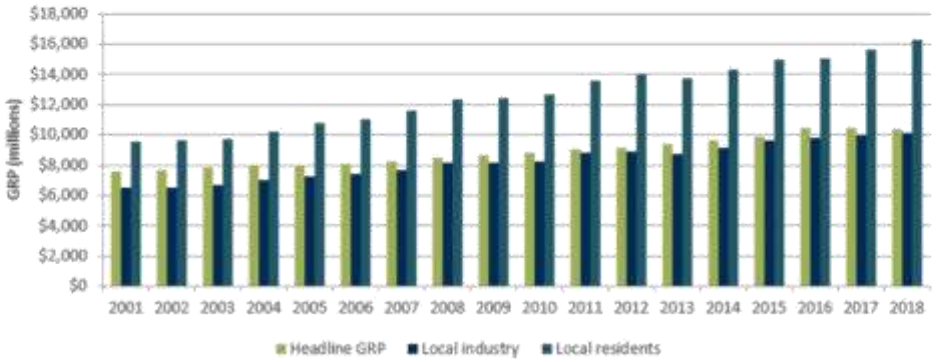
Figure 8: Gross regional product over time for Inner West LGA



Source: economy.id 2018

4.5 Business counts

Analysis of business counts in Inner West LGA reveals that between June 2015 and June 2017 an additional 628 business were recorded. The bulk of this growth was in transport, postal and warehousing businesses with 182 new businesses. Financial and insurance services, professional and scientific services, and health care and social assistance were the other top performing businesses. Also notable was the decline in manufacturing, electricity, gas, water and waste services. The two trends combined suggest a repositioning of the Inner West LGA in favour of professional types of businesses and services.

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Table 7: Registered businesses by industry

Industry	2017			2015			Change
	No.	%	NSW %	No.	%	NSW %	2015 to 2017
Agriculture, Forestry & Fishing	121	0.7	7.1	161	0.9	7.6	-40
Mining	10	0.1	0.2	13	0.1	0.2	-3
Manufacturing	752	4.1	3.5	816	4.6	3.7	-64
Electricity, Gas, Water & Waste Serv.	25	0.1	0.3	34	0.2	0.3	-8
Construction	1,984	10.7	15.8	1,914	10.7	15.2	+70
Wholesale Trade	749	4.0	3.7	721	4.0	3.9	+29
Retail Trade	1,190	6.4	5.8	1,222	6.8	6.3	-32
Accommodation and Food Services	891	4.8	4.1	888	5.0	4.1	+3
Transport, Postal and Warehouse	1,015	5.5	6.8	833	4.6	6.2	**+182**
Information Media and Telecom.	545	2.9	1.2	541	3.0	1.2	+5
Financial and Insurance Services	1,400	7.6	9.1	1,280	7.1	8.8	**+121**
Rental, Hiring & Real Estate Serv.	2,143	11.6	11.0	2,153	12.0	11.2	-10
Professional, Scientific & Technical Serv.	3,671	19.8	13.1	3,535	19.7	13.0	**+136**
Administrative and Support Serv.	785	4.2	4.0	732	4.1	4.0	+53
Public Administration and Safety	64	0.3	0.4	61	0.3	0.4	+3
Education and Training	337	1.8	1.4	309	1.7	1.4	+28
Health Care and Social Assistance	1,409	7.6	5.9	1,296	7.2	5.8	+114
Arts and Recreation Services	580	3.1	1.3	537	3.0	1.3	+43
Other Services	670	3.6	4.0	675	3.8	4.1	-5
Industry not classified	202	1.1	1.2	199	1.1	1.2	+4
Total business	18,546	100.0	100.0	17,918	100.0	100.0	+628

Source: Australian Bureau of Statistics, Counts of Australian Businesses, including Entries and Exits, 2015 to 2017 Cat. No. 8165.0. Non-employing businesses includes sole proprietors where the proprietor does not receive a wage or salary separate to the business income.

4.6 Industry value added

Industry value added (IVA) measures the net contribution that the industry makes to the country's wealth. Value added by industry is an indicator of business productivity. It shows how productive each industry sector is at increasing the value of its inputs. It is a refined measure of the productivity of an industry sector as some industries have high levels of output but require large amounts of input expenditure. In 2017/18, the five largest industries, by IVA were:

- Professional, scientific and technical services ($771.4 million)
- Health care and social assistance ($759.8 million)
- Manufacturing ($651.9 million)
- Construction ($593.6 million)
- Retail trade ($574.5 million).

The below figure compares value added by industry in Inner West LGA between 2007-08 and 2017-18. What is significant is that manufacturing went from being the largest contributor in 2007-08 to now being surpassed by health care and social assistance and professional, scientific and technical services. The change in construction from 2007-08 is also significant and reflective of the significant development occurring in the area.

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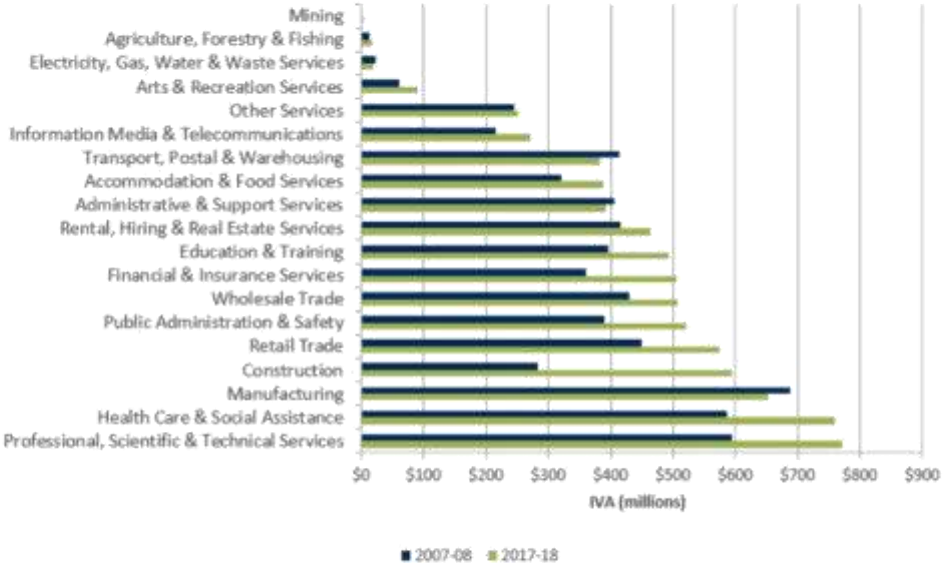
Figure 9: Value added by industry in Inner West LGA, 2007-08 and 2017-18



Source: economy.id 2018

4.7 Self-containment

Self-containment measures the proportion of residents who are employed within the boundaries of the LGA or region. It indicates the propensity of residents to seek employment outside the LGA or region in which they live[5]. The Inner West LGA self-containment rate in 2016 was 19.6 per cent, which means that a vast majority of resident workers are leaving the Inner West LGA to work in another location. This is fairly normal in an inner-city location where a lot of people travel to the city or nearby strategic centres.

[5] .id the population experts

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Table 8: Employment self-containment by industry

Inner West Council area	2016			2011			Change
Industry	Total resident workers	Resident workers employed in the Inner West Council area	per cent resident workers employed in the Inner West Council area	Total resident workers	Resident workers employed in the Inner West Council area	per cent resident workers employed in the Inner West Council area	2011 to 2016
Wholesale Trade	2,632	447	17.0	3,725	700	18.8	-1.8%
Other Services	3,104	868	28.0	2,855	820	28.7	-0.8%
Industry not classified	3,898	1,025	26.3	1,863	461	24.7	+1.6%
Agriculture, Forestry and Fishing	137	32	23.4	69	16	23.2	+0.2%
Transport, Postal and Warehousing	3,274	485	14.8	3,201	494	15.4	-0.6%
Health Care and Social Assistance	10,972	2,264	20.6	9,905	2,186	22.1	-1.4%
Mining	102	13	12.7	88	8	9.1	+3.7%
Construction	5,049	1,085	21.5	3,271	963	29.4	-8.0%
Education and Training	10,419	1,990	19.1	9,249	1,684	18.2	+0.9%
Professional, Scientific & Technical Ser.	14,012	2,691	19.2	12,253	2,641	21.6	-2.4%
Public Administration and Safety	6,297	893	14.2	5,784	744	12.9	+1.3%
Administrative and Support Services	3,582	669	18.7	3,318	647	19.5	-0.8%
Electricity, Gas, Water and Waste Services	569	44	7.7	548	29	5.3	+2.4%
Financial and Insurance Services	7,341	392	5.3	7,070	361	5.1	+0.2%
Retail Trade	7,288	2,073	28.4	6,883	2,161	31.4	-3.0%
Rental, Hiring and Real Estate Services	1,798	424	23.6	1,558	452	29.0	-5.4%
Manufacturing	3,531	872	24.7	4,602	1,058	23.0	+1.7%
Information Media and Telecommunications	5,338	633	11.9	5,190	573	11.0	+0.8%
Arts and Recreation Services	2,966	783	26.4	2,403	691	28.8	-2.4%
Accommodation and Food Services	6,859	1,865	27.2	5,714	1,561	27.3	-0.1%
Total industries	**99,529**	**19,543**	**19.6**	**89,851**	**18,259**	**20.3**	**-0.7%**

Source: Australian Bureau of Statistics, Census of Population and Housing 2011 and 2016 Compiled and presented in economy.id by .id , the population experts.

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4.8 Location quotient

The location quotient identifies that extent of industry specialisation in a location relative to a wider region. Where LQ=1, that industry is exactly as prevalent as in the wider region. A LQ greater than 1.2 indicates a significant specialisation of the industry in the local area – possibly a key economic strength. Higher numbers mean greater specialisations. Anything over 2 is a major specialisation. A LQ between 0.8 and 1.2 means the industry is broadly similar in importance in the local area compared to the comparison region and could be seen as representative. An LQ under 0.8 indicates an industry which is more important in the region than the local area and may represent an economic weakness or opportunity for growth[5].

Table 9 shows the change in LQ between 2012/13 and 2017/18 by industry type and identifies areas of specialisation. The industry of 'other services' reflected the highest specialisation. This includes services such as automotive repair and maintenance, personal services, religious services, and laundry and dry cleaning services. These are population serving urban services that are generally important and valued by local residents. Arts and recreation services are another specialised area that has slightly grown over the last five years. This industry includes sectors such as creative artists, musicians, writers and performers; museum activities; sports and recreation activities; performance arts operations; and health and fitness centres and gymnasium operations.

Table 9: Change in LQ by industry sector 2012/13 – 2017/18

	2017/18			2012/13			Change
Industry	Inner West LGA %	Greater Sydney %	LQ (compared to Greater Sydney)	Inner West LGA %	Greater Sydney %	LQ (Compared to Greater Sydney)	2012/13 to 2017/18
Other Services	5.0	3.6	**1.41**	5.1	3.8	**1.35**	+0.0
Arts and Recreation Services	2.3	1.7	**1.37**	2.3	1.8	**1.29**	+0.1
Accommodation and Food Services	9.3	7.1	**1.31**	8.2	6.5	**1.25**	+0.0
Public Administration and Safety	6.7	5.6	1.19	6.3	5.8	1.10	+0.1
Manufacturing	7.4	6.3	1.17	8.5	7.8	1.09	+0.1
Health Care and Social Assistance	14.3	12.3	1.16	13.1	11.0	1.19	-0.0
Retail Trade	11.0	9.6	1.15	11.7	9.5	1.23	-0.1
Education and Training	9.9	8.8	1.12	8.4	7.9	1.06	+0.1
Construction	10.4	9.5	1.10	8.5	8.2	1.05	+0.0
Rental, Hiring and Real Estate Services	1.8	1.9	0.95	2.5	1.9	1.32	-0.3
Wholesale Trade	3.3	3.7	0.89	4.6	4.8	0.96	-0.1
Administrative and Support Services	3.1	3.5	0.89	3.6	3.7	0.98	-0.1
Professional, Scientific & Technical Serv.	8.0	10.7	0.75	8.5	10.1	0.84	-0.1
Transport, Postal and Warehousing	3.6	5.2	0.69	4.7	5.7	0.83	-0.2
Information Media and Telecomm.	1.9	2.8	0.66	2.1	3.3	0.64	+0.0
Agriculture, Forestry and Fishing	0.2	0.4	0.46	0.2	0.4	0.40	+0.1

[5] .id, the population experts

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Financial and Insurance Services	1.8	6.4	0.29	1.5	6.6	0.23	+0.2
Electricity, Gas, Water & Waste Services	0.1	0.8	0.18	0.1	1.0	0.15	+0.2
Mining	0.0	0.3	0.06	0.0	0.3	0.11	-0.5

4.9 Creative industries

Creative industries are an employment sector that is highly visible in the LGA. In 2016 the Inner West cultural and creative industries featured 6,400 local jobs and generated $1.4 billion in output[7]. This represented 8 per cent of jobs in the Inner West LGA. Around 9 per cent of residents were employed in cultural and creative industries, double the greater Sydney average. In the five years to 2016, cultural and creative industries grew by 2.9 per cent per annum compared to 1.7 per cent for all other industries. Key industries in which local creative and cultural employment is focussed include creative artists, musicians and writers; printing; architecture; design; arts education; and the film industry. There are more than 4,830 cultural and creative industry businesses in the Inner West.

The following estimates have been provided by Inner West Council of creative industries from the 2011 Census to indicate the range of creative industries in the Inner West LGA.

Table 10: Creative Industries

Business type	No.	Proportion
Printing	488	10.1%
Reproduction of Recorded Media	0	0.0%
Book and Magazine Wholesaling	13	0.3%
Jewellery and Silverware Manufacturing	71	1.5%
Entertainment Media Retailing	28	0.6%
Newspaper and Book Retailing	183	3.8%
Publishing (except Internet and Music Publishing), nfd	55	1.1%
Newspaper, Periodical, Book and Directory Publishing, nfd	4	0.1%
Newspaper Publishing	24	0.5%
Magazine and Other Periodical Publishing	191	4.0%
Book Publishing	97	2.0%
Software Publishing	13	0.3%
Motion Picture and Sound Recording Activities, nfd	7	0.1%
Motion Picture and Video Activities, nfd	16	0.3%
Motion Picture and Video Production	280	5.8%
Motion Picture and Video Distribution	20	0.4%
Motion Picture Exhibition	96	2.0%
Post-production Services and Other Motion Picture and Video Activities	29	0.6%
Sound Recording and Music Publishing, nfd	5	0.1%
Music Publishing	0	0.0%
Music and Other Sound Recording Activities	47	1.0%
Radio Broadcasting	21	0.4%
Television Broadcasting, nfd	0	0.0%

7 Source: https://public.tableau.com/profile/economyid#!/vizhome/InnerWestCulturalAnalysis_0/InnerWest

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Business type	No.	Proportion
Free-to-Air Television Broadcasting	89	1.8%
Cable and Other Subscription Broadcasting	7	0.1%
Internet Publishing and Broadcasting	9	0.2%
Library and Other Information Services, nfd	0	0.0%
Libraries and Archives	29	0.6%
Architectural, Engineering and Technical Services, nfd	19	0.4%
Architectural Services	563	11.6%
Other Specialised Design Services	552	11.4%
Advertising Services	299	6.2%
Professional Photographic Services	214	4.4%
Arts Education	273	5.6%
Heritage Activities, nfd	0	0.0%
Museum Operation	47	1.0%
Parks and Gardens Operations, nfd	0	0.0%
Zoological and Botanical Gardens Operation	4	0.1%
Nature Reserves and Conservation Parks Operation	28	0.6%
Creative and Performing Arts Activities, nfd	19	0.4%
Performing Arts Operation	60	1.2%
Creative Artists, Musicians, Writers and Performers	590	12.2%
Performing Arts Venue Operation	59	1.2%
Funeral, Crematorium and Cemetery Services	31	0.6%
Religious Services	254	5.3%
Total	4,834	100.0%

Source: Inner West Council

4.10 Implications

In general, the Inner West LGA has a strong and well performing economic sector. Inner West LGA is estimated to have had 75,447 jobs as of 2017-18, representing a 9.7 per cent increase in employment generation from that recorded in 2012-13, when the LGA contained an estimated 68,756 jobs[8]. In 2017/18, the five largest industries, by industry value added were:

- Professional, scientific and technical services
- Health care and social assistance
- Manufacturing
- Construction
- Retail trade.

Notably, health care and social assistance along with some construction employment will typically occur outside the employment precincts.

Industries having the most specialisation are most commonly the service sector, automotive repair and maintenance, personal services, religious services and laundry and dry cleaning services. These are population

[8] (economy.id, 2018)

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serving urban services that are generally important and valued by local residents. Arts and recreation services are another specialised area that has slightly grown over the last five years. This industry includes sectors such as creative artists, musicians, writers and performers; museum activities; sports and recreation activities; performance arts operations; and health and fitness centres and gymnasium operations. Continuing to leverage on these specialisations will benefit the LGA.

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COMMUNITY VIEWS

5.0 COMMUNITY VIEWS

The following community engagement was undertaken to inform the development of the Strategy:

- Workshop involving a local democracy group
- Targeted telephone survey of businesses and peak organisations
- Interviews with organisations selected by Inner West Council

Records from the engagement are provided at Appendix A. A brief summary of key outcomes is provided below.

Further engagement with the community will occur as Council works towards a new LEP for the Inner West LGA. This will include exhibition of the Strategy.

5.1 Views of the business sector

Key issues raised during discussions with local businesses are summarised in Table 11 by issue.

Table 11: Summary of issues raised during consultation

Issue	Common responses
Land use conflicts	• Increased residential development near employment land is increasing complaints from residents about noise generated by employment activities • Some businesses in the employment precincts are changing operations to reduce noise but this is affecting their business.
Access	• Recent growth in residential development is reducing on street parking for businesses and their customers.
Rezonings	• Pressure to rezone employment land for residential development is threatening the continuation of employment activities in the Inner West LGA.
Suitable spaces for employment activities	• Newer strata developments in employment precincts are not delivering the same types of spaces as older style developments which is contributing to some industries moving out of the Inner West LGA • Some of the older spaces are quirky and highly sought after • New mixed use developments are not delivering the type of space that businesses in the area need • Fragmentation of employment precincts by new mixed use development will erode the character of the area and push out businesses • Area that offer a mix of older and new spaces are ideal • There is a need for more smaller spaces that are suited to artisan premises • Rents are increasing generally which is impacting on creative industries in particular • Most creative industries would prefer to stay in the inner west but increases in rents may lead to them moving out of the Inner West LGA • Ground floor retail areas in mixed use developments often remain vacant • There is a need for a network to support start-up businesses • Universities are trying to incubate start-ups and students to help commercialise research. There is progress, but there is a way to go.
Creative and artisan industries	• The appropriateness of some creative and artisan uses in industrial zoned areas is questioned, such as restaurants associated with artisan food, as these uses can conflict with warehousing and other activities • Microbreweries are attracting young people to the precinct and generating a vibrancy that was not previously present.

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Attachment 1

Operations	• There are strong synergies between businesses in the employment precincts with many occupants utilising the offer of other businesses in the precinct

5.2 Community perceptions

The following perceptions about the centres and employment land were identified in a workshop involving a local democracy group, targeted telephone survey with businesses and key organisations and interviews with organisations selected by Inner West Council. Records from the engagement are provided at Appendix A. A brief summary of key outcomes is provided in Table 12.

Table 12: Community perceptions

Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
Booth Street and Johnston Street, Annandale (retail/commercial)	• Ample open/green space at Johnston Creek (end of Booth Street) • Strong local character identity, in particular Johnston Street 'witches houses' • Diverse and practical range of businesses • High quality selection of restaurants • Strong 'village like' local character identity	• Community support for non-residential uses has declined • Limited parking • Lack of public access to underutilised heritage building stock • Lack of cultural/community spaces
Ashfield centre (retail/commercial)	• Substantial creative community and businesses • High quality Asian food and beverage establishments • Focal point for Sydney's Chinese community • Intricate and interesting urban fabric • Diverse and practical range of small businesses/services • Pratten Park music, cultural and community role • Ashfield Park	• Difficult to get through on Saturday's with traffic congestion and lack of clearways • Maintenance of streetscape amidst high density development • Lack of high quality pedestrian areas • High rental rates • Decline in sense of community/community feel
Callan Park, Balmain (creative industries)	• Crown land • Important green space • Vital area for providing creative uses space • Casual space for creative uses • Diverse range of uses • Substantial creative community and businesses • Strong heritage local character identity	• Dilapidated urban fabric • Underutilisation of buildings • Lack of tenure security (NSW Government related) • Lack of protection • Lack of community control • Neglect of certain green space areas • Accessibility from the West
Darling Street, Balmain (retail/commercial)	• Strong heritage streetscape • Considerable local pub heritage • Established restaurant strip	• Limited parking • Decline in businesses • High rental rates

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
	• Diverse range of businesses/services • Frequent local markets • Strong local character identity • Diverse selection of food and beverage establishments	• Traffic congestion • Residential rental rates too high for local employees • Expensive retail outlets
Bays Precinct/White Bay, Balmain, Balmain East, Rozelle (industrial)	• Cruise ship related employment • Potential for creative industries • Potential for cultural venues • Strong maritime history and built environment heritage	• Possible pollution from proposed cement plant • Possible future overdevelopment • Possible heavy focus on residential development as opposed to creative industries • Cruise terminal related noise and air pollution
Camperdown centre (health/education/retail /commercial)	• Strong medical/health sector • High quality public healthcare • Substantial creative community and businesses • Ample open/green space • Strong education sector	• Excessive focus on medical/health sector • Overly concentrated medical/health facilities • Dilapidated urban fabric
New Canterbury Road, Dulwich Hill, Hurlstone Park (retail/commercial)	• Strong heritage streetscape • Sense of community • Convenient public transport • Ample open/green space • New retail/commercial premises, such as: Cafes, wool shop and sewing school, in recently completed mixed use developments	• Increase in rental rates • New creative industries and new businesses need protection from rental increases • Greenway completion required to connect employment lands • Lack of effective traffic management • Lack of dedicated parking
Enmore Road , Enmore, Newtown (retail/commercial)	• Anchored by the Enmore Theatre • Established restaurant strip • Vibrant entertainment precinct	• Overcrowded public transport
Haberfield centre (retail/commercial)	• Strong heritage streetscape • Ample local open/green space • Sense of community • High quality food and beverage establishments	• Limited trade parking • Haberfield Village • Lack of street seating • Empty retail/commercial space
Canal Road, Leichhardt (creative industries)	• Substantial creative community and businesses • Appropriate zoning reinforces local uses • Ample open/green space • Convenient public transport • Ease of access to wider road network	• Regular flooding issues • Lack of tenure security • Increase in rental rates
Lords Road, Leichhardt (industrial)	• Important manufacturing area	• Lack of tenure security (zoning related)

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
Norton Street, Leichhardt (retail/commercial/industrial)	• Ample open/green space • Pioneer Park • Strong heritage streetscape • Independent local businesses/services • High quality food and beverage establishments • Established restaurant strip	• Narrowly focused on food and beverage establishments • Lack of music venues • Lack of parking • Lack of efficient public transport options, in particular heavy rail • Lack of traffic calming devices • Empty retail/commercial premises • Lack of street seating • Lack of urban design that encourages people to 'hang around' • Lack of tenure security
Lewisham		• Loss of creative industries • Lack of understanding of cultural production • Inappropriate new creative spaces
Addison Road, Marrickville (retail/commercial)	• Vibrant entertainment precinct • Independent local businesses/services • Diverse and practical range of businesses/services • Convenient public transport • Accessible cultural venues • High quality food and beverage establishments • Sense of community	• Lack of tenure security for live music/entertainment venues and spaces (residential development related) • Lack of tenure security (zoning related) • Overcrowding • High rental rates • Redevelopment can lead to loss of original tenants and result in empty new retail space
Carrington Road, Marrickville (industrial)	• Important industrial centre (IN1 - General Industrial) • Diverse range of industrial/commercial businesses/services • Local employment centre	• Possible loss of aviation related businesses • Lack of tenure security (zoning related)
Marrickville Road and Illewarra Road, Marrickville (retail/commercial)	• Vibrant entertainment precinct • High quality food and beverage establishments • Diverse and practical range of businesses/services, such as: Restaurants, galleries, coffee, fruit and veg, transport, good food, cultural/retail • Established restaurant strip • Independent retail outlets • Accessible cultural venues • Sense of community	• Redevelopment can lead to loss of original tenants and result in empty new retail space • Lack of tenure security for live music/entertainment venues and spaces • Lack of tenure security (zoning related) • High rental rates • Reduction of community activity such as local markets • Loss of cultural integration • Overcrowding

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
Victoria Road, Marrickville (industrial)	• Important urban services centre	• Lack of tenure security (zoning related) • Increase in rental rates • Increase in residential development • Important industrial centre (IN1General Industrial) • Possible loss of manufacturing/urban services due to residential zoning
King Street, Newtown (retail/commercial)	• Strong local character identity • Diverse and practical range of businesses/services • Convenient public transport • Strong local community groups • Established restaurant strip • Independent local cinema • Vibrant entertainment district • Great music and other performance spaces • Accessible cultural venues • Substantial creative community and businesses • Ample open/green space, often used for employment activities such as: boot camp and music performances	• Traffic congestion
Petersham centre (retail/commercial)	• Focal point for Sydney's Portuguese community • Diverse selection of food and beverage establishments • Older industrial stock is a creative incubator	• Increase in rental rates
Darling Street and Victoria Road, Rozelle (retail/commercial)	• Established restaurant strip • Diverse and practical range of businesses/services • Ample open/green space • Diverse selection of food and beverage establishments	• Limited parking • Derelict Leagues Club site negatively impacts local amenity • Narrow streets limit public transport access • Traffic congestion, particularly regarding City West Link access roads
Stanmore centre (retail/commercial)	• Strong education sector	• Traffic congestion • Increase in residential development
St Peters (industrial)	• Ample open/green space • Successful redevelopment and reuse of industrial land • Substantial creative community and businesses	• Lack of industrial/commercial supply • Loss of industrial/commercial space due to WestConnex • Lack of busways on WestConnex

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
	• Integration between different industries/sectors • Important supply of industrial and small business space • Vibrant live music venue	• Need for preservation of industrial buildings (and their industrial uses) in perpetuity • Lack of tenure security (zoning related) • Increasing residential development • Expensive public transport • Expensive parking • No services
Summer Hill centre (retail/commercial)	• Strong 'village like' local character identity • Substantial creative community and businesses • Diverse and practical range of businesses/services, such as: dentist, doctor, butcher and hairdresser	• Decrease in creative retail/commercial premises due to increase in regular retail businesses • Traffic congestion • Lack of traffic management • Lack of parking at certain times (eg garbage collection day)
Sydenham (industrial)	• Possibility for 24 hour operation • Substantial creative community and businesses • Important food processing and retail area	• Traffic congestion • Lack of tenure security (zoning related) • Lack of zoning security for food production/manufacturing • Increase in rents
Tempe (specialised retail/industrial)	• Important industrial centre (IN1 - General Industrial) • Major cluster of specialised retail businesses • Anchored by IKEA	• Lack of 'fun stuff'
Parramatta Road corridor, Annandale, Ashfield, Camperdown, Haberfield, Leichhardt, Lewisham, Petersham, Stanmore, Summer Hill (retail/specialised retail/commercial/industrial)	• Strong industrial local character identity • Local heritage awnings • Vibrant food truck and late night entertainment precinct	• Dilapidated urban fabric • Lack of parking • Restricted tenancy uses • Loss of local character through redevelopment • Hard to negotiate retail/commercial leases • Area in 'development limbo' due to PRCUTS • Increase in rental rates • Lack of bus shelters and street seating • Lack of street trees • Traffic congestion • Loss of businesses due to WestConnex • Possible loss of cultural venues and creative spaces due to redevelopment

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5.3 Implications

The stakeholders contacted for this study feel very protective of the Inner West LGA. In general, they are seeking to protect employment lands and the opportunities that they bring. Many felt that there were ways to improve how the employment precincts operate and function through improvements in traffic management and parking. Most feel that it is important to allow the employment precinct to operate for their purpose, with potential for land use conflicts to be minimised. The encroachment of residential development into employment precincts and their immediate surrounds was felt to compromise the operations in the employment lands.

Stakeholders highly valued the Inner West LGA's centres as both economic and socially important locations. Parking and traffic inefficiencies were cited as common concerns across all centres. Stakeholders felt that inadequate parking was adversely impacting on businesses and the centres.

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TRENDS AND INFLUENCES

6.0 TRENDS AND INFLUENCES

This section considers the range of factors (local, regional and global) that could impact on retail and employment lands to 2036 in Inner West LGA. It provides recommendations on changes that may be required to ensure centres and employment precincts are able to accommodate for these trends.

6.1 Commercial trends

Retail experiences and shopping convenience are the driving forces in retailing. This is part of a continually evolving retail market, which has been most significantly influenced by the growth of online retailing and e-marketplaces.

Retailing is responsive to the demands of the local market by its nature. The need for a business to anticipate and respond to its customers' needs and desires ensures that the retail industry must innovate. Changes in the socio-demographic characteristics of a trade area, lifestyle preferences and available incomes, require individual retailers to constantly monitor shifts in demand and reposition their offer, mode of operation and distribution.

Over the last three and a half decades, all retail industry groups have recorded growth in turnover. However, food retailing has out-performed all other industries over this period, recording a $3 billion or 709 per cent growth in turnover. Of this growth, around $2.5 billion was attributed to supermarket and grocery stores with this subcategory comprising 83 per cent of the turnover recorded for food retailing in 2018[9].

Strong growth has also been recorded in the industry of household goods retailing, especially circa 2000. This industry is closely linked to the property market where the purchase of new white goods and other furnishings go hand in hand with the purchase of a new dwelling or redevelopment/refurbishment of an existing dwelling. This linkage can be seen in the slight decline in turnover experienced by the industry between 2009 and 2012. This is likely a result of the global financial crisis where uncertainty subdued development and retail expenditure.

The growth in leisure shopping and the rise of the café culture in NSW have witnessed strong growth in the provision and turnover of the cafes, restaurants and takeaway food services industry in recent years. This is evident in the industry experiencing a $645 million or 49 per cent increase in turnover over the last eight years[10].

The rise of the café culture has seen a dramatic increase in the number of cafes and restaurants across Sydney with increased demand for outdoor dining options and enhanced amenity within centres to facilitate this.

Turnover of department stores has been variable and subdued over recent years, recording only a $2 million increase in turnover over the last eight years[11]. Recently department stores have experimented with new innovative sales and in-store experiences to attract shoppers and reverse this trend, while also shrinking in size. Innovation in new technologies, niche markets and unique experience will need to be constantly provided and examined for this industry type to remain relevant and profitable.

[9] ABS Cat. 8501.0 Retail Trade, Australia Table 13
[10] Ibid
[11] Ibid

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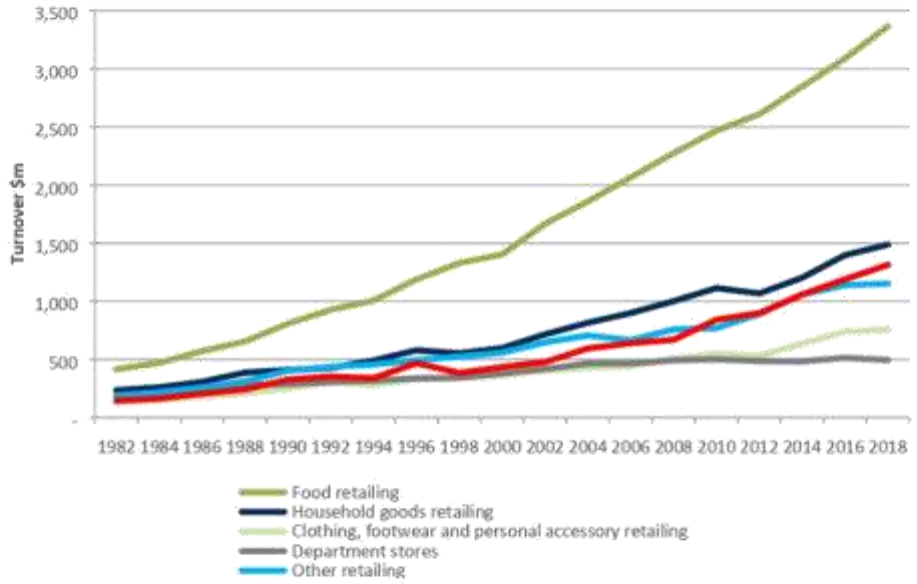
Figure 10: Growth in retail turnover in NSW 1982-2018 by industry group (month of April)



Source: ABS Cat. 8501.0 Retail Trade, Australia Table 13

6.1.1 Traditional retailing

Traditional retailing has been declining nationally. Low wage growth, high personal debt levels and a weakening housing market are contributing to this trend as consumers are becoming more reluctant to spend on non-essentials. ABS retail turnover data, has recently shown negligible growth in New South Wales, whilst Victoria, Queensland, Western Australia, Tasmania and the ACT all saw turnover trends increase. While data is not available for small areas, it is likely that this national trend will impact retailing in Inner West LGA.

The performance of traditional 'bricks and mortar retailing' is being outpaced by the growth of the online retail sector. The growth in online retail is mainly from domestic online shopping as international online sales have almost stalled, possibly due to currency related trends.

Even with increased online retail, anticipated population growth and associated retail expenditure increase is expected to generate demand for an additional 7.2 million sqm of shopfront retail floorspace by 2031 in Australia.

At the local level, current industry forecasts suggest that the strong forecast population growth in Sydney will support demand for local floorspace. Inner city retailing is expected to remain strong as lifestyles are intrinsically linked to amenity and retail. Supermarkets, specialty retailers and bohemian style boulevards and neighbourhoods are key attractors for inner city populations.

Demand for retail floorspace is not expected to decline despite the growth in online retailing. Demand for retail floorspace will be underpinned by projected population growth and sought after inner city lifestyles.

6.1.2 Warehousing and retail distribution for online retailing

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Retail analysts generally agree that growth in online retail is likely to continue in the future. There is no clear consensus as to the amount of growth that can be expected, possibly because indicators show mixed results.[12] The rate of growth in online retail sales have slowed and from October 2018 to November 2018 was estimated at 0.1 per cent[13]. National Australia Bank (NAB) Online Retail Sales Index recorded a negative 1.4 per cent month-on-month contraction in December 2018, down from a 2.9 per cent increase in November 2018 noting that November sales are typically the largest for the calendar year. However, NAB also indicates that for year to year growth in 2019, online retail spending increased by 9 per cent. This accounted for approximately 6.5 per cent of traditional retail spending overall, although market penetration rates vary significantly across category types. There has been continued growth in online trading for electronic games and toys, fashion, homewares and appliances, groceries and liquor, but trends have been much weaker for recreational and personal goods and media.

The introduction of online sales events such as Black Friday and Cyber Monday (28 per cent year to year growth), and EOFYS shopping night (30 per cent year to year growth) have cemented the importance of online sales in Australia's retail shopping calendar.

The growth in online retailing has been accompanied by strong demand for 'last mile distribution' facilities. CBRE has estimated that across Australia *the growth in e-commerce sales will generate demand for an additional 350,000sqm of distribution space annually*[14]. The Inner West LGA is ideally situated to capture this demand being located close to Sydney Airport and road transport links connecting the Inner West LGA to urban and regional markets. The Inner West LGA's location could allow retailers to ensure consumers receive same-day delivery, or 'within an hour' deliveries.

The Inner West Integrated Transport Strategy (Principle F) as well as this Study have recommendations regarding planning for the management of an efficient freight and goods delivery network to enhance efficiency and Inner West liveability. The planning chapter, particularly Table 42 and Table 43 consider the introduction of 'local distribution premises' use in a variety of zones.

It is noted that whilst large scale distribution space is limited in the LGA, smaller sites are being used for small-scale warehousing, storage and distribution, which was discussed in Section 3. While protecting larger lots is crucial for larger-scale activities, existing industrial land with smaller subdivisions in the Inner West will also be important to support demand for distribution space into the future.

Large online sales events cement the importance for online sales in Australia's retail shopping landscape with online retail spending increasing by 9 per cent year to year in 2019. This growth has been accompanied by strong demand for 'last mile distribution' facilities, Inner West LGA is suited to provide some of the estimated 350,000 sqm of distribution space annually required to meet the needs of the market.

6.1.3 Supermarkets in centres

Recent growth in demand for larger format retail space and new format supermarkets in smaller centres is expected to continue. This trend would see an increase in proposals to develop supermarkets of around 1,000sqm to 1,500sqm in smaller centres where previously, smaller supermarkets or convenience stores may have prevailed. Coles and Woolworths have introduced more metro style and upmarket formats, which resemble fresh food halls more than traditional supermarkets. The new Coles supermarket in East Village, Zetland is an example of this format.

[12] National Australia Bank. (2019) Online Retail Sales Index
[13] Popomaronis, T. (2018). E-Commerce In 2018: Here's What The Experts Are Predicting. *Forbes*
[14] Sydney Morning Herald, Omni-channel retail the new fix for quick service, By Carolyn Cummins 2018

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It is anticipated that this trend will continue, due to:

- Steady population growth from infill redevelopment contributing to a growing demand for additional supermarkets
- Relatively fewer sites and opportunities for larger full-line supermarkets
- Prevalent lifestyle and consumer habits increasingly favouring multiple smaller convenience shopping trips during the week rather than one large shopping trip
- Increasing desire from consumers for walkable, convenient access to food and grocery shopping reflecting declining vehicle ownership/usage and expectations for access to retail facilities outside of traditional trading hours
- Strong activity from smaller supermarket operators including ALDI and Harris Farm with Coles and Woolworths increasingly competing at this end of the market.

Recent amendments to *Standard Instrument—Principal Local Environmental Plan* (Standard Instrument) accommodates this trend by introducing a definition of a neighbourhood supermarket and permitting the development of small-scale supermarkets of up to 1,000sqm in size in the B1 - Neighbourhood Centre zones. This trend will have implications for floorplate sizes in neighbourhood centres as traditionally these centres have had floorplates of around 400 to 600sqm.

The attraction of larger supermarkets of around 1,000sqm into smaller centres can have both a negative and positive impact. On one hand, a larger supermarket directly competes more with smaller speciality shops, such as bakeries, butchers and fruit and vegetable shops. On the other, the supermarket increases the attractiveness of a centre to its surrounding community, thereby increasing the number of times they choose to shop there. This increased pedestrian traffic has positive effects for other shops in the centre. This is mainly through increased opportunity for capturing passing trade.

An increase in proposals for smaller supermarkets of around 1,000sqm in neighbourhood centres is expected in response to lifestyle changes that favour convenience and smaller, more frequent grocery shopping trips. This could strengthen the role of neighbourhood centres but would present increased competition to fresh food retailers.

There is still the potential for larger, full-line supermarkets to locate within centres across the Inner West, particularly with the anticipated population growth. This is discussed further in Section 7.5.

6.1.4 Food services

The Inner West LGA is a competitive destination for food services within Sydney due to its accessibility as well as its wealth of heritage character and cultural diversity. Growth in food retailing is increasing, largely as a result of changes in consumer behaviour: less cooking at home, increasing consumption of meals out and a desire for entertainment and socialisation whilst eating. This has assisted in supporting centres across the Inner West. The Inner West has a number of distinctive dining destinations including Balmain, Leichhardt and Ashfield.

Increasingly, customers are seeking an 'experience' when dining out. This has meant that purpose-built dining destinations are seeking to differentiate themselves through providing unique experiences which can evoke an emotional response and attachment from customers that will have them talking and referring friends and family. Examples include the Tramsheds at Harold Park and 'The Grounds' at Alexandria. Other examples of ways food services differentiate themselves include extended trading hours and locating close to existing natural assets or open space, providing customers with a pleasant outlook. This 'experience' has seen increased demand for comfortable outdoor dining options.

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Purpose built, large food destinations require substantial sites or spaces that are uniquely proportioned, which challenging in a dense and highly and built up environment such as the Inner West, particularly when large landholdings are rare. This means that operators are reliant on existing built forms, rather than purpose-built spaces. Improved centre amenity and rejuvenated retail spaces, including the adaptation of heritage buildings are required to ensure the Inner West takes advantage of these trends.

Internet shopping and social media are being used increasingly in food services. However, the potential impact on 'brick and mortar' food services is not as significant as it potentially is for non-food retail. This is because when food is ordered online it is prepared, in most cases, by the same store or restaurant that people sit down in.

The competitive advantage of Inner West is based on its vibe and energy rather than its physical offerings. It has highly successful markets and street festivals and a long term reputation for accommodating for an eclectic offering of dining options. There is a strong presence of food manufacturing within the LGA and connections within the food industry can support further growth in food services.

The clustering of specialised food manufacturing within the industrial areas of Inner West LGA creates a competitive advantage with regard to food services as café/restaurant operators will choose to locate close to this industry cluster due to ease of delivery. This relates to proximity of businesses to suppliers; the start-up/entrepreneurial nature of a number of these food suppliers; associated industry networking within the area. These in turn encourage new business concepts to also locate nearby.

Burwood Brickworks Rooftop Garden concept (middle), Hugo's Manly (right)





Source: HillPDA, Frasers Property, Hugos.com.au

Opportunities exist to build on the Inner West LGA's reputation for food retailing through ongoing innovation. Overseas examples of emerging trends and new retail formats include the following:

- Amazon markets with no checkouts where the shopper can eat-in or take-out and have the items automatically billed to their credit account
- Adaptation of heritage buildings such as Mercado da Ribeira Timeout Market in Lisbon and the Chelsea Markets in New York.

Internet shopping and social media are being used increasingly in food services. However, the potential impact on 'brick and mortar' food services is not as significant as it potentially is for non-food retail. This is because when food is ordered online it is prepared, in most cases, by the same store or restaurant that people sit down in.

Maintaining the Inner West LGA's reputation as a leader in food can be supported by protecting and managing its industrial lands so that the clustering of the specialised food manufacturing sector can be maintained and grown, strengthening the industry links between the different levels of the supply chain.

Providing suitable spaces for food services in the Inner West could include reviewing controls for adaptation of heritage buildings to encourage food related uses, reviewing the Local Approvals Policy to facilitate more

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community events and seeking opportunities to create more public space within centres to accommodate such activities, which is discussed in further detail in Section 9.2.

6.1.5 Out-of-centre retailing

The high level of demand for retail floorspace is anticipated to continue, given the constraints on in-centre development. The lack of large and appropriately serviced sites in established centres, such as those required by larger retailers, and the relatively high land values in those centres, contribute to the attractiveness of out-of-centre developments. Floorspace requirements from specialised goods and other retailers such as supermarkets will lead to continued pressure to develop in out-of-centre industrial and employment sites.

The development of out-of-centre retailing, especially for supermarkets, has the potential to affect the continued economic viability of the established centres. An international study found that the presence of out-of-centre retailing can negatively affect retail activity in nearby centres by around 12 per cent[15].

The Employment and Retail Lands Study makes detailed recommendations in relation to permissibility of retail uses in the employment zones in both the Planning Chapter and Precinct Profiles. Action 1.1.1 of the Strategy establishes the retail hierarchy of the LGA and Action 3.5.1 of the Strategy identifies the B6 – Enterprise Corridor as an appropriate location for specialised retail premises.

6.1.6 Residential uses in centres

Demand for housing within centres is increasing as a result of:

- Increasing population and demand for residential stock
- Demand for smaller dwellings in accessible locations with public transport to support affordable living
- Lifestyle changes with residents increasingly favouring the accessibility, and retail and service provision of centres
- Improved viability of redevelopment as residential values outperform other land use types in many situations.

In many cases providing residential development in centres can improve business conditions by increasing the population in the retail catchment. There is an increasing preference by younger households to live in highly accessible and well-serviced locations. At the same time, retirees are seeking to remain in their local neighbourhoods and downsize their dwelling. These trends and preferences will continue to influence centre development into the future.

Delivering residential development in centres can increase demand for retail services and make a positive contribution to the amenity and vitality of the centre.

6.1.7 Commercial office floor space

Businesses owners are increasingly choosing to locate in commercial centres outside of the larger established 'commercial office precincts' because of their established identity, amenity, and proximity to their own homes. This demand is likely to continue to grow. To encourage this trend the study area, in appropriate centres, should provide:

[15] Land Use Policy, The impact of out-of-town shopping centres on town-centre retailers and employment: The case of the Region of Murcia. Armando Ortuño Padillaa; Antonia Alarcón Hermosillab; and Olga Tomás Ozoresc 2017

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Attachment 1

- An increased range of commercial floor plates that can accommodate local professional services, start-ups and boutique small and medium-sized enterprises (SME)
- Provision of affordable commercial office space
- Provision of flexible floorplates suitable for co-working
- A continuation of floorspace suited to professional business services to cater to the local population.

Encouraging specific businesses to locate in the area is difficult. Businesses will tend to choose their location based on a variety of individual factors such as style, identity, skill base, demographics, accessibility, competition, proximity to other businesses, utilities, rents, infrastructure, and ordinance. To support new investment, a clear vision and direction for the study area can be embedded in the planning framework. Maintaining flexibility in the size of and variety of floor plates will be important to attract the greatest diversity of uses. Protecting the existing supply of commercial floorspace will also be important so not to inadvertently affect rents and the affordability of the location.

The Strategy has a series of recommendations to support the growth of commercial office floor space which are substantiated within Section 8.1.1 of the Study.

6.1.8 Activity clusters

Centres with a balance of commercial and residential uses tend to experience enhanced activation both day and night with workers contributing greatly to the vitality of the centre during daytime hours, and residents increase activation after hours. Global trends and disruptive technology are changing the way office and business premises are being delivered. There is a growing demand for flexible working spaces in suburban locations that are closer to people's homes. More affordable, generally older, office stock can also be attractive to start-up businesses looking for a pathway into the market.

Activities are tending to cluster within centres to capture the benefits of co-location and synergies between businesses. Commercial activity clusters, eat streets, and village shops collectively function as vibrant and dynamic centres.

6.1.9 Council interventions to revitalise centres

Councils are increasingly taking action to encourage activation and revitalisation of traditional centres that have experienced decline. Incorporating public spaces and community facilities in centres encourages visitation by families and customers that would otherwise not visit the centre. Hosting markets and free events increases activity and attracts visitors. Strengthening the streetscape appeal and delivering public spaces creates a pleasant street environment and improved amenity, generally more conducive to outdoor dining.

Providing spaces within the public domain that can accommodate cultural infrastructure supports Objective 9 and Strategy 9.1 of the Greater Sydney Region Plan. Notably the plan discusses multi-functional and shared spaces as cultural infrastructure and highlights how great places are made when artistic, cultural and creative works are visible, valued, distinctive and accessible. Centres in Inner West are well placed to deliver these opportunities.

The Greater Sydney Commission Eastern City District Plan highlights the importance of having high quality public places in and around centres, *'streets, plazas, parks and recreation spaces provide places for community events, markets and festivals and for encouraging social interaction and active lifestyles. Growth and renewal will increase opportunities to expand and connect these places and to explore innovative public places, such as rooftops and podiums.'* P48

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Council assets can provide a valuable resource in stimulating the revitalisation of centres. Where surplus land is available in a centre, partnering with a developer can deliver valuable community benefits. Some examples of actions by councils to revitalise centres are discussed below.

Marrickville Library, Former Marrickville Council NSW

Former Marrickville Council partnered with Mirvac to develop the former Marrickville Hospital site, originally Council-owned land, bordering Marrickville Road, Livingstone Road and Lilydale Street. The development consists of a new larger library and much needed new community and cultural facilities, open space and residential apartments. As part of the redevelopment, Council received:

- Nine affordable housing apartments dedicated to Council
- 3,600m² of purpose-built library and event space spread over three storeys
- 1,200m² of landscaped outdoor garden and a 100m² children's playground
- Café with indoor and outdoor seating areas
- Conferencing facilities
- 58 underground car parking spaces including 5 accessible spots and a loading dock

The new Marrickville Library provides a new anchor of activity on the northern end of the Marrickville town centre.

Kiaora Place, Double Bay NSW

Kiaora Lands is a master planned mixed-use precinct in the heart of Double Bay, a joint venture between Woolworths, Solotel, and Woollahra Council.

The main components of the scheme were a 600-space car park including 300 car spaces for public use, a 2,000sqm Public Library, a 3,500sqm supermarket, speciality retailing, 133 apartments, a 21 room private hotel with function rooms, and a five storey commercial office building. The project realigned three streets and included a 600sqm public square. The development consisted of six separate buildings over a common two-level basement car park. The middle stretch of Kiaora Lane was pedestrianised, while the trucks use either end for access to Woolworth's underground loading bay.

Woollahra Council amalgamated a number of sites to create the new library centre with a through-site link. The public library is considered a 'next-generation' space featuring everything from a slippery dip for children, to a public access computer hub, meeting rooms, study areas, and even a quiet reading area with a fireplace. The library has become a destination in its own right, providing a public space for events including live music and exhibitions, extensive children's programs and workshops and movie screenings. It has been designed with all ages in mind and acts as an attractor for the centre. The library is framed by a number of retail shops and cafes that line the through-block connection. The library is open until 8 pm.

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Figure 11: Kiaora Place, Double Bay



Source: Woollahra Council

Prahran Square – City of Stonington

The City of Stonington in Melbourne has redeveloped a 9,000sqm car park into a new public plaza, dubbed Prahran Square. Prahran Square contains 10,000 square metres of multi-functional urban parkland sitting above 500 car parking spaces, a 20 per cent increase in car parking spaces to service the surrounding Chapel and Greville street precincts.

The square is now complete and incorporates retail/hospitality opportunity spaces, free public WiFi, environmentally friendly design features, safe and improved pedestrian movement paths and capacity for events such as outdoor cinemas, markets, and live performances. The cost of the project is estimated to be at least $60 million.

It demonstrates how other local governments have made use of existing assets to provide for much needed cultural infrastructure, open space and modern retail spaces to revitalise centres and precincts.

Figure 12: Artist impressions -Cato Square, Prahan Melbourne



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Source: Hunn, P 2018 'Work begins on burying 9,000m2 Melbourne carpark under public plaza', viewed at: https://landscapeaustralia.com/articles/lyons-and-aspect-studios-to-transform-melbourne-carpark-into-public-park-1/ and Images source: City of Stonnington, 2018

Several centres in Inner West have large landholdings, currently used for purposes such as parking that could be repurposed for supporting activities such as market stalls, cultural performances, outdoor dining festivals and other events. Identifying opportunities for public spaces within centres are identified through actions contained in Strategy 1.5 of the ERLS.

Chapel Street, Melbourne

The Chapel Street Masterplan focuses on the pedestrian experience of Chapel Street, Melbourne – a prominent retail street surrounded by mixed-use functions and including heritage buildings. The masterplan was produced to improve the 'rundown' urban form to secure the destination into the future. The plan established a hierarchy of streets and focussed on the single-lane streets immediately stemming from Chapel Street. Improved landscaping on these streets made more roads attractive for small businesses and extended the activity footprint of the area.

The plan sought to co-locate small public open spaces with train stations, tram stops and street corners, which provided a pause point that attracts pedestrian activity. Well-designed and stylish street furniture was included in the streetscape plan, as well as plenty of lighting, signage, and universally-designed kerbs and paths. Under-storey car parking off Chapel Street was advocated, to encourage foot-traffic on the main street.

A crucial and successful aspect of this plan was a community engagement workshop run with local residents. The workshop gave the residents a say on planning matters and small-scale initiatives. This included making some one-way streets one-way, moving power underground to make way for trees, and relaxing density controls at principle urban junctions. Small-scale initiatives included the addition of local art projects to the streetscape, a free shuttle tram, projecting urban art to blank walls, and using native plants. Giving more control to the community encouraged the locals to spend more time on Chapel Street.

6.1.10 Market considerations

Commercial properties along traditional neighbourhood retail strips such as Darling Street, Balmain and Liverpool Road, Dulwich Hill and Ashfield comprise traditional two storey buildings; ground floor retail and first floor commercial or residence is provided.

HillPDA has undertaken high level market research of the retail and commercial market focusing on Ashfield, Leichhardt and Marrickville.

The main retail precinct of Marrickville along Illawarra Road and Marrickville Road is currently struggling with high reported levels of vacancies. Despite the easing of demand a local leasing agent has reported a strong

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level of food and drink retailing as well as local services such as gyms and childcare operators. The agent has indicated that net retail rents range from $500 to $600/sqm of net leasable area (NLA) and first floor commercial range from $250 to $300/sqm of NLA. Local agents have also indicated that freehold sale value rates range from $5,000 to $7,000/sqm of NLA (freehold). Although there has been renewed interest in Marrickville in the past few years as an alternative to Newtown and Enmore, it is currently experiencing slow activity in a lagging economy.

Similarly, Leichhardt has experienced renewed interest with the northern side of Norton Street experiencing increased popularity for café/restaurant operators due to the increased availability of car parking. Local agents have also indicated that freehold sale value rates range from $5,000 to $7,000/sqm of NLA, there has been limited sale activity over the past two years. Haberfield has experienced increased vacancies in recent years however, most recent indications are that there is growing interest.

It has been reported that Ashfield is also experiencing low levels of market activity and agents have reported the majority of enquiries are for the use of food retailing and professional services. Local agents have also indicated that freehold sale value rates range from $8,000 to $12,000/sqm of NLA and retail net rents range from $750 to $900/sqm of NLA.

Marrickville is currently experiencing slow activity despite renewed interest in the area as an alternative to Newtown and Enmore. Leichhardt has experienced limited sale activity whilst Haberfield is showing indications of growing interest and Ashfield is showing an increase in enquiries for the use of food retailing and professional services.

6.1.11 Office trends

The NSW experience in job growth is similar to that observed in Europe and the US, where a 20-year analysis of net job growth revealed that firms less than five years old were the only cohort of firms that were net job creators. Every other cohort was found to have shed more jobs than they created. This fact is a key consideration in positioning Inner West LGA to attract commercial jobs growth. It suggests that a focus on start-up businesses is likely to yield a net job increase.

Start-ups and flexible spaces

Start-ups have great disruptive potential because of the ease with which they can reach global audiences through the use of technology. These businesses can exploit a competitive advantage in price through high labour productivity and lower capital requirements.[3] Providing a supply of spaces that are able to respond to technology requirements and expand to meet growth will assist start-ups to compete on a regional and global platform for the jobs of the future.

Space and floor plate requirements are changing, with the traditional purpose-built office space increasingly giving way to more flexible options like co-working spaces. These spaces act as a shared workspace for a highly diversified workforce of small businesses, start-ups, freelancers, and entrepreneurs. The rise in demand for co-working space has grown by 6 per cent per annum in the five years up to 2017, with approximately 50,000sqm of space existing in Sydney in that year.[16] That said, there is still demand for larger floor plates >2,000sqm to accommodate international or domestic corporations.

The initial demand for these spaces was focussed around urban cores, with 53 per cent of Australian co-working spaces located in CBD or metro areas in 2017. However, there has been growth in suburban locations away from metropolitan centres,[5] with these areas accounting for 32 per cent of spaces. The growing demand for

[3] PwC (Commissioned by Google). (2013): The Startup Economy; How to support tech start-ups and acceleration innovation

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flexible workspaces away from the metropolitan core echoes trends in the US market.[16] Co-working typically requires comparatively small office spaces of less than 200sqm.

While the demand from co-working space operators is primarily domestic at present, it is predicted that the imminent entry of international operators will increase demand for spaces suited for co-working.[17] JLL has predicted that 30 per cent of all office space will be classed as flexible by 2030.[18] The demand for these types of spaces is continuing to grow, most notably in suburban locations.

The impact of technology is fundamentally changing the way in which people work, adding flexibility to when and how they allocate their time. The traditional concept of the workplace being a fixed space is changing, with telecommuting and remote working now commonplace. While research has found that there has been an overall decrease in regular work from home since 2001, it remains highly prevalent amongst managers and professionals, with 41.2 per cent of managers and 38.2 per cent of professionals regularly working at home, as of 2016. Over the last twenty years the proportion of employed professionals has expanded rapidly, now comprising the largest occupational grouping, at almost 24 per cent. As a consequence, telecommuting is set to continue expanding.[19]

This is playing out in the changing nature of contemporary workplaces, and therefore the type of spaces that are in demand. This translates into people working from home or other suitable spaces. Naturally, this will have a flow-on effect on the way space is used in Inner West LGA, influencing the times when offices are active and the total floorspace required by different industries.

Home business and work from home patterns are discussed in Section 9.4.1,

> Providing more flexible working space is likely to attract new businesses, freelances and start-ups. Embracing this concept will assist in the support of small business, attract jobs growth and deliver jobs closer to homes.

Businesses owners are increasingly choosing to locate in commercial centres outside of the larger established 'commercial office precincts' because of their established identity, amenity, and proximity to their own homes. This demand is likely to continue to grow. To encourage this trend the study area, in appropriate centres, should provide:

- An increased range of commercial floor plates that can accommodate local professional services, start-ups and boutique small and medium-sized enterprises (SME)
- Provision of affordable commercial office space
- Provision of flexible floorplates suitable for co-working
- A continuation of floorspace suited to professional business services to cater to the local population.

Encouraging specific businesses to locate in the area is difficult. Businesses will tend to choose their location based on a variety of individual factors such as style, identity, skill base, demographics, accessibility, competition, proximity to other businesses, utilities, rents, infrastructure, and ordinance. To support new investment, a clear vision and direction for the study area can be embedded in the planning framework. Maintaining flexibility in the size of and variety of floor plates will be important to attract the greatest diversity of uses. Protecting the existing supply of commercial floorspace will also be important so not to inadvertently affect rents and the affordability of the location.

[17] JLL. (2017), Bracing for the Flexible Space Revolution

[18] The University of Sydney. (2017). An introduction to the growing co-working industry in 2017. *Co-working Spaces Australia*

[19] Bankwest Curtin Economics Centre. (2018)

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6.1.12 Centres with professional services role

There is an identified trend within the Inner West of smaller centres establishing a professional services role rather than a retail role. This includes Croydon (refer to Section 9.2.7) and increasingly Stanmore, (refer to Section 9.2.13).

Employment floor space within some smaller centres is transitioning from a retail focus to office and business premises. Professional services include businesses such as architects, accountants, engineers, doctors and lawyers which do not necessarily require locations within the Sydney CBD or larger centres, where rents are higher. This trend is likely to continue, particularly as mixed use redevelopment in larger centres across Sydney reduces available office floor space and some centres experience decline.

Inner West is well placed to attract these businesses compared to the Sydney CBD, as they can offer a reduced commute and the modern world of communications means businesses don't necessarily need to be as close to clients. Centres within heritage conservation areas and with a number of heritage items may not offer the same flexibility for redevelopment as other centres, and these smaller ground floor spaces may be better suited to office and/or business premises rather than emerging retail concepts.

With the construction of the south-west metro, it is likely that professional services will continue to grow in key centres such as Sydenham (south of the station), parts of Marrickville and Dulwich Hill. There are some centres in Inner West that are in decline such as Haberfield and Lewisham (station) that may strengthen as locations for professional services.

While office and business premises may not activate the street frontage in the same way as retail, they do attract visitors to the centre.

6.1.13 Floor space monitor

A floor space and employment review of centres can provide a snapshot of the land use, employment and built form dynamic across the Inner West's centres. The survey can provide Council understanding of the demand and suitability of employment floor space in the LGA's centres. Noting the significance of creative industries and independent professional services in the Inner West, further understanding of the built form, floor space and amenity requirements to meet the demand of these niche industries would be useful.

Overall, the data from this survey would inform Council's future plan and policies to guide where people will work and live as well as to respond to industry trends in office and retail.

Key information to consider within the survey:

- Type of activities conducted by businesses;
- Quality and flexibility of floor space format for each activity;
- Amount and quality of floor space occupied for creative purposes;
- Amount of floor space each activity and associated worker occupies;
- How many people employed in each activity;
- Occupancy rate of ground floor non-residential spaces;
- Quality of ground floor non-residential spaces that fails to attract businesses;
- Carparking requirements
- Type of amenities and services supporting the operation of certain businesses (i.e. co-working spaces and independent professional services);

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- Average rent.

The extent of the monitor would depend on resourcing. Focussing on a key precinct as a pilot can assist in understanding resource implications for Council.

6.1.14 Recommendations

Overall, there is a need to develop a policy approach for centres across the Inner West to ensure that Council is proactive in accommodating to trends in retail and office. The actions in the Strategy contain a broad range of actions which aim to:

- Retain and grow office and retail floor space in existing centres
- Identifying opportunity sites within Centres that could facilitate new public domain spaces and retail oppurtunities (eg council car parks or additional levels above existing shopping centres). Where possible this should be an expansion of an existing centre.
- Zoning additional land (non-industrial) for retail and commercial uses to accommodate future growth, where there is a genuine demand which cannot be met in centres.
- Reducing barriers to in centre development (eg design requirements and retail demand and impact assessments).
- review the neighbourhood centres to identify more localized retail and service needs.

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6.2 Employment land trends

The globalisation of trade, wider use of information technology and online retailing is influencing demand for industrial floorspace. Today's global economy is underpinned by linkages between businesses, which enable the efficient sharing of information and the delivery of goods through a global supply chain.

This supply chain, or movement of goods through production to the end user, is an alignment of firms that design, develop, market and produce goods and services and deliver them to the customer when needed. Demand for space built for the transfer of goods is increasing, primarily for 'high throughput distribution' space that is essentially designed to facilitate the rapid movement of goods through the supply chain. Businesses with low inventory turnover are gravitating to inexpensive land and low cost buildings.

Retail and industrial operations are becoming increasingly aligned, with omni-channel real estate emerging as a key trend in 2018. Supply chain efficiencies is a key for the success of the retail sector with the rise of online retailing also driving demand for warehousing and distribution centres. A recent article prepared by CBRE and Jagonal[20] indicated that proximity to key transport routes is one of the priorities for industrial occupiers due to supply change efficiencies and the increasing geographic division between consumption and production. The Inner west LGA's connection to WestConnex and other motorways has it well placed to service demand for product distribution.

The evolution of industry is impacting on occupier demand. Industrial demand is increasingly being influenced by technology with cutting edge micro-manufacturing replacing traditional manufacturing. As production and manufacturing technologies evolve, there will most likely be a shift in the scale and land requirements of businesses. While the size of distribution and warehousing increases, manufacturing will become more automated, reducing floorspace and car parking requirements. This will be more evident in major markets before filtering to the regions.

There is an opportunity to capitalise of the Inner West LGA's strategic road and Sydney Airport connections to deliver industrial spaces that respond to the changing face of retail by offering 'strategically proximate' warehousing for online retailers. These types of spaces would be well-positioned to offer strong returns to investors.

[20] CBRE (December 2017), "Time to motorway drives rental savings"

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Expert insight, Ross Lees Fund Manager for Centuria Industrial REIT

Retailers need to reassess supply chains

Many retailers are recognising the need to reassess their supply chains. Most traditional networks don't include enough distribution centres to deliver goods cost-effectively and quickly – and this is a challenge as consumers demand ever-shorter delivery times.

Retailers also realise they cannot separate the online from their traditional shop-based business; rather, they need to be viewed as two parts of a whole. Successful retailers now think end-to-end, which means including transport and fulfilment centres in the mix. This is where industrial property, particularly warehouses located close to consumers and transport hubs, is benefitting.

Proximity to the consumer means cheaper transport costs and faster delivery times – both of which play an important role in overall profitability. And as the number of fulfilment centres for online retailing increases, so too does the number of businesses which service these centres, such as packaging companies. And both require industrial property.

Industrial property outlook

Growth in exports, business investment, and infrastructure, are driving demand for industrial property. There has been a strong flow of capital into the Australian industrial sector from a diverse range of investors – including domestic private and institutional groups, and offshore groups.

Supply is constrained however, and as a result, yields have compressed across the board. In Sydney, yields moved from 5.73 per cent (in H2 2017) to 5.26 per cent (in H2 2018); in Melbourne from 6.27 per cent to 6.06 per cent.

At the same time, the digital revolution and advances in technology mean that industrial property is changing from the simple, low-tech warehouses of the past. Today's industrial property is more sophisticated, efficient, and flexible – ready to service a diversified range of industries.

As a result, prices have risen across the board – but more significantly in locations close to population hubs, where there is greater density and higher competition from alternative uses.

While online retailing is providing a positive flow-on to industrial property, to regard this as a one-to-one increase in industrial space would be overstating the case. Certain types of industrial space will benefit disproportionately from the rise in online retailing. For online retailers in pursuit of supply chain efficiencies, "strategic proximity" is key: industrial property that is close to transport nodes and consumers will be the winner.

From an investment perspective, the same holds true. Industrial portfolios that align with the changing face of retail – by offering "strategically proximate" warehousing for online retailers – will be well-positioned to offer strong returns to investors.

Extract from article published: Tuesday, April 30, 2019 at http://www.switzer.com.au/the-experts/ross-lees/online-retailing-increasing-demand-for-industrial-real-estate/

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6.2.1 Emerging and disruptive technologies

Technological progress provides potential for economic growth, but its impact is seen by some, as a disruptive force for labour markets and established business models. 'Disruptive innovation' refers to an innovation that creates a new market by applying a different set of values, and which ultimately (and unexpectedly) overtakes an existing market. [21] This commonly occurs by harnessing new technologies, or by developing new business models. Products based on disruptive technologies are typically cheaper to produce, simpler, better performing, and more convenient to use.[22]

Disruptive technologies have the potential to impact growth, employment, and inequality by creating new markets and business practices -and ultimately on demand for employment land. Disruptive technologies will have potentially negative effects on some firms, through declines in shareholder value and loss of markets. Employment lands may suffer increased vacancies unless they provide spaces that are suited to the emerging business types and their changing operations.

Researchers from the University of Wollongong, Monash University, and University of Technology Sydney recently undertook a collaborative project funded by the Australian Research Council – Urban Cultural Policy and the Changing Dynamics of Cultural Production. Their research findings indicate that impacts of robotics and automation on small-scale manufacturing and industrial activities within the Inner West have been negligible, and are unlikely to be significant in the future. Their research across a range of niche creative-manufacturing industries, from surfboard-making to ceramics, jewellery-making to guitar-making, demonstrated that automation and robotics are unlikely to displace jobs. What makes the varieties of small-scale creative-manufacturing present in the Inner West viable high-value add propositions are an emphasis on rarity and quality, and human craft labour input.

Robotics and automation equipment are also capital-intensive investments rarely viable for micro- and small-scale manufacturers. The Inner West have few suitable sites, and the cost of amalgamating sites to a suitable scale is likely to make other parts of Sydney more attractive for such investment.

> Employment lands that provide spaces in a variety of sizes and price ranges are more likely to be resistant to the impacts of disruptive technologies.

Analysts[23] have identified emerging and disruptive technologies that will likely have significant impact on the manufacturing transformation, they include (in alphabetical order):

- **Additive manufacturing** (3D printing): The class of materials that can be printed has been expanded greatly, from plastics, paper, ceramics, metals, superalloys, to biomaterials. Developments in additive manufacturing will likely create new applications that will have significant impact on traditional manufacturing methods.
- **Advanced robotics**: New and advanced robotics will increasingly be used in precision manufacturing and assembly, in semiconductor fabrication, and even in human-robotic cooperative environments beyond manufacturing. Manufacturers using advanced robotics are typically seeking larger spaces.
- **Digital manufacturing**: Traditional experiential and experimental approaches to product development, manufacturing process design and validation, factory automation and supply network development are being replaced by highly efficient digital thread approaches.

[21] Clayton Christenson (The Innovator's Dilemma).
[22] Ibid.
[23] Jun Ni and Jay Lee (2016) Emerging and Disruptive Technologies for the Future of Manufacturing: 2015 - 2025
Keywords: disruptive technologies, emerging trends, future manufacturing technologies, University of Michigan, University of Cincinnati

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- **Distributed and cyber manufacturing**: Distributed manufacturing has been enabled by the DIY maker movement, 3D printing technologies, CNC machines and the internet. This promises to transform centralised manufacturing hubs, the supply network and the logistics industry as machine APPs operating on cyber platforms create on-demand design and manufacturing.
- **Hybrid processes**: The development of new, advanced materials and the increasing integration of multi-functionalities into a single product is creating innovative hybrid manufacturing processes
- **Lightweight materials and structures**: The demand for energy-efficient transportation vehicles has driven the rapid adoption of lightweight materials and multi-material structures for the construction of aero, ground and marine vehicles. These new advanced materials and structures call for the disruptive development of novel manufacturing methods.
- **Intelligent maintenance systems:** In the era of industrial big data, new development in predictive analytics and infotronics has enabled complex engineering equipment and systems to achieve near-zero breakdown performance. The monitoring and prognostic health management capability allows proactive approaches to address the performance degradation of their systems and equipment.
- **Prognostics and health management for self-aware machines and equipment:** Future manufacturing equipment will have the increasingly more sophisticated capacity to sense its environment, monitor its condition, be aware of its own operating performance drift, and adaptively compensate for any deviation from the ideal performance target.
- **Predictive manufacturing and smart factory**: Leading manufacturing firms are adopting highly automated, IT driven manufacturing planning, scheduling and production controls. Such factories employ smart machines and equipment that have self-aware capabilities, use vast amounts of industrial big data to evaluate and predict production conditions in real time (eg cost, quality, productivity, material supply and market demand), and proactively synchronize factory-level as well as enterprise-level resource requirements.
- **Reconfigurable manufacturing systems**: Modern manufacturing systems are increasingly expensive and yet the product life cycle becomes shorter and shorter due to fierce market competition. This dilemma has motivated many manufacturing firms to look for ways to effectively reuse the capital investment for their manufacturing systems, thus leading to the paradigm of reconfigurable manufacturing.
- **Remanufacturing systems**: The increasing pressure for environmental sustainability has created more opportunities for products to be remanufactured after their typical end of life. A properly designed and operated remanufacturing system will not only address the issue of environmental sustainability but will also increase economic benefits for the manufacturers as well as consumers, leading to a truly circular economy.
- **Real-time 3D machine vision**: Rapid development in pipeline image processing and advanced optics have created unprecedented new capability for real-time 3D machine vision technologies to be widely adopted for advanced manufacturing process control, assembly verification, and in-process product certification. This also helps to provide real-time guidance for advanced robotics.

Researchers from the University of Wollongong, Monash University, and University of Technology Sydney recently undertook a collaborative project funded by the Australian Research Council – Urban Cultural Policy and the Changing Dynamics of Cultural Production. Their research findings indicate that impacts of robotics and automation on small-scale manufacturing and industrial activities within the Inner West have been negligible, and are unlikely to be significant in the future. Their research across a range of niche creative-manufacturing industries, from surfboard-making to ceramics, jewellery-making to guitar-making, demonstrated that automation and robotics are unlikely to displace jobs. What makes the varieties of small-

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scale creative-manufacturing present in the Inner West viable high-value add propositions are an emphasis on rarity and quality, and human craft labour input.

Robotics and automation equipment are also capital-intensive investments rarely viable for micro- and small-scale manufacturers. The Inner West have few suitable sites, and the cost of amalgamating sites to a suitable scale is likely to make other parts of Sydney more attractive for such investment.

The Inner West LGA, relative to other industrial areas in Sydney, has so far had negligible impact from robotics and automation. It is considered that these trends may have a less significant impact in the future compared to other industrial precincts within Sydney.

There is however, a larger potential for automation to affect larger-scale industrial processes (closer to the airport) and potentially in the Bays Precinct if future planning accommodates.

On the other hand there is a trend for creative uses/producers to share larger facilities in a co-work environment. This clustering has numerous benefits from smaller supply chains, to sharing otherwise expensive facilities, and cross-fertilisation of ideas. However, these larger spaces need to be managed. In a few cases this has been undertaken by one of the industries, however, site set up and management in these cases remains an issue.

The potential impacts of the above include:

- Strong growth in industries focused on health care, leisure and hospitality, with these industries continuing to drive future growth of commercial space.
- Continued growth in demand for co-working and flexible workspaces.
- Continued growth in demand for spaces in locations that more efficiently connect providers with customers, with the goal of offering better service and cheaper goods to the consumer.
- Greater demand for leisure with increased automation allowing people to focus on culture, reemphasize social activities, and develop an experience-driven economy in more urban centres.
- Experience related real estate is expected to boom (sports, entertainment, and food and beverage).
- Physical footprints changing to accommodate automation, typically requiring larger floorplates in some areas.
- Given anticipated distance restrictions on commercial drone deliveries, warehouses may move closer to population centres, to allow these properties to operate as drone distribution bases, thereby dramatically improving supply chain efficiency.

[24] https://www.leggmason.com/content/dam/legg-mason/documents/en/insights-and-education/whitepaper/clarion-whitepaper-disruptive-technologies.pdf

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6.2.2 Creative industries

Creative industries and culture are essential to the local community and identity. Inner West Council estimates that at the 2011 Census 9.4 per cent or 8,685 people in the Inner West Council were employed in cultural occupations, the highest of any LGA in NSW. Council's *Cultural Action Plan (2016 – 2020)* identified that arts and culture are integral to local social and economic advantage and the liveability of the area.

Table 13 presents information for a sample of creative industries located in the Inner West LGA. All feel the threat of redevelopment and rent increases. Uncertainty around tenure is impacting on operations and revenue by restricting business to short term planning.

Table 13: Issues faced by creative industries

Creative industry	Current concerns
CANAL ROAD FILM CENTRE 1 Canal Rd, Leichhardt Canal Road Film Centre (CRFM) is an umbrella organisation that runs Australia's largest independent film and TV production precinct - a unique collection of businesses, artists, and support services.	• Council has rezoned the site to SP1 - Special Activities in recognition of its importance. • Strategically located near two light-rail stations. • Difficulties in getting approvals for location shootings in the city is hampering film and television businesses. • Location shooting is the only way to maintain local productions in Sydney. • The current regulatory environment is not supportive, forcing many productions to relocate to more filming friendly locations.
ART EST. 4/67/69 Lords Rd, Leichhardt Art Est. is a private art school and gallery providing weekday classes, weekend workshops, and art programs, catering both to adults and children with a wide offering of creative lessons, ranging from painting and drawing to pottery, printmaking, cartooning, life drawing and travel sketching.	• Previous attempt to redevelop the site for residential uses: – The most recent planning proposal for the site, submitted in October 2018, sought to rezone the site from IN2 - Light Industrial to R3 - Medium Density Residential, increase the floorspace ratio from 1:1 to 2.4:1 and introduce a maximum building height control of RL35. – The intent of the planning proposal was to facilitate a redevelopment of the site including approximately 23,158sqm of residential floorspace, comprising 235 dwellings, and 3,000sqm of non-residential floorspace across five (5) buildings ranging from three to nine storeys, positioned around 1,650sqm of centrally located open space. – Strong opposition to redevelopment was found from the community. • Current activities undertaken in the warehouses cannot move to shop fronts or be integrated with residential functions. • No other suitable sites in the area. The remaining industrial spaces in outer suburbs may be too far away for the school's customers. • Measuring the economic and cultural value of existing creative operations has tended to underestimate the situation by only accounting for full time employees but the centre also: – gives work to more than 60 local artists per annum – hosts more than a thousand students – holds exhibitions that attract hundreds of visitors – is instrumental - a network of creativity would be lost if redeveloped.
LEGS ON THE WALL 91 Canal Road, Lilyfield	• The site is Crown land and there is uncertainty about leasing terms and future plans. • Threat of rent increases would jeopardise or heavily impact the business.

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Creative industry	Current concerns
Legs On The Wall is a physical theatre company including aerial performances and floating stage effects and apparatus.	• Zoning and other regulations restrict the possibility of hosting live audience performances which would be a potential revenue stream. • Applying for relevant permits is too costly and time consuming and there are concerns regarding the impact public traffic and congregation will have on other tenants. • The lack of affordable space for rehearsal and storage is encouraging casualisation of artistry with a detrimental effect on the quality and innovation of Australian theatre.
TORTUGA STUDIOS 31 Princes Hwy, St Peters Tortuga Studios is an artist-run initiative with its own gallery, a co-working space and a production house for TV, film and theatre, which includes set builders, lighting designers prop-makers.	• The warehouse space is old and requires a lot of maintenance which is often beyond the means of the organisation. • Neighbouring redevelopment and construction of the WestConnex motorway has produced dust, asbestos debris, heavy noise, and traffic jams. • Safety concerns from dust and truck movements; odour from remediation works. • Operating under a medium-term lease for the next 3-6 years. • WestConnex St Peters Masterplan proposes the industrial block be replaced by apartments, with an 'art space' within the buildings and a private open space.
SQUAREPEG STUDIOS 10 Junction Street, Marrickville A collaborative jewellery workshop used by professional contemporary jewellers, sharing heavy equipment that would be too expensive or unsuitable for installation in homes.	• There is always the possibility that the warehouse will be sold to a developer to build apartments. • The area is considered suitable for new development, given its proximity to the future Sydney Metro station. • Operators believe additional apartments and commercial spaces could increase business opportunities, provided that creative venues such as SquarePeg Studios are retained in the process.
ERTH 22-26 Myrtle Street, Marrickville An international theatre company specialising in live performances and large-scale puppetry shows.	• Erth has had to become a venue manager while remaining a physical theatre company to cover costs. • Erth has become an umbrella organisation itself, managing security, telephone lines, internet, cleaning, maintenance, and so on. • Maintenance costs associated with an old warehouse. • The building floods during heavy rains in the basement (storage) area. • A demolition clause is included in the 3+3 year lease, as the area is zoned for residential development.

Andrea Pollio, Ien Ang, David Rowe, Deborah Stevenson, Liam Magee *Cultural Creation and Production in the Inner West LGA A case-study needs analysis* December 2018, University of Western Sydney

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Rent Controls in Hackney Wick, London

Rent controls are to be imposed on properties in the Hackney Wick area to protect creative businesses.

The area which is currently experiencing a massive regeneration has long been a home to artists and other creative enterprises but has seen its rents increase by more than 50 per cent in just one year.

The initiative has the support from the Mayor of London, Sadiq Khan. It will force landowners in the area to set rents at less than half of the current market rate.

Creative businesses will benefit from more support and protection to stay in the area thanks to new planning rules approved by the council and the London Legacy Development Corporation (LLDC). The LLDC, which manage a substantial part of the area, has agreed to a planning arrangement intended to provide new work and studio spaces at affordable rents for established businesses.

More than 8,400 sqm of existing low-cost work will be re-provided under the new planning rules, alongside hundreds of new homes, modern retail, and community facilities. The rent controls follow the creation of the masterplan for the regeneration of the area.

The Council is already in the process of refurbishing two existing buildings in the Trowbridge area. Local workspace providers will be in charge to manage the building for the small, independent and artistic firms that have already made Hackney Wick their home.



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The views of creative industries were also considered through the community engagement process (see Section 5). Creative industries in the area generally fear termination of leases and redevelopment forcing them out of the area, either directly or through increases in rents. Inner West Council has been instrumental in protecting creative uses by protecting industrial land from rezoning that would permit residential uses.

The continued operation of creative industries could be assisted through:

- Articulation of a clear vision for the creative industries in the Inner West LGA.
- A stronger policy position on creative industries and the future of employment lands in the Inner West LGA, including planning requirements directed to retaining or increasing the supply of low cost, suitable spaces, in perpetuity.
- Clear recognition of the benefits, including economic benefits, for the collective contribution of creative industries across the LGA.

This would position Council to more easily respond to future planning proposals and development applications.

Factors that are challenging artists' ability to access affordable spaces in the local area include:

- Gentrification and a loss of industrial spaces, which would be heightened by any further loss of industrial lands.
- A shortage of, larger style industrial 'bare bones' warehouses, suitable for hybrid and large-scale production, such as sculpture and large scale visual arts, noting that newly built creative spaces at market rent are generally unaffordable for the area's specialised artists and makers.
- Deterioration and poor maintenance of older buildings

Creative industries and culture are essential to the local community and identity of the Inner West. The industry faces challenges with regard to affordability and ability to secure suitable spaces.

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6.2.3 Microbreweries



Inner West LGA has recently attracted interest as a place for microbreweries to locate. The implications of allowing microbreweries to establish in employment areas are still being monitored. Of particular concern is the potential for associated tasting rooms to lead to land use conflicts while taking away important industrial zoned land from industrial purposes. Microbrewers are an example of emerging industries and debates ensue about how to accommodate such industries within the planning framework.

In the US, microbreweries have played a key role in the revitalisation of economically distressed neighbourhoods with many reporting rising property values in areas surrounding craft breweries.[25] The research found that microbreweries have a positive impact on residential property values and areas near a craft brewery appear to have been associated with relatively higher price premiums even before the opening of the brewery. However, it also found there were no significant impacts on commercial property values. Policy makers are reportedly considering revising zoning laws and other regulations in efforts to promote the growth of microbreweries and spur economic development in their local economies.

Microbreweries with the Inner West LGA are gaining an identity and are collectively promoting their product through events. There is an opportunity to support this recent initiative and for future events to be coordinated and hosted by Council, noting that the breweries are typically hosting smaller individual events already.

The potential for expansion of microbreweries tasting rooms, as a result of representations from microbrewers, were discussed in Council Report C0318 item 2 at its 13 March 2018 meeting. Nine microbreweries were known to Council at that time, with the industry growing two-fold since 2015. In that report, Council also stated its position that a 'tasting room' would satisfy the provisions of 'industrial retail outlet,' but restricted to the serving of goods produced on the premises. Council noted several concerns related to the impact on industrial lands with an expansion of industrial retail outlets. In the months following that meeting Council engaged with the then Department of Planning and Environment multiple times to develop and refine a definition to more accurately define the microbrewery/tasting room land use.

In parallel, Liquor and Gaming NSW, working with Inner West Council, announced that a new Inner West micro-brewery licence had been drafted and would operate on a trial basis for 12 months commencing on Saturday 1 September 2018. The special authorisation is subject to certain conditions including:

- No beer, cider, spirit or liqueur may be sold on site unless they are the licensee's product
- The number of patrons on the premises does not exceed 100
- Food to be provided consistent with the responsible sale, supply and service of alcohol.

From a planning perspective, microbreweries have historically been established through the development application (see Development No. DA201400458) or complying development (see CDC No. 201700099) planning pathways, with 'industrial retail outlet' uses serving as tasting rooms or small bars for on-site consumption. This allows for the light industrial use of manufacturing (i.e. the brewing aspect of the business) to be combined with the industrial retail outlet use (i.e. the sales/consumption) under the LEPs and *State Environmental Planning Policy (Exempt and Complying Development Codes) 2008* (Codes SEPP).

[25] Nilson, I. The value of a craft brewery: On the relationship between craft breweries and property values, Article in Growth and Change, March 2019 DOI: 10.1111/grow.12292

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Due to licensing requirements requiring the provision of food, operators have relied on solutions such as food trucks as exempt development. This framework allowed for microbreweries to work around food and drink premises prohibitions normally associated with industrial zones.

The microbrewing industry has expressed frustrations with this framework and has expressed a need for harmonising the relevant controls in the three former Council LEPs relating to 'industrial retail outlets' (which has been interpreted by private and Council assessors as including tasting rooms as a retail component) to help support the development of the microbrewery industry in the Inner West LGA.

The recent introduction of the term 'artisan food and drink industry' within the Standard Instrument definitions and has also attempted to resolve this inconsistency. The term is defined as follows:

> *artisan food and drink industry means a building or place the principal purpose of which is the making or manufacture of boutique, artisan or craft food or drink products only. It must also include at least one of the following:*
>
> *(a) a retail area for the sale of the products,*
>
> *(b) a restaurant or café,*
>
> *(c) facilities for holding tastings, tours or workshops.*
>
> *Note. See clause 5.4 for controls in industrial or rural zones relating to the retail floor area of an artisan food and drink industry.*

This land use effectively allows for businesses that produces small-scale food or drink products to also sell them, operate a restaurant or café, or operate facilities for tastings, tours or workshops. Notably, these uses must be subordinate to the manufacturing of the food or drink products (see Planning Circular PS13-001 for more information on 'principal purpose'). With respect to microbreweries, this would ideally allow for permanent on-site kitchen facilities, rather than rely on exempt development such as food trucks.

At the same time the use was introduced, the Codes SEPP was amended to remove the complying development pathway for food and drink manufacturing, combined with retail sales.

Clause 5.4(10) of the three Inner West LEPs indicates that retail floor area (not including any café or restaurant area) must not exceed the following:

- Ashfield LEP: 40 per cent of the gross floor area of the industry or 400 square metres, whichever is lesser.
- Leichhardt LEP: 20 per cent of the gross floor area of the industry or 100 square metres, whichever is lesser.
- Marrickville LEP: 11 per cent of the gross floor area of industry or 400 square metres, whichever is lesser.

Prior to the introduction of the new land use, the Codes SEPP previously allowed for industrial retail outlets up to 20 per cent of the GFA of the building they are within. Allowing retail floorspace exceeding that, particularly 40 per cent of the size of the industrial component, would have a more significant impact on industrial land provision than previously existed. A consistent percentage of floorspace needs to be determined for whole of the Inner West LGA. This percentage should reflect that concerns about potential loss of industrial land to other uses.

The new land use does not contain specific size restrictions for the other uses, including the restaurant or café options. While it is intended for these components to be subordinate to the manufacturing, recent applications (DA No. 201800295 and 201800576) have included sizeable venues that are arguably major components of the proposed development.

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There is potential for the expansion of restaurant and cafes and retail floorspace within industrial zones, which would see the emphasis shift from industrial uses and production to retail and hospitality venues in these areas. Further, the expansion would potentially impacting on businesses within town centres and properties zoned for more traditional retail uses, by drawing traffic away from them at a time when they are also competing with increasing online sales. This would be inconsistent with the Greater Sydney Commission's District Plan and more recent assertions from *A Metropolis that Works* that safeguarding all existing industrial land and urban services land is an urgent priority to ensure the long-term liveability and functionality of the city.

The recent growth of the microbrewery trend has had a major influence on land use in the Inner West, particularly in industrial zones. This poses challenges with regard to management of employment lands.

6.2.4 Specialised food manufacturing

The Greater Sydney Commission identifies specialised food manufacturing as a target industry for the Inner West in the Eastern City District Plan, under Action E13, 'Supporting growth of targeted industry sectors, including industries that support a circular economy.'

The Inner West is an attractive location for specialised food manufacturing due to its close proximity to a dense customer base of cafes, restaurants, hotels and food retail as well as due to the variety of industrial stock, particularly smaller sized premises, which is suited to emerging new businesses, seeking relatively affordable rents at the early stages of operations.

One key specialisation of the Inner West is food services, i.e. manufacturers who produce ingredients sent direct to restaurants/cafes. The proximity of the Inner West to the dense clustering of restaurants and cafes in the Inner City make this an ideal location for these businesses as the transport costs and travel time are low and food is still fresh upon delivery.

Table 14 lists a number of notable food manufacturing businesses in the Inner West LGA. There are notable clusters in a number of precincts, particularly Carrington Road, which is discussed in Section 9.1.3.

Table 14: Examples of food manufacturing businesses in the Inner West LGA

Name	Address	Type	Land size	Products	Established
Faros Fish	21-25 Buckley St, Marrickville	Wholesale/Retail	1374sqm	Seafood	1969
Black Forest Smokehouse	148 Victoria Rd, Marrickville	Manufacturing/ Wholesale/Retail	1518sqm	Small Goods	1982
Poor Toms	6 Chalder Ave, Marrickville	Manufacturing/ Wholesale/Retail	231sqm	Alcohol	2015
Food Company	2/19 Unwins Bridge Rd, Sydenham	Manufacturing/ Wholesale	n/a	Condiments	1988
Serendipity Ice Cream	333-339 Enmore Rd, Marrickville	Manufacturing/ Wholesale/Retail	550sqm	Ice Cream	1966 (different location)
Yianni Fine Food	4/87-89 Moore Street, Leichhardt	Manufacturing/ Wholesale	n/a	Baked Goods	1990

The specialised food manufacturing sector has a strong history and role within the Inner West. The retention and growth of specialised food manufacturing in the Inner West LGA is dependent on the retention and management of industrial lands.

6.2.5 Cluster dynamics

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Researchers from the University of Wollongong, Monash University, and University of Technology Sydney, are undertaking a project funded by the Australian Research Council – Urban Cultural Policy and the Changing Dynamics of Cultural Production – involving in-depth urban analysis in Sydney's Inner West relevant to consideration of employment lands. The research focuses on empirical documentation of the economic benefits of cross-sectoral linkages between the creative industries and manufacturing, and the functional importance of industrial zoning, supporting enterprise development and growth, and diversified employment.

As part of their submission to the draft Employment and Retail Lands Strategy, the following discussion was provided.

Clustering occurs where enterprises locate in close proximity in order to access expertise, share space, exchange networks, build relationships and interdependencies, and to benefit from the social interactions and socalled 'buzz' generated at street level from dense networks of activity (Chapain et al. 2010). Clusters are highly sought-after among urban planners and decision-makers internationally, for they generate jobs, build place reputations, and attract talent. But cluster dynamics cannot be easily engineered from scratch. Rather they evolve over time, in place, given the right mix of social, economic and built environment features. They are most often discussed in the academic and planning literatures in relation to creative, knowledge and innovation industries (start-ups, tech, etc), but the same dynamics apply also to other sectors, notably small-scale manufacturing (Bryson and Ronayne 2014), and as our research shows, between sectors – as when creative industries and manufacturers co-locate. Why protection (and expansion) of existing industrial-zoned land in the Inner West is so critical is that the Inner West houses many such clusters. From our research, Carrington Road alone houses 15 functional clusters (i.e. networks with observable linkages and interdependencies between firms and sectors – see Gibson et al. 2017 for detail).

This Strategy acknowledges the importance of clustering dynamics to enterprise and job creation in the Inner West. It is clear that the Inner West has an advantageous presence of clusters in creative industries and small-scale manufacturing (including food manufacturing.)

The protection of existing clusters, such as in creative industries and small scale manufacturing (including food manufacturing) is important for Inner West productivity and identity. There may be opportunities to support the growth and establishment of new clusters, such as biomedical, industrial, creative and urban services in the Camperdown-Ultimo Collaboration Area.

6.2.6 Market considerations

HillPDA has undertaken research into current market conditions in the Inner West LGA as outlined below. Conversations with local agents in Leichhardt have indicated that industrial properties in Leichhardt have site and access constraints due to the surrounding residential development. For example, 37 John Street, Leichhardt is currently on the market at a reduced sales price. Feedback has been that limited on-street car parking and constraints to the manoeuvrability of trucks has detracted from the marketability of the property.

The selling agent has indicated that industrial properties in Leichhardt sell within the range of $4,000 to $5,500/sqm of site area (improved) and indicative rents are within the range of $225 to $300 per sqm of gross leasable area (GLA) per annum. The likely buyer profile is owner-occupiers and comprise mostly of small local operators of light industrial uses such as light manufacturing and workshops.

Market research of industrial properties in Marrickville found that the main industries comprise e-commerce, logistics and warehousing. Typical building areas are within the range of 250 to 500sqm with medium height clearance.

A selling agent indicated that industrial properties in Marrickville sell within the range of $4,000 to $5,000/sqm of site area (improved) and indicative gross rents are within the range of $250 to $300 per sqm per annum.

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Agents are also reporting that buyers and prospective lessees are more price conscious than interested parties in South Sydney.

In consideration of industrial precincts in the Inner West LGA, Marrickville is a popular industrial precinct due to its relative affordable price point in comparison to the industrial precincts in South Sydney and its connectivity to the Princes Highway.

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6.3 Major infrastructure influence

There are several major projects that are under construction and in the planning phase that will impact on employment lands in the Inner West LGA. These are summarised in Figure 13 and Table 15.

Figure 13: Map of major infrastructure influences



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Source: Inner West Council

Table 15: Summary of major infrastructure influences

Name	Summary	Implication for retail and employment land
Sydney Gateway	Proposed direct motorway connection between Sydney Airport and Port Botany. Will reduce travel times to international gateways helping to move people and goods around New South Wales. Additionally, it will provide improved access to all airport terminals and cater for increased rail freight, which will help take pressure off local roads.	Council owned Tyne Container Yards, Inner West Council depot as well as land owned by Sydney Airport proposed to be acquired. This affect the greater economic activity and resilience of the LGA. Refer to Section 9.1.1.
Sydney West Metro	Proposed metro line between Sydney CBD and Parramatta with a station at Bays Precinct.	Discussed in Section 9.4.3 and 9.1.7. Risk of pressure on industrial lands close to the station location.
Sydney Metro City & Southwest	Construction of a new metro rail line, approximately 16km long (of which approximately 15km is in underground tunnels) between Chatswood and Sydenham. Conversion of Bankstown Line to metro standard. Increased connectivity for Marrickville, Sydenham and Dulwich Hill to Sydney CBD and key strategic centres across the metropolitan areas.	Population growth in the *Inner West Local Housing Strategy* likely to occur near Dulwich Hill and Marrickville Stations. Planning for these centres will need to ensure that suitable employment floor space can be accommodated. Potential pressure on industrial lands for rezoning and redevelopment for other employment uses and residential uses. Refer to relevant sections of the Precinct Profiles.
Western Harbour Tunnel	A new tolled motorway tunnel connection across Sydney Harbour, and the Warringah Freeway Upgrade to integrate the new motorway infrastructure with the existing road network and to connect to the Beaches Link and Gore Hill Freeway Connection.	Increased connectivity to Inner West by Road providing opportunities for business and industry in employment lands.
WestConnex New M5	New multi lane twin motorway tunnels between the M5 East Motorway (east of King Georges Road, Beverly Hills and Bexley Road, Bexley) and St Peters, and a new road interchange and upgrade of local roads at St Peters to connect to Campbell Road and Euston Road, St Peters and Gardeners Road, Mascot.	Increased connectivity to Inner West by Road providing opportunities for business and industry in employment lands.
WestConnex M4-M5 Link	The construction of a new, tolled multi-lane road link between the proposed M4 East at Haberfield and the proposed New M5 at St Peters.	Increased connectivity to Inner West by Road.
Inner West Greenway	GreenWay Central Missing Links capital works project is a unique north-south public transport and active transport corridor which connects several precincts identified in this document eg Bays Precinct, Lilyfield, Callan Park, Canal Road, Taverners Hill, Lewisham West/Summer Hill, New Canterbury Road, Dulwich Hill.	Redevelopment around the light rail stops and implementation of the GreenWay Master Plan adopted by Council in 2018 will result in further activation, which will benefit precincts specialising in knowledge-based and creative industries jobs. The GreenWay shared path is scheduled to be completed in 2022.

Source: Major projects register, Department of Planning and Industry

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Attachment 1

INNER WEST

Item 1

GROWTH, DEMAND AND CAPACITY

Attachment 1

7.0 GROWTH, DEMAND AND CAPACITY

This section projects the demand for commercial centres and employment lands within the Inner West to 2036.

7.1 Employment floorspace

7.1.1 Method

Employment floorspace in the Inner West LGA has been estimated through an audit process. The audit was undertaken between March and June 2019. The process is summarised below.

1. Review of available data

Available data was compiled and analysed including:

- Earlier audits conducted by SGS Economics
- PCA Shopping Centre Directory 2018
- Shopping Centre News 2018
- Recent development application reports
- Information obtained from building and shopping centre operators.

2. Desktop audit

Where existing data is incomplete or there has been significant change or development, data has been supplemented in part or wholly by a desktop audit conducted using:

- Google Street View imagery (2018)
- Australian Business Register (2019)
- Geoscape building envelopes (2019).

3. Physical survey

Where the above two methods could only render incomplete or out-of-date land use information, up to date data was obtained through a visual survey in the field.

4. Quality assurance checks

- Building envelope data matches development on each lot
- Appropriate floorspace is recorded to each lot (search for outliers)
- Map to identify any missing lot data and amend.

The audit included review of employment by industry for each precinct using data from the Australian Bureau of Statistics Census data. Industries are sorted as per the Australian and New Zealand Standard Industrial Classification (ANZIC). Table 16 gives examples of each ANZIC classification[26].

Table 16: ANZIC codes and titles

Category	Example
Industrial	

[26] Further detail on ANZIC and the complete list of codes and titles can be found https://www.abs.gov.au/ausstats/abs@.nsf/mf/1292.0

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Attachment 1

Category	Example
Manufacturing	• Food production • Textile, leather clothing and footwear • Petroleum and Coal product
Wholesale Trade	• Basic material wholesaling • Machinery and equipment wholesaling • Motor vehicle and motor vehicle parts wholesaling
Electricity, Gas, Water and Waste Services	• Electricity and gas supply • Water supply, sewerage and drainage services • Waste collection, treatment and disposal services
Urban services	
Accommodation and Food Services	• Accommodation • Cafes, restaurants, take away food services • Pubs, taverns, bars
Arts and Recreation Services	• Creative and performing arts activities • Sports and recreation activities • Gambling activities
Construction	• Building construction (residential and non-residential) • Heavy and civil engineering construction • Construction services
Rental, Hiring and Real Estate Services	• Motor vehicle and transport equipment rental and hiring • Farm animal and bloodstock leasing • Property operators and real estate services
Retail Trade	• Motor vehicle, motor vehicle parts and fuel retailing • Food retailing • Furniture, clothing, pharmaceutical and other store-based retailing
Transport, Postal and Warehousing	• Road, rail, water, air and space transport • Scenic and sightseeing transport • Postal and courier pick-up and delivery • Warehousing and storage services
Other Services	• Repair and maintenance • Personal care services • Funeral, crematorium and cemetery services • Religious services • Civic, professional and other interest group services • Private households employing staff
Knowledge intensive	
Information Media and Telecommunications	• Publishing • Motion picture and sound recording activities • Library services
Financial and Insurance Services	• Finance – banking • Insurance and superannuation • Auxiliary finance and insurance services
Professional, Scientific and Technical Services	• Architectural, engineering and technical services • Legal and accounting services

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Category	Example
	• Computer system design
Administrative and Support Services	• Employment services • Travel agency and tour arrangement services • Building cleaning, pest control and gardening services
Public Administration and Safety	• Central, state and local government administration • Defence • Public order, safety and regulatory services
Health care and education	
Education and Training	• Preschool and school education • Tertiary education • Adult, community and other education
Health Care and Social Assistance	• Hospitals and Medical services • Residential care services • Social assistance services including childcare services

7.1.2 Interpretation

The results of the floorspace audit are provided in the sections that follow and in the precinct profiles at Section 9. It should be noted that the floorspace audit presents a snapshot of uses and floorspace on a site at a point in time. Floorspace, uses and vacancies change overtime.

In addition, in some instances, access to a lot or building could not be obtained making it difficult to estimate floorspace. In these instances, it was necessary to rely on building signage and occupant boards, which can be outdated. Consequently, the floorspace data provided in this report is an estimate only and should be interpreted accordingly.

As the floorspace audit captures an estimate of floorspace at a point in time, care should be taken when interpreting the data. In particular, vacant floorspace has been measured at a point in time and vacancies fluctuate according to market demand, rents and other influences such as changes in the quality of the floorspace.

7.2 Floorspace and employment projections -employment precincts

The following section projects the demand for employment lands within the Inner West LGA to 2036. The methodology used is indicated below.

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7.2.1 Projected employment

Employment projections available from Transport for NSW's Transport Performance and Analytics (TPA) at a travel zone level, released in 2019.

TPA employment projections include what appears to be an anomaly in that employment in Transport, Postal and Warehousing (TPW) in the former Leichhardt LGA being projected to increase by 8,431 between 2019 and 2036, despite the very limited supply of land zones for this purpose. This is extremely high when compared to projections for in neighbouring areas (former Ashfield LGA +23 jobs; former Marrickville LGA +232 jobs).

Consequently, in consultation with Council it was decided to apply employment TPA employment projections for the former Ashfield and Marrickville LGAs and for Leichhardt the compound growth rate for TPW employment between 2016 and 2026 was applied at the Travel Zone (TZ) level to give total growth of 58 TPW jobs, in line with other LGAs.

Lastly, having accounted for this, as requested by Council, TPA employment projections were prorated to Forecast id population projections for Inner West LGA to better align with retail demand modelling.

Applying this methodology, employment within the LGA is forecast to increase from 77,510 jobs in 2019 to 94,950 jobs by 2036. This represents a 17,420 or 22% employment growth over the period.

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Table 17: Employment projections by scenario

Industry	2019	2021	2026	2031	2036	Net change
Agriculture, Forestry and Fishing	116	123	137	147	155	40
Mining	13	11	11	11	11	-2
Manufacturing	6,168	6,278	6,788	6,895	6,883	715
Electricity, Gas, Water and Waste Services	136	144	155	163	171	35
Construction	7,021	7,139	7,474	7,832	8,240	1,219
Wholesale Trade	2,815	2,978	2,973	2,866	2,832	17
Retail Trade	9,094	9,317	9,566	9,897	10,248	1,154
Accommodation and Food Services	6,471	6,886	7,571	7,711	7,892	1,421
Transport, Postal and Warehousing	3,168	3,216	3,377	3,416	3,439	271
Information Media and Telecom.	1,601	1,614	2,751	2,751	2,765	1,164
Financial and Insurance Services	1,501	1,577	1,678	1,761	1,844	343
Rental, Hiring and Real Estate Ser.	1,548	1,580	1,708	1,794	1,885	337
Professional, Scientific & Technical Ser.	8,035	8,446	9,690	10,360	11,057	3,022
Administrative and Support Ser.	2,557	2,459	2,567	2,629	2,743	186
Public Administration and Safety	4,908	5,131	5,540	5,891	6,162	1,254
Education and Training	6,557	6,962	7,685	8,196	8,667	2,110
Health Care and Social Assistance	10,062	10,115	11,630	12,353	13,058	2,995
Arts and Recreation Services	1,865	1,924	2,112	2,240	2,371	506
Other Services	3,875	4,136	4,328	4,436	4,528	653
Total	**77,511**	**80,038**	**87,742**	**91,346**	**94,952**	**17,442**

Source: TPA 2016 employment projections, HillPDA

7.2.2 Projected floorspace

Future floorspace has been projected based on the above employment projections and industry standard benchmarks of floorspace per worker. The projected floorspace requirements are for an additional demand of around 217,730sqm of floorspace to be accommodated in the Inner West LGA's employment precincts as seen in the table below.

Table 18: Total net change in floorspace demand by industry to 2036 (sqm)

Industry	Net change in floor space demand to 2036(sqm)
Agriculture, Forestry and Fishing	1,186
Mining	-67
Manufacturing	67,938
Electricity, Gas, Water and Waste Services	6,357
Construction	24,376
Wholesale Trade	964
Retail Trade	6,060
Accommodation and Food Services	4,263
Transport, Postal and Warehousing	46,401
Information Media and Telecommunications	4,656
Financial and Insurance Services	1,030
Rental, Hiring and Real Estate Services	4,041
Professional, Scientific and Technical Services	7,556
Administrative and Support Services	1,305
Public Administration and Safety	5,015
Education and Training	6,329
Health Care and Social Assistance	8,986
Arts and Recreation Services	3,036
Other Services	18,294
Total	**217,727**

Source: HillPDA

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7.2.3 Occupied employment floorspace by precinct

The total floorspace demand has been distributed across Inner West LGA precincts in Table 19, having regard to each precinct's unique land use mixture and market share, as observed during the land use audit.

Combined, the employment precincts currently accommodate around 1.77 million square metres of occupied employment floorspace. Over the next few decades, this is forecast to increase to around 1.99 million square metres across the precincts.

Table 19: Total occupied employment floorspace demand by employment precincts

Precinct	Current floorspace (sqm)*	Demand	Net change
Addison Road Industrial	85,434	94,569	9,135
Balmain Road Industrial	18,073	20,128	2,055
Balmain Working Waterfront	4,775	5,366	591
Camperdown Core Precinct	157,883	176,288	18,405
Camperdown Frame Area	23,366	25,353	1,987
Canal Road Arts Precinct	33,943	37,492	3,549
Canterbury Road Enterprise Corridor	5,576	6,016	440
Carrington Road Industrial	106,218	122,555	16,337
Dulwich Hill Industrial	4,486	5,164	678
Gladstone Street Business Precinct	9,774	10,662	888
Kings Bay Core Precinct	16,845	18,078	1,233
Kings Bay Frame Area	13,111	14,219	1,108
Leichhardt Precinct Frame Area	8,449	9,045	596
Lewisham Industrial	7,900	8,606	706
Lilyfield Industrial	7,256	7,940	684
Marion Street Industrial	4,064	4,444	380
Marrickville Sydenham	565,875	641,974	76,099
Milton Street	1,791	1,967	176
Moore Street Industrial	60,355	69,328	8,973
Precinct 75	3,062	3,467	404
Princess Highway and Airport Enterprise	278,186	307,356	29,170
St Peters Triangle	61,302	68,927	7,625
Stanmore Bridge Road West	3,799	4,655	856
Summer Hill Industrial	9,911	10,716	805
Taverners Hill Core Precinct	38,117	42,256	4,139
Taverners Hill Frame Area	70,059	76,800	6,741
Terry Street Industrial	15,159	16,986	1,827
Victoria Road Marrickville	87,237	100,059	12,822
White Bay Industrial	72,704	82,022	9,318
Total	**1,774,710**	**1,992,437**	**217,727**

Source: HillPDA, *excludes residential space

7.2.4 Total employment floorspace demand by precinct

It is important to maintain some level of vacancy in industrial areas to allow for the free and efficient movement of businesses, as well as to provide space for new businesses. Current vacancy rates across the precincts is around 2.9 per cent. Recent research has revealed that the industrial vacancy rate across the eastern seaboard is around 2.4 per cent, with Sydney's vacancy rate being 1.8 per cent. In response, a conservative vacancy rate of 2.5 per cent has been assumed for each precinct.

Accounting for residential space and a target vacancy rate, combined, the employment precincts currently accommodate around 1.78 million square metres of floorspace, as detailed in Table 19.

Floorspace demand is forecast to increase to around 2.05 million square metres across the precincts, representing an increase of around 271,245sqm over the period.

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Table 20: Total floorspace demand by precinct (including current residential and target vacancy rate)

Precinct	Current space*	Demand	Net change
Addison Road Industrial	85,434	97,043	11,609
Balmain Road Industrial	18,073	20,907	2,834
Balmain East Working Waterfront	6,808	7,642	834
Camperdown Core Precinct	157,883	180,944	23,061
Camperdown Frame Area	23,366	26,013	2,648
Canal Road Arts Precinct	33,943	38,478	4,535
Canterbury Road Enterprise Corridor	5,576	6,169	593
Carrington Road Industrial	106,218	125,831	19,613
Dulwich Hill Industrial	4,486	5,303	817
Gladstone Street Business Precinct	9,774	10,929	1,155
Kings Bay Core Precinct	16,845	18,524	1,680
Kings Bay Frame Area	13,111	14,665	1,554
Leichhardt Precinct Frame Area	8,449	9,859	1,410
Lewisham Industrial	7,900	8,829	929
Lilyfield Industrial	7,256	8,148	892
Marion Street Industrial	4,064	5,184	1,120
Marrickville Sydenham	565,875	658,642	92,767
Milton Street	1,791	2,019	228
Moore Street Industrial	60,355	71,179	10,824
Precinct 75	3,062	3,558	496
Princess Highway and Airport Enterprise	278,186	315,257	37,071
St Peters Triangle	61,302	70,717	9,415
Stanmore Bridge Road West	3,799	4,785	986
Summer Hill Industrial	9,911	10,996	1,085
Taverners Hill Core Precinct	38,117	43,345	5,228
Taverners Hill Frame Area	70,059	78,725	8,665
Terry Street Industrial	15,159	17,436	2,277
Victoria Road Marrickville	87,237	102,712	15,476
White Bay Industrial	73,551	84,993	11,442
Total	**1,777,590**	**2,048,834**	**271,244**

Source: HillPDA, *Includes residential space

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7.2.5 Capacity analysis

The capacity for each employment precinct to accommodate the demand forecasted under different proportions of take-up is shown in Table 20. Take-up ratios of 60 per cent, 75 per cent and 100 per cent have been applied. A 60 per cent take up ratio indicates the result if 60 per cent of the total capacity of the precinct under current planning controls was developed. The resulting development floorspace has been subtracted from the capacity of the precinct. Where capacity is insufficient to accommodate the projected floorspace demand, a negative figure results. A positive number indicates a surplus in capacity.

Overall, the projections demonstrate that under the 60 per cent capacity scenario there would be a shortfall in capacity of around 432,540sqm, while under the 75 per cent scenario the shortfall would be around 28,465sqm. If full capacity was achieved there would be a surplus of 644,990qm.

Table 21 Employment precinct capacity assessment by precinct

Precinct	Scenario 1		
	60%	75%	Max
Addison Road Industrial	-41,173	-27,205	-3,926
Balmain Industrial	-12,627	-10,557	-7,107
Balmain East Working Waterfront	-2,532	-1,255	875
Camperdown Core Precinct	-126,050	-112,326	-89,453
Camperdown Frame Area	-18,490	-16,609	-13,474
Canal Road Arts Precinct	-10,260	-3,205	8,552
Canterbury Road Enterprise Corridor	7,109	10,429	15,962
Carrington Road Industrial	-53,887	-35,901	-5,924
Dulwich Hill Industrial	-2,588	-1,909	-777
Gladstone Street Business Precinct	-4,507	-2,901	-225
Kings Bay Core Precinct	-7,360	-4,569	82
Kings Bay Frame Area	9,185	15,148	25,085
Leichhardt Precinct Frame Area	698	3,337	7,736
Lewisham Industrial	74	2,300	6,010
Lilyfield Industrial	-1,842	-265	2,362
Marion Street Industrial	-2,040	-1,254	56
Marrickville Sydenham	-346,009	-267,851	-137,587
Milton Street	-122	352	1,142
Moore Street Industrial	-29,695	-19,324	-2,039
Precinct 75	4,051	5,953	9,123
Princess Highway and Airport Enterprise	266,092	411,430	653,659
St Peters Triangle	-21,505	-9,202	11,303
Stanmore Bridge Road West	-2,896	-2,424	-1,637
Summer Hill Industrial	29,050	39,061	55,747
Taverners Hill Core Precinct	-19,839	-13,963	-4,169
Taverners Hill Frame Area	15,194	38,674	77,807
Terry Street Industrial	-6,582	-3,869	654
Victoria Road Marrickville	-618	24,905	67,444
White Bay Industrial	-53,372	-45,466	-32,290
Total	**-432,540**	**-28,466**	**644,989**

Source: HillPDA, existing floorspace includes residential space at the time of the audit

The projections indicate that most precincts are unlikely to be able to accommodate demand into the future. This signals a likely shift in the location of employment activities with Taverners Hill Frame Area and the Princes Highway Corridor Precinct becoming increasingly important in accommodating the Inner West LGA's future demand. Measures to improve the attractiveness and amenity of these precincts will assist the Inner West LGA to continue to attract employment demand. The projections also suggest that increases in densities in non-corridor employment precincts, particularly the IN1 - General Industrial and IN2 - Light Industrial lands, may be needed to accommodate future demand.

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7.3 Non-retail commercial floorspace demand

The following section forecasts the demand for additional employment space (predominantly office space) to be accommodated in the commercial centres of the Inner West LGA over the next 17 years (2019-2036).

Non-retail commercial floorspace in the commercial centres refers to floorspace that is used for businesses and other employment uses other than retail. Occupiers are generally in a range of industries and services including finance, insurance, real estate, medical, travel, education and recreation. Some of these businesses such as banks with customer services and travel agents will occupy shop front space to gain visual exposure. Other businesses will generally occupy office premises in suites above ground floor shops or in stand-alone office buildings (single occupier or multi-tenanted).

The base for the projections in this section have been the TPA's 2016 employment forecasts for the Inner West LGA by small areas (Travel Zone). This is then prorated to the Forecast Id projections to be consistent with the retail chapter.

The methodology to estimate the required office space to meet forecast growth in employment for each commercial centre was as follows:

1. Assessed TPA employment projections by ANZSIC 1-digit codes
2. Apportioned employment by industry types to the main land use categories being industrial areas, commercial centres and other destination zones (including special use zones)
3. Prorated TPA employment projections at the ANZSIC 1 Digit level to Forecast id population forecasts to be consistent with industrial and retail demand modelling
4. Estimate employment directed to individual centres based on their current proportion of employment by industry sector
5. Apply observed and industry standard employment densities to individual industry sectors employment to estimate floorspace.

The TPA projections are provided in the Table 22.

Table 22: TPA employment projections 2019-2036, Inner West LGA

Industry	2019	2026	2036	Change 2019-2036
Agriculture, Forestry and Fishing	116	137	155	40
Mining	13	11	11	-2
Manufacturing	6,168	6,788	6,883	715
Electricity, Gas, Water and Waste Services	136	155	171	35
Construction	7,021	7,474	8,240	1,219
Wholesale Trade	2,815	2,973	2,832	17
Retail Trade	9,094	9,566	10,248	1,154
Accommodation and Food Services	6,471	7,571	7,892	1,421
Transport, Postal and Warehousing	3,168	3,377	3,439	271
Information Media and Telecommunications	1,601	2,751	2,765	1,164
Financial and Insurance Services	1,501	1,678	1,844	343
Rental, Hiring and Real Estate Services	1,548	1,708	1,885	337
Professional, Scientific and Technical Services	8,035	9,690	11,057	3,022
Administrative and Support Services	2,557	2,567	2,743	186
Public Administration and Safety	4,908	5,540	6,162	1,254
Education and Training	6,557	7,685	8,667	2,110
Health Care and Social Assistance	10,062	11,630	13,058	2,995
Arts and Recreation Services	1,865	2,112	2,371	506
Other Services	3,875	4,328	4,528	653
Total	**77,511**	**87,742**	**94,952**	**17,442**

Source: TPA 2016 employment projections

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The next step involves allocating the forecast jobs to the employment zones: industrial zones, commercial centres and special infrastructure. The assumptions are shown in Table 23.

Table 23: Assumed allocation of jobs by land use zone

	% directed towards industrial Precincts	% directed towards to Commercial Centres	Remainder (Special Purpose, etc)
Agriculture, Forestry and Fishing	50%	50%	0%
Mining	50%	50%	0%
Manufacturing	95%	5%	0%
Electricity, Gas, Water and Waste Services	90%	10%	0%
Construction	50%	40%	10%
Wholesale Trade	70%	30%	0%
Retail Trade	15%	85%	0%
Accommodation and Food Services	10%	90%	0%
Transport, Postal and Warehousing	95%	5%	0%
Information Media and Telecommunications	10%	85%	5%
Financial and Insurance Services	10%	90%	0%
Rental, Hiring and Real Estate Services	30%	70%	0%
Professional, Scientific and Technical Services	10%	90%	0%
Administrative and Support Services	20%	80%	0%
Public Administration and Safety	10%	75%	15%
Education and Training	5%	35%	60%
Health Care and Social Assistance	5%	35%	60%
Arts and Recreation Services	10%	70%	20%
Other Services	40%	50%	10%
Total (weighted average)	**28%**	**56%**	**16%**

Jobs in retail and food services will allocate to shop front retail space rather than office space. The balance of jobs will be in office space. Some jobs in nominally office-based industries will allocate to shop front space, particularly real estate, travel, banking services and sometimes medical services.

Based on the above method, jobs in office space in the commercial centres were forecast to increase from 30,000 in 2019 to around 34,850 in 2026, a net increase of 4,850 jobs. By 2036 the number of workers in office space is expected to reach 38,400, a net increase of 8,400.

Assuming 20sqm GFA per worker and 5 per cent vacancy this calculates to an additional 100,000sqm by 2026 and 176,000sqm by 2036.

Table 24 provides the required allocation of office space for each of the commercial centres, based on the TPA forecasts at SA2 and Travel Zone levels.

Table 24: Forecast Commercial office floorspace in the commercial centres 2019-2036

	Net increase in workers		Required GFA		
Commercial Centre	2019-26	2026-36	2019-26	2026-36	Total 2016-36
Ashfield	409	423	8,606	8,905	17,511
Balmain	0	96	0	2,019	2,019
Leichhardt	799	154	16,816	3,249	20,065
Rozelle	834	1,368	17,553	28,797	46,350
Marrickville	891	459	18,756	9,670	28,426
Newtown-Enmore	250	134	5,260	2,828	8,088
Petersham and Stanmore	304	197	6,402	4,142	10,543
Leichhardt Frame	402	170	8,472	3,574	12,045
Camperdown Frame	83	45	1,753	943	2,696
Others	874	483	18,399	10,166	28,565
Total	**4,846**	**3,529**	**102,017**	**74,291**	**176,309**

Source: HillPDA estimate from TPA forecasts at SA2 level

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7.4 Retail floorspace demand

Retail floorspace is the total area of a structure leased for the selling of goods (foods, personal and household goods) and services (hair and beauty, optical dispensing, dry cleaning services) excluding non-retail commercial services such as real estate, financial and medical services (notwithstanding these businesses occupy shop front spaces). Demand for retail space is derived mainly from three sources being residents (household expenditure), workers and visitors or tourists. The majority of retail sales in Inner West LGA are derived from residents. For the purpose of the modelling, interstate and international tourists have been excluded, as the numbers are not significant with some capture of expenditure from beyond the LGA. The first step in the modelling is to define the smaller areas and forecast population growth in these areas. Travel zones were adopted as this is the smallest geographical area providing population projections. Population forecasts are shown in Table 25.

Table 25: Population forecasts

Small area population zone	2016	2021	2026	2031	2036
Annandale	9,973	10,124	10,281	10,456	10,776
Ashfield	25,546	27,682	29,026	30,160	30,818
Balmain	11,146	11,318	11,184	11,052	11,033
Balmain East	2,053	2,049	2,008	1,990	1,999
Birchgrove	3,415	3,284	3,220	3,199	3,200
Camperdown	3,689	4,160	4,439	4,496	4,780
Croydon	5,421	5,493	6,180	6,924	6,999
Dulwich Hill	14,295	16,109	16,463	16,601	16,833
Enmore	4,125	4,156	4,165	4,167	4,173
Haberfield	6,779	6,538	6,569	6,612	6,780
Leichhardt	15,514	18,488	21,333	21,753	23,307
Lewisham	3,383	4,760	5,643	5,703	5,940
Lilyfield	8,088	8,113	8,041	7,982	8,026
Newtown	8,411	8,525	8,506	8,495	8,517
Petersham	8,522	9,320	10,206	10,202	10,318
Rozelle	9,348	9,310	9,345	9,465	9,429
St Peters	4,546	5,654	6,486	7,531	8,052
Stanmore	8,320	8,657	9,110	9,179	9,221
Summer Hill	7,666	8,330	8,701	8,969	9,076
Tempe	3,782	3,730	3,722	3,734	3,803
Marrickville	28,000	29,549	32,288	35,004	37,585
TOTAL	192,022	205,349	216,916	223,674	230,665

Source: Population Id

Expenditure data was sourced from MDS Marketinfo 2017 which utilises national accounts, ABS Census and ABS Household Expenditure Survey data to derive estimated household expenditure down to SA1 level for 625 categories of expenditure. Average expenditure per capita in retail goods and services is shown in Table 26.

Table 26: Average expenditure per capita ($2018)

	Food, Groceries & Liquor*	Drinks & Meals out**	Apparel	Bulky Goods***	Other Goods	Personal Services#	Total
Annandale	5,595	3,540	1,870	2,731	4,173	732	18,641
Ashfield	4,577	2,715	1,277	1,551	3,073	439	13,632
Balmain	6,112	3,929	2,095	3,009	4,552	800	20,497
Balmain East	6,219	4,096	2,146	3,002	4,792	868	21,123

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	Food, Groceries & Liquor*	Drinks & Meals out**	Apparel	Bulky Goods***	Other Goods	Personal Services#	Total
Birchgrove	6,201	3,969	2,250	3,354	4,600	822	21,196
Camperdown	6,039	4,973	2,008	2,374	4,954	852	21,199
Croydon	4,776	2,424	1,276	1,840	3,150	464	13,930
Dulwich Hill	5,129	2,952	1,436	1,995	3,635	539	15,686
Enmore	5,164	3,430	1,542	2,032	3,868	638	16,674
Haberfield	5,229	2,513	1,512	2,205	3,422	540	15,420
Leichhardt	5,212	3,218	1,617	2,309	3,839	670	16,865
Lewisham	5,568	3,284	1,671	2,412	3,995	598	17,529
Lilyfield	5,462	3,030	1,710	2,565	3,952	677	17,395
Newtown	5,414	3,991	1,705	2,245	4,241	735	18,330
Petersham	5,371	3,379	1,597	2,269	3,949	620	17,185
Rozelle	5,899	4,086	2,115	2,974	4,479	839	20,392
St Peters	5,086	3,395	1,503	2,179	3,778	642	16,582
Stanmore	5,459	3,534	1,723	2,317	3,960	661	17,654
Summer Hill	5,107	3,225	1,532	2,066	3,687	567	16,184
Tempe	4,719	2,363	1,135	1,937	3,317	458	13,929
Marrickville	4,858	2,683	1,275	1,801	3,375	490	14,482
TOTAL	5,255	3,266	1,591	2,198	3,812	618	16,741

* Includes take-away liquor
** Includes fast foods and meals and drinks in restaurants, clubs and hotels
*** Includes furniture, electrical goods, hardware, domestic appliances and the like
# includes hair and beauty, clothing alterations, video hire and optical dispensing but does not include travel, real estate, financial and medical services
Sources: MDS Marketinfo 2017, ABS Household Expenditure Survey 2015-16 and HillPDA

Converting household expenditure by small geographical area into retail sales at each centre is done by assuming varying capture rates. Table 27 and Table 28 show the assumed capture rates for food, grocery and liquor (FGL) shopping and non-FGL shopping. Totals will generally be 90 per cent or less because residents shop outside Inner West LGA (eg close to work or travelling). We estimate that around 35% of total retail sales escape the LGA largely because the LGA lacks any destination regional shopping centre and homemaker centre. A considerably level of expenditure is captured by Broadway Shopping Centre and Burwood and a proportion of bulky goods expenditure would be captured by the Lidcombe Auburn Parramatta Road corridor.

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Table 27: Assumed capture rates for FGL household expenditure

Small Area	Ashfield	Haber-field	Leich-hardt	Balmain & Rozelle	Marrick-ville	Newtwn/ Enmore	Summer-hill	Leich-hardt Frame	Camper-down Frame	Other	TOTAL
Annandale			15%					10%	5%	10%	40%
Ashfield	80%							0%		6%	86%
Balmain				70%						7%	77%
Balmain East				70%						7%	77%
Birchgrove				70%						7%	77%
Camperdown						50%		8%	5%	7%	70%
Croydon	20%									7%	27%
Dulwich Hill	20%				40%		5%			25%	90%
Enmore					25%	50%				4%	79%
Haberfield	15%	35%	20%					8%		7%	85%
Leichhardt			70%					10%		4%	84%
Lewisham	20%		10%		20%		20%	8%		4%	82%
Lilyfield			60%	20%				3%		4%	87%
Newtown						75%		3%		7%	85%
Petersham	20%		25%		25%			3%		7%	80%
Rozelle			15%	55%						4%	74%
St Peters					25%	40%				7%	72%
Stanmore			10%		25%	25%		8%	5%	7%	80%
Summer Hill	25%						50%			4%	79%
Tempe					65%					12%	77%
Marrickville					65%					12%	77%
From Beyond	5%	10%	10%			50%		5%	10%	8%	75%

Source: HillPDA estimate

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Table 28: Assumed capture rates for Non-FGL household expenditure

Small Area	Ashfield	Haber-field	Leich-hardt	Balmain & Rozelle	Marrick-ville	Newtwn/ Enmore	Summer-hill	Leich-hardt Frame	Camper-down Frame	Other	TOTAL
Annandale			9%					10%	5%	10%	34%
Ashfield	44%									6%	50%
Balmain				39%						7%	46%
Balmain East				39%						7%	46%
Birchgrove				39%						7%	46%
Camperdown						28%		8%	5%	7%	48%
Croydon	11%									7%	18%
Dulwich Hill	11%				22%		3%			25%	61%
Enmore					14%	28%				4%	45%
Haberfield	8%	19%	12%					8%		7%	55%
Leichhardt			42%					10%		4%	56%
Lewisham	11%		6%		11%		11%	8%		4%	51%
Lilyfield			36%	11%				3%		7%	57%
Newtown						41%		3%		7%	51%
Petersham	11%		15%		14%			3%		7%	50%
Rozelle			9%	30%						4%	43%
St Peters					14%	22%				10%	46%
Stanmore			6%		14%	14%		8%	5%	4%	51%
Summer Hill	14%						28%			4%	45%
Tempe					36%					10%	46%
Marrickville					36%					10%	46%
From Beyond	5%	10%	10%	5%		50%		10%	100%	8%	47%

Source: HillPDA estimate

Applying the above capture rates to expenditure by trade area residents for each centre derives the estimated total retail sales which is shown in Table 29.

Table 29: Estimated total retail sales by Commercial Centre ($millions in 2018 dollars)

Commercial Centre	Food and Groceries	Meals Out	Non-Food Expenditure	TOTAL
Ashfield	160.3	70.6	121.3	352.3
Marrickville	107.2	53.2	88.8	249.2
Newtown/Enmore	116.2	74.9	88.8	279.9
Leichhardt Core	63.4	47.3	71.7	182.5
Balmain	59.7	37.1	38.4	135.3
Rozelle	49.3	26.6	47.6	123.5
Marrickville Metro	69.5	19.8	56.1	145.3
Marion St (Leichhardt Marketplace)	80.0	14.4	62.9	157.2
Leichhardt Frame	30.1	16.7	56.7	103.4
Camperdown Frame	6.9	4.1	58.4	69.4
Others	138.0	111.1	141.0	390.1
TOTAL	**880.5**	**475.9**	**831.7**	**2,188.1**

Source: HillPDA estimate

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Total retail sales were cross-checked with reported turnover figures, where available, with retail supply figures and industry benchmark retail turnover densities.[27]

Forecast total retail sales is derived from population growth. The forecast in the table immediately below has assumed 1 per cent real growth per annum per capita for food, groceries and meals out expenditure and 0.5 per cent per annum for non-food goods and services. This is generally in line with the historic trend since 1986 (ABS Retail Sales).

Table 30: Estimated total retail sales in 2036 by Commercial Centre ($millions in 2018 dollars)

Commercial Centre	Food and Groceries	Meals Out	Non-Food Expenditure	TOTAL
Ashfield	220.1	97.0	152.5	469.6
Marrickville	151.8	75.4	115.0	342.1
Newtown/Enmore	153.9	99.2	107.3	360.4
Leichhardt Core	97.4	73.0	100.9	271.3
Balmain	70.6	43.9	41.5	156.0
Rozelle	58.2	31.4	51.5	141.1
Marrickville Metro	98.3	28.1	72.6	199.0
Marion St (Leichhardt Marketplace)	103.1	13.6	71.3	187.9
Leichhardt Frame	41.7	23.1	71.8	136.5
Camperdown Frame	8.9	5.4	69.0	83.3
Others	185.7	150.0	173.4	509.0
TOTAL	**1,189.5**	**640.0**	**1,026.7**	**2,856.3**

Source: HillPDA estimate

Required floorspace is calculated by dividing forecast retail sales by industry standard retail turnover density (RTD) levels, measured as retail sales divided by leasable square metres ($/sqm). RTDs vary by location and retail store type. A target of $11,000 to $12,000/sqm would be required for supermarkets in the Sydney metropolitan area. However bulky goods and department stores would have lower turnovers, generally less than $4,000/sqm. For the purpose of the demand forecast modelling the RTDs in Table 31 were assumed.

Table 31: Assumed Target RTD

Retail Store Type	$/sqm
Supermarkets	12,000
Specialty Foods	9,500
Take-away Foods	9,500
Cafes, restaurants, clubs, etc	6,000
Department Stores	3,700
Apparel Stores	6,000
Bulky Goods	3,700
Other Non-Food Goods	5,250
Selected Personal Services	3,500

Sources: Various including Shopping Centre News, PCA Shopping Centre Directory, ABS Retail Survey 1998-99 (adjusted to current dollars), various annual reports, Urbis Retail Averages and various consultancy reports

[27] Shopping Centre News has reported retail sales for most of the indoor shopping centres including Ashfield Mall, Leichhardt Marketplace, Norton Plaza and Marrickville Metro.

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Average target is around $7,400/sqm. Table 32 provides the forecast demand for retail floorspace by commercial centre. It is assumed that target RTDs will increase at a rate of 0.4 per cent per annum.

Table 32: Forecast demand and current supply of retail floorspace (sqm)*

	Current Supply**	Demand in 2018	Demand in 2026	Demand in 2036	Additional GLA Required	Additional GFA***
Ashfield	53,205	50,373	57,513	61,485	8,280	9,741
Marrickville	27,650	35,428	40,896	44,567	16,917	19,902
Newtown/Enmore	43,730	39,262	43,511	46,396	2,666	3,137
Leichhardt Core	26,707	26,746	34,905	36,492	9,785	11,511
Balmain	19,627	18,196	18,612	19,293	-334	-392
Rozelle	18,520	18,126	18,443	18,994	474	558
Marrickville Metro	19,136	21,955	25,278	27,446	8,310	9,777
Marion Street Leichhardt	14,934	23,545	24,706	25,726	10,792	12,697
Leichhardt Frame	26,793	19,700	22,970	23,838	-2,955	-3,476
Camperdown Frame	26,041	16,341	17,629	18,110	-7,931	-9,331
Others	70,281	64,509	72,627	77,353	7,072	8,320
TOTAL	**346,624**	**334,180**	**377,091**	**399,701**	**53,077**	**62,443**

* excludes pubs and taverns

** Sources: Various including:
Leichhardt Commercial and Retail study: Norton Street and Parramatta Road, SGS 2016
Ashfield, Sydney Retail Impact Assessment of proposed Woolworths supermarket, Location IQ 2019
Marrickville Metro Economic Impact Assessment, Pitney Bowes 2010
IBECON land use data across Greater Sydney 2004
HillPDA land use audit

*** Assuming 15 per cent of GFA is non-leasable.

Based on this information, an additional 60,000sqm (GFA) of additional retail floorspace should be planned for in the LGA. Nearly 30,000sqm will be required in Marrickville. This is understandable given the current strong trading levels for Marrickville Metro and the high forecast of population growth in the locality. A further 18,000sqm is required in the Leichhardt area (Leichhardt core, frame and Marion Street). Almost 10,000sqm more should be planned for in Ashfield and just over 8,000sqm in other locations including Dulwich Hill.

There will be a need for additional supermarkets given a further 30,000 more residents in the LGA by 2036. Already there are several centres that lack a full-line supermarket. Newtown for example lacks a full-line anchor supermarket which is unusual for its size and trading position. The modelling suggests that there is current demand to support one. Balmain or Rozelle could also support an additional full-line supermarket. Between 2026 and 2036 Ashfield could support a further supermarket. Dulwich Hill or Summer Hill may provide an alternative location to Ashfield.

While the performance of department stores has been a little mundane over the past 15 years, there remains an undersupply of such space in the LGA. An additional DDS could be supported in the LGA by 2026 either in Marrickville or in Leichhardt.

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7.5 Implications

Employment precincts

Demand for employment precincts are likely to experience:

- An increase in employment of around 3,208 jobs, representing 18 per cent of the LGAs forecast growth over the 17 years from 2019
- Demand for an additional 271,245sqm of floorspace.

Combined, the employment precincts currently accommodate around 1.8 million sqm of occupied employment floorspace.

Demand modelling suggest floorspace is forecast to increase to around 2.05 million square metres across the precincts, representing an increase of around 315,000sqm over the period.

Assuming all sites could be redeveloped to 60 per cent of their allowable yield under current planning controls, there would be a shortfall in capacity of around 432,540sqm. When developed to their maximum allowable yield, there would be a surplus in capacity of approximately 644,990sqm.

Commercial office

Jobs in office space in the commercial centres have been forecast to increase from around 30,010 in 2019 to 34,860 in 2026, a net increase of around 4,850 jobs. By 2036, the number of workers in office space is expected to reach around 38,390, a net increase of around 8,380 jobs.

Assuming 20sqm GFA per worker and 5 per cent vacancy, an additional 102,000sqm of commercial floorspace will be needed by 2026 and around 176,000sqm by 2036.

Retail

An additional 60,000sqm of retail floorspace (GFA) should be planned for in the LGA. The area with the strongest need will be in Marrickville. This is understandable given the current strong trading levels for Marrickville Metro and the high forecast of population growth in its trade area.

Two or three more full line supermarkets should be planned for – one in Newtown, one in Balmain or Rozelle and one in the Ashfield / Dulwich Hill / Summer Hill area. A further discount department store could be supported either in the Marrickville or Leichhardt.

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Item 1

PLANNING REVIEW

Attachment 1

8.0 PLANNING REVIEW

Inner West Council is the product of the amalgamation of three previous councils: Municipality of Ashfield, Municipality of Leichhardt, and Marrickville Council. Since its creation in mid-2016, Inner West Council has operated and administered four LEPs:

- *Ashfield Local Environmental Plan 2013*
- *Leichhardt Local Environmental Plan 2013*
- *Leichhardt Local Environmental Plan 2000* (relating to Balmain Leagues Club site)
- *Marrickville Local Environmental Plan 2011.*

Inner West Council is undertaking detailed planning work to align the planning instruments and consolidate the controls into a single instrument. The study brief requires this report to:

- Review the business and industrial zones across the LEPs and identify key differences in permitted land uses. This is explained in detail within this Chapter and on a location specific basis within Chapter 9.0.
- Research and evaluate the potential impacts of the recent introduction of 'artisan food and drink industry' on competing land uses in industrial zones. This is addressed in Section 8.1.7.
- Review the floorspace requirements for 'industrial retail outlet' and 'artisan food and drink industry' and 'neighbourhood shops', across the LEPs. This is addressed in Sections 8.1.9 and 8.1.7
- Identify zones that currently permit the 'artisan food and drink industry,' which sits under the 'light industry' group term. This is explored within Sections 8.1.7, 8.2 and explored on a precinct level in Chapter 9.0.

During the course of the study, additional issues have arisen including:

- The appropriateness of residential uses being permissible in business zones given the ongoing pressure to rezone employment lands
- The impact of creative industries on the long-term supply of employment land
- The need for a clear strategy to accommodate creative industries in the LGA, including the need for suitable, low cost spaces which permit 24 hour per day operations, at low rents and without high maintenance or building improvement costs
- The appropriateness of employment land being developed for live-work commercial mixed uses
- The need to identify a long term supply of employment land
- The need for a consistent approach to zoning centres and employment land across the LGA.

Each of these matters is considered below.

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8.1 Current issues

8.1.1 Protecting and growing non-residential floor space within centres

This Study establishes the following:

- a hierarchy of centres, detailed in Section 9.2
- projected demand for retail and office floor space within centres, detailed in Sections 7.3 and 7.4
- a need for flexible ground floor premises within mixed use buildings, detailed in Section 8.1.2
- the need to accommodate a wider range of employment uses within Centres, to relieve pressure on industrial and urban services lands.

Planning controls applicable to mixed use zones in Inner West have been reviewed, to better understand the trends with regard to delivery of employment floor space within centres. While the size and usability of this type of space is explored further in Section 8.1.2, this section considers the actual quantity of retail and office floor space currently available and how planning controls will need amendment to ensure existing supply is protected and grown into the future.

Section 7.5 forecasts the need for an additional 176,000 sqm of office space by 2036 and an additional 60,000sqm of retail floor space (GFA) in our Centres.

Development activity sections within the precinct profiles in Section 9.2 demonstrate that mixed use redevelopments in centres have maximised their residential floor space as a proportion of the overall floor space available under existing planning controls, confining non-residential uses almost exclusively to the ground floor. If this trend continues unchecked it will tend to restrict non-residential uses to the ground floor in centres. Without a requirement to provide above-ground non-residential floor space, under current planning controls, there are only limited opportunities to expand commercial floor space in centres.

There is also a risk that existing planning controls will not only constrain potential for growth in commercial floor space in centres but also result in the reduction of existing capacity. For instance, current controls would allow multi-level standalone office buildings in Ashfield and Marrickville town centres to be redeveloped with residential above the ground floor.

Action is required to avoid the loss of town centre commercial employment in Inner West to other parts of Sydney and to reduce pressure for rezoning of industrial and urban services lands for office/retail uses.

Planning controls to protect and grow commercial floor space in centres are summarised below and reflected in Action 1.2.2 of the Strategy:

Level in hierarchy	Centre	Recommended planning controls
Major Centre	Ashfield	▪ incorporate a clause within the LEP specifying no net loss of commercial floor space, applied on a site-by-site basis ▪ establish a minimum non- residential FSR of 1.3:1 on land west of Victoria Street and east of Thomas Street as an interim measure and review following the completion of design and feasibility testing ▪ Prohibiting residential uses from being located on the ground and first floors ▪ Safeguard employment floorspace from inappropriate residential/associated development
Town Centre	Balmain Marrickville	▪ undertake a design and financial feasibility review to determine an appropriate minimum non- residential FSR for Town Centres.

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	Newtown -Enmore Norton Street Leichhardt (includes Norton Street North) Rozelle	▪ undertake urban design studies and a feasibility tipping point analysis to determine controls required to secure commercial floor space at ground floor and at podium level along Norton Street Leichhardt and Illawarra Road Marrickville.
Dulwich Hill centres	Canterbury Road Enterprise Corridor Dulwich Hill Station Dulwich Hill Centre Dulwich Hill West	▪ Undertake a design and financial feasibility review to determine the viable tipping point for establishing a minimum non-residential FSR for Dulwich Hill Centres and Canterbury Road Enterprise Corridor
Other centres	N/A	▪ No non-residential FSR proposed

The above recommendations will allow for an increase in the worker and residential population in the catchment, leverage the delivery of Sydney Metro at Marrickville and Dulwich Hill and increase commercial employment opportunities within the LGA.

It is also noted that FSR controls alone will not necessarily lead to the development of non-residential floorspace. Commercial momentum is important and is a pervasive issue in the LGA, particularly along Parramatta Road. This requires a broader consideration of commercial markets and the competitive offer of the LGA's centres which would need to occur before controls are implemented.

There is an opportunity, resulting from implementation of the Housing Strategy and planning control reviews for non-residential floor space requirements to be included as part of any future review of controls applicable within centres or on the periphery of centres, especially where FSR uplift is considered.

There may also be some instances, where only ground floor employment floor space can be achieved (e.g. fine grain areas and heritage conservation areas) such as Rozelle and Balmain.

8.1.2 Providing flexible ground floor premises within mixed use buildings

Rapid changes in technology and in retail trends, emerging night-time economies and population growth require councils to be agile and responsive in their planning for centres growth. Adaptive and flexible spaces may be required, particularly in centres close to the CBD, because of an increasing demand for workspaces from start-up and creative industries. Greater Sydney Commission | Eastern City District Plan p78

There is limited capacity for the expansion of employment floor space in the Council area. This is especially so for industrial uses which require flexible spaces and heavy vehicle access in order to function efficiently and without impacting the amenity of adjoining uses. There is also limited capacity for retail uses that are less suitable for centres including specialised retail premises, hardware and building supply retailers.

Industrial areas transitioning to mixed use precincts have seen a significant loss in the availability of floor space that is suitable for the range of uses that once existed in these areas. Whilst it has been the intent of many planning controls, such as those in the St Peter's triangle refer to Section 9.1.8 , to retain employment floor space these spaces are proving to be inadequate.

- Mixed use developments generally seek to maximise residential floor space within the allowable gross floor area and height of a development, as they command the highest price per square metre. This shifts the floor space make up and the allocation of allowable height in a building to residential. Additionally, residential uses require the lowest ceiling heights in the mix of uses, with employment uses requiring the highest.
- Whilst there are controls in place requiring the ground floor plane to provide non-residential uses, the spaces provided are often tokenistic, designed only to fulfil the requirement of the control but are

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inadequate for a vast range of uses apart from retail, business premises and offices. In some cases, space suitable for even these uses is extremely limited.

- The ground floor plane also competes with a range of other services and facilities required on the ground floor for the residential uses above, including fire stairs, plant rooms, lobbies, driveways, fire services and communal open space. This typically makes the non-residential floor space an after-thought that is fit in around these facilities, especially on smaller sites with a limited site area. This issue is evident in recent development activity in multiple transitioning precincts like the St Peters Triangle and the Addison Road industrial area (Section 9.1.5) as well as within a number of centres such as Norton Street North (Section 9.2.10).

In order for the spaces to be useable, they must be designed in balance with the requirements of the residential uses above, ideally on larger sites that can utilise the ground floor to fulfil the needs of both the residential uses and provide flexible non-residential floor space on the ground floor.

In designing and constructing a flexible ground floor space for a wide range of uses, a number of design considerations and service provisions must be made. These include, although are not limited to the following;

- Ceiling heights – adequate floor to ceiling heights are required well above that required for small scale retail or residential uses and the NCC. Ceiling heights will often be required to emulate those that are currently afforded to purpose built large format retailers, industrial buildings and warehouses.
- Loading facilities – In order to move either a large volume of goods or bulky goods efficiently, convenient loading facilities need to be provided. These facilities also require that access streets are able to cope with the kind of vehicles servicing the use.
- Service parking – there is a need that adequate service parking is provided (e.g. for deliveries and building maintenance). This is crucial for developments fronting roads where clearways occur and in locations with limited on-street parking.
- Ventilation – Many industrial uses require the use of chemicals and processes which emit large volumes of heat and gases that require purpose built ventilation systems. Ideally these systems are inbuilt throughout the building, providing a riser from the employment floor space vertically through the building, ventilating above the roof. Built in ventilation also makes it easier for uses such as restaurants to establish.
- Noise and vibration attenuation – To ensure the uses are safeguarded from negatively impacting the amenity of adjoining residential uses, premises need to be adequately attenuated. This includes sealing doors, windows, vents and loading facilities, as well as installing acoustic glazing and building floor plates which limit the transmission of noise and vibrations between floors and ceilings.
- Size – Premises should be provided at a range of sizes for a range of possible uses, just as specialist retail premises, warehouses and industrial buildings come in various sizes.
- Affordability – Many industrial uses, especially the more creative industry aligned uses, are not hugely profitable, however the goods or services they provide are for industries with great economic multipliers. These spaces thrive in run-down low grade industrial areas (much like those in Marrickville) however struggle to afford spaces in modern developments. This is discussed further in Section 6.2.2. Affordability is also an issue for start-ups of all types. This in turn has flow on effects to local employment as new businesses provide the greatest increase in employment opportunities.
- Utilities – Access to large quantities of electricity is required for a range of industrial uses. Access to this kind of power can be difficult to retrofit into an existing building, especially one within a strata scheme. Additionally, a gas and adequate water connection will also be required to ensure all possible uses have the utilities they require.

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- Owners consent in a strata scheme – Subdivision of a building into a standard strata scheme is not ideal for flexible employment space. When a development application made, the owner's corporation must endorse it for submission to Council. The nature of many uses will prejudice this process and halt the submission of the application. A stratum subdivision however places the floor space on a separate strata plan and removes the need for consent from other parties associated with the site. This is common for shopping centres, larger multi-use buildings and infrastructure running through sites.

Without providing these spaces, the Inner West risks losing vulnerable industries which thrive in the area, including creative industries. Creative industries are part of the economic, social and cultural identity of the Inner West and are intrinsic to the unique character of the area.

The Eastern City District Plan makes reference to these spaces and the potential to exploit them for the benefit of creative industries. It specifically identifies the opportunity for under-utilised mixed use areas, ground level commercial or declining high streets to become locations for creative industries and cultural enterprise (Planning Priority E4, pg. 33). Designing these spaces appropriately will enable creative industries to tenant these spaces in the future.

Within the same Planning Priority, the District Plan also stipulates the importance of having capacity for creative industries, arts and cultural uses near major cultural institutions, with specific reference to retaining this within Inner West. In order to provide for creative industries to locate in close proximity to these locations, appropriate floor space that can be occupied by these uses needs to be available.

There are limited examples of flexible ground floor space being delivered in Sydney. 97 Pyrmont Bridge Road, Pyrmont, located within the City of Sydney is one such example. In 2012 a DA was submitted for the construction of a six storey mixed use development. This includes a warehouse and retail premises on the ground floor, 71 apartments over levels 1 to 6 and 2 levels of basement car parking.

The ground floor is currently tenanted by a trade wholesaler, utilising the space as a wholesale building supplies centre, as well as a warehouse. This use is able to function on site due to a number of design considerations.

The site has an area of approximately 2,173sqm and provides approximately 856sqm of floor space for the warehousing and associated retail use. This calculation however does not include floor area allocated for a loading dock or ground floor car parking associated with the non-residential use, which is a substantial portion of the area.

The ground floor provides a substantial ceiling height of approximately 5.1m, a drive through loading dock and separate waste facilities. It is not known if additional power utility or ventilation is afforded to the space.

Acoustics were also considered in the assessment of the building. An acoustic report was submitted which identified the required acoustic treatments to the ground floor premises, to protect the amenity of dwellings above and on adjacent sites. The recommendations included the installation of a thicker floor level above the ground floor use, as well as other acoustic treatments to the ground floor.

In order to achieve results like this, controls are required to deliver premises that meet similar outcomes to the above-mentioned example. This includes a coordination of DCP and LEP controls.

Not all sites are suitable for accommodating the type of ground floor space similar to the above case study. There will be a need for lot amalgamation in some instances, for redevelopment to occur with a suitable employment outcome. Examples of common challenges are outlined below:

- Small sites – sites that have narrow frontages or small in dimension will have limited opportunity for flexible ground floor employment floor space.
- Corner sites with no rear lane access – the proximity of the driveway access may be too close to an intersection to be workable.

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Specific industry consultation would be required to firstly, determine stakeholder/business requirements and secondly, get specific design advice. It would be beneficial for council to gauge the perspective of other businesses/industry before determining these controls.

It is recommended that the following short- and long-term strategies for delivering controls and to guide development that can accommodate a variety of employment uses within mixed use buildings:

- Establish building types that ensure that ground and first level storeys have adequate functional capacity to ensure viable businesses. Requirements will include:
  - structural layout providing flexible open plans (to allow spaces to be subdivided as required)
  - space needs including minimum floor to floor heights and minimum ceiling heights
  - site facilities (loading docks, service corridors and lifts, storage rooms, waste collection and removal, mechanical ducting for ventilation horizontal and vertical shafts and substations)
  - separation requirements to ensure acoustic amenity for upstairs apartments
  - ensuring a compatible architectural fit within the building's surroundings.
- Determine a framework for the subdivision of employment floor space in mixed use developments with the use of stratum subdivision schemes to delineate ownership structures and obligations to the overall building with regard to requiring owners' corporation consent for the submission of development applications and complying development certificates.
- Identify specific areas to implement controls to deliver usable ground floor employment floor space.
- Investigate mechanisms to deliver affordable employment floor space in mixed use developments for creative industries.

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8.1.3 Flexibility of development standards for employment uses in industrial zones

Industrial precincts across the Inner West LGA function well, having low vacancy rates, a high level of business diversity and a high level of creative enterprises. This is likely due to the older building stocks which are high clearance warehouses and industrial premises that are conducive to creative enterprises. The older building stock also keeps the rent prices down.

There is evidence in a number of precincts (e.g. Camperdown and Marrickville-Sydenham) where the existing building stock is already built well above the existing development standards such as Floor Space Ratio and Height. This limits opportunity for expansion or redevelopment.

One option to resolve this is to increase or remove development standards. However, there is some concern that this could:

- raise land values, pushing out uses that rely on lower rents
- encourage further fragmentation of the land through strata subdivisions into smaller industrial units
- encourage the development of premises which are not in keeping with the unique demands of multiple industries and suit more profitable smaller office based industries.

Increasing the FSR may also however, relieve pressure on rents by increasing supply. If other planning controls such as subdivision requirements are introduced to prevent fragmentation of land, this may address the potential negative consequences.

Implementation of these provisions should be carefully considered as not all industrial uses can operate above the ground floor. Consequently, such controls will not create new floorspace for all industrial operations. If this floorspace is taken up to any significant degree it will skew the profile of the industrial areas, which may in turn cause problems for more traditional industrial operations.

Multi-storey industrial is only in its infancy in Australia, with only a handful of planning proposals in the City of Sydney currently. It is unlikely that there would be significant take up of such controls in the Inner West in the short to medium term.

Action 2.4.1 in the Strategy recommends a review of development standards for land zoned IN1 - General Industrial and IN2 - Light Industrial, considering the potential for increases in or removal of height and/or floor space standards where feasibility studies demonstrate that this is required for redevelopment for industrial purposes.

8.1.4 Tourist and visitor accommodation uses in B5 Business Development, B6 Enterprise Corridor zones

Provision of land for the purposes of tourist and visitor accommodation is critical to the economic success of the Inner West and Greater Sydney, for the tourism industry and the night time economy.

Tourist and visitor accommodation is a group term that covers five uses. They include backpacker's accommodation, bed and breakfast accommodation, farm stay accommodation, hotel or motel accommodation and serviced apartments. There has been particular interest in serviced apartments in the B5 Business Development and B6 Enterprise Corridor zones. Farm stay accommodation is not relevant to, nor included in the discussion.

Uses within the tourist and visitor accommodation group are permissible in various business zones throughout the Council area. Permissibility however differs throughout the three Inner West LEPs. These are detailed within the precinct profiles.

All the relevant tourist and visitor accommodation uses are permissible in the B2 Local Centre zone, an extensively used zone in all three LEPs. The B4 Mixed use zone also permits these uses, apart from the

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Leichhardt LEP, which prohibits backpackers and bed and breakfasts. Apart from the Ashfield town centre, there is limited use of the B4 – Mixed Use zone in the Council area.

Serviced apartments in the B5 zone

The B5 business development zone is exclusively used in the Marrickville LEP 2011 (MLEP 2011). Use of the B5 zone is limited to a number of precincts. These include Addison Road, St Peters Triangle, a row of shop fronts in Tempe along the Princes Highway, a pocket of sites on Marrickville Road, Marrickville, Gladstone Street precinct, Lewisham Industrial Precinct, Lewisham West Precinct, the Stanmore Bridge Road West Precinct and extensively throughout the Victoria Road Precinct.

There are two B5 zoned sites in the MLEP 2011 area that have been given recent approvals as serviced apartments, these are summarised in the table below:

Address	Approval date and number	Details	Additional comments
97 Marrickville Road, Marrickville	December 2014, DA201400212	Five storey mixed use development comprising of three ground floor commercial tenancies and 38 serviced apartments.	Operational consent issued November 2017.
641-657 King Street, St Peters	July 2017, DA201600179	Eight storey mixed use development comprising of five ground floor retail units, 56 residential apartments and six serviced apartments.	Residential accommodation was an additional permitted use on site (it is no longer). The DCP required a minimum 20% of the GFA be non-residential, the serviced apartments were part of this 20%.

Serviced apartments in the B6 zone

The B6 Enterprise Corridor zone is only located on parts of Parramatta Road and the Princes Highway. Serviced apartments are permitted in both the Ashfield LEP 2013 (ALEP 2013) and the MLEP 2011 within the B6 zone. There is only one identified recent approval for serviced apartments in the B6 zone. This may be partially attributed to land owners speculating on changes that will arise from the PRCUTS and the potential for uplift in these areas to include residential accommodation. The recent approval is summarised in the table below.

Address	Approval date & number	Details	Additional comments
826 – 836 Princes Highway, Tempe	22 January 2019, DA201700497	Three storey mixed use building comprising four ground floor commercial tenancies and 17 serviced apartments.	Court approved.

Analysis

Although both business zones with similar land use tables, the B6 and B5 zones are utilised quite differently. B6 zones are designated to main roads only and aim to provide space for land uses that require larger floor plates. They create an environment that is conducive to uses requiring multiple and large vehicle movements whilst creating minimal amenity issues for sensitive land uses, due to their location on arterial roads. B5 however is often utilised as a buffer zone between industrial land and sensitive zones like residential. They provide an opportunity for innovative commercial land uses and do not necessarily require the floor plates of B6 zoned sites.

Whilst different in detail, on a macro level both zones are designed to provide floor space for employment and select commercial and industrial land uses. The use of these zones for serviced apartments is in conflict with the objectives of this zone as it creates additional sensitive receivers and areas that typically host amenity disruptive uses or are adjacent to areas with poor residential amenity (like main roads and industrial land).

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Because of this, they are unsuited to accommodating serviced apartment uses, as these land uses are typically sensitive to employment and industrial land uses and do not provide the diversity in the local economy and job creation that can only be provided in these zones.

Serviced apartments however do have a role to play in the tourist and visitor economy and are a valued land use. There are multiple zones throughout the Council area that provide space for this land use, the most notable being the B2 Local Centre zone. This zone is used extensively throughout the Council area, being the primary zone for all local centres. This zone has the added benefit of being close to public transport links, like train stations and frequent bus services, as well as permitting land uses like restaurants, pubs, shops and business premises which are desirable to existing adjacent serviced apartments, creating better amenity for tourists and visitors. Serviced apartments are also permitted in the B4 Mixed use zone which is frequently located adjacent the B5 zone. Examples of this include Victoria Road, St Peters and Addison Road.

Hotel or motel accommodation is a mandated permitted use in the B6 enterprise corridor zone. Limiting tourist and visitor accommodation in the B6 zone to this land use only will not open up further land use conflicts with other uses in the zone.

Actions 2.2.2, 2.2.3 and 2.2.4 of the Strategy recommend the following:

- Prohibit tourist and visitor accommodation in industrial and B5 - Business Development zone.
- Prohibit all tourist and visitor accommodation, (apart from hotel or motel accommodation) in the B6 - Enterprise Corridor zone.
- Realign objectives in the B6 - Enterprise Corridor zone to focus on employment uses and not accommodation.

8.1.5 Night time economy/Agent of change

A vibrant and safe night-time economy will enhance Greater Sydney's standing as a global city, while meeting the social and recreational needs of shift workers, families, children and communities. Planning for a night-time economy in centres should support a diverse range of small businesses, such as retail, and cultural events and assets accompanied by a suitable regulatory environment.

Greater Sydney Commission | Eastern City District Plan p79

The night time economy is generally defined as social or business activities that take place between 6pm and 6am the following morning. Typically, the definition refers to night time activities that include entertainment, performing arts, sports, amusements, casinos or gambling, food and drink services, liquor retailing and hotels. In the Inner West however, this definition should be expanded to include non-retailing and non-entertainment uses, such as warehousing, manufacturing and other industrial operations that take place outside of typical business hours.

The Eastern City District Plan recognises the contribution to the night time economy makes to Sydney's liveability and productivity. This includes support for the night-time economy as a principle for the place-based planning of centres, and recognising the intrinsic link between the night time economy and cultural and arts sector, with specific reference to the Marrickville and Newtown centres.

Action 38K of the plan specifically requires the following; "Provide access to jobs, goods and services in centres by: providing for a diverse and vibrant night-time economy in a way that responds to potential negative impacts".

There are concentrated pockets of thriving and emerging night time economies in the Inner West. They are each varied in their character, hours of operation and the uses they support. A summary of the various local night time economies is provided below. Please note that these summaries are relatively anecdotal rather than a result of detailed surveying.

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Place	Land uses	General hours of activity
Newtown-Enmore	Bars, small bars, nightclubs, live entertainment, retail, restaurants, tourist and visitor accommodation	6pm till 4am
Marrickville and Illawarra Road	Bars, restaurants, live entertainment	6pm till 1am
Darling Street, Balmain	Bars, restaurants, small bars	6pm till 1am
Norton Street, Leichhardt	Bars, restaurants, retail	6pm till midnight
Liverpool Road, Ashfield	Bars, restaurants, retail	6pm till 11pm
Summer Hill Town Centre	Small bars, restaurants	6pm till midnight
Marrickville Road and New Canterbury Road, Dulwich Hill	Small bars, restaurants	6pm till midnight
Marrickville – Sydenham Employment precinct	Warehousing, logistics, light industry, live entertainment, artisan food and drink premises	6pm till 6am

There are a number of barriers that are unique to the operation of the night time economy. These barriers typically arise through the conflict in amenity expectations outside of typical working hours. Residential uses are particularly sensitive and activity of commercial uses can disturb this. There are also other barriers concerning building and planning regulations. These barriers and recommendations to overcome them are discussed below.

Sound management

Under NSW regulations sound management is geared towards shutting down venues and premises that create noise. This is because all noise can be considered a nuisance. This has led to issues for a number of venues. Notable examples of premises that have either had to close at one point in time, or change their business operations include the Annandale Hotel, the Marrickville Bowling Club, the Bridge hotel in Rozelle and the Sly Fox in Enmore, just to name a few.

In order to alleviate this issue, multiple new policies and practices need to be put into place. These include the following:

Agent of change

Agent of change is the principle by which the newcomer into an area must be designed to either ameliorate or withstand the existing soundscape. For example, a flat building being developed within 100m of a live music venue must be designed to ensure the future occupants of the building are not disturbed by the venue's noise. Their rights to complain about noise should also ideally be minimised. This will protect the venue from noise complaints and ensure its survival. Conversely, a live music venue moving in adjacent a residential use would need to ensure that sound is mitigated at the source, so as not to impact on their amenity.

The agent of change could also be extended further to not be only venue specific, but precinct wide as well. This meaning that defined precincts could be made, for example, a 75m buffer from King Street Newtown could be mapped, and all new sensitive uses like residential apartments within that buffer must be designed to withstand noise throughout the night. This would become a consideration in the development assessment process.

This could likewise be applied to uses that create other types of noise, like industrial. Precincts could be mapped that protect industrial lands from residential encroachment and the amenity conflicts that arise from this. The newly introduced residential land uses along Victoria Road are an example of where this could be implemented.

Management of sound expectations

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Although ideal for new builds and the protection of existing venues, the agent of change does not deal with existing noise conflicts in the environment from existing building stock and existing entertainment/industrial noise. Further work should also be completed on investigating methods for setting new expectations and parameters for sound in the urban environment.

A method of doing this may be to implement sound expectations on 10.7 planning certificates. Just as these certificates identify zones, tree preservation orders and a multitude of other planning implications on land, so too could they be utilised to identify sound expectations in specific precincts. Wollongong Council implemented such a measure on their 10.7 certificates. This was recommended under the Wollongong Cultural Plan 2014-2018. It identifies the CBD as an entertainment precinct, meaning any new residents should expect noise between 5pm and midnight.

Approval pathways (development applications, exempt and complying)

Objective 9, Strategy 9.1 of Region Plan states that *'reducing the regulatory burden for creative and temporary uses and the night-time economy is essential. This may require measures such as simplifying development approval processes or increasing exempt and complying development provisions for these uses.'*

Alternative approval pathways for certain commercial uses

Extending hours of operation for commercial uses like shops, kiosks and business premises requires a development application in the form of a new DA or a Section 4.55 modification. These uses are of minor concern in local centres and the operation of businesses like clothing shops, homewares stores, hairdressers, banks, drycleaners and grocers till 10pm is unlikely to cause harm to surrounding amenity. Applying for a DA to extend these hours however can be an onerous process. Many business owners also fear that Council will discover issues with the existing operation and shut down the use entirely or place new conditions on the consent which will supress the existing business operation. Due to this, there may be untapped potential for a diversified base of businesses operating in the night time economy.

Development approval pathways alternate to the DA process should be considered in order to permit these uses. This should be considered through an approach with exempt or complying development. The intention is to permit extended hours for certain uses such as shops, kiosks and business premises through exempt or complying development pathways.

Exempt or complying development pathways could also be considered for the establishment of small scale cultural uses. These uses are particularly financially sensitive and are severely obstructed by the development application process which is considered to be onerous and expensive. Use parameters could be established through exempt or complying development pathways which inhibit high impacting practicing and allow others to flourish.

Other inhibiting factors

Onerous nature of the National Construction Code (NCC)

Under the NCC, any use which incorporates live performance or the assembly of a crowd (e.g. art galleries, theatres, functions centres, etc.) is classified as a class 9b building. This is the most onerous building classification under the NCC, requiring significant fire safety and egress measures to be put in place. These upgrades can significantly increase the cost of change of use application, making it unfeasible. These upgrades are required regardless of the nature of the performance space, the audience size or floor area of the performance space.

Due to this, small venues are placed with huge premises upgrade costs which can include emergency lighting, fire hose reels, sprinkler systems, egress widening, fire insulation to walls, ceilings and floor and other measures.

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Whilst the role of NCC is to reduce the risk to human life occupying buildings, there are examples of exemptions being granted to other Australian States in the NCC for such uses. In South Australia, an additional definition is given for a "small arts venue". This being a venue for activities like live music, art displays, dancing, poetry and other performance, less than 300sqm and without the use of pyrotechnics. These venues are under the class 6 building classification, which is much less onerous in terms of fire safety and amenity provision.

Making similar or other reforms in NSW would enable the establishment of safe smaller venues, creating further opportunities for artists, business owners and audiences in the cultural economy.

Development controls

Development Control Plans provide the detailed assessment criteria for development applications, including applications which include late night trading. The three existing Inner West DCPs approach late night trading premises applications quite differently. The Marrickville DCP uses qualitative measures to set appropriate hours, whilst Leichhardt utilising mapping and prescribed hours for certain types of uses. The Ashfield DCP does not contain any controls for late night trading management altogether.

A new Development Control Plan with a Council wide approach to assessing late night trading needs to be formulated. These controls should be exhaustive, consider the types of uses that are desirable, where they should be located, how amenity issues can be dealt with and provide clarity on Council's expectations to industry.

Actions listed under Strategy 1.8 of the ERLS include the following:

- Embed the agent of change principle into Inner West planning regulations to protect live music venues and late night precincts as well as employment and industrial areas. Note this principle states that a person or business (the agent) introducing a new land use is responsible for managing the impact of that change
- Identify areas with existing and expected higher noise levels, including both industrial and entertainment noise. Implement a means of managing the expectations of noise amongst existing and future residents in and around these areas.
- Investigate exempt development approval pathways for night time trading by certain commercial uses.
- Investigate exempt and/or complying development approval pathways for small scale, low impact cultural use and production venues.
- Develop comprehensive late night trading management DCP controls for the Inner West. They should deliver clear direction on expectations for land use within the night time economy for both assessment officers and the community.
- Work with the City of Sydney to develop a joint strategy for land use planning and night time economy on King Street, Newtown.
- Advocate for reforms to the National Construction Code to reduce regulatory requirements for smaller scale cultural venues and production spaces.

8.1.6 Subdivision of industrial land

Industrial precincts within the Inner West LGA are highly fragmented, largely as a result of their organic formation alongside and within residential areas, long before any established planning scheme existed. This may limit larger scale operations from locating in the LGA but provides a rare supply of smaller sites for small-medium scale operations. The benefits include:

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- Affordable entry points for small scale businesses and start-ups – operating in smaller premises is a safer option for start-ups and new smaller scale businesses due to lower rents.
- Allows low-risk up and downscaling of operations – manufacturers can store off-site at a second location if they increase production, meaning that they can downscale without having to relocate their main operations.
- Off-site storage and warehousing opportunities for nearby retailers – retail outlets operating within centres in the inner city may need space to store stock or a distribution point closer to the city. Locating this space in premises in the industrial zones is an affordable option and provides retailers with flexibility.
- Advent of online shopping – online shopping trends mean retailers need rapid access to stock.

Overall, the supply of large industrial sites for larger scale operations is constrained in the Inner West LGA:

- The largest landholdings in the LGA have recently been lost to the WestConnex St Peters Interchange
- Other substantial landholdings in St Peters will be lost if the Gateway project proceeds
- There is also pressure for other larger sites to be strata subdivided for small-scale office-warehouse loft style developments (refer to section 9.1 for further information on the range of lot sizes within industrial precincts).

Examples of larger lots include 2,000-9,000sqm lots in the Addison Road Industrial Precinct, 5,000-20,000sqm lots in Carrington Road and 2,000 – 10,000 sqm lots in Moore Street Industrial. There are few lots of this size remaining in industrial areas across the LGA.

The need to protect larger industrial sites from subdivision has been acknowledged in Marrickville Employment Lands Strategy 2014 which recommended protecting sub-regionally significant industrial lands; restrict subdivisions and/or strata titling to prevent fragmentation.

It should be noted however, that the Inner West is unlikely to be able to accommodate larger scale freight and logistics beyond what is already established in the environs of Sydney Airport. Objective 16 of the Eastern Sydney District Plan refers to sites of generally two hectares or more being necessary, this is rare within the Inner West. It is crucial, for this reason that existing large-scale freight and logistics operations in the Inner West are protected.

In depth urban analysis undertaken by Urban Cultural Policy and the Changing Dynamics of Cultural Production have explored this matter in detail:

Establishing minimum lot sizes is vital to prevent fragmentation and loss of the integrity of industrial precincts, and especially their capacity to house dense clusters of diverse firms who form links across sectors. Our geospatial mapping work demonstrates that over time, gradual fragmentation and conversion has been the dominant spatial process driven by interests seeking to maximise value uplift from spot rezonings. Minimum lot sizes will assist in preventing this, and thus enable the spatial integrity and full potential for enterprise and job growth within industrial precincts to be maintained. It will also enable strategic planning to guide the evolution of those districts, rather than ad hoc, opportunistic, processes.

Action 2.3.1 of the Strategy recommends that a minimum subdivision lot size of 10,000sqm be established (including restricting strata subdivision) in IN1 General Industrial zone to reduce further fragmentation.

8.1.7 Artisan food and drink industry

In August 2018, the term "artisan food and drink industry" was introduced into the Standard Instrument LEP. In detailing the amendment, the Government said "the new land use term was introduced to provide clarity for the growing artisan and craft food and drink industry such as microbreweries or cheese makers, by

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establishing a new definition that reflects the nature of these uses"[28]. The amendment was introduced following strong growth in boutique, craft and artisan food and drink products with some consumers turning away from mass-manufactured offerings and seeking out a unique experience linked to the producer[29].

The term artisan food and drink industry means:

> *a building or place the principal purpose of which is the making or manufacture of boutique, artisan or craft food or drink products only. It must also include at least one of the following:*
>
> *(a) a retail area for the sale of the products,*
>
> *(b) a restaurant or cafe,*
>
> *(c) facilities for holding tastings, tours or workshops.*

The new land use term requires that as well as the manufacture of boutique, artisan or craft food or drink products, at least one of the following services must also be included – retail sales, a café or restaurant, facilities for tours, workshops or tastings. However, the principal purpose of an 'artisan food or drink industry' must be the carrying out of an industrial activity involving the manufacture of boutique, craft or artisan food or drink products. The land use does not apply if the non-industrial components are major components of the development (see Planning Circular PS 13-001).

The land use is mandated as permissible with consent in any zone where light industries are mandated as permissible with consent, including the B6 - Enterprise Corridor, B7 - Business Park, IN1 - General Industrial and IN2 - Light Industrial zones in the LGA. The land use is also permissible with consent in the following zones:

- Leichhardt LEP: B2 - Local Centre
- Marrickville LEP: B4 - Mixed Use and B5 - Business Development

In parallel, Inner West Council has collaborated with Liquor and Gaming NSW in a trial that would allow microbreweries to sell their products for consumption on the premises, with a maximum patronage of 100 persons. Liquor and Gaming NSW advised that they have recently extended the trial until the end of August 2020 to encourage more take up. Towards the end of the trial period, L&GNSW will reach out to councils to refine the review.

Combined with the rollout of the artisan food or drink industry land use, the trial period should provide Council with considerable information on the implications of this approach to balancing the size of the manufacturing and non-manufacturing components of artisan food and drink premises.

Background

The introduction of the definition for artisan food and drink industry assists manufacturers of craft products by making it easier to lawfully operate retail, restaurant, and other pseudo-tourism uses in industrial zones where previously such development was only achievable through a complex planning framework. The artisan food and drink industry term will likely have the following implications:

- Result in an increase in development applications for such premises, due to the expanded permissibility making it easier for applicants
- Encourage longer term growth in the artisan food and drink sector, as the planning system now supports the industry

[28] https://www.holdingredlich.com/blog/making-room-for-hipster-development
[29] https://www.theshout.com.au/news/nsw-govt-redefines-land-use-to-boost-craft-industry/

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- Encourage changes in the format of artisan food and drink premises as the new definition offers a different set of parameters from that which was previously in place.

From a planning perspective, the development outcomes of the land use vary based on the zone. As discussed in Section 6.2.3, Council and private certifiers have approved applications for food and drink manufactures (eg microbreweries and coffee roasters), with associated industrial retail outlets. These approvals were largely in industrial and B5 - Business Development, B6 - Enterprise Corridor and B7 - Business Park zones. Approvals were most commonly associated with change of use applications, rather than new builds.

Historically, microbreweries have established de-facto restaurants utilising sizable industrial retail outlet space as a seating area, with exempt uses (eg food trucks) providing food to meet licensing requirements. Similarly, Council has approved limited sit-down/takeaway cafes as an ancillary use to coffee roasters (See DA reference DA201400458).

In retail-focused business zones, the Codes SEPP was historically a less reliable planning pathway, due to the limitations in change of use. Light industries with industrial retail outlets would only be permitted under the Codes SEPP where a similar use already existed. Therefore, food and drink manufacturing as a light industrial use, with an associated retail outlet, would normally have be assessed as a development application. However, a restaurant could also be included, either as permissible or complying development. Given these considerations, the land use is largely redundant to uses already permitted in centres where light industry is permitted.

A review of development applications from mid-2018 to mid-2019 has shown most applications occuring in Marrickville LEP industrial zoned lands (See Table 33).

Table 33: Sample of recent development applications for artisan food and drink industry

DA No.	Date lodged	Address	Zone	Purpose	Description
Lodged prior to introduction of Artisan Food and Drink Industry land use					
DA201800295	11/07/2018	2/153-155 Victoria Road MARRICKVILLE NSW 2204	R4 - High Density Residential	Introduction of restaurant associated with existing microbrewery via existing use/ancillary use provisions	To fitout and use a portion of the premises and outdoor area in conjunction with the brewery as a food and drink premises.
DA201800314	26/07/2018	54 Sydenham Road MARRICKVILLE NSW 2204	IN1 - General Industrial	New Bakery with associated takeaway/sit down food and drink premises via change of use provisions	To demolish part of the premises and carry out ground and first floor alterations and additions so as to use the premises as a bakery operating 24 hours a day, 7 days a week and a portion on the ground floor as a takeaway food and drink premises operating from 6.00am to 10.00pm, 7 days a week with an outdoor seating area and associated signage.
Lodged after introduction of Artisan Food and Drink Industry land use					
DA201800404	28/09/2018	20 Chapel Street MARRICKVILLE NSW 2204	IN2 - Light Industrial	Modification of food production industry to include café, retail and tasting area	To carry out alterations and fitout and use the premises for the purpose of an artisan food and drink industry to be used in conjunction with a food

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Attachment 1

DA No.	Date lodged	Address	Zone	Purpose	Description
					production and distribution facility.
DA201800576	24/12/2018	23-25 Cadogan Street MARRICKVILLE NSW 2204	IN1 -General Industrial	Modification of brewery/industrial retail outlet to include restaurant component	To carry out internal alterations and to use the premises as an artisan food and drink premises.
DA201900038	7/02/2019	1/2C Gladstone Street NEWTOWN NSW 2042	B7 -Business Park	Modification of warehouse for new brewery and ancillary restaurant	To demolish part of the premises and carry out ground and first floor alterations and additions to the building and use the premises as a brewery and restaurant operating 7:00am to 10:00pm daily.
DA201800544	14/12/2018	5-7 Denby Street MARRICKVILLE NSW 2204	IN1 -General Industrial	Modification of warehouse for new coffee roasting, warehousing and espresso bar	To demolish part of the premises and carry out ground and first floor alterations and additions and to use the premises for the purpose of coffee roasting, warehousing, espresso bar, retail coffee sales, and ancillary office space.
DA201900105	1/04/2019	73 Mary Street ST PETERS NSW 2044	IN2 - Light Industrial	Modification of winery/industrial retail outlet to brewery with seating (pre-packaged food offered)	To carry out works and use the premises as an artisan food and drink industry (craft brewery).

Based on the review of these applications, the primary implementation of the land use has been to formalise restaurant/kitchen components of existing microbreweries. Applications associated with other food industries had markedly smaller retail and restaurant components. It is unclear if this is due to land constraints or the feasibility of the business models.

As the complying development pathway is now closed, other food and drink industries premises seeking to sell goods on site will be required to lodge a development application.

There are anecdotal claims that the artisan food and drink industry in industrial zones is driving rent increases and leading to displacement of more traditional industrial uses in these areas. It is important to note in this discussion that many artisan food and drink industries require three-phase power, a reasonable water supply and larger voids to accommodate sizeable vats e.g. breweries and distilleries, therefore, the quantum of space required is larger. This space is not readily available in the traditional retail/commercial areas and it unlikely that a manufacturing business such as a brewery would be able to afford to pay retail/commercial rents. These businesses are manufacturing first with ancillary retailing uses.

At St Peters east of Unwins Bridge road the rents are $500/sqm, slightly more than retail rents around the station that are approximately $350-$400/sqm. This is an example of clustering of creative businesses with Precinct 75 a destination attracting other likeminded businesses and as such agents are maximising rents in response to the highly curated environment. This example is unique in a sense that it's IN2 Light Industrial zoned land, includes office space on the first and second floor and is surrounded by R2 Low Density Residential.

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In Marrickville, where a number of breweries are located in the IN1 General Industrial zone land, the rents appear to be steady and unaffected by the artisan food and drink offering.

Implications

The historic trend of introducing food and drink manufacturing with retail/on-site consumption into industrial and higher order business zones has had an impact on those zones. This is evidenced by the introduction of specialised planning definitions and the specialised microbrewery liquor license, that indicates a response to demand. Further, there is an obligation for food to be served, creating a legal, if not market demand for a restaurant component.

This trend has the potential to cause a shift in the character of employment areas as detailed in A Metropolis that Works. As detailed in that document, permitting cafes and restaurants, such as those permitted by the land use, may result in recast expectations for industrial and urban services areas. In the longer term, this can result in the areas being not viable for traditional urban services.

As discussed above, the addition of the artisan food and drink industry definition to the Standard Instrument LEP is less of a new outcome, but the formalisation of planning controls. To date, this formalisation does not appear to have had a substantial effect on industrial and higher order business zones. It may result in lesser impacts than the former complying/exempt development pathway previously used by businesses to introduce restaurant-style uses. The primary effect of the land use would be the formalising of a permanent kitchen and the serving of food. This would have a less than substantial effect on the surrounding area. Further, there is no evidence that diversion of household expenditure from centres to industrial precincts is occurring at scale that is likely to undermine the role of the retail and commercial centres in the Inner West LGA.

The new definition allows Council to develop a more tailored planning response to artisan food and drink premises outside the industrial zones. It is appropriate that Council continue to monitor artisan food and drink premises and their take up of industrial land.

Council may also identify areas where artisan food and drink industries are appropriate, in consultation with their community, and consider allowing artisan food and drink industry in zones where 'light industry' is not a mandatory permissible use. This could present an opportunity to leverage the strong popularity of artisan food and drink premises to revitalise areas.

The recent introduction of the new term into the Standard Instrument provides a simpler planning framework that will apply to artisan manufactures across the State (discussed in Section 6.3.3). It is unlikely to lead to a proliferation of artisan food and drink premises throughout the Inner West LGA. This is due to previous planning frameworks that have allowed for establishment of similar facilities which have capitalised on land that satisfies industry requirements, limiting suitable locations for future operations. Artisan producers require areas where they can make and sell their products and offer customers an experience, while tasting or testing the product.

The closure of the complying development planning pathway will likely result in more development applications being lodged with Council, but due to the rigours associated with development applications, this is likely to be less than the complying development pathway that was previously available.

Section 6.3 reviewed the impact of artisan food and drink premises in other locations and found that these developments are typically associated with increases in rents following an increase in the popularity of the surrounding area for similar businesses and associated improvements in amenity. Over time, artisan food and drink premises can contribute to changes in the character and make up of a precinct as higher rents impact on the tenant mix. Any concern at the potential loss of employment land is balanced by the increased range of activities and raised profile they can provide to the employment precinct.

Common concerns with artisan food and drink industry restaurants establishing in employment precincts and potential responses are examined in Table 34.

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Table 34: Artisan food and drink industry restaurants -potential issues and responses

Issue	Potential Council response
Floorspace that has been zoned for industrial purposes is being taken up by non-industrial uses	• Establish assessment and DCP guidelines for: – Defining 'principal use' to require demonstration that the industrial use is dominant to all other uses (eg employees, floorspace or projected revenue by use) – Clearly prohibiting the consideration of restaurants or entertainment areas as ancillary uses in new applications – Activities permitted or prohibited in the retail portion of the land use (eg limit to take-away sales) – Require any consumption or customer circulation space to be classified as a 'restaurant' or 'café' to aid in determination of principal use.
Industrial rents, which are typically lower than retail rents, will over time, increase to reflect the retail use on the site, encouraging rent increases to neighbouring properties	• Enforce principal use test to limit intensity of retail uses (eg limit floorspace, seating areas and patron limits), aligning retail potential with industrial retail outlet uses that are permitted with other industrial uses. Limit size of non-industrial uses to ensure industrial uses continue to be prioritised
Noise arising from neighbouring premises can impact on restaurant operations and where uses change over time, land use conflicts can occur	• Place the onus on the artisan food and drink premises to accept the noise environment currently and in the future • Include standard reverse-amenity condition to limiting the ability for non-industrial tenants to lodge complaints about industrial activities • Require acoustic impact assessments as part of a development application to demonstrate how noise impacts from surrounding uses can be mitigated within service areas.
Safety concerns arising from unpopulated industrial precincts having poor lighting and natural surveillance can increase costs to Council, the police and the community	• Require safety assessments to accompany a development application and refer these to the NSW Police for comments • Where trading hours are being sought that extend into the evening, require applicants to: – Contribute to the cost of street lighting if trading hours are extended – Contribute to the cost of external CCTV cameras • Provide guidance in DCP regarding external lighting and orientation of service areas to promote passive surveillance
Increased traffic and pedestrian movement associated with restaurants can create traffic conflicts arising from the movement of large vehicles within industrial areas	• Require development applications to demonstrate: – How safe pedestrian access to the venue will achieved – What steps will be taken to minimise risks to pedestrians • Require through conditions of consent, measure to ensure safe pedestrian movement
Cumulative impacts arising from restaurants attracting other similar activities to the area	• Amend DCP to state that ancillary retail uses are prohibited in industrial zones, requiring assessment as industrial retail outlets or artisan food and drink industries.
Potential loss of revenue to restaurants and cafes in zones where those uses are permitted.	• Maintain retail hierarchy strategy that supports complementary uses and amenities in centres where restaurants are a desired land use. • Limit the size of restaurant and café uses • Permit artisan food and drink premises in other zones to reduce impact on Industrial zones land

In the current planning provisions, there appears to be no limit on the area that can be used for restaurant/café in the artisan food or drink premises, other than the principle purpose requirement.

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Given the constrained supply of employment land in the LGA, Council could consider encouraging artisan food and drink industry in suitable locations outside the industrial zones including in centres and along enterprise corridors. To reduce the impact of artisan food and drink premises on the loss of employment floorspace in industrial areas, Council could consider introducing restrictions on restaurant and café areas to protect the use of employment land from larger scale retail uses.

The current trial of limiting licensed venues to 100 patrons will provide a benchmark for an acceptable size. Based on a review of applications, this number is lower than the requested patron capacity of applications lodged for microbreweries, but larger than those associated with other food and drink industries. According to BCA requirements, 1 sqm is required for each person in a restaurant. Including a kitchen, toilets and other supporting uses, 150 sqm would be a reasonable size for a 100-patron restaurant.

The need to restrict artisan food and drink industry from industrial areas has been considered but the use is considered appropriate as it:

- Includes manufacturing as a principle purpose
- Provides services to employees as well as visitors to the area
- Contributes to improved amenity for workers
- Contributes to the overall vitality of an employment precinct.

Qualifying provisions

The definition of artisan food and drink industry in the Standard Instrument includes qualifications on the size of the retail component in industrial zones but not in business zones. As such, the size of the retail component of artisan food and drink industries in business zones is not restricted.

Table 35 indicates the current provisions applying in Inner West LGA. Notably, Marrickville LEP has the lowest floor area as a percentage of GFA (11 per cent) yet almost all the recent DAs for artisan food and drink premises have been in the former Marrickville LGA. This suggests the control does not have a significant influence on artisan food and drink businesses' choice of location. The availability of suitable floorspace, accessibility and local character are likely to have more influence on locational decisions.

Table 35: Current qualification on retail area in artisan food and drink premises

Marrickville LEP	Ashfield LEP	Leichhardt LEP
(10) Artisan food and drink industry exclusion	(10) Artisan food and drink industry exclusion	(10) Artisan food and drink industry exclusion
If development for the purposes of an artisan food and drink industry is permitted under this Plan in an industrial or rural zone, the floor area used for retail sales (not including any cafe or restaurant area) must not exceed:	If development for the purposes of an artisan food and drink industry is permitted under this Plan in an industrial or rural zone, the floor area used for retail sales (not including any cafe or restaurant area) must not exceed:	If development for the purposes of an artisan food and drink industry is permitted under this Plan in an industrial or rural zone, the floor area used for retail sales (not including any cafe or restaurant area) must not exceed:
(a) 11 per cent of the gross floor area of the industry, or	**(a) 40 per cent of the gross floor area of the industry, or**	**(a) 20 per cent of the gross floor area of the industry, or**
(b) 400 square metres,	**(b) 400 square metres,**	**(b) 100 square metres,**
whichever is the lesser.	**whichever is the lesser.**	**whichever is the lesser.**

In consolidating the Inner West LEP, a decision will be required as to the appropriate limit for retail space. There is considerable variation between LGAs. As noted earlier, the controls do not appear to be having a significant influence on locational choices of artisan food and drink industries.

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The current approach in Leichhardt LEP is a suitable mid-point for space controls. Development applications and operations should be monitored as part of the LEP review process to determine the potential long-term impacts of the control.

As noted above, the definition does not include restrictions on the size of restaurants or cafes, but the manufacturing component must be the principal purpose of the development. Principal purpose is not defined in legislation but is commonly understood to be a major use, as explained by the planning circular. However, the circular is dated, with limited guidance on how to identify the principal use (eg revenue, space or occupancy). Case law established prior to the circular provides additional guidance, where the judgement for Adbooth Pty Limited v Ryde City Council [2006] NSWLEC 783, relied on by the Macquarie Dictionary to define principal as being 'first or highest in rank, importance, value, et cetera; chief; foremost.'

Based on a review of relevant development applications, there is not a consensus on how to justify the principal use provision. Council could provide information to clarify how it interprets the principal purpose test, as per the definition above to set expectations and increase certainty. Matters for consideration may include:

- Allocation of space between industrial, amenity and other uses
- Projected revenue associated with industrial and other uses
- Employees associated with industrial and other uses
- Hours of operation associated with industrial and other uses
- Comparison of the above with surrounding industry-only uses.

Council could also provide clarity in intent by permitting or prohibiting the use in certain business zones, including encouraging the restaurant/café element land use in more suitable locations via additional local provisions.

Alternatively, Council may prepare a planning proposal that includes a new Clause 5.4 provision that relates to the restaurant/café use, prepared in consultation with the Department of Planning, Industry and Environment. In this instance, the 150 sqm restaurant land use cap would be a suitable starting point. If restaurant and retail components are combined in a single application, the combined floorspace should not exceed 200 sqm or 20% of the total GFA for the application. This would provide flexibility to applicants in allocating floorspace, while also maintaining manufacturing as the principal use.

This section has identified several recommendations relating to regulatory and policy responses to the Artisan food and drink industry land use. Table 36 and Table 37 summarise the recommendations. Note that recommendations that would amend the LEP would require consultation with DPIE to align State and local planning policy.

Table 36: Artisan food and drink regulatory recommendations

Recommendation	Purpose
Cap artisan food and drink industry retail sales area at 100 sqm or 20% of GFA, whichever is the lesser, in LEP	Provide suitably large area for supporting retail uses as part of an artisan food and drink industry.
Cap artisan food and drink industry restaurant area at 150 sqm, in LEP	Provide suitably large area for a 100-patron restaurant, the current cap for the microbrewery liquor license.
Cap combined artisan food and drink industry retail sales area and restaurant area at 200 sqm or 20% of GFA, whichever is the lesser, in LEP	Provide suitably large area for non-manufacturing retail components of an artisan food and drink industry establishment. This would allow for applicants to determine the best mix of supporting retail uses within the establishment, while clearly maintaining the principal use of manufacturing.

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Allow artisan food and drink industry in non-industrial zones, in LEP	Promote the land use in areas where both the light industrial and retail components of the land use are acceptable, providing an alternative area for the industry.
Clearly define 'principal use' in DCP	Provide clarity to industry regarding Council's expectations regarding the relationship between manufacturing and retail components and overall capacity. Tests may include floorspace, employee count or revenue.
Clearly define activities permitted or prohibited in retail areas in DCP	Provide clarity to industry regarding the separation between the retail component and restaurant/supporting uses to appropriately allocate floorspace.
Clearly define activities in restaurant/ café area in DCP	Provide clarity to industry regarding the activities that are considered to be part of a restaurant (eg seating, circulation, bar service, entertainment areas).
Prohibit restaurant and entertainment areas as ancillary uses in DCP	Require any proposed or existing non-manufacturing area to be captured in the assessment of a new application, and for any retail use to be assessed as an industrial retail outlet or artisan food and drink industry.
Require acceptance of reasonable reverse amenity conditions in DCP	Ensure that artisan food and drink industry uses do not inhibit the orderly development of surrounding industrial lands by lodging complaints.
Require acoustic impact assessments for development applications in DCP	Ensure that artisan food and drink industry uses are suitable within the current industrial context and that on-site management measures are introduced to reduce impacts from outside sources.
Require safety assessments and appropriate management measures in DCP	Ensure that customers and workers are safe in day and evening hours, with lighting provided after dark, clearly marked pedestrian areas, security cameras and passive surveillance from the establishment.

Table 37: Artisan food and drink policy recommendations

Recommendation	Purpose
Continue to monitor the take-up of artisan food and drink industry land use	Identify the qualities of development applications being lodged (type of food or drink being produced, manufacturing vs retail area, employees and customers) and location of businesses to identify industry needs and build guidelines for effective assessment of future applications. This would provide guidance for a review of controls at the next LEP review.
Maintain retail hierarchy strategy that supports high quality retail, restaurants and services in centres	Clearly differentiate between up-market retail operations and supporting retail components. This will provide guidance to businesses that industrial areas will allow for supporting retail uses as part of a manufacturing business, but not retail uses that would change the character of the area.

8.1.8 Neighbourhood shops

Table 38 indicates the current provisions applying in Inner West LGA. There is little variation across the three instruments. In preparing the new Inner West LEP, a decision will be required as to the appropriate limit for neighbourhood shops. An upper limit of 100sqm would align the LEPs and allow for varied development outcomes.

Table 38: Current qualification on neighbourhood shops

Marrickville LEP	Ashfield LEP	Leichhardt LEP
(7) Neighbourhood shops If development for the purposes of a neighbourhood shop is permitted under this Plan, the retail floor area must not exceed 100 square metres.	(7) Neighbourhood shops If development for the purposes of a neighbourhood shop is permitted under this Plan, the retail floor area must not exceed 100 square metres.	(7) Neighbourhood shops If development for the purposes of a neighbourhood shop is permitted under this Plan, the retail floor area must not exceed 80 square metres.

Action 4.1.8 in the Strategy recommends introducing a floor space limit of 100sqm for the 'neighbourhood shop' definition in the consolidated LEP.

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8.1.9 Industrial retail outlet

Table 39 indicates the current restrictions on the size of industrial retail outlets in Inner West LGA. There is considerable variation between instruments. An upper limit of 20 per cent of GFA or 100sqm, whichever is the lesser, would allow Council to take a conservative position, given the projected future shortfall in employment lands is some precincts.

Table 39: Current qualification on industrial retail outlets

Marrickville LEP	Ashfield LEP	Leichhardt LEP
5.4(4) Industrial retail outlets If development for the purposes of an industrial retail outlet is permitted under this Plan, the retail floor area must not exceed: (a) 11 per cent of the gross floor area of the industry or rural industry located on the same land as the retail outlet, or (b) 400 square metres, whichever is the lesser.	5.4 (4) Industrial retail outlets If development for the purposes of an industrial retail outlet is permitted under this Plan, the retail floor area must not exceed: (a) 40 per cent of the gross floor area of the industry or rural industry located on the same land as the retail outlet, or (b) 400 square metres, whichever is the lesser.	5.4(4) Industrial retail outlets If development for the purposes of an industrial retail outlet is permitted under this Plan, the retail floor area must not exceed: (a) 20 per cent of the gross floor area of the industry or rural industry located on the same land as the retail outlet, or (b) 100 square metres, whichever is the lesser.

Action 4.1.8 in the Strategy states recommends introducing a floor space limit of 20 per cent of GFA or 100sqm (whichever is the lesser) for the 'industrial retail outlet' definition in the consolidated LEP.

8.1.10 Kiosks

Table 40 indicates the current restrictions on kiosks in the Inner West LGA. There is considerable variation between instruments. The controls in Ashfield are comparable with a neighbourhood shop. In preparing the new Inner West LEP, a decision will be required as to the appropriate limit for neighbourhood shops. A 30 sqm limit would allow for development of a moderately sized kiosk that serves local needs without approaching the size of a full-sized shop.

Table 40: Current qualification on kiosks

Marrickville LEP	Ashfield LEP	Leichhardt LEP
5.4(6) Kiosks If development for the purposes of a kiosk is permitted under this Plan, the gross floor area must not exceed 30 square metres.	5.4(6) Kiosks If development for the purposes of a kiosk is permitted under this Plan, the gross floor area must not exceed 100 square metres.	5.4(6) Kiosks If development for the purposes of a kiosk is permitted under this Plan, the gross floor area must not exceed 20 square metres.

Action 4.1.8 in the Strategy states recommends introducing a floor space limit of 30sqm for the 'kiosk' definition in the consolidated LEP.

8.1.11 Creative industries

The Inner West LGA is one of Australia's leading independent arts quarters, hosting one of Australia's most diverse communities. It is home to many artists, studios, commercial art galleries, artist-run initiatives, theatres and festivals. Structurally, this typically comprises old-style residential properties, industrial and semi-industrial areas. Several factors are challenging artists' ability to access affordable spaces in the local area including the undersupply of suitably sized premises and ongoing building compliance issues. The gentrification and a potential for ongoing loss of industrial space are heightened by approved or proposed land zoning changes such as Victoria Road and Carrington Road, Marrickville.

Creative industries include a diverse range of uses that are difficult to define but in general they are uses that deal with art, culture, music and performance and may result in the production of physical or digital items.

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Creative industries do not fall neatly within definitions in the Standard Instrument. Most commonly, creative industries would apply for development consent as light industry, general industry, business premises and office premises.

Defining creative industry

'Creative industry' is often a limiting or confusing term, further complicated by the fact that cultural and creative industries fall across several census data occupation categories. 'Culture'/'cultural industries' is an important addition to the more commonly described 'creative industries.' Culture includes the making, production, distribution and participation in creativity by the community of residents, artists and makers and reflects local heritage and character. The broader scope of creative and cultural occupations include everything from publishing to television and film production, to heritage and libraries, and from artists and musicians to artisan manufacturing (id. Profile, 2018).

It is important that Inner West Council clarifies its understanding of creative and cultural industries as relevant to land use, as it is often the new technology and design-based creative industries that are most easily planned into new developments and business parks and who are typically able to pay higher rents for their work spaces. However, the outstanding local creative and cultural industries of regional importance are its cultural production activities.

For the purposes of Inner West LGA land uses, the following definitions have been provided by Inner West Council for consideration:

Cultural production *is the making of cultural products, from small-scale jewellers and ceramic manufacturers to musicians, and from visual artists and theatre makers, to larger scale prop and set designers. This generally includes direct-to-consumer products and services, whose making is often noisy and messy at occurs at the interface of creative industries and manufacturing. Cultural producers generally need affordable, flexible spaces with long opening hours, loading zones and can require a variety of sizes including smaller studio type spaces and large format warehouses. It is noted that cultural production spaces are often hybrid and can include elements of production, testing and showcasing. In terms of land use planning, cultural production is defined as a type of industry.*

Creative services *are generally commercial business-to-business services, including advertising, marketing, architecture, design, photography and software and digital content development. These are often technology-based and desk-based and are found more typically in office and retail spaces. In terms of land use planning, creative services may be defined as a type of business or office use.*

Cultural presentation *is the performing, exhibiting and presenting of culture, often taking place in venues and other creative spaces, such as music and performance venues, community spaces, galleries, libraries and museums.*

The following definition has been provided to describe the overall provision of creative spaces in the Inner West LGA that enable the above activities:

Cultural infrastructure *is creative spaces and venues for the purpose of making, producing and presenting culture, for professional and community-based creativity and also includes mixed-use spaces that house creative uses. Examples include studios, creative manufacturing spaces, co-working spaces, music and performance venues, studio spaces and community spaces for rehearsal and presentation, galleries and museums. These spaces can be provided by both the private and public sector and can incorporate hybrid art forms and activities.*

Existing provisions

The existing planning framework includes additional provisions as set out in Table 41, which aim to clarify the planning position for creative industries.

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Table 41: Current provisions relating to creative industries

LEP	Clause
MLEP 2011	6.12 Business and office premises in certain zones (1) The objective of this clause is to promote certain types of business and office premises in Zone IN2 - Light Industrial and Zone B7 -Business Park. (2) This clause applies to land in the following zones: (a) Zone IN2 - Light Industrial, (b) Zone B7 - Business Park. (3) Development consent must not be granted to development for the purpose of business premises or office premises on land to which this clause applies unless the consent authority is satisfied that the development will be used for a creative purpose such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes.
LLEP 2013	6.9 Business and office premises in Zone IN2 - Light Industrial (1) The objective of this clause is to promote certain types of business and office premises in Zone IN2 - Light Industrial. (2) This clause applies to land in Zone IN2 - Light Industrial. (3) Development consent must not be granted to development for the purpose of business premises or office premises on land to which this clause applies unless the consent authority is satisfied that the development will be used for a creative purpose such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes.

The above clauses make way for creative industries suited to business and office premises to locate in the IN2 - Light Industrial zone in the former Marrickville and Leichhardt LGA and B7 -Business Park zone in the former Marrickville LGA. This clause allows for creative industries to counteract declining industrial sectors, revitalising areas with often a higher concentration of employees. However, Council has expressed concern that:

- Permitting business and office premises in the IN2 - Light Industrial zone has the potential to erode the capacity of industrial land for industrial purposes
- Permitting strata titled business and office premises increases fragmentation of land and building holdings, preventing future development for industrial purposes
- The long term use of office and business premises for creative industries cannot be guaranteed, noting that like any other industry, creative industries are vulnerable to market conditions and changes in rents.

Alternative measures to support the establishment of creative industries warrant consideration. This is addressed further below.

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Creative Enterprise Zones

The creative industries in London contribute £47 billion a year to the UK economy and provide one in six jobs in London. The creative workforce is growing four times faster than the economy as a whole, and research shows that creative jobs are 87 per cent less likely to become automated. Creative jobs are the jobs of the future.

Artists and creatives can play an important part in incubating good growth, bringing new opportunities to an area and attracting new development. Artists move into cheap areas and help them grow and become desirable. But then they often find themselves priced out by the very success that they have helped create. As the creative economy faces global competition, disrupting this cycle becomes a priority.

In recognition of the importance of creative industries, the Greater London Authority introduced Creative Enterprise Zones in 2018, to designate areas where artists and creative businesses can find permanent affordable space to work. Creative Enterprise Zones will help the capital remain a creative and forward-looking city by securing much-needed affordable workspace, supporting areas to become or remain creative hubs and providing job and training opportunities that will ensure that the local community benefits from creative sector growth. They will ensure that artists and entrepreneurs, regardless of background, will be given the support they need and become our creative leaders of the future.

The Mayor designated the first six Creative Enterprise Zones in December 2018. To qualify as a Mayoral Creative Enterprise Zone, local authorities have demonstrated how they will provide the following:

- Space: Permanent, affordable, creative workspace and live-work spaces at below market rents and ensuring no net loss of space
- Skills and support: Building entrepreneurial skills and offering business support to artists, start-ups, sole traders, micro-sized and small businesses, developing career pathways and opportunities for progression into the creative industries and supporting sectors
- Policy: Local Plans with pro-culture policies in planning, housing, business development, technology and infrastructure, and supportive business rates policies
- Community: Embedding creative production in communities, creating socially-inclusive places and strong links with education providers.

London Boroughs are leading consortiums of local creative businesses, artists, local community groups, developers, workspace providers, further and higher education institutions and other stakeholders.

Proposed approach

A comprehensive suite of actions could be considered by Council to manage and support the ongoing opportunity for creative industries, including statutory planning mechanisms and non-statutory mechanisms as indicated below:

- A focus on the previously rezoned Marrickville Road Sydenham precinct as a 24-hour precinct with a mix of uses suited to an industrial setting, including artisan food and drink, entertainment, restaurants and small bars
- Make light industry permissible in the B2 - Local Centre, B4 - Mixed Use, B5 - Business Development and B6 - Enterprise Corridor zones to expand the range of locations where creative industries could locate and consider including creative industries in the objectives of the zones

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- Limit creative industries in IN1 - General Industrial and IN2 - Light Industrial zones to those industries that 'produce' an item
- Introduce creative industries DCP provisions to:
  - Define creative industries
  - Provide a clear policy position on what is considered a creative industry
  - Set out built form requirements to meet the needs of creative industries including ceiling heights, doorway widths, loading and parking
- Council (or a third party contracted by Council) maintain a register of creative spaces and act as a facilitator in assisting industries to locate suitable space
- Prepare supporting documentation on development application processes / information packs.

8.1.12 Sydenham Station Creative Hub

The Sydenham-Marrickville area is the last major mixed industrial precinct in inner Sydney and it is in high demand as reflected by market data.

Sydenham Station Creative Hub has been the subject of Council strategic planning since September 2014, with a proposal involving creating a diverse employment and entertainment focused precinct put to Council in late 2016. The proposal evolved over the period prior to the amendment to Marrickville LEP 2011 in 2019 and originally intended to expand the range of permissible uses within IN1 -General Industrial land to the north of Sydenham Station to creative industries (including associated businesses and office premises), small bars, cafes and restaurants.

The original proposal was associated with a desire by Council to establish an innovative mixed use precinct in the Inner West LGA. This type of adaptive reuse of industrial lands for creative industries, bars, restaurants and live entertainment has been successful internationally but initially evolved as a strategy to revitalise declining industrial precincts. In response to the planning proposal, the delegate from the GSC required that an economic impact assessment be prepared and exhibited to address the potential impacts of the proposal upon the current and future economic viability of the precinct. Specific reference was given to the potential effect of small bars and restaurants and creative purposes-related business and office premises upon the economic future f the precinct. It is noted that the Sydenham Industrial Precinct is not in a state of decline.

In mid-2017, SGS Planning and Economics examined the impacts of the proposal in Sydenham Create Hub: Economic impact analysis. The key findings included:

- *"Sydenham-Marrickville is the last major mixed industrial precinct in inner Sydney and it is in high demand as reflected by the market data. Pushing more 'low value' uses out to cheaper land in the west may create or even entrench supply-chain inefficiencies resulting in a range of broader economic impacts (higher supply/ production costs, more traffic on the road, even job losses in the extreme case of products/ services being imported).*
- *Future population growth, coupled with major urban renewal projects, will place pressure on remaining industrial lands to turn over to higher value land uses whilst simultaneously increasing demand for population-serving industries.*
- *While the SCH planning proposal will not result in a rezoning, if industrial uses were to be pushed out of the precinct by the target industries, these industrial uses will need to find alternative locations. The research undertaken as part of the study highlighted that businesses do not want to relocate and the options are limited. Similarly, there is a lack of supply in the inner city which has led to increasing demand for land in the SCH and broader Sydenham-Marrickville industrial area."*

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Given the shortage of employment land in the Inner West LGA, and the potential impact of the proposals on rents, the appropriateness of the reduced Sydenham Creative Hub was questioned, with a revised planning proposal considered in 2018. This proposal was reduced in scale, limited to permitting restaurants, cafes and small bars with development consent on certain land fronting Marrickville Road and Railway Parade, Marrickville. In February 2019, Council amended Marrickville LEP 2011, bringing the proposal into effect. The amendment is expected to result in some industrial and urban services premises being converted to restaurants and bars, resulting in a loss of important employment land.

The GSC discussion paper A Metropolis that Works stressed that:

> *"a 'no regrets' approach is required in any decisions affecting industrial and urban services land, with the ramifications of any displacement of activity fully understood and strategically managed.' It stressed that 'seemingly minor tweaks including 'more pervasive actions such as rezoning to B4 Mixed Use and allowing cafes and restaurants, recasts expectations and can act as a Trojan Horse or stepping-stone to uses which in the longer term are not in the best interests of maintaining a productive industrial and urban services area."*

This discussion highlights the concerns that arise when adding permitted uses to industrial zones. Council's decision to permit cafes, restaurants and small bars in the precinct is anticipated to result in a modest loss of employment land, noting that the area affected is relatively small. Council's intentions may be reinforced by promoting the area as a 24-hour precinct offering live entertainment restaurants, cafes, small bars, industrial and creative industries. The level of amenity impacts between industrial and non-industrial uses should be monitored, with the intent of preserving remaining industrial uses.

As discussed in the SGS economic impact analysis, allowing non-industrial uses, specifically the introduction of restaurants, cafes, small bars, and business and office premises in the IN1 General Industrial zone, has the potential to push out existing industrial uses and limit the introduction of new industrial uses. This also applies to the introduction of creative and other uses associated with the office and business premises land uses. Given the scarcity of industrial land in the LGA, and anticipated demand (discussed in Section 7.2), permitting competing uses in the IN1 General Industrial zone should be carefully considered.

It is recommended that any planning proposals to permit higher value commercial uses on industrial land must be supported by an economic impact assessment that identifies the short, medium and long term impacts of the change in the precinct, LGA and Eastern City District, including LGA and precinct demand projections similar to those provided in Section 7.2.

Care must be taken to ensure any economic impact assessment process has a clear definition of 'higher value'. EIAs are very good at defining value in very narrow terms and in favour of less productive uses (such as retail or residential land uses). Any such adoption should consider detailed explanations of how value is ascribed, possibly through a Net Community Benefit or cost-Benefit Assessment framework.

8.1.13 Neighbourhood supermarket

On 22 August 2018, the Standard Instrument was amended to include a new land use definition, neighbourhood supermarkets, as a sub-use of 'shops.' The land use allows for the sale of groceries and foodstuffs to provide for the needs of people who live or work in the local area. The gross floor area of neighbourhood supermarkets is not to exceed 1,000sqm.

Neighbourhood supermarkets are mandated as permissible with consent in the B1 - Neighbourhood Centre zone, and any zone where shops, retail premises or commercial premises are mandated as permissible with consent, including the B2 - Local Centre and B4 - Mixed Use zones as relevant in the Inner West LGA.

Prior to the amendment, the planning pathways for supermarkets was to apply for development consent or a complying development certificate for a shop, either as a new or change of use. This would allow for full service

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supermarkets (approximately 3,200 sqm) and smaller format supermarkets (approximately 800 – 1,000 sqm) in any zone where shops were permitted. Currently, this includes all B1 - Neighbourhood Centre, B2 - Local Centre and B4 - Mixed Use in Inner West LGA, B6 - Enterprise Corridor land in the former Ashfield LGA R1 - General Residential and B7 - Business Park land in the former Leichhardt LGA.

Major supermarkets, including Woolworths and Coles, have recently expanded into smaller format supermarkets under the brand names Woolworths Metro and Coles Local. This has increased competition in the smaller format supermarket occupied by chains such as IGA and Aldi, as well as independent stores.

The review of centres has identified existing supermarkets across the Inner West LGA that would be best described as a neighbourhood supermarket, including:

- Aldi Ashfield – 260 A Liverpool Road, Ashfield – B4 - Mixed Use zone
- IGA Stanmore plaza – 2 Holt Street, Stanmore – B1 - Neighbourhood Centre zone
- Woolworths Metro Rozelle (formerly 'About Life') – 605 Darling Street, Rozelle – B2 - Local Centre Zone.

As noted above, the neighbourhood supermarket land use currently exists in the zones that are required to allow the use with consent. Notably, only one chain neighbourhood supermarket type business was identified in a B1 - Neighbourhood Centre zone, with the remainder clustered in B2 - Local Centre or B4 - Mixed Use zones within precincts. This suggests that market conditions have not been suitable for expansion into the more neighbourhood centric shops associated with B1 - Neighbourhood Centre zones, or that their small lot size (almost exclusively less than 800 sqm) is not suitable for the format.

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8.1.14 Dulwich Hill centres and corridor planning considerations

The *Inner West Local Housing Strategy* forecasts future population growth around Dulwich Hill, in addition to a large number of dwellings built in the past five years. The Canterbury/New Canterbury Road corridor (shown below in blue) contain two centres and one enterprise corridor. There is also a centre located adjacent to Dulwich Hill Station (not shown on the map below). These precincts are discussed extensively in Sections 9.2.8 and 9.1.12.



The purpose of this Section is to highlight the need for an overall planning and urban design review of the corridor as well as reviewing the role of the three Dulwich Hill centres (including Dulwich Hill Station).

Corridors (Canterbury and New Canterbury Road)

A number of issues have been identified with the function of the Canterbury/New Canterbury Road corridor:

- Lack of secondary vehicular access for properties.
- Redevelopment reliant on front vehicular access leading to poor development outcomes.
- Clearways impeding access to businesses.
- Canterbury Road enterprise corridor does not function as an employment corridor.
- Ad-hoc approach to planning controls west of Dulwich Grove Light Rail stop.
- Western end of corridor split between Inner West and Canterbury Bankstown LGA.
- Appropriateness of ground floor employment space.
- Lack of character and place, including a lack of street tree canopy.
- Shop-top housing permitted along Canterbury Road, inconsistent with role of B6 – Enterprise Corridor zoning.

A land use, urban design and feasibility study is required for this corridor to address the above issues. The following outputs of this study are required:

- Define the section of the corridor that should have a focus as a retail centre (focussed around Marrickville Road) and the section that will have a non-retail employment focus (to be determined by the Study).
- Identify opportunities for expanded mixed-use zoning, with an employment focus, along corridors or adjacent to centres.

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- Implement planning controls that deliver usable and flexible employment floor space, based on the recommendations from Section 8.1.2. This is crucial for the section of corridor determined to require a non-retail employment focus.
- Consider precinct specific planning controls which address challenges which prevent redevelopment such as vehicular access and parking.
- Reviewing the zoning, planning controls and footprint of the Canterbury Road Enterprise Corridor with a minimum non-residential floor space requirement to facilitate redevelopment whilst maximising delivery of employment floor space.
- Understand the role and interrelationships of the three centres, especially when revising planning controls which affect capacity of retail/non-retail employment floor space.
- Undertake a feasibility tipping point analysis for B6 - Enterprise Corridor land on Canterbury Road to determine planning controls required to incentivise redevelopment with an employment focus.
- Consider the potential for expansion of mixed use zoning to include adjoining residential properties to enable secondary vehicular access, particularly along Canterbury Road.

There is opportunity for land currently zoned residential, fronting New Canterbury Road west of Dulwich Hill Centre to be considered as part of the review. Due to the amenity constraints along the corridor and the underperforming nature of the recently developed commercial floor space, consideration should be given to implementing commercial floor spaces which can cater to a larger range of uses. This includes setting minimum standards for ceiling height, loading/unloading capabilities and floor plate size, to name a few. Further insight to what may be required can be found under Section 8.1.2 of this report. This would create spaces for use as showrooms, specialised retail, light industry and larger anchor retail tenancies, or businesses of greater regional significance. The residential uses above should also be retained to continue to foster a growing population in the area and support the finer grain commercial uses. Urban design implications and the feasibility of this will also need to be considered.

If successful, this may be replicated along the length of New Canterbury/Canterbury Road. Heritage constraints and the interface between low density residential uses in the streets behind with the new built form to lots on New Canterbury Road will also need to be considered.

This should also be applied to the B6 Enterprise Corridor extending along Old Canterbury Road, Hurlstone Park between Princess Street in the south and Hanks Street in the north. Whilst having this zone for some time, as well as provision for shop top housing as an additional permitted use, there has been very little take up of the intended uses and built form. Investigations should be made as to why this area has not been redeveloped as intended and how barriers to this can be addressed.

The formation of an urban tree canopy along New Canterbury Road should also form part of the urban design considerations. This may include making breaks in continuous awnings for the development of a meaningful tree canopy.

Centres

Historically, Dulwich Hill Centre has had a retail focus while Dulwich Hill West has historically had an urban services role. Dulwich Hill station historically has had a neighbourhood centre function. Considerable population growth and redevelopment at these locations has changed the make-up of employment floor space. A coordinated response is required to ensure there is a clearly defined role for each of these centres and the broader New Canterbury Road/Canterbury Road corridor.

The objectives of this proposed study are to:

- Strengthen and grow the retail core of Dulwich Hill Centre

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- Consider growing the Dulwich Hill Station with a focus on growing retail/office
- Leverage off infrastructure projects that are complete or in progress including delivery of the Dulwich Hill Station Detailed Master Plan
- Identify areas for potential office floorspace to meet projected demand
- Safeguard existing employment from inappropriate residential development.

The study will need to:

- Consider the specific locations for population growth, in line with the direction in the Local Strategic Planning Statement and the *Inner West Local Housing Strategy*.
- Consolidate the number of applicable zones.
- Align permitted employment uses with the future defined role and function of centres in Dulwich Hill
- Determine where the boundaries of these centres may need to grow or contract
- Identify the economic impact of expanding the centre surrounding Dulwich Hill Station
- Consider whether certain commercial uses should be limited outside of the Dulwich Hill Centre to strengthen its role and provide space for other employment uses.
- Consolidate and rationalise the zoning of the centres in line with the outcomes of the study.

Action 1.7.1 and 3.1.1 of the Strategy supports the preparation of the Dulwich Hill Centres and Corridor Study which will consider:

- Strategic role of Dulwich Hill Centre and Dulwich Hill Station together with the delivery of Sydney Metro.
- Improving urban design and employment outcomes along Canterbury/New Canterbury Roads
- Growing office and retail floor space at Dulwich Hill Station and Dulwich Hill Centre
- The economic impact of the potential expansion of Dulwich Hill Station centre on the broader trade catchment.

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8.1.15 Industrial land monitoring

The monitoring of industrial land supply is a key tool to assist and improve Council's planning, delivery and servicing of employment lands in the Inner West. The primary purpose of a monitoring system is to:

- Maintain an adequate supply of industrial land for employment purposes.
- Provide up-to-date information to underpin strategic planning in employment precincts.
- Identify functional relationships and interdependencies between enterprises.
- Coordinate investments and provision of infrastructure to adequately service industrial land.
- Enable early action to be taken to address potential industrial land supply shortfalls or constraints.
- Support regular review of the Strategy to ensure it is current and effective in responding to new and emerging trends.

The monitoring system could include the following key criteria (not exhaustive):

- Identify existing IN1 and IN2 zones
- Identify existing industrial uses in non-industrial zones
- Identify non-industrial uses occupying industrial zones
- Lot size and floor plates distribution
- Stock of available and unavailable sites for future supply
- Estimated net developable area
- Proximity to key transport routes and hubs
- Type and condition of building
- Employment mix
- Supplier network and location of key markets being serviced
- Car parking and truck access/loading dock requirements
- Rent costs
- Constraints and opportunities on a site-by-site basis
- General perception from tenants
- Identify potential for expansion

Further understanding of older style industrial building stock is required as they present unique qualities that attract certain microenterprises. The monitoring system should incorporate greater recognition of the benefits of the features of older industrial building stock that would have on employment land mix and enable Council to maximise these benefits to create better economic and social outcomes.

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8.2 Planning implications

Table 42 summarises the planning implications of the above analysis in the context of the existing employment zones in the LGA.

Table 42: Implications of introducing certain use types into a zone

	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Artisan Food and Drink	• Artisan food and drink would already be enabled if light industries are permitted. • The inclusion may increase the appeal and viability of the overall centre if attracting new customers. • The inclusion may assist in reducing vacancy rates in centres and contribute to broader employment opportunities. **Recommendation:** • Subject to environmental consideration, permit 'Light industry' with consent in all business zones (as currently the case in the Leichhardt LEP B2 - Local Centre zone). This would enable the operation of artisan food and drink.	Light industries are already enabled in all business settings except B5 - Business Development. Currently only the Marrickville LEP adopts the B5 - Business Development zone. Adopting the B5 - Business Development zone in the new LEP would broaden the possibility for light industry uses including artisan food and drink premises that can add to the vibrancy of a business area. **Recommendation**: • Enable light industries in B5 - Business Development zone.	• Technically can already operate in the zone. Restaurant uses may have greater capacity and potentially displace less viable industrial businesses. • Additional traffic and demand for parking could negatively impact on industrial activity in the area. • More pedestrians in the area may lead to greater safety issues. • Improves the vibrancy and desirability of a location. • Provides opportunity for business meetings and social networking for workers in the area. **Recommendation**: • Refer to Section 8.1.7 of the Study and Action 2.6.1 and 2.6.2 in the Strategy.

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	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Specialised retail premises	• Net leasable area rates are higher in areas that permit all retail, therefore specialised retail premises would more likely operate in a lower order centre. • Where there are high vacancy rates in centres and rents are reduced, specialised retail premises may seek to capitalise on the opportunity to locate closer to residential markets. • The impact on traditional retail is generally not significant as the specialise retail premises can attract greater patronage, benefitting surrounding businesses. • Specialised retail premises falls under the 'commercial premises' group term and is already mandated in the B2 - Local Centre and B4 - Mixed Use zone **Recommendation:** • Do not permit specialised retail premises in the B1 - Neighbourhood Centre zone.	• Specialised retail premises generally have a greater ability to pay a higher amount for sites than uses traditionally found in Business zones. If there is high demand for specialise retail premises, they can displace office and light industry functions, particularly if they begin to cluster. • Specialised retail premises are already mandated in B5 - Business Development Business Development zone. **Recommendation:** • Prohibit specialised retail premises in B7 - Business Park • Permit specialised retail premises in B6 - Enterprise Corridor zones. • Develop performance measures for specialised retail premises in the B6 - Enterprise Corridor zone	• Specialised retail premises can pay twice the land value compared with general industrial uses, crowding out industrial uses. • Once clustering occurs, specialised retail premises can inflate land prices up to five times the amount, compromising industrial areas further and stymying traditional industrial activity. **Recommendation:** • Prohibit specialised retail premises in industrial zones to reduce competition for industrial land.

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	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Neighbourhood supermarket	N/A already permitted in relevant zones	• Out of centre neighbourhood supermarkets can compete with other office, business and specialised retail premises. • Across the LGA there is generally sufficient supply of B1 - Neighbourhood Centre, B2 - Local Centre and B4 - Mixed Use centre zones to accommodate neighbourhood supermarkets in centres. • Enabling them in other zones would impact the retail hierarchy. **Recommendation:** • Prohibit neighbourhood supermarkets in B5 - Business Development, B6 - Enterprise Corridor and B7 - Business Park zones.	• Would potentially displace less viable industrial uses. • Would enable greater convenience retailing for local workers. **Recommendation:** • Prohibit neighbourhood supermarkets in industrial zones
Office and business premises	N/A already permitted in relevant zones	• Office and business premises already permitted in most relevant zones • Business premises are currently prohibited in the B7 - Business Park zone under Leichhardt LEP 2013. **Recommendation:** • Permit 'business premises' in all business zones.	• Industrial areas provide a more affordable alternative for businesses priced out of traditional centres and office markets. Considering trends in enterprise/small business in the Inner West and the attractiveness of some of the industrial areas due to lower rent, there is potential that this will push up land values and increase competition for land, potentially displacing some less viable uses. • Office and business premises have greater ability to locate in centres, whereas some industrial uses cannot. To reduce the demand on valuable industrial land, office and business premises, that are not associated with the industrial use, should be prohibited in industrial settings. **Recommendation:** • Prohibit office and business premises in industrial setting.

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	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Residential accommodation	• In the current market, residential accommodation receives a higher and better land value and rent returns that standard retailing, office and business premise. • While residential accommodation with lower floor retail, office and business premises is appropriate, enabling residential accommodation without lower floor commercial would erode the intent of the business centre and potentially displace less viable businesses. • To maximise the diversity of ground floor uses – consider implementing a higher minimum floor to ceiling height along major road frontages such as Parramatta Road and Victoria Road to encourage other forms of commercial and business premises other than shops. Refer to Section 8.1.2 for further discussion and full recommendations. **Recommendation:** • Consider minimum non-residential FSR controls. Refer to Section 8.1.1 for full recommendations.	• In the current market, residential accommodation receives a higher and better land value and rent return than commercial and industrial uses. • Introducing residential accommodation, in any form can cause fragmentation of business areas and can create future reverse amenity effects. **Recommendation:** • Undertake review of the B7 - Business Park zone across the Inner West LGA to determine whether land is more appropriately zoned IN2 - Light Industrial • Prohibit all forms of residential accommodation and tourist and visitor accommodation, except where it is mandated as a permitted use under the Standard Instrument in the B5 - Business Development and B6 - Enterprise Corridor zones. Refer to Section 8.1.4 for full recommendations.	• Introducing residential accommodation, in any form into industrial settings has an immediate effect on the EPA technical requirements then triggered for new industrial uses as the residential component is a sensitive receiver. • Residential accommodation generally has a greater ability to pay, pushing up land values and potentially displacing less viable industrial uses. **Recommendation:** • Prohibit all forms of residential accommodation and tourist and visitor accommodation in IN1 – General Industrial and IN2 – Light Industrial zones. • Seek to provide buffers to IN1 – General Industrial lands from residential accommodation

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	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Light industries	• The definition of light industries is that they do not interfere with amenity of the neighbourhood. The effect on centre function would be minimal. • New manufacturing formats based on advanced technologies would be price competitive and appropriate for the business setting and would respond to global trends. • Industrial activity formats, that do not have amenity effects, would be compatible with business centres, increasing the space available for these uses outside industrial zones. • Enabling light industries in all B zones would increase the flexibility and utilisation of commercial spaces in centres and along enterprise corridors. • Land and rent values in centres are generally higher with some light industries potentially unable to afford the higher rent. Where this is the case there remains opportunity to operate in enterprise corridors and industrial areas. • Some light industries may potentially displace less viable retail uses in centres. **Recommendation:** • Permit light industry in all Business zones • Within mixed-use zones only, introduce a local clause that specifies minimum floor to ceiling heights at ground floor to improve opportunity for various uses. Further discussion and recommendations contained in Section 8.1.2.		Already permitted in setting

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Attachment 1

	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Local distribution premises	• There is increasing demand for local distribution centres due to online retailing and consumer expectation of rapid delivery services. Enabling these distribution centres, where appropriately designed, in local centres, will reduce pressure on industrial land. • Consider further design specifications in the DCP to ensure distribution premises do not affect local character. • Potential effect on vehicle trip generation and safety issues in local centres. **Recommendation:** • Permit 'local distribution premises' in B2 - Local Centre zones and B4 - Mixed Use zones. • Require rear delivery vehicle access in B2 - Local Centre zones. • Cap the size of these uses through an additional local provision around the maximum allowable floor space so not to impact on the character and amenity of centres. Local distribution premises would still need to be fairly large to enable the movement of a mid-size rigid vehicle. A 400sqm floorplate would likely be the minimum size that would enable adequate forward movement of vehicles. Further design investigation should be undertaken.	Already permitted in relevant zones	• Already allowed in industrial areas. • Market demand is increasing for local distribution appropriate spaces. Will be competing for space with more traditional industrial uses, which do not have the ability to locate in centres. This may cause displacement of some less viable businesses. • Distribution centres are generally more viable businesses and will likely be able to afford higher land and rent values. • The use is currently mandated under the standard instrument and therefore is permissible, however encourage the use to locate in business zones

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	Retail centre setting (B1 - Neighbourhood Centre, B2 - Local Centre, B4 - Mixed Use)	Business setting (B5 - Business Development, B6 - Enterprise Corridor, B7 - Business Park)	Industrial setting (IN1 - General Industrial, IN2 - Light Industrial)
Creative industries (non-manufacturing/ not making or crafting a product)	• Business and office premises are already permitted in these zones.	N/A already permitted in relevant zones Discussion of B7 - Business Park included discussion to the right.	• Under clause 6.9 of the Leichhardt LEP and clause 6.12 of the Marrickville LEP, development consent can be granted for the purpose of business and office premises in the IN2 - Light Industrial and B7 - Business Park (Marrickville only) zones, where the consent authority is satisfied that the development will be used for creative purposes. • This additional local provision could undermine the intent of the industrial zone, introducing additional uses that might potentially displace or reduce the supply of land for traditional industrial uses that cannot operate in any other zone. • The affordability of industrial land is what attracts these creative businesses to the area, as generally their capacity to pay is lower. However, without assessment of an individual business' ability to pay, it is difficult to ascertain which of these businesses need the subsidised rent, and which of them are just benefitting from the market opportunity. • Inner West has very limited land available for traditional industrial uses. Where a business is not required to locate in an industrial area due to amenity reasons, they should not be encouraged, unless they are the type of creative activity that needs large inexpensive accommodation. • Refer to 8.1.11 for detailed consideration of relevant clauses with recommendations.

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8.3 Proposed zoning framework recommendations and implications

The recommendations in the table below should be considered as part of an overall review of business zones by Council, especially the B4 – Mixed Use, B5 – Business Development, B6 – Enterprise Corridor and B7 – Business Park zones.

Currently, these zones in the Inner West LGA all have some form of residential, live-work and mixed use development permitted (whether in the land use table or through special clauses).

Further work is required to appropriately establish how business zones function outside of centres. The zones need to each have a clearly distinct employment based role in the Inner West LEP. Potential examples include:

- a zone which allows mixed-use development but with clearly defined minimum design requirements for ground floor employment spaces (suitable for B4 – Mixed Use) and/or minimum percentage of office or live work floor space.
- a zone which is similar to an IN2 – Light Industrial zone but with office and business premises permitted in the zone

Action 2.3.3 of the Strategy recommends that Council develop a distinct set of business zones, with land across the LGA reviewed to consider where the zones should apply. This should consider actions in the Strategy which recommend rezoning for certain precincts and identify opportunities to be explored for certain precincts and corridors, where the applicable zone requires further review.

Table 43: Proposed zoning framework

Zone	Role (the purpose of it)	Function (where should it apply)	Recommendation	Implication/rationale
B1 - Neighbourhood Centre	• To provide a range of small-scale retail, business and community uses that serve the needs of people who live or work in the surrounding neighbourhood. • To enable shop-top housing that is well-integrated with the primary business function of the zone.	• Least intensive business zoning • Small-scale shops and services that cater to the local community.	• Prohibit non-mandated residential accommodation uses in B1 - Neighbourhood Centre (eg shop top housing and boarding houses) • Investigate rezoning smaller B2 -Local Centre zones in former Leichhardt to B1 - Neighbourhood Centre • Maintain smaller B1 - Neighbourhood zoning, even if on a single site to protect longer term need for local convenience retailing.	• Prohibiting other forms of residential maintains the primary role of the centre for local convenience purposes and protects retail uses from potential displacement. • Current inconsistency between Leichhardt LEP and Ashfield and Marrickville LEPs. The change would re-align the zone intent providing clarity around intended function and role. • If adopted, Clause 5.3 in the LEP allows flexibility of uses where a B1 - Neighbourhood Centre site may be isolated and seeks an alternate use in line with land uses on the adjoining zone. Consider expanding this clause across LGA and included a relevant distance of 25 metres. Under sub-clause (3) add and an (aa) land in IN1 - General industrial and IN2 - Light industrial zones.

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Zone	Role (the purpose of it)	Function (where should it apply)	Recommendation	Implication/rationale
B2 - Local Centre	• To provide a range of retail, business, entertainment and community uses that serve the needs of people who live in, work in and visit the local area. • To encourage employment opportunities in accessible locations. • To maximise public transport patronage and encourage walking and cycling. • To allow appropriate light industries and local distribution premises that supports the vitality of the centre, while protecting the amenity of surrounding residents. • To provide more homes closer to jobs.	• Anchored by a supermarket or other major commercial tenant • Provide a diversity of local employment opportunity • Provide access to goods and services that meet the needs of the local community • Provide a collection of shops and health, civic and commercial services.	• Permit with consent in B2 - Local Centre zones, residential accommodation land uses, paired with an additional local provision specifying that residential accommodation is only permissible where a commercial or light industrial premise is enabled on the ground floor. Introduce a minimum non-residential FSR provision in key centres (refer to Section 8.1.1) • Permitting with consent in B2 -Local Centre, local distribution premises, and light industries with an additional local provision around maximum floorspace. Consider rezoning larger B1 - Neighbourhood Centre hubs in Leichhardt LEP and Marrickville LEP to B2 -Local Centre (eg Dulwich Hill Station and Stanmore).	• Continuing to enable residential accommodation would increase the density of residential in the walkable catchment surrounding centres, making potential business uses more viable. • In line with the future centre hierarchy, Ashfield is to become the major centre in the LGA with additional commercial floorspace mandated. • In higher order centres, where commercial floorspace may currently be, or need to be, on ground and upper levels, a minimum non-residential FSR would prevent the net loss in floorspace and assist in securing floorspace to meet future commercial needs. • Market demand is increasing for local distribution, specialised retail and light industry spaces. Enabling this use type in local centres would reduce the pressure on industrial and other business zones, increasing the diversity of employment opportunities in locations with higher amenity and transport accessibility. These uses would only be enabled where they do not have implications on the amenity and character of a centre and could be controlled through specific floorspace controls. • This would align the zoning of centres with the current and intended function.
B4 - Mixed Use	• To provide a mixture of compatible land uses. • To integrate suitable business, office, residential, retail and other development in accessible locations so as to maximise public transport patronage and encourage walking and cycling.	• To accommodate a mix of out of centre commercial uses and residential accommodation. • Retail is of a size and scale that does not detract from the commercial centre hierarchy.	• Minimise the use of B4 - Mixed Use zoning unless there is adequate evidence that other land zones are not appropriate. • Permit local distribution premises and light industries in the B4 – Mixed Use zone with an additional local provision around maximum floorspace. • Introduce an additional local provision for land zoned B4 – Mixed	• B4 - Mixed Use encourages increased residential accommodation encroaching on industrial and business centres. Minimising the use of this zone will assist in protecting employment uses. • Increasing the availability of space for local distribution premises and light industries reduces the competition for land in industrial zones. • The current shop-top housing provision (see Leichhardt LEP 6.11A) does not adequately allow for other forms of commercial and light industrial

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Zone	Role (the purpose of it)	Function (where should it apply)	Recommendation	Implication/rationale
	• Facilitate a broader diversity of industries including creative spaces, warehousing and light industries.		Use, specifying that residential accommodation is only permissible where a commercial or light industrial premise is enabled on the ground floor.	development at ground floor. Amending the provision would facilitate this change.
B5 - Business Development	• To enable a mix of business and warehouse uses, and specialised retail premises that require a large floor area, in locations that are close to; and that support the viability of, centres. • To enable a greater diversity and varying scale of employment generating uses • To provide for a range of higher order job opportunities including health, cultural and high technology industries. • To provide for a range of development that relates to university and hospital activities, creative and cultural industries, and business incubators.	• Provides a residential free land zone. • Encourages a mix of employment uses including creative business and office spaces. • Intended to provide a commercial zone that complements and supports the function of industrial zones and centres.	• Prohibit any further residential accommodation, or tourist and visitor accommodation, including through additional permitted uses. • Permit food and drink premises, light industrial and markets in B5 - Business Development zones to support workers and businesses. • Undertake feasibility assessment to determine specific planning controls that would enable a feasible non-residential development outcome. • Consider expanding the implementation of the B5 - Business Development zone to other areas in the LGA including: – Balmain East Waterfront, Lilyfield Road and Gordon Street from B2 - Local Centre.	• The B5 - Business Development Zone currently only applies to land in the former Marrickville LEP. Although land use table prohibits residential accommodation, Schedule 1 of the Marrickville LEP 2011 has been used to permit residential flat buildings in the zone. The current function does not match the intent for the zone in the standard instrument. By applying the zone as intended under the standard instrument, it would create additional capacity across the LGA for a diversity of employment uses, without undermining industrial land and business centres. Where residential development is permitted under additional use clauses – they would still be able to operate. • Feasibility testing is required to determine non-residential uses that are able to be delivered and what planning controls would need to be provided to make development viable. • Some existing local centres do not necessarily operate in line with the intended function. Consider rezoning to B5 - Business Development to enhance the diversity of employment uses that can be facilitated.
B6 - Enterprise Corridor	• To promote businesses along main roads and to encourage a mix of compatible uses. • To provide a range of employment uses (including business, office, retail and light industrial uses).	• Facilitates employment uses along major road corridors • Provides an amenity buffer to surrounding residential • Prohibits residential accommodation and serviced apartments	• Introduce new B6 – Enterprise Corridor zone along Victoria Road Rozelle. Refer to Section 9.2.5 for more detail. • Review appropriateness of B6 – Enterprise Corridor zoning along Canterbury Road Ashfield. Refer to Section 9.1.12.	• The current zone facilitates a range of employment uses along major road corridors. • To encourage redevelopment in line with PRCUTS, where it is consistent with relevant Council and District Plan policies. • Where possible, retail should be provided only where it does not impact on the retail hierarchy.

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Zone	Role (the purpose of it)	Function (where should it apply)	Recommendation	Implication/rationale
	• To maintain the economic strength of centres by limiting retailing activity.	• Creates opportunity for specialised retail premises	• Permit, with consent, certain retail and supporting uses in the B6 - Enterprise Corridor zone. This may include food and drink premises; kiosks; industrial retail outlets; industrial training facilities; neighbourhood shops; vehicle sales or hire premises; wholesale supplies; specialised retail premises; timber yards. • Prohibit neighbourhood supermarkets in the B6 - Enterprise Corridor zone. • Prohibit tourist and visitor accommodation in the B6 - Enterprise Corridor zone, with the exception of hotel and motel accommodation.	• Short term accommodation should only be provided in the form of hotel and motels. Serviced apartments should not be permissible.
B7 - Business Park	• To provide a range of office and light industrial uses. • To encourage employment opportunities. • To enable other land uses that provide facilities or services to meet the day to day needs of workers in the area.	• Provide opportunity for live/work arrangements • Support creative industries • Enable a range of employment uses in proximity to residential	• Retain the B7 - Business Park zone as a live/work zone. Implement a pilot compliance and review process to monitor the use of the zone and if the intent is being achieved. If deemed successful, consider expanding the implementation of the live/work zone. • Identify areas where B7 - Business Park is used as a buffer zone between IN1 - General Industrial and residential uses and transition to B5 - Business Development or IN2 - Light Industrial • Prohibit non-mandated retail premises uses in the B7 - Business Park zone.	• The zone is unique in that it enables a live/work arrangement. The implementation of this zone would need to be closely monitored to ensure it is being utilised in an appropriate way. The zone should not detract from the retail hierarchy and therefore should not enable retail uses. • The zone directly fronts IN1 - General Industrial zones, potentially permitting residential uses that would conflict with general industry uses. Transitioning these lots to an employment zone that does not permit residential uses would serve as an amenity buffer and preserve industrial uses.

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Zone	Role (the purpose of it)	Function (where should it apply)	Recommendation	Implication/rationale
IN1 - General Industrial	• To provide a wide range of industrial and warehouse land uses. • To encourage employment opportunities. • To minimise any adverse effect of industry on other land uses. • To support and protect industrial land for industrial uses.	• Serves a local, district and regional purpose • Provides essential support services for the airport and port • Enables the operation of amenity intrusive and 24/7 operation	• Retain IN1 - General Industrial land • Prohibit all forms of residential accommodation in IN1 - General Industrial zones	• Inner West has reached a critical threshold in that the LGA does not have sufficient land available to accommodate future industrial uses under the worst case scenario. This scenario considers that some industrial uses require land area, rather than floorspace to accommodate the business function (eg concrete batching, council waste depot or empty container storage) • Residential accommodation introduces reverse amenity impacts. It also triggers additional EPA requirements (eg noise and air quality) to be met by new or change of use developments as it is considered a sensitive receiver in close proximity.
IN2 - Light Industrial	• To provide a wide range of light industrial, warehouse and related land uses. • To encourage employment opportunities and to support the viability of centres. • To minimise any adverse effect of industry on other land uses. • To enable other land uses that provides facilities or services to meet the day to day needs of workers in the area. • To support and protect industrial land for industrial uses.	• Serves a local and district purpose • Provides essential urban support services and other industrial activities	• Retain IN2 - Light Industrial land Prohibit all forms of residential accommodation in IN2 - Light Industrial zones • Prohibit specialised retail premises in the IN2 - Light Industrial zone.	• As above • As above • Specialised retail premises (large format retailing) can increase land and rent values and displace traditional industrial uses competing for the same space. This use can also operate in business centres whereas some industrial activities cannot. Considering the need to protect industrial land, reducing competition for supply is recommended.

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Item 1

EMPLOYMENT AND RETAIL PRECINCTS

Attachment 1

9.0 EMPLOYMENT AND RETAIL PRECINCTS

9.1 Employment precincts

This section provides a profile of significant employment precincts in the LGA. The profiles are intended to provide a summary of the existing uses in the precincts, the development outlook, and key opportunities for the future. The information has been compiled from a variety of sources including previous studies on the centres and precincts, a floorspace audit, development applications registers and the Australian Bureau of Statistics. The Employment floorspace demand discussed in this section is based on the scenario modelling detailed in The capacity for each employment precinct to accommodate the demand forecasted under different proportions of take-up is shown in Table 20. Take-up ratios of 60 per cent, 75 per cent and 100 per cent have been applied. A 60 per cent take up ratio indicates the result if 60 per cent of the total capacity of the precinct under current planning controls was developed. The resulting development floorspace has been subtracted from the capacity of the precinct. Where capacity is insufficient to accommodate the projected floorspace demand, a negative figure results. A positive number indicates a surplus in capacity.

Overall, the projections demonstrate that under the 60 per cent capacity scenario there would be a shortfall in capacity of around 432,540sqm, while under the 75 per cent scenario the shortfall would be around 28,465sqm. If full capacity was achieved there would be a surplus of 644,990qm.

Location	Employment Precincts	GFA	Proportion (%)	Vacancy rate (%)
Marrickville-Sydenham	Marrickville - Sydenham Employment Precinct	565,875	30.9	0.4
	Carrington Road Industrial	106,218	5.8	3
	Victoria Road, Marrickville	87,237	4.8	3
	Addison Road Industrial	85,434	4.7	4
Princes Highway	Princes Highway and Airport Enterprise Corridor	278,186	15.2	2
	St Peters Triangle	61,302	3.3	0
Parramatta Road Corridor Note: Excludes Leichhardt Core (Norton Street)	Camperdown Core Precinct	157,883	8.6	3
	Camperdown Frame Area*	23,366	1.3	0
	Taverners Hill Core Precinct	38,117	2.1	2
	Taverners Hill Frame Area	70,059	3.8	15
	Leichhardt Frame Area**	68,578	3.7	11
	Kings Bay Core Precinct	16,845	0.9	9
	Kings Bay Frame Area	13,111	0.7	8
Other	White Bay Industrial	72,704	4	3
	Moore Street Industrial	60,355	3.3	3
	Canal Road Arts Precinct	33,943	1.9	0
	Balmain Road Industrial	18,073	1	10
	Terry Street Industrial	15,159	0.8	3
	Summer Hill Industrial (Lewisham West Precinct)	9,911	0.5	5
	Gladstone Street Business Precinct	9,774	0.5	7
	Lewisham Industrial	7,900	0.4	5

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	Lilyfield Industrial (Lilyfield employment precinct)	7,256	0.4	1
	Canterbury Road Enterprise Corridor	5,576	0.3	7
	Balmain East Working Waterfront	4,775	0.3	0
	Dulwich Hill Industrial	4,486	0.2	0
	Marion Street Industrial	4,064	0.2	0
	Stanmore Bridge Road West*	3,799	0.2	Data unavailable
	Precinct 75	3,062	0.2	18
	Milton Street	Data unavailable	Data unavailable	Data unavailable

* Excludes floor space relating to B1, B2, B4 zonings that are contained within these precincts

** Includes floor space relating to B2, B4 zonings that are contained within these precincts

Figure 14 provides an overview of the employment precincts.

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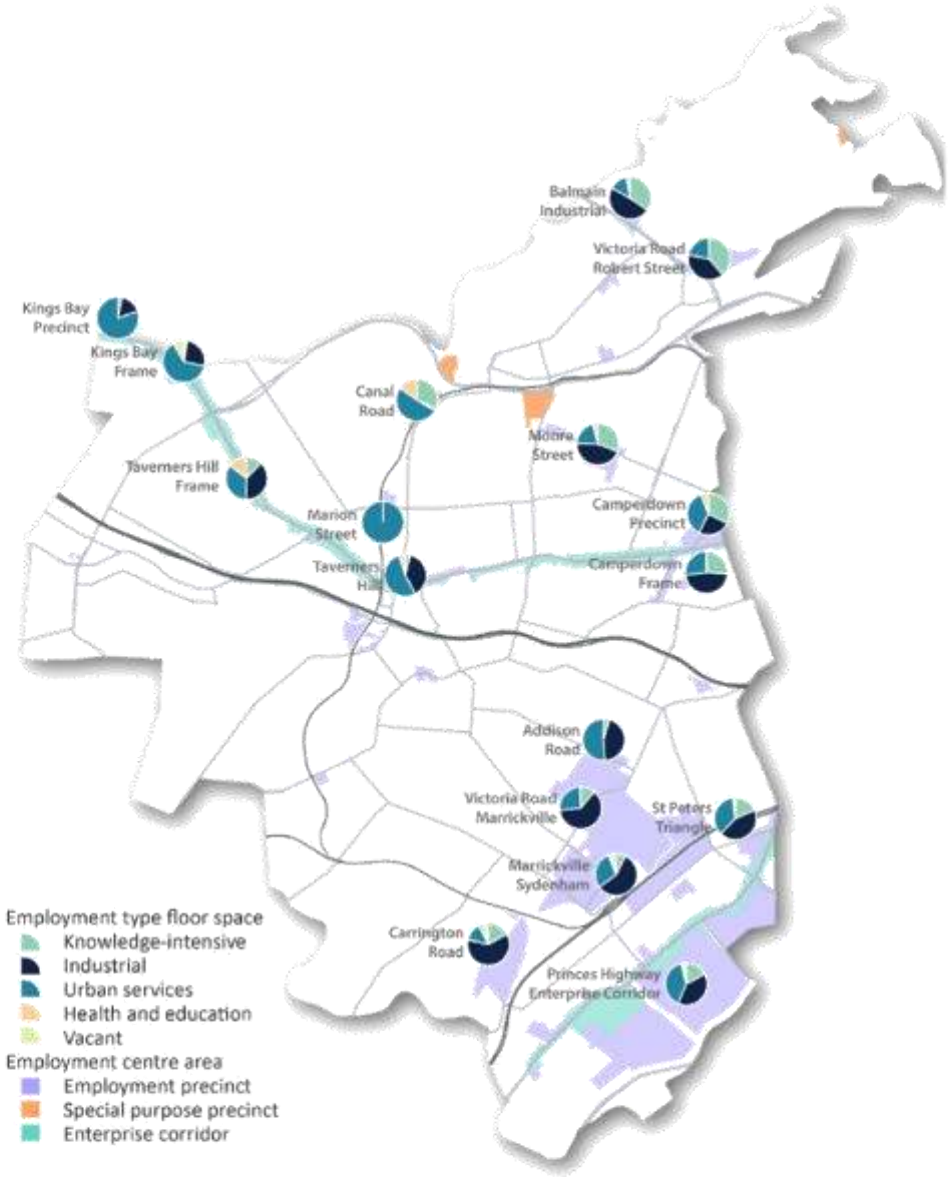
Figure 14: Employment precinct overview



*Australian Bureau of Statistics, Census of Population and Housing 2016, per destination zone (113261414 and 113281420), Economy.id

**Australian Business Register -filtered counts, current at 3rd Dec 2018, per destination zone (113261414 and 113281420), Economy.id

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9.1.1 Princes Highway and Airport Enterprise Corridor

Role and function

Overview

The Princes Highway and airport enterprise corridor stretches 2.5 kilometres from the WestConnex interchange at Campbell Road to Holbeach Avenue at the southern edge of the Inner West LGA. The corridor is well served by buses. Tempe, Sydenham and St Peters railway stations also service the precinct. The role and function of the corridor varies considerably due to the wide variety of building typologies, lot sizes and land use zones that apply. This is shaped further by the range of additional permitted uses that apply throughout the precinct via Schedule 1 of Marrickville LEP 2011.

Princes Highway is an enterprise corridor providing a mix of speciality retailing, take-away food services, pubs, suppliers and wholesale traders. The 1,717,039 sqm precinct (this includes all land in the precinct including the WestConnex interchange) provides an estimated 278,186sqm of total floorspace. Built form is varied, with new stock generally containing showrooms and older stock containing a mix of automotive repair and wholesale trade businesses. Building height is generally between one and two storeys with higher floor to ceiling clearances.

The industrial land adjoining and to the south of Princes Highway has been affected by the WestConnex St Peters Interchange and the proposal for Sydney Gateway, if approved, will also impact on industrial land supply in the precinct. This includes potential effects on the shipping container and construction material recycling areas that serve a regional and state function. These transport projects have resulted in a loss of strategically important industrial land in close proximity to the airport, port and rail line.

The precinct is strategically located close to Sydney Airport, Port Botany and Sydney's motorway network. It serves a critical role as a trade gateway for Port Botany and the wider NSW freight network. Objective 16 of the Greater Sydney Commission Eastern City District Plan states 'freight and logistics network is competitive and efficient.'

North

The section of the corridor between Campbell and Canal Roads is highly fragmented, which is exacerbated by the recent construction of the WestConnex St Peters Interchange. On the eastern side of the Princes Highway, properties fronting the main road have a retail function including garden centres and hardware/building suppliers. There are also a number of fast food outlets and a budget motel. A large modern industrial office and warehouse complex is located on a large irregular block of land. It contains approximately 35 strata titled warehouse/office spaces, each containing approximately 200sqm of employment space. They each have parking provisions and attract a diversity of businesses including a range of urban services and creative uses (including a recording studio). The western side of the Princes Highway at this location is dominated by urban services such as automotive repairers and bulky goods retailers. There is also a pub, known as the White Horse Hotel.

Central

The middle section of the corridor between Canal Road and the main freight railway line contains substantial landholdings of IN1 - General Industrial land to the east of the Princes Highway. This land extends to the Alexandria Canal. The majority of this land currently contains a large freight container terminal and a Boral concrete facility. A large portion of this land is at risk of acquisition for the construction of the proposed Sydney Gateway motorway. Closer to the canal are a number of industrial and urban services uses. There is a large modern industrial office and warehouse complex along Burrows Road South, with approximately 30 strata titled warehouse/office spaces. Properties closer to the Princes Highway comprise a mix of IN1 - General Industrial, IN2 - Light Industrial and B6 - Enterprise Corridor. Businesses range from recording studios, to storage premises, retail, fast food and other urban services. The Southern Cross Hotel is located within this section of the precinct.

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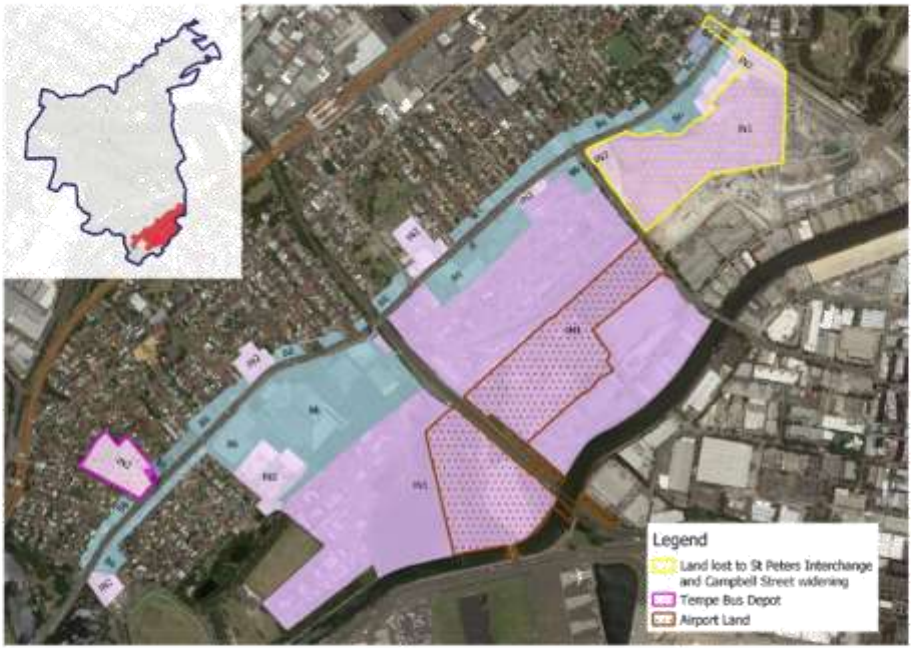
To the west of the Princes Highway are a number of residential dwellings, petrol stations, automotive repairers and wholesalers.

South

The southern end of the precinct, to the south of the main freight line has five distinct components:

- A container terminal, zoned IN1 - General Industrial.
- Tempe Bus Depot
- Sydney Airport owned land zoned IN1 - General Industrial. This land currently contains a large car park and secured land which supports the function of the airport.
- Retail precinct fronting Princes Highway, zoned B6 – Enterprise Corridor. This precinct consists of an Ikea, Decathlon, Good Guys and a Bunnings has been recently approved at this location.
- Remaining lands within the precinct primarily front Princes Highway and have a primarily automotive and urban services function. There are is a presence of residential dwellings and a retail strip exists adjacent to the bus depot.

Precinct map



Planning controls

The Princes Highway and Airport Enterprise Corridor consists of B4 - Mixed Use, B5 - Business Development, B6 - Enterprise Corridor, IN1 - General Industrial, and IN2 - Light Industrial zones.

Schedule 1 of Marrickville LEP 2011 contains a number of additional permitted uses for specific sites, which has shaped the role and function of this precinct. The figure below identifies sites within the precinct profile with additional permitted uses.

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The majority of the precinct is zoned IN1 - General Industrial. The intention of this zone is to accommodate industrial activities more likely to generate amenity impacts. Business premises and office premises are prohibited in the zone. While specialised retail premises are prohibited, garden centres and hardware and building supplies and artisan food and drink industry are permitted. No additional permitted uses apply to IN1 - General Industrial land within this precinct.

Parts of the precincts are zoned IN2 - Light Industrial under Marrickville LEP 2011. The floorspace ratio control applying to the precinct is 0.95:1. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct. The historic Tempe Bus Depot owned by Transport for NSW is located at 745 Princes Highway, is zoned IN2 - Light Industrial and has 'passenger transport facility' as an additional permitted use under Marrickville LEP 2011.

There is a narrow strip of land zoned B5 - Business Development in the precinct. These properties are located between the St Peters Bus Depot and Union Street. Notably the strip of properties resembles a typology similar to a main street retail strip. The B5 - Business Development zone permits specialised retail premises, food and drink premises, garden centres, hardware and building supplies, landscaping material supplies, office premises, health services facilities, business premises, light industry and local distribution premises. Retail premises are permitted as an additional permitted use. The zone permits serviced apartments.

The B6 - Enterprise Corridor zone refers to residential accommodation in its objectives and permits both 'hotel or motel accommodation' (mandated under the Standard Instrument LEP) and 'serviced apartments.' Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, landscape material supplies and food and drink premises are notable permitted uses in the zone. Specialised retail premises and shops are prohibited in the zone however there are exceptions to this as a result of additional permitted uses applying to a number of sites under Marrickville LEP 2011. In terms of industry, the B6 - Enterprise Corridor permits light industry including artisan food and drink industry. It also permits 'warehouse or distribution centres.'

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Specialised retail premises are permitted as an additional permitted use for the majority of land between Bellevue and Smith Streets Tempe, fronting the Princes Highway on land zoned B6 - Enterprise Corridor. The additional permitted use is well utilised with The Good Guys, Salvos Store, Decathlon, Ikea operating at this location and a Bunnings has recently been approved to operate within this precinct. Specialised retail premises and retail premises (only in relation to engineering supplies or tools or vehicle parts and accessories) are permitted as additional permitted uses at 500 Princes Highway, St Peters. A retail centre currently exists at this location.

There is a small strip of land at the northernmost corner of the precinct zoned B4 - Mixed Use. This permits mixed use development and the entire commercial premises group term.

Floorspace

Category	GFA(sqm)	Proportion
Knowledge Intensive	**46,963**	**17%**
Administrative and **Support Services**	32,647	12%
Financial and **Insurance Services**	372	0%
Professional, Scientific and **Technical Services**	3,613	1%
Public Administration and **Safety**	5,810	2%
Rental, Hiring and **Real Estate Services**	4,521	2%
Health and Education	**4,928**	**2%**
Education and **Training**	2,935	1%
Health Care and **Social Assistance**	1,993	1%
Population Serving	**107,721**	**39%**
Accommodation and **Food Services**	9,060	3%
Arts and **Recreation Services**	3,171	1%
Construction	8,647	3%
Other Services	11,738	4%
Retail Trade	75,105	27%
Industrial	**106,117**	**38%**
Electricity, Gas, Water and **Waste Services**	3,208	1%
Mining	1,119	0%
Manufacturing	17,119	6%
Transport, Postal and **Warehousing**	56,836	29%
Wholesale Trade	27,835	10%
Inadequately described and not stated	**7,264**	**3%**
Total occupied floorspace	**272,993**	**98%**
Vacant	**5,193**	**2%**
Total	**278,186**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7 for audit method and interpretation. Note the St Peters Interchange and Tempe Bus Depot was not included in the above capacity modelling. Lands proposed to be acquired as part of Sydney Gateway project are included in the capacity modelling above.

Employment floorspace demand

The floorspace and employment projections to 2036 provided in Chapter 7 suggest that depending on how much of the available capacity is taken up under current planning controls, especially FSR, there could be a surplus of industrial and urban services floorspace in the Princes Highway and Airport Enterprise Corridor. This could be

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between 266,092sqm and 653,659sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The estimates of floorspace provided above may overstate the availability of employment land in this precinct due to the implications of the proposed Sydney Gateway motorway project, which is estimated to result in the loss of:

- 116,057sqm of Council owned land, currently used for freight use, zoned IN1 – General Industrial
- Approximately 65,000sqm of Sydney Airport owned land (refer to Sydney Airport Master Plan 2036), currently zoned IN1 – General Industrial

When the above are taken into consideration, it represents a further loss of approximately 180,000sqm of land zoned IN1 – General Industrial.

The precinct is crucial in its role as an enterprise corridor and a location to support freight related uses, with two large freight container transfer facilities currently in operation. Other key sites such, as bulky goods retail, are reliant on large carpark areas. This means the types of businesses that operate in this precinct are not reliant on FSR utilisation and instead are more likely to have low amounts of GFA. This results in a misrepresentation of these sites as having capacity for employment floorspace. This further constrains the capacity figure presented above.

Employment floor space yet to be lost but anticipated to be lost following recent rezoning will further exacerbate the LGA wide shortfall of employment floor space. This is not reflected in these figures and is discussed in Section 9.4.2. This is relevant when considering the potential for the LGA to meet its employment targets, the loss of other employment land will result in a greater shortfall in the precinct and across the Inner West.

Development activity

- Recording Studio Development Application
  A recording studio recently submitted a development application (DA201800238 -32/2 Bishop Street St Peters) for 'alterations and additions and use as a creative media production studio.' The site was a strata office/warehouse space in an industrial complex in the IN2 - Light Industrial zone. The Statement of Environmental Effects considered a recording studio as aligning with the 'office premises' term.
  Notably, a recording studio located within the IN1 - General Industrial zone, at another location along the corridor (DA201000245) was approved in 2010
- Boral
  In January 2019, The NSW State Government approved modification number 11 to the Boral concrete batching plant and materials handling facility at St Peters. This modification permits a significantly increased level of concrete production, from 280,000m^3 to 750,000m^3. It also approved changes to the layout of the materials and handling facility to enable an increase in throughput from 760,000 tonnes per annum to one million tonnes per annum
- Approved Serviced Apartment Development in B6 - Enterprise Corridor zone
  In January 2019, a three storey serviced apartment development was approved through the Land and Environment Court, on land zoned B6 – Enterprise Corridor at 826-836 Princes Highway Tempe. The development consists of four commercial tenancies ranging from 40sqm to 131sqm and seventeen serviced apartments. Under Marrickville LEP, serviced apartments are permissible in the B6 – Enterprise Corridor zone. It also has an objective, 'To provide for residential uses, but only as part of a mixed development.' This contradicts the role and function of this precinct. In order to protect the role and function of this precinct, revisions to permissible uses within the zone need to be undertaken.

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Previous and other relevant studies

A *Marrickville Employment Lands Study* 2014 was commissioned to peer review a 2008 *Employment Lands Study* adopted by former Marrickville Council. It provides strategic directions as a guide for employment lands planning. Strategy 5 of the study supports:

- Promoting the corridor as the preferred location for large format retail to reduce pressure on the Marrickville - Sydenham industrial area (Action 5.1)
- Retaining IN1 - General Industrial and IN2 - Light Industrial zones for remnant industrial operations in the Princes Highway corridor (Action 5.2).

Refer to Section 3.4.3 of the literature review for further discussion of the Study.

Issues and recommendations

- Proximity to international trade gateway

Princes Highway and Enterprise Corridor precinct has significant tracts of industrial lands in close proximity to Sydney's growing international trade gateway. The GSC Eastern City District Plan (Planning Priority E9) stresses that *'supporting industrial precincts and essential transport connections and corridors must therefore be safeguarded and given the support required for growth,'* and that these lands *'provide support services critical to their operations, capacity and growth.'*

A number of recommendations in this study align with priorities and objectives in the District Plan relating to the importance of retaining these lands and preventing fragmentation and potential conflict with other land uses. The following from Action 30 and 31 of the Eastern City District Plan are relevant to this precinct:

- providing buffer areas to nearby activities such as residential uses that are sensitive to emissions from 24-hour port and freight functions
- retaining industrial lands for port, intermodal and logistics uses as well as the landside transport network from the encroachment of commercial, residential and other non-compatible uses which would adversely affect industry viability to facilitate ongoing operation and long-term growth
- requiring sensitive developments within influence of port and airport operations to implement measures that reduce amenity impacts
- identifying and preserving land for future port and airport, intermodal and rail infrastructure
- identifying and retaining strategically important employment and urban services land in and near Sydney Airport precinct
- protecting Sydney Airport's function as an international gateway for passengers and freight, and support airport-related land uses and infrastructure in the area around the Airport
- limiting incompatible uses in areas expected to have intense freight activity.

Analysis and recommendations in this Section and in Chapter 8.0 seek to address the above.

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- Specialised retail premises in B6 – Enterprise Corridor zone

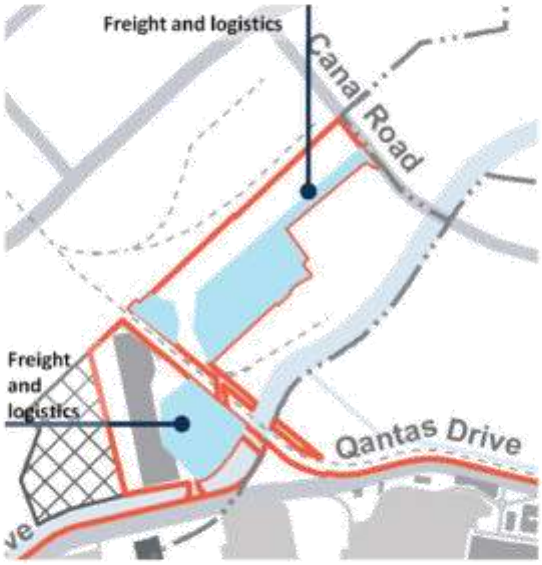
Land zoned B6 - Enterprise Corridor under Marrickville LEP 2011 fronts the Princes Highway. Historically, RMS has not supported specialised retail premises being permitted in this zone except for some selected Key Sites. There are a number of sites in the precinct which have this use permitted under Schedule 1 of Marrickville LEP 2011.

There is, however an opportunity as part of the collaboration with Transport for NSW under the 'Movement and Place Framework' to support development along the Princes Highway, particularly the larger sites on the southern side, to enable specialised retail premises to occur where appropriate vehicular access can be provided to and from such properties. Changes to the Infrastructure SEPP could allow for easier direct vehicular access for premises located in enterprise corridors. Action 3.5.1 in the Strategy recommends permitting 'specialised retail premises' in the B6- Enterprise Corridor zone and the rationale is further explained in Section 8.3.

- Sydney Airport Land

The lands owned by Sydney Airport within this precinct are currently zoned IN1 - General Industrial. The rest of Sydney Airport is zoned SP2 - Infrastructure in the neighbouring Bayside LGA. The Sydney Airport Master Plan 2039 refers to this precinct as the 'Northern Lands Sector.' The Master Plan describes the Sector as follows, *"The Northern Lands Sector includes leased and freehold airport land located north of Airport Drive. The Northern Lands Sector is largely undeveloped, with the exception of staff overflow car parking accessed from Airport Drive via the Nigel Love Bridge. The High Intensity Approach Lighting (HIAL) for Runway 16R/34L is located within the Northern Lands Sector.'*

The strategic vision for the Northern Lands Sector is for the construction of freight and logistics facilities. It is also noted that land lost due to the Gateway project has been accounted for within the Sydney Airport Master Plan (footprint of project shown in white).



The vision for freight and logistics to be constructed within these lands aligns with the strategic role of lands in close proximity to the Airport.

- Strategic role of the corridor supporting Sydney's trade gateway

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Actions 30, 31 and 32 of the Eastern City District Plan provide direction on how employment lands within this precinct should be managed given its role in the freight and logistics network as well as the proximity to trade gateways. This is also supported by Strategy 16.1 and Objective 16 of the Greater Sydney Region Plan.

Two substantial sites within the precinct support the function of Port Botany by providing container facilities. Some of this land has been identified for acquisition as part of the Sydney Gateway proposal. If displaced, it would be highly challenging to relocate these facilities close to the port and it would be likely that these services would have to move to Western Sydney.

As identified in the Strategy (Action 2.3.1), remaining large allotments must be protected from subdivision, to support the strategic role of the corridor. The rationale is further explained in Section .

- Encroachment of residential type uses

While residential uses are prohibited from the B6 - Enterprise Corridor zone, 'serviced apartments' are permitted. As shown above, recent development has included serviced apartments. Continued take-up of these controls could risk the erosion of the corridor as an urban services corridor. The risks of encroachment of such uses are also explored in Strategy 16.1 and Objective 16 of the Greater Sydney Region Plan, given the strategic importance of employment lands adjacent to the airport and potential for land use conflicts.

Under Marrickville LEP 2011, one of the objectives of the B6 - Enterprise Corridor zone is *"To provide for residential uses, but only as part of a mixed use development."* It is also noted that despite residential accommodation being permitted in similar circumstances on land zoned B5 -Business Development, no similar objective applies in the B5 -Business Development zone. It is considered that the objective could be deleted from the zone. Similarly, 'serviced apartments' could be made a prohibited use in the B6 -Enterprise Corridor zone.

Ground floor retail spaces are not an appropriate substitute for the types of uses that have traditionally operated in this corridor, and further redevelopment for serviced apartments with ground floor commercial c result in further displacement. The Princes Highway is one of the closest enterprise corridors to the Sydney CBD and it is crucial that this is protected from development that does not align.

Action 2.2.1 in the Strategy provides direction on prohibiting these uses in the B6 – Enterprise Corridor zone, which is supported by analysis in Section 8.1.4. This precinct has a crucial urban services role, making any future allowance of residential uses inappropriate, particularly given the shortfall of employment floor space identified in this Strategy and the overall shortfall identified in the ECDP.

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Case Study: Cooks River Intermodal Terminal



The Cooks River Intermodal Terminal is a 17.2ha Intermodal Logistics Centre and empty container park providing an important link in the container logistics freight network. It is the largest site within the precinct and effectively forms an extension of Port Botany.

The Cooks River Intermodal Terminal is available to all logistics providers, while both road and rail are used to transfer containers to and from Port Botany and regional New South Wales. The Terminal provides the largest empty container storage facility in the state and enables empty containers to be transferred by road and rail to regional New South Wales for packing for the export trade. The Terminal offers facilities for the storage, repair, upgrading, and washing of empty containers, as well as other ancillary services.

The Terminal's convenient location close to Port Botany, Sydney Airport and key transportation links gives it many advantages over other similar facilities. This location means it is accessible from key arterial roads including the Princes Highway, M5 Motorway and Eastern Distributor, as well as the dedicated freight rail line. Its location opposite the under construction WestConnex St Peters Interchange will provide a direct connection to the M4 Motorway and a more direct connection to the M5 motorway. The Terminal operates 24 hours a day, seven days a week.

The Greater Sydney Commission in its Eastern District Plan made creating and maintaining a "freight and logistics network [that] is competitive and efficient" one of its key objectives. The Cooks River Intermodal Terminal is an important trade gateway and a chief component of the New South Wales, and Australian, freight network. It is a significant local employer and plays a major role in supporting the greater Sydney and New South Wales economy.

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9.1.2 Marrickville - Sydenham Employment Precinct

Role and function

The Marrickville-Sydenham precinct is one of the most significant employment and industrial precincts in the Inner West LGA and Greater Sydney. It contains a wide diversity of businesses and industries which are accommodated in a range of premises types and sizes. The precinct covers an area of approximately 599,785sqm and has approximately 565,875sqm of total floorspace.

The site is located within the suburbs of Marrickville, Sydenham and St Peters. Sydenham Station is located on the southern edge of the site, with the precinct extending to Edgeware Road at the north, Victoria Road to the west and Unwins Bridge Road to the east. There are two distinct areas within the precinct. These are the St Peters area along Unwins Bridge Road which includes the island site on Mary Street, an isolated site on the northern end adjacent Marrickville Metro and then the main precinct area, extending from Marrickville Metro shopping centre in the north to the freight line at the southern edge.

Uses within the precinct vary widely. No single use dominates the land use make up. The most common land uses are manufacturing, wholesale trade and transport, postal and warehousing services. Within these uses, specifically manufacturing, there are a significant number of creative enterprises that flourish in the area. These uses are able to exist in the area due to the ample supply of premises in poor condition and appropriate sizes which demand lower rents. This is unique to the area and is largely due to factors that limit development pressure on the precinct including the low flying flight path overhead and the flood prone nature of the area.

A number of sites within the precinct fronting Marrickville Road are subject to an "additional permitted uses" clause that permits bars, restaurants, cafes and small bars. This was made as part of the Sydenham Creative Hub precinct (refer to sections 3.3.5 and 8.1.12). To date, there is no evidence of sites having taken advantage of these additional permitted uses.

In certain areas, the precinct was previously a residential area prior to converting to industrial. A legacy of this is that there are still a number of residential dwellings located throughout the precinct. These typically include single and double storey federation and Victoria terraces and semi-detached dwellings. Some significant pockets of this include 37-43 Marrickville Road, Marrickville, Shirlow Street, Marrickville, 62-88 Fitzroy Street, Marrickville and Meeks Road, Marrickville.

The area is serviced by multiple public transport links. Sydenham Station is located within the precinct and provides rail connections to the CBD and throughout Sydney via the T3, T4 and T8 rail services. Frequencies of service can be up to every 2-3 minutes in peak hour and 15 minutes in non-peak and on weekends. There are also multiple bus services in the area including the 418, M30, 425, 426, 423, L23 and 308 bus lines. The precinct is also in proximity to multiple other bus lines and St Peters station.

The success of the Sydenham industrial area for 24/7 uses is demonstrated by the observed patterns witin the Integrated Transport Strategy, that virtually the same number of workers arrive by train at the station in the morning peak (for day shifts) as in the evening peak (for night shifts).

Significant infrastructure works are underway in the vicinity of precinct including the WestConnex motorway interchange at St Peters and the South West Metro. The WestConnex project will establish motorway connections to and from the area from Northern, Southern and Western Sydney, as well as providing local road upgrades for better access to the Eastern suburbs, as well as Sydney Airport and Port Botany. The South West Metro project will upgrade the T3 line at Sydenham Station, providing more frequent and reliable passenger rail services to the CBD and greater Sydney Trains network.

Development of the Sydney Metro project has however meant the State Government has acquired a large portion of the precinct, approximately 78,300sqm, to build the infrastructure. This site is currently being used as

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a dive site to commence and build a tunnel for the metro, as well as manufacturing the tunnel pre-castings. Once construction phase is complete, part of this site will become a stabling yard for the Sydney Metro trains.

Further losses to the precinct include the conversion of a site to retail for the Marrickville Metro shopping centre expansion on the northern end of the precinct and re-zoning of sites adjacent Victoria Road for mixed use and high density residential.

The Strategy identifies this precinct as having a specialised retail, creative industries, food production and urban services role and function.

Precinct map



Planning controls

The precinct is made up of a range of industrial and business zones, including B5 - Business Development, B7 - Business Park, IN1 - General Industrial, and IN2 - Light Industrial. Each zone in the precinct serves a distinctive strategic purpose and caters for a range of different uses.

There are also a number of key sites and additional permitted uses throughout the precinct.

The IN1 - General Industrial zone permits a wide range of industrial uses, including uses that could cause amenity impacts to nearby sensitive land uses. Because of this, other zones including IN2 - Light Industrial, B7 - Business Park and B5 - Business Development are utilised in the precinct to act as buffers, allowing lower impact industrial and businesses uses closer to residential uses. On some occasions, main roads like Unwins Bridge Road are also used to separate the IN1 - General Industrial zone from residential zones.

There is no height limit applying to the majority of this precinct, including the B7 - Business Park, IN1 - General Industrial and IN2 - Light Industrial zoned areas. Therefore, the FSR control is the only development standard

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restricting the built form. An FSR of 0.95:1 applies to the entire precinct, apart from a small portion of land zoned B5 - Business Development which has a 1.75:1 FSR control and limit.

- St Peters area

Land within the St Peters area is predominantly bounded by Unwins Bridge Road to the east and the railway to the west. It is zoned IN1 - General Industrial at the northern and southern extents, with an IN2 – Light Industrial zone in the centre. There is also an island site zoned IN2 - Light Industrial on Mary Street, approximately 50m east of the main industrial area.

The IN1 - General Industrial zone in the area permits a wide range of uses.The northern site of this area is an art deco commercial building that is heritage listed under the Marrickville LEP 2011 as a locally significant item.

- Marrickville area

The Marrickville area is a large tract of employment lands including the IN1 - General Industrial, IN2 - Light Industrial, B5 - Business Development and B7 - Business Park zones. The land zoned B5 - Business Development zone is the only part of the precinct that is subject to both a height limit (14m) and an FSR control (1.75:1), with the remainder of the precinct unaffected by a height limit and with an FSR of 0.95:1.

The IN1 - General Industrial zone permits a wide range of uses that may cause amenity impacts to surrounding uses. Due to this, the IN2 - Light Industrial, B7 - Business Park and B5 - Business Development zones have been utilised to buffer between these high impact uses from sensitive uses like residential.

There are three tracts of B7 - Business Park zoned land within the precinct. These three tracts are typically made up of residential dwellings, with the occasional site being converted to an industrial style building. Viewing these sites from the street, many appear to be residential dwellings, with some being used for business purposes.

The B7 - Business Park zone is relatively flexible and the zoning table in the Marrickville LEP 2011, permits residential flat buildings with consent. However, there is a limit on the amount of floorspace that can be allocated to residential purposes. Clause 6.13 of the Marrickville LEP 2011 dictates that no part of the ground floor can be a residential use, and at least 60% of the GFA must be for non-residential uses. Due to the highly fragmented land ownership, the relatively low and likely already realised FSR provision and the limit on residential uses, there has been no take-up of the permitted residential flat building. No take-up is expected under the current controls.

The Marrickville LEP 2011 also permits the use of purpose built dwellings within business and industrial zones to be utilised for residential purposes, so long as they were designed specifically as a dwelling, were constructed prior to commencement of the plan and provide an acceptable level of amenity.

Part of the precinct fronting Marrickville Road and zoned IN1 -General Industrial is identified as key site 'L' under the Marrickville LEP 2011. These additional permitted uses are discussed under the relevant heading below.

Floorspace Ratios

As the precinct is without a height limit, the only development standard regulating the intensity and scale of development throughout the precinct (apart from the few B5 - Business Development zoned sites on Marrickville Road) is the FSR control of 0.95:1.

A review of recent applications in the area revealed that very few breached the FSR control applying to the area. This could reflect a lack of appetite for additional floorspace above the single or two storey buildings, or the planning controls being too onerous to allow take up in the current market.

Increasing the FSRs in the area may provide additional floorspace and compensate for the loss of land to the Sydney Metro infrastructure project and the Victoria Road rezoning. Opportunities could be explored for remnant land to be returned to industrial uses after the completion of the Sydney Metro. Additional permitted uses

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Number 74 Edinburgh Road, Marrickville is zoned IN1 - General Industrial. Additional permitted uses on the site under schedule 1 of the Marrickville LEP 2011 include garden centres and hardware and building supplies. The current uses on site are warehousing, storage premises and light industry.

Part of the precinct fronting Marrickville Road and zoned IN1 -Genera Industrial is identified as key site 'L' under the Marrickville LEP 2011. In accordance with Schedule 1, Clause 22 of the Marrickville LEP 2011, additional permitted uses apply to this land, including restaurants, cafes and small bars. This key site was gazetted on 22 February 2019 as part of the *Sydenham Creative Hub* project. It sought to foster the creative nature of the area by establishing companion uses throughout the precinct. A report by SGS Economics dated June 2017 assessed the impact of the original Sydenham Creative Hub proposal, which was to introduce the additional permitted uses to the whole precinct and recommended that the additional uses should not be permitted as the precinct was already functioning well, was in high demand, there was no strong reason to introduce such uses and the additional uses were not compatible with the precinct. For this reason, the additional permitted uses were only introduced along Marrickville Road, forming as an extension to the existing Marrickville Road commercial area. At present, there is no on-ground evidence of these additional permitted uses.

Artisan food and drink premises and industrial retail outlets

Industrial retail outlets and artisan food and drink premises associated with the manufacturing of goods on site are a notable land use within the precinct. In particular, there has been an increase in the number of breweries and distilleries in the precinct with industrial retail outlets attached to them.

Council has advised that retail was not envisaged as a strategic intent of this employment precinct and the land was intended to be protected for industrial uses that rely on the specific building typologies in the area and cannot easily co-exist with other sensitive uses, which can include retail.

In order to minimise the impact of retail uses, industrial retail outlets are the only form of retail (apart from take-away food and drink premises) permitted within the IN1 - General Industrial and IN2 - Light Industrial zones. They are also restricted to selling only goods that are produced on site and the retailing area can be no larger than 11% of the GFA.

Artisan food and drink industry is a recently introduced land use definition. It's a mandated use under the standard instrument within the IN1 - General Industrial and IN2 - Light Industrial zones. Additional to industrial retail outlets, this land use definition also permits a café or restaurant to operate on site in conjunction with the industrial use. However the café or restaurant is not restricted on size alike the retail area.

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Floorspace

Category	GFA(sqm)	Proportion
Knowledge Intensive	**41,217**	**7%**
Administrative and Support Services	148	0%
Financial and Insurance Services	3,054	1%
Information Media and Telecommunications	9,910	2%
Professional, Scientific and Technical Services	21,473	4%
Rental, Hiring & Real Estate Services	6,632	1%
Health and Education	**8,959**	**2%**
Education and Training	5,627	1%
Health Care and Social Assistance	3,332	1%
Population Serving	**161,775**	**29%**
Accommodation and Food Services	18,096	3%
Arts and Recreation Services	13,849	2%
Construction	35,085	6%
Other Services	52,958	9%
Retail Trade	41,787	7%
Industrial	**325,299**	**58%**
Electricity, Gas, Water and Waste Services	24,521	4%
Manufacturing	120,975	21%
Transport, Postal and Warehousing	53,281	9%
Wholesale Trade	127,522	23%
Inadequately described and not stated	**25,268**	**4%**
Total occupied floorspace	**563,518**	**99.6%**
Vacant	**2,356**	**0.4%**
Total	**565,874**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation. Note that The Sydney Metro site was excluded from the Capacity assessment above but included in the land area quoted above.

Employment floorspace demand

The floorspace and employment projections in Section 7 demonstrate that there will be a shortfall of industrial and urban services floorspace in the Marrickville-Sydenham employment precinct of between 137,587sqm and 346,009 sqm based on several factors of potential future capacity as detailed in Section 7.2.5 (refer to Table 21)

In terms of size and operations this is an important employment precinct to the LGA. Despite this it has had substantial losses of employment land including a significant portion for Sydney Metro construction and others to residential uses. These losses are contributing to the projected shortfall in employment land across the LGA, suggesting the area should be retained for long term employment uses and particularly for urban services. Any opportunities to regain former employment land following completion of the Sydney Metro construction should be explored.

Development activity

- 97 Marrickville Road, Marrickville (DA201400212)
  In December 2014, Council approved the demolition of existing improvements on site and the construction of a part four, part five storey mixed use development comprising of three ground floor

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commercial tenancies and 38 serviced apartments throughout the levels above. Basement and ground floor rear car parking is also approved.

- 76 Edinburgh Road, Marrickville (DA201500093)
  In October 2015, Council approved the demolition of existing improvements on site and subdivision of the site into two Torrens title allotments. Lot A is approved for a high technology space, takeaway food and drink premises, basement car parking and a four storey building. Lot B is approved for a two storey building containing 57 strata titled industrial units with car parking. So far, only lot B at the rear has been constructed.
- 23-25 Cadogan Street, Marrickville (DA201800576)
  In July 2019, Council approved internal alterations and use of an existing premises as an artisan food and drink premises. This includes a kitchen, beer brewing area, car parking for four cars, an industrial retail outlet, indoor dining area and outdoor dining area. Hours of operation a restricted to between 10am and 10pm, Mondays to Sundays with a 12 month trial between 10pm and midnight on Fridays and Saturdays only. Live music is also permitted on site until 8pm Sunday through Thursday and till 10pm Friday and Saturday
- 21 Unwins Bridge Road, St Peters (DA201800039)
  In April 2018, Council approved alterations and additions too and change use of premises to a timber yard. Approved hours are between 6am and 9pm, Monday to Fridays and 7am till 7pm Saturdays. Also included modifications to the parking layout, new signage and landscaping
- 1-7 Unwins Bridge Road, St Peters (DA201600590)
  In June 2019, Council approved a modification to a DA, permitting alterations and additions to a warehouse including construction of a new floor within the building to create nine new tenancies on the new first floor and reconfiguring the ground floor to provide a new tenancy.

Previous and other relevant studies

The *Marrickville Employment Lands Study 2014* was commissioned to peer review a 2008 Employment Lands Study adopted by former Marrickville Council. The peer review provided strategic directions to guide employment lands planning. It identifies this land as a "sub regionally significant industrial precinct" and that "it provides space for local service/ light industrial operations as well as larger lots for more traditional industrial activity."

Action 1.2 of the 2014 Study by SGS Economics recommended "*restricting further subdivision and/or strata titling of larger lots in the Marrickville-Sydenham precinct core to prevent fragmentation.*" The study identified the larger lots as a feature of the precinct and that "*subdivision and/ or strata titling of lots in the core of the precinct should be resisted.*"

Action 1.3 of the Study argued for the prevention of retailing and services spreading into the precinct core. Action 5.1 expanded on this recommending 'prohibiting large format retail from locating in the Marrickville-Sydenham precinct.'

Issues and recommendations

- Floorspace ratios

The precinct functions well, having a low vacancy rate, a high level of business diversity and a high level of creative enterprises. This is likely due to the older building stocks which are high clearance warehouses and industrial premises that are conducive to creative enterprises. The older building stock also keeps the rent prices down.

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One option to increase the supply of available floorspace in the area would be to increase the blanket 0.95:1 FSR. However, there is some concern that this could raise land values, pushing out uses that rely on lower rents. It could also encourage further fragmentation of the land through strata subdivisions into smaller industrial units. It could also potentially encourage the development of premises which are not in keeping with the unique demands of multiple industries and suit more profitable smaller office based industries.

Even with these risks, the potential to increase flexibility and unlock of additional floorspace in this strategically significant employment precinct is considered beneficial. To some extent increasing the FSR may relieve pressure on rents by increasing supply.

Action 2.3.1 recommends the review of FSR development standards for sites zoned IN1 - General Industrial and IN2 - Light Industrial. The rationale is explained further in Section 8.1.3.

- Loss of industrial land

This precinct has lost extensive areas of industrial land to State infrastructure projects and residential development. The Sydney Metro project is temporarily occupying a large site to construct the metro line, part of which will become a permanent rail stabling facility. The remainder could be returned as employment land.

In addition the recent Victoria Road MLEP amendment rezoned industrial land to R4 - High Density Residential and B4 - Mixed Use. This reduced the stock of local and sub-regional employment land and has increased the risk of land use conflict between new residential and existing industrial land uses.

Sydney Metro's submission on the draft Strategy suggested that there will be three post construction residual land holdings with a total site area of approximately 30, 000 square metres, which could be an opportunity to relieve the loss of employment land in the local government area. Sydney Metro also proposed that this residual land might be used for offices. It is recommended that Council explore opportunities to restore Sydney Metro post construction residual sites to employment uses (refer to Action 2.5.6).

- Industrial retail outlets and artisan food and drink premises

Growth in breweries and distilleries with retail outlets and artisan food and drink premises is a recent phenomenon of the precinct. These uses offer bars and restaurants, potentially taking land from employment uses and encouraging increases in rents. Refer to section 6.2.3 and 8.1.2 for further discussion.

- Dwelling houses

As noted earlier, dwelling houses are reducing the availability of land for employment uses. They have also increased land use conflict. Strategy Action 4.2.3 recommends removal of dwelling house permissibility within industrial zones.

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9.1.3 Carrington Road Industrial Precinct

Role and function

The Carrington Road industrial is a long, linear area situated around Carrington Road, abutting the railway tracks between Marrickville and Tempe stations. The precinct identifies as a creative enterprise, food manufacturing and small goods manufacturing area and is also supported by urban services at both ends of the precinct. The precinct covers an area of approximately 126,218sqm and has approximately 106,218sqm of total floorspace.

Land on the eastern side of Carrington Road is zoned IN1 -General Industrial and is characterised by large and old two-storey warehouses. Businesses in this section of the precinct include smash repairs, prop warehouse, furniture warehouse and clothes manufacturing, providing unique services to the local area and broader region. Several offices are located in the precinct as well as food outlets.

The precinct contains a mix of pre and post-World War II industrial buildings. The principal industry on Carrington Road in the 1930's was the General Motors-Holden Ltd Marrickville Plant. The façade of this building remains at 10 Carrington Road. Another interesting industrial building is located at 47 Carrington Road. The majority of the remaining buildings are two storey industrial buildings built to the boundary, some with associated car parking areas. The condition of the industrial buildings is varied, ranging from modern developments in good condition to former converted manufacturing or warehousing properties. This spectrum of properties provides a choice of property types, sizes and prices for the varied businesses that have chosen to operate from the precinct.

The western side of Carrington Road is zoned IN2 - Light Industry and is characterised by older, smaller industrial buildings interspersed with modern developments. These buildings contain a range of creative uses, food manufacturing, cosmetic manufacturing and some household and specialty retail. Low density residential housing borders this area to the west.

The most southern property is 350m from Tempe Station. The northern-most property is 500m from Marrickville station. There are several on-site car parks within the precinct plus on-street car parking. Carrington Road has a dedicated north-south cycle path.

The audit undertaken to inform *Made in Marrickville*, found that the precinct accommodates 223 businesses and approximately 1,800 full-time equivalent jobs. The three most prevalent categories of enterprises in the precinct were manufacturing (27%), creative (17%) and creative/manufacturing (17%). *"The precinct is overwhelmingly home to micro- (less than four employees) and small-businesses (between 5-19 employees), as defined by the Australian Bureau of Statistics. Micro- and small enterprises constitute 92 percent of the precinct"*. Notwithstanding, there are a smaller number of major anchor tenants including Choice, New Directions, Lush Cosmetics, Double Roasters, and Vital Strength/Power Foods International. The audit also found that the precinct hosts a distinctive interface between creative industries and manufacturing, not replicated elsewhere in Sydney, and its significance as a creative industries-manufacturing hub has increased as other industrial sites have been lost. Carrington Road features a mix of affordable and practical workspaces, smaller studio suites and larger production facilities – all in a small number of co-located complexes.

Made in Marrickville documented 15 discrete functional clusters in the Carrington Road precinct. These clusters have formed as a result of relationships and dependencies, both formal and informal, between businesses. It is noted that interaction across cluster types within Carrington Road enhances and deepens the embedded nature of the precinct's cluster diversity. "Beyond the precinct's numbers of enterprises and jobs, this means there is a very strong local multiplier effect -amplifying the precinct's overall economic contribution to Sydney". Businesses within clusters are sensitive to mobility: they are not easily moved, and relocation threatens their local job creation potential, and ability to recuperate lost local relationships and interdependencies.

The precinct's proximity to the CBD, airport, and Port Botany relative to other similarly sized industrial estates makes it particularly valuable.

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There are a small number of local heritage items within the Carrington Road industrial precinct. These include select industrial façades (10, 16 and 47 Carrington Road) and the Canary Island date palms.

The Precinct is located on land that formerly comprised a swamp. Consequently, the land is very flat and low lying, making it susceptible to flooding from overland flow as well as the inflow of the tide and preventing stormwater draining freely by gravity to the river. With ground levels below high tide, raised banks provide separation from the river.

The precinct was within the area earmarked for redevelopment by the draft Sydenham to Bankstown Urban Renewal Corridor Strategy.

Previous research found that any loss of industrial floorspace in this area would mean that many existing businesses would be unable to find suitable alternative spaces in the Inner West, and most would find it impractical to relocate to western Sydney. Most businesses indicated that they would cease trading or leave the Sydney region altogether. This would result in significant losses of industrial jobs, unique award winning businesses, specialist experience, world class creative enterprises and talent that cannot be offset by short term jobs in construction or longer term low value retail and leisure employment.

Creative Industries

This complex comprises a creative industrial hub and houses more than 200 diverse micro-enterprises and small manufacturers. These industrial uses include theatre production, performing arts, puppet and prop-making, furniture restoration, fashion and textiles. Myrtle Street Studios is located within this area. Arts and live music uses could be undertaken in this area without the need for development consent, on the basis that the premises have relevant development consent for the use of the premises for creative uses and that arts/live music uses are likely to be ancillary to the main use of these premises.

Numbers 20-28 Carrington Road house the following creative practitioners:

- Hayden Youlley (ceramics)
- Dezion Studio (lighting)
- Think Negative (art photography)
- Louise M Studio (ceramics)
- A Silver Circle Design (jewellers)
- Feloffa Designs (independent textiles)
- The Raisin Did It (independent textiles)
- Liz Shreeve (fine artist)
- Jane Pollard (jewellers)
- Eva Cassis (independent textiles)

Specialised food manufacturing

This precinct has a notable cluster of specialised food manufacturing. This ranges from smaller scale operations to larger scale operations, such as Evia Yohgurt and a vitamin supplement wholesaler.

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Evia Yoghurt[30] supplies more than 650 Woolworths outlets and produces more than 30 tonnes of yoghurt a week. Evia Yoghurt previously had smaller premises nearby on Sydenham Road and moved into a larger site within the Carrington Road Precinct, indicating a desire for the business to remain in the local area.

Smaller scale operations include coffee roasters, fruit and vegetables, gelato producers, caterers, meat wholesalers, a mediterranean foods wholesaler and breadmakers.

A few sites have large open-paved areas, with evidence of use by larger trucks and semi trailers. Industrial sites with the ability to be serviced by trucks/semi-trailers in the Inner West are rare and are particularly important for larger scale operators.

Precinct map



Planning controls

Land on the western side of Carrington Road is zoned IN2 - Light Industry under Marrickville LEP 2011. The floorspace ratio control applying to this land is 0.95:1. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct. While specialised retail premises are prohibited, garden centres and hardware and building sites are permitted.

Land on the eastern side of Carrington Road is zoned IN1 -General Industrial under Marrickville LEP 2011. Business premises and office premises are prohibited in the zone. Artisan food and drink industry is also

[30] https://www.dailytelegraph.com.au/newslocal/inner-west/300-year-old-family-recipe-used-by-marrickville-based-the-yoghurt-company/news-story/2ae31a76822f55f1a01aa0282dc72405

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permitted. While specialised retail premises are prohibited, garden centres and hardware and building sites are permitted.

Floorspace

Category	GFA(sqm)	Proportion
Knowledge Intensive	**17,289**	**16%**
Administrative and Support Services	13,581	13%
Professional, Scientific and Technical Services	2,319	2%
Rental, Hiring & Real Estate Services	1,389	1%
Health and Education	**4,295**	**4%**
Health Care and Social Assistance	4,295	4%
Population Serving	**14,104**	**13%**
Accommodation and Food Services	225	0%
Arts and Recreation Services	1,408	1%
Construction	2,473	2%
Other Services	9,697	9%
Retail Trade	271	0%
Industrial	**63,103**	**59%**
Manufacturing	17,438	16%
Transport, Postal and Warehousing	41,576	39%
Wholesale Trade	4,089	4%
Inadequately described and not stated	**4,202**	**4%**
Total occupied floorspace	**102,993**	**97**
Vacant	**3,225**	**3%**
Total	**106,218**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are contributing to an overall shortfall in employment land across the Inner West. The floorspace and employment projections in Section 7 demonstrate, that depending on how much of the available capacity under current planning controls is taken up, there could be a shortfall of industrial and urban services floorspace in the Carrington Road Industrial precinct of between 5,924 and 53,887 sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

Development activity

In May 2017, a planning proposal was lodged for the larger part of the precinct at 4-38 Carrington Road. The planning proposal sought to:

- Rezone the site from IN1 - General Residential to part B2 - Local Centre and part R4 - High Density Residential
- Establish varied maximum building height controls for the site of 25m, 50m and up to a maximum of 105m
- Increase the FSR controls for the site from the current 0.95:1 to 3.15:1.

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The proposed changes to the planning framework were intended to facilitate a redevelopment of the site comprising 20 buildings up to 35 storeys, 2,616 units and 17,300sqm of retail and commercial space and no industrial floorspace.

In September 2017, Council officers advised that additional information and justification was required to enable a thorough assessment of the planning proposal to be undertaken. In August 2018, the Proponent (Mirvac) provided an update on a revised planning proposal for the site and acknowledged the position of the Eastern City District Plan to retain and manage industrial land. Council's response dated September 2018 referred to the announcement of 27 July 2018 by the Minister for Planning that Council would coordinate and lead the planning for its part of the Sydenham to Bankstown Corridor. The letter advised that the planning proposal was deemed to have lapsed and that any changes to the planning framework for this land should be considered as part of the new comprehensive LEP.

Previous and other relevant studies

A Marrickville Employment Lands Study 2014 was commissioned to peer review a 2008 Employment Lands Study adopted by former Marrickville Council. The peer review put forward several possible strategic directions for employment lands planning as discussed below.

The 2014 study identified the overall precinct as an area that could be considered for rezoning to a combination of light industrial and residential. In acknowledgment of its low-lying nature and proximity to the Sydney Airport Obstacle Limitation Surface (OLS), Council identified the eastern section of the precinct, largely comprised of 4-38 Carrington Road, as the least suitable for residential. Land on the western side of Carrington Road, which is further way from the OLS and partly less exposed to flood risk, borders an existing residential area so might once have been considered for a mix of light industrial and residential.

Notwithstanding, any opportunity for introducing residential at Carrington Road was overtaken by ongoing loss of industrial land elsewhere in the LGA. By the advent of the draft Eastern City District Plan in October 2017 it had become clear that this loss had become critical and that "existing industrial and urban services land needs to be protected from conversion to residential and mixed use development."

This situation was echoed in a Council Economic Impact Study undertaken by SGS Economics and Planning in 2014 that reviewed the industrial land implications of a rezoning proposal at Lewisham in the former Marrickville LGA. The study estimated that the employment forecast for the Inner West LGA would create demand for an additional 431,700sqm of industrial zoned floorspace. Based on supply at 2017, SGS concluded that this would result in a floorspace deficit of approximately 375,900sqm-666,600sqm.

This analysis was then reinforced in March 2018 with the release of the Eastern City District Plan with its "retain and manage" priority for industrial and urban services land. The Greater Sydney Commission's A Metropolis that Works also emphasised the importance of retaining industrial and urban services land, stressing the need to have a "no regrets" approach to any decision affecting such land. This paper refers to the Carrington Road precinct as an exemplar of the "crucial nexus between creativity and the new maker economy richly embedded within its local and regional context". This paper also warned against the Trojan Horse of seemingly minor changes to industrial zonings such as adding artisan premises, rezoning to B4 - Mixed Use and allowing cafes and restaurants because these types of changes "are not in the best interest of maintaining a productive industrial and urban services area". It warns that "introducing residential uses to the city's working spaces brings with it a change in land pricing signals which will undermine retention of employment uses over time".

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Issues and recommendations

Flooding and ageing building stock

The severe flooding and building compliance issues resulting from the ageing building stock pose challenges for businesses seeking to locate and expand within the Carrington Road precinct. Both issues require mitigation in the long term to maintain industrial and creative uses into the future.

However, any suggestion that mixed use redevelopment, including residential, could help to resolve flooding and the ageing building stock of the Precinct, must be treated with caution. As identified by Made in Marrickville, these older buildings often satisfy the physical space requirements of creative industries/manufacturing uses that have been attracted to the Precinct, providing flexible internal subdivisions, suitable roof height and truck access, and co-location with likeminded and/or functionally interdependent enterprises at an affordable cost.

Action 2.2.1 in the Strategy reinforces the recommendations of the Greater Sydney Commission, in recognition of the undersupply of industrial land both in the Eastern District and Inner West.

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9.1.4 Victoria Road Employment Precinct, Marrickville

Role and function

The Victoria Road precinct is an industrial area currently undergoing a transition to a mixed use residential and employment precinct, including creative industries. The precinct covers an area of approximately 98,185sqm and has approximately 87,237sqm of total floorspace. It was recently rezoned from industrial to a mix of B4 - Mixed Use and B5 - Business Development. Part of the existing industrial area located to the west of the precinct has been rezoned to R4 - High Density Residential and R3 - Medium Density Residential. Some parts of the precinct are walking distance to centres such as Addison Road, Marrickville Metro, Marrickville Centre but the precinct generally is more than 800m from train stations in the area.

This precinct is typified by one to two storey warehouses currently home to light industrial uses. There is a variety of lot sizes in this precinct with some smaller row shops as well as large warehouses with stock yards. There are many creative manufacturing businesses in the area which capitalise on cheaper land and proximity to the CBD. A range of population servicing industries also operate here including logistics, gyms, automobile repair and tile shops.

Precinct map



Planning controls

This precinct is part of a recent rezoning of Marrickville LEP 2011 (precinct 47). The precinct is subject to its own development control plan. Key extracts from the existing DCP are shown below, demonstrating the desired transition from industrial to mixed use:

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- To create an active commercial corridor along Victoria Road by encouraging active ground floor commercial uses such as cafes, small retail opportunities, boutique retail showrooms and professional business space.
- To foster the transition of industrial uses to cleaner and modern, light and creative industries to improve the amenity of the precinct, while retaining employment opportunities.
- To encourage the conversion of existing warehouses to support the creation of a hub within the Chapel Street Sub-precinct for home renovation and food production businesses, that promotes active or display ground floor uses such as ancillary showrooms and cafes.

A draft amendment to this site specific DCP is currently being considered for adoption. The draft amendments do not change the intent relating to land uses shown above.

A large proportion of the precinct is zoned B5 - Business Development. The zone permits specialised retail premises, food and drink premises, garden centres, hardware and building supplies, landscaping material supplies, office premises, health services facilities, business premises, light industry and local distribution premises. Notably it also permits serviced apartments. The floorspace ratio controls within the B5 - Business Development zoned portion of the precinct range from 0.95:1 to 2:1. Height limits are between 20 and 23 metres. A portion of this land is currently subject to a development application which is discussed in the section below.

The southern end of the precinct is primarily B4 - Mixed Use. Permitted uses in this zone are wide ranging allowing residential accommodation, office, business and retail premises. The height and FSR controls within this area are significant, with 50m height limits and floorspace ratio controls of 3:1 to 3.5:1. A development application for high density mixed use development, to the north of Wicks Park, is before Council at the time of writing.

Floorspace

Category	GFA(sqm)	Proportion
Knowledge Intensive	**9,608**	**11%**
Professional, Scientific and Technical Services	6,766	8%
Rental, Hiring & Real Estate Services	2,842	3%
Health and Education	**251**	**0%**
Health Care and Social Assistance	251	0%
Population Serving	**22,103**	**25%**
Accommodation and Food Services	999	1%
Arts and Recreation Services	9,259	11%
Construction	800	1%
Other Services	9,474	11%
Retail Trade	1,571	2%
Industrial	**52,849**	**61%**
Manufacturing	27,576	32%
Transport, Postal and Warehousing	14,984	17%
Wholesale Trade	10,289	12%
Total occupied floorspace	**84,811**	**97%**
Vacant	**2,425**	**3%**
Total	**87,236**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

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Employment floorspace demand

The floorspace and employment projections in Section 7 suggest demonstrate that unless current planning controls are fully utilised, especially FSR, there will be a shortfall of industrial and urban services floorspace in the Victoria Road employment precinct of up to 618 sqm or a surplus of 67,444 sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

Section 7 identifies theoretical capacity by employment precinct in the Inner West to accommodate forecast demand, using different proportions of take-up of existing planning controls. A large shortfall in employment land across the Inner West has been identified.

Development activity

- 1-9 Rich Street, Marrickville (DA201700558)
  In July 2019, the Sydney Eastern City Planning Panel approved the demolition of existing improvements and the construction of a staged commercial development. Stage one comprises site preparation works, construction of two new buildings incorporating ground level food and drink tenancies, studio spaces, upper level offices and car parking. This will be across two buildings, the three storey north hub and four storey south hub. It will also involve public domain works and subdivision of the site into three allotments. Stage two comprises the construction of a five storey Marker building with a ground floor food and drink tenancy, upper level offices and a roof terrace. Stage one is currently under construction
- 182 Victoria Road, Marrickville (DA201900096)
  In April 2019, a development application was lodged with Council to demolish the existing improvements on site and construct a mixed use development ranging from six storeys to 14 storeys in height, comprising 2,351sqm of ground floor retail floorspace, 270 residential apartments, two levels of associated basement car parking and the provision of public domain and landscaping works. This application was under assessment at the time of writing
- 105A Victoria Road, Marrickville (DA201600518)
  In August 2018, Council approved alterations and additions to an existing venue (the factory theatre). This included partial roof enclosure, new bar, new café, amplified music, signage and public art. It also approved an increase in hours of operation and patron capacity.

Previous and other relevant studies

A Marrickville Employment Lands Study 2014 was commissioned to peer review a 2008 Employment Lands Study adopted by former Marrickville Council. The peer review provides strategic directions as a guide for employment lands planning. It identified this land as part of their Marrickville-Sydenham profile and referred to it (Action 1.1) as a "sub-regionally significant industrial precinct" and that "it provides space for local service/ light industrial operations as well as larger lots for more traditional industrial activity."

Action 1.2 of the SGS 2014 Study stated to *"restrict further subdivision and/or strata titling of larger lots in the Marrickville-Sydenham precinct core to prevent fragmentation."* It identified the larger lots as a feature of the precinct and that "subdivision and/ or strata titling of lots in the core of the precinct should be resisted." Action 1.3 of the Study argued for the prevention of spreading of retailing and services into the precinct core.

Issues and recommendations

- Permissibility of serviced apartments in the B5 - Business Development zone

The permissibility of serviced apartments in the B5 – Business Development zone places a large proportion of this precinct at risk of redevelopment for non-employment uses. Given the substantial loss of industrial and

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urban services uses that have occurred across the LGA, the precinct is to be retained and managed for employment uses.

A removal of 'serviced apartments' from the B5 zone does not contradict the intent of the recent rezoning of the Victoria Road precinct. The precinct specific DCP contains sub-precinct profiles which outline the intent of the future land uses in these precincts and they do not envision residential forming part of this.

Action 2.2.2 of the strategy addresses removal of 'serviced apartments' as a permitted use from the B5 - Business Development zone to maximise the potential of the precinct for employment uses. The rationale behind this actions is addressed in Section 8.1.4.

- Growth of retail premises in the area

The mixed-use redevelopment currently under construction adjacent to Wicks Park (DA201900096) is proposed to include 2,351 sqm of retail floor space. This will include a market of 1,500sqm, and five additional retail tenancies, designed around an inner courtyard space. Retail tenancies will be set back providing covered outdoor space for possible café seating along Victoria Road and Wicks Park.

An approved commercial development at 1-9 Rich Street Marrickville (DA 201700558) is proposed to include 3,500sqm (approx.) of retail floor space, largely food and drink premises. There is an additional proposed 10,000sqm (approx.) of office floor space.

These two developments combined with the Marrickville Metro expansion and growth of commercial tenancies along Addison Road should be acknowledged as this competition places pressure on the nearby Marrickville Centre. Similarly, a recent rezoning has enabled additional permitted uses apply to IN1 – General Industrial land near Sydenham Station including restaurants, cafes and small bars which, if developed could create further competition with nearby centres.

Growth of out-of-centre retail does not align with the centres hierarchy outlined in Action 1.1.1 in the Strategy.

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9.1.5 Addison Road Industrial Precinct

Role and function

The Addison Road precinct has a mixed character with traditional industrial activities with an emerging neighbourhood centre in part of the precinct. It is approximately 91,153sqm with 85,434sqm of employment floorspace and 1,837sqm of commercial floorspace. The precinct forms the northern edge of the larger Marrickville industrial lands. The industrial precinct is located to the south of Addison Road while the majority of the emerging neighbourhood centre is largely to the north of Addison Road. It is services by multiple bus services (423, 426, L23, M30) connecting the precinct to the CBD and around the inner south-west. It is five minutes' walk from Marrickville Metro shopping centre. Enmore Park is situated to the east of the precinct. Parking is very limited within the overall precinct.

The industrial precinct to the south of Addison Road has a distinctly different character. Properties zoned IN1 - General Industrial tend to be on substantial landholdings which are rare in the Inner West, supporting large scale industrial activities. The IN1 - General Industrial precinct has a strong industrial role and function and is heavily utilised. Examples of businesses include mechanical repairers, sheet metal and air-conditioning manufacturers. Notably, the zone also hosts the Portugal Madeira Sydney Social & Cultural Sports Club.

Properties on the periphery of the IN1 - General Industrial precinct, zoned B7 - Business Park and IN2 - Light Industrial tend to be on smaller, narrower lots. Most properties to the west of Shepherd Street consist of residential dwellings that are occupied for residential uses. Employment uses within the precinct include art galleries, automobile repairs, light manufacturing, seafood and coffee wholesalers, fashion accessories, butchers, micro-breweries, food manufacturers and studios.

The emerging neighbourhood centre along Addison Road is characterised by a mix of shop-top two storey early 20th Century buildings on narrow lots as well as newer retail spaces, located within new mixed use development on the northern side of the road. The corner of Addison and Enmore Roads is characterised by the Vic on the Park pub as well as a row of compact shopfronts. There is evidence of small bars, cafes, restaurants and business services. There are a limited number of small shops. This centre also has a number of car related urban services.

The Addison Road Community Centre is located 50 metres to the west of the precinct and is home to more than 20 community organisations, artists, galleries, a theatre, radio station, park, and organic gardens. The centre is managed by the Addison Road Community Centre Organisation (ARCCO), which provides affordable spaces for NGOs, community groups and artists and is also used by ARCCO for their own community development programs in arts, culture, environment and social justice as well as a meeting place for the community. Arts and live music uses are likely to be ancillary to the main use of these premises. This community centre forms part of the Inner West's cultural infrastructure.

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Precinct map



Planning controls

Industrial Core – south of Addison Road

The industrial core of the precinct to the south Addison Road is zoned IN1 -General Industrial. The intention of this zone is to accommodate industrial activities more likely to generate amenity impacts. Business premises and office premises are prohibited in the zone. While specialised retail premises are prohibited, garden centres and hardware and building supplies and artisan food and drink industry are permitted.

Surrounding this core of IN1 - General Industrial is a buffer area of IN2 – Light Industrial and B7 - Business Park land, to separate it from residential areas. This includes land fronting the southern side of Addison Road, the western side of Shepherd Street and eastern side of Cook Road. The land use zones applied within the buffer include IN2 - Light Industrial and B7 - Business Park.

Part of the IN1 - General Industrial buffer comprises land zoned IN2 - Light Industrial under Marrickville LEP 2011. The floorspace ratio control applying to the precinct is 0.95:1. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

The B7 - Business Park zone is also used as a buffer between the industrial and residential areas in some parts of the precinct. Similar to the IN2 - Light Industrial zone, while business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes.

Clause 6.13 of Marrickville LEP 2011 allows for residential flat buildings in the B7 - Business Park zone provided not less than 60% of the total gross floor area of the building will be used for non-residential purposes.

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Marrickville LEP 2011 does not specify a height limit for the IN1 - General Industrial, IN2 - Light Industrial and B7 - Business Park zones in the Addison Road Precinct. There is however, an FSR control of 0.95:1 across these zones. The low FSR has not encouraged redevelopment, as observed in the St Peters Triangle B7 - Business Park zone.

Emerging neighbourhood centre – mostly north of Addison Road

Under Marrickville LEP 2011, a mix of B5 - Business Development, B1 - Neighbourhood Centre and B4 - Mixed Use zonings are applied to properties along Addison Road on the fringes of the precinct. While the zoning is varied, the resulting built form is consistent with that of an emerging centre, rather than an employment precinct. 'Light Industry' and 'artisan food and drink industry' are only permitted within the B4 - Mixed Use portion of the centre. Local distribution premises are only permitted within the B5 - Business Development part of the centre.

Within the parts of the centre that are zoned B1 - Neighbourhood Centre, the FSR is 1.2:1, with two isolated lots to the north at 0.85:1 and height controls ranging from 9.5 to 11 metres. Shop top housing is permitted within the zone.

The land zoned B5 - Business Development within the Addison Road precinct has additional permitted uses applying under Marrickville LEP 2011. Development for the purpose of residential accommodation is permitted with consent, but only as part of a mixed use development. This has resulted in redevelopment of some land for mixed use development. Notwithstanding the additional permitted use, the zone also permits serviced apartments. The B5 - Business Development zone permits specialised retail premises, food and drink premises, garden centres, hardware and building supplies, landscaping material supplies, office premises, health services facilities, and business premises. It does not permit shops which limits uses that can occur in the ground floor commercial floorspace within these new mixed use developments.

Floorspace – Employment zones

Category	GFA (sqm)	Proportion
Knowledge Intensive	3,715	4%
Professional, Scientific and Technical Services	3,367	4%
Rental, Hiring & Real Estate Services	348	0%
Population serving	39,641	47%
Accommodation and Food Services	9,191	11%
Art and Recreation Services	3,179	4%
Other Services	22,852	27%
Retail Trade	4,419	5%
Industrial	36,629	44%
Manufacturing	8,439	10%
Transport, Postal and Warehousing	17,558	21%
Wholesale Trade	10,632	13%
Total occupied floorspace	79,985	96%
Vacant	3,612	4%
Total	83,597	100%

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

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Floorspace – Commercial zones

Category	GFA (sqm)	Proportion
Personal Services	982	53%
Speciality Food	271	15%
Café/restaurant	196	11%
Construction	106	6%
Accommodation & Food Services	101	5%
Speciality Non-Food	97	5%
Total occupied floorspace	1,753	95%
Vacant	84	5%
Grand Total	1,837	100%

Source: HillPDA Desktop Audit, 2019

Employment floorspace demand

The floorspace and employment projections in Section 7 suggest that, depending on how much of the available capacity under current planning controls is taken up, there will be a shortfall of floorspace in the Addison Road industrial precinct of between 41,173sqm and 3,926sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The precinct includes a large portion of residential development which is unlikely to be returned to employment uses. The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

Development activity

Addison Road has seen a number of mixed-use developments from 2014-2019. Recently completed projects include:

- 23-29 Addison Road (DA201300025) (numbered 3 on the contextual map below). This 6 storey mixed use project was approved by Council in 2013 and completed in 2017. It consists of a 200sqm ground floor commercial space, which is currently tenanted, and 64 apartments. These replaced a light industrial warehouse and office building.
- 31-33 Addison Road (DA201300345) (numbered 2 on the contextual map below). This 5 storey mixed use project was approved by Council in 2013 and completed in 2018. It consists of an approximately 320sqm ground floor commercial space, that is currently vacant, and 26 apartments. These replaced a warehouse.
- 65 Addison Road (DA201300346) (numbered 1 on the contextual map below). This 4 storey mixed use development was approved by Council in 2013 and completed in 2016. It consists of an approximately 160sqm ground floor commercial space, that is currently tenanted, and 10 apartments. This was a redevelopment and addition to an existing shop top mixed use building.

A motel development at 43-51 Addison Road, shown on the contextual map below, has been approved which is yet to commence construction.

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Previous and other relevant studies

The *Marrickville Employment Lands Study 2014* was commissioned to peer review a 2008 Employment Lands Study adopted by former Marrickville Council. The peer review provides strategic directions as a guide for employment lands planning.

It identified this land as part of their Marrickville-Sydenham profile and referred to it (Action 1.1) as a "subregionally significant industrial precinct" and that "it provides space for local service/ light industrial operations as well as larger lots for more traditional industrial activity."

Action 1.2 of the 2014 Study recommended council "*restrict further subdivision and/or strata titling of larger lots in the Marrickville-Sydenham precinct core to prevent fragmentation.*" It identified the larger lots as a feature of the precinct and that "*subdivision and/ or strata titling of lots in the core of the precinct should be resisted.*"

Action 1.3 of this Study argued for the prevention of spreading of retailing and services into the precinct core.

Issues and recommendations

- Multiple zones along Addison Road

A number of zones including B1 - Neighbourhood Shop, B5 - Business Development and B4 - Mixed Use apply along Addison Road. In this context, all properties along this strip permit residential uses. Properties within the B5 - Business Development zone have already been redeveloped with mixed uses. Council reports that the large number of zones creates complexity and confusion for businesses that are considering opening within existing commercial or new ground floor commercial spaces as part of mixed use development. For example, a 'shop' or 'neighbourhood shop' is prohibited within the B5 - Business Development zone.

The existing B5 - Business Development zone on Addison Road should be reviewed to enable more convenience shops and entertainment options to service the adjacent industrial and business area. There is also a need to review the B1 – Neighbourhood Centre, B2 – Local Centre and B4 – Mixed Use zoned land along Addison Road with the intention of harmonising to maximise the range of permissible employment uses that can operate within the centre.

Action 1.7.4 of the Strategy makes a recommendation to review zoning of this strip.

- Pressure for further rezoning for residential uses

There is concern that the recent rezoning of land to permit residential to the south within the Victoria Road precinct combined with the new mixed use developments to the north of Addison Road, could encourage speculative land acquisition under the expectation that land can be rezoned for mixed use development.

There is also concern that the declining availability of employment land may push up the cost of land and rents. Industrial land values have already increased significantly in recent years. Any rezonings would reduce the

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amount of available industrial land, contributing to a growing shortage in industrial land supply, with the potential to push up rents land values.

Action 2.2.1 of the Inner West Employment and Retail Lands Strategy states a position on the retention and management of industrial lands.

- Risk of loss of large parcels

The Addison Road precinct has substantial parcels of land of up to 9,000sqm in size. These landholdings are rare, are primarily in the IN1 - General Industrial zone and should be protected from fragmentation so that the Inner West can maintain a diversity of businesses. This zone currently has a diversity of lot sizes that enable opportunities for various size businesses. Protecting the larger lots from further fragmentation, secures a pipeline of diverse land parcels to cater to changing industry needs.

As identified in the Strategy (Action 2.3.1), remaining large allotments must be protected from subdivision, with the rationale explained in Section 8.

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9.1.6 Moore Street Industrial Precinct

Role and function

The Moore Street precinct is located in between Leichhardt and Annandale centres and provides an estimated 60,355sqm of total floorspace. Primarily characterised by local-servicing industrial uses, the precinct also includes manufacturing. The precinct's size and mix of uses identifies it as one of the key industrial precincts in the northern part of the LGA. The precinct has good vehicular access from Catherine Street and Booth Street. The precinct is close to the City West Link. The precinct is surrounded by residential uses, which is important given its predominantly local-light industry mix that often services local catchments. It is also close walking distance from retail and amenities in both Annandale and Leichhardt.

The larger eastern precinct is bound by Catherine Street, Moore Lane, Hill Street and Whites Creek Lane. The key site within the precinct is a substantial council owned depot on 7,000sqm of land. A number of sites in the precinct range in size from 2,000 to 5,000sqm. Properties fronting Moore Street are on smaller landholdings which reflect former residential subdivision. A substantial amount of floorspace is occupied by freight and logistics. Office uses and some detached residential are located on Moore Street. The built form varies from large open warehouse structures and smaller brick industrial buildings along Moore Street. The built form is predominately two to three storey unit heights. A number of auction houses exist within the precinct as well as building material suppliers, food wholesalers, automotive repairs and appliance wholesalers.

The western portion is located along Moore Street, west of Mackenzie Street. It consists of three substantial landholdings between 2000 and 5000sqm. While two properties are strata subdivided for warehouse space, the third is in single ownership. There are two large modern industrial office and warehouse complexes, one with 10 and the other with 6 strata titled warehouse spaces. The individual units in the strata properties still offer larger floor plates (300-500sqm) This area includes creative uses including two recording studios, namely Love HZ Studio and Linear Recording. Other uses in the precinct include car repairers and food manufacturers and wholesalers.

Precinct map



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Planning controls

The precinct is zoned IN2 - Light Industrial under Leichhardt Local Environmental Plan 2013. The floorspace ratio control applying to the precinct is 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP 2013 (cl. 6.9) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusements centres, function centres and general industries. These uses make the Leichhardt IN2 - Light Industrial zone quite broad in its range of permitted uses.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**17,901**	**30%**
Administrative and Support Services	10,165	17%
Financial and Insurance Services	440	1%
Information Media and Telecommunications	1,230	2%
Professional, Scientific and Technical Services	5,632	9%
Public Administration and Safety	434	1%
Health and Education	**2,404**	**4%**
Health Care and Social Assistance	2,404	4%
Population Serving	**11,765**	**19%**
Accommodation & Food Services	117	0%
Construction	4,413	7%
Other Services	2,419	4%
Retail Trade	4,816	8%
Industrial	**26,300**	**44%**
Manufacturing	8,682	14%
Transport, Postal & Warehousing	17,208	29%
Wholesale Trade	410	1
Total occupied floorspace	**58,370**	**97%**
Vacant	**1,985**	**3%**
Total	**60,355**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation Employment floorspace demand

Employment floorspace demand

The floorspace and employment projections to 2036 (see Section 7) demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Moore Street industrial precinct of between 2,039sqm and 29,695sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

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Development activity

- 5-7 White Street (D/2017/250)
  A development at 5-7 White Street has recently been completed, containing an affordable housing development of 22 units. The redevelopment represents a loss of employment lands. While not permissible under Leichhardt LEP 2013, the proponent was able to obtain a site compatibility certificate under Division 5 of State Environmental Planning Policy (Affordable Rental Housing) 2009
- 42-48 John Street (D/2018/657)
  A development application was received by Inner West Council on 17 December 2018, for the demolition of existing structures on a 2,800sqm block of land and the construction of a mixed use development comprising 18 light industrial units, 28 self-storage units, one take away food and drink premises and six business/office premises for creative purposes.

Previous and other relevant studies

SGS Economics completed the *Leichhardt Industrial Lands Study* in December 2014. Its overall actions and recommendations included:

- Protect Leichhardt's industrially-zoned precincts for their important employment and service functions
- Ensure adequate provision of industrial land for population-serving industries
- Maintain current provision of IN2 – Light Industrial zoned land
- Prohibit large-format retail in industrial zones
- Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts.

The Study identified this precinct as the former Leichhardt LGA's most significant industrial precinct. In its specific assessment of the Moore Street precinct, actions included:

- Rezone the key industrial precinct of Moore Street South (eastern precinct within this Precinct Profile) from IN2 - Light Industrial to IN1 - General Industrial to maximise its industrial potential.

In 2016, a subsequent study by SGS Economics reaffirmed this recommendation to retain both precincts as industrial. It also reiterated that, "*Moore Street South is Leichhardt's largest 'traditional' industrial precinct with regards to role and function. A re-zoning to IN1 - General Industrial would signal that this precinct is not one to consider peripheral industrial uses and will not be a location for alternative uses such as commercial or residential. Although feasibility testing suggested that in some instances, the introduction of commercial and/or residential could deliver an increase in floorspace, the possible loss of this precinct due to land-use conflicts is too great to contemplate seeking a marginal increase in floorspace.*"

Issues and recommendations

- Pressure to rezone for residential use

The Moore Street Industrial precinct is the largest industrial area in the former Leichhardt Local Government Area and the northern part of the LGA. It must be protected and well managed into the future to accommodate a diverse range of industrial and urban services. This has been addressed by Action 2.2.1 of the Strategy.

- Potential rezoning of land from IN2 - Light Industrial to IN1 - General Industrial

The northern part of the LGA currently has no industrial land zoned IN1 - General Industrial. However, the IN2 zoning in Leichhardt provides for a broader range of industrial uses, by permitting General Industries in the zone. The merging of the IN2 - Light Industrial zone to harmonise the LEPs of the former 3 councils, creates the risk of

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losing 'general industrial' as a permitted use, affecting all industrial lands in the former Leichhardt LGA. However, this issue is most critical for the Moore Street precinct, the largest and least fragmented industrial zone remaining under Leichhardt LEP. The current IN2 zoning also means that the land is open to redevelopment for the purpose of business and office premises under clause 6.9 of Leichhardt LEP 2013.

In order to protect large landholdings from fragmentation and to maintain availability of land and price points for general industrial type uses, a rezoning of land to IN1 General Industrial could be considered for this precinct, potentially with a light industrial buffer to the most sensitive interfaces. This potential was flagged in past studies by SGS Economics.

- Protection of large lots

The precinct includes some large, relatively unfragmented sites. Protecting the larger lots from further fragmentation will assist in securing a pipeline of diverse land parcels in the LGA to cater to changing industry needs. Notably, the Council owned depot in this precinct is on a substantial landholding. If surplus to requirements in the future, the site has the potential to house industrial uses that require large landholdings and provide for a buffer to surrounding land uses. Landholdings of this size are rare in the LGA. This is further explained in Section 8. See Action 2.3.1 of the Strategy.

- Review considerations for site compatibility certificates on industrial land in Inner West LGA

Council has expressed concern at the issuing of site compatibility certificates for residential development in industrial zones. The impact of this practice on industrial land is inconsistent with the direction of the Greater Sydney Commission to retain and manage industrial lands.

Action 4.1.2 in the Strategy recommends Council explore this issue with the Department of Planning, Industry and Environment further.

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9.1.7 White Bay Industrial Precinct

Role and function

White Bay industrial is primarily located along Victoria Road and Robert Street in Rozelle and provides an estimated 72,704sqm of total floorspace over a land area of 68,658sqm. The precinct has a strong urban service function. Access is from Mullens and Robert Streets although some lots have frontage to Victoria Road. The precinct has good access to major arterial roads and Sydney's motorway network. It is adjacent to the Bays Precinct, which is expected to undergo major redevelopment in the near future, with a possible metro station at this location. Currently, it is also well serviced by buses, providing rapid CBD access. The precinct is in close walking distance to Rozelle Centre.

The large warehouse buildings vary in age but are consistent in their form – brick and three to four storeys, some with very high ceilings. Surrounds include low-density residential suburb of Balmain. The precinct adjoins maritime-servicing land. The large lots and proximity to port and arterial road infrastructure mean that the precinct is appropriately located to continue to accommodate for industrial uses.

A key sub-area of the precinct fronts Victoria Road between Prosper Street and Crescent Street and has a distinct urban services function similar to an enterprise corridor. Lots are smaller, more fragmented and vehicular access challenging due to the narrowness of side streets. Key land uses include numerous automotive repairers, Council owned carpark, funeral home, veterinary hospital, equipment hire and a gym. There is a vacant block of land located at 75 Victoria Road, Rozelle. A number of residential dwellings, including recently built live-work units also exist. A large proportion of properties in this area are not covered by heritage conservation area.

The second sub area within this profile is located to the east of Crescent Street and largely fronts Robert Street. This precinct has a mix of historic warehouse buildings on large parcels of land. There are also newer office/warehouse developments. Most of the precinct is strata titled however there are some landholdings in single ownership remaining mainly south of Parsons Street. There is also a row of terraces converted for office use. The area is within a heritage conservation area. Light industry and essential urban services are the primary functions of this precinct. Uses include storage premises, heritage restoration services, automotive repairers and retailers, fitness, churches, building repairers and a number of smaller businesses.

The precinct is in close proximity to surrounding residential areas to the north. While proximity creates risk of amenity impacts, the precinct fronts a major arterial road and creates a buffer between surrounding residential areas and Victoria Road.

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Precinct map



Planning controls

The precinct is zoned IN2 - Light Industrial under Leichhardt Local Environmental Plan 2013. The floorspace ratio control applying to the precinct is 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP 2013(cl. 6.9) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusements centres, function centres and general industries. These uses make the Leichhardt IN2 - Light Industrial zone quite broad in its range of permitted uses.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**27,413**	**38%**
Administrative and Support Services	3,126	4%
Information Media and Telecommunications	22,183	31%
Professional, Scientific and Technical Services	1,716	2%
Rental, Hiring and Real Estate Services	388	1%
Health and Education	**288**	**0%**
Health Care and Social Assistance	288	0%
Population Serving	**15,094**	**21%**
Accommodation & Food Services	192	0%
Arts and Recreation Services	4,237	6%
Construction	181	0%

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Category	GFA (sqm)	Proportion
Other Services	9,565	13%
Retail Trade	919	1%
Industrial	**27,525**	**38%**
Manufacturing	6,372	9%
Transport, Postal & Warehousing	20,101	28%
Wholesale Trade	1,052	1%
Total occupied floorspace	**70,320**	**97%**
Vacant	**2,384**	**3%**
Total	**72,704**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections in Section 7 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the White Bay industrial precinct of between 53,372sqm and 32,290sqm based on several factors of potential future capacity as detailed in Section 7.2.5. This shortfall will form part of a shortfall across the LGA arising from growing population of the LGA and the loss of employment land to infrastructure construction and residential development.

Development activity

- **2-8A Parsons Street Rozelle – Bunnings Proposal – Land and Environment Court Approval**

  Approval for demolition of existing structures and improvements, consolidation of lots into Torrens Title Lots with existing legal rights/easements retained, and the construction of a hardware and building supplies store with associated car parking, landscaping and signage.

Previous and other relevant studies

SGS Economics completed the Leichhardt Industrial Lands Study in December 2014. Its overall actions and recommendations included:

- Protect Leichhardt's industrially-zoned precincts for their important employment and service functions
- Ensure adequate provision of industrial land for population-serving industries
- Maintain current provision of IN2 - Light Industrial zoned land
- Prohibit large-format retail in industrial zones
- Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts

In its specific assessment of the White Bay Industrial, it identified it as a large mixed industrial precinct of subregional importance. It has also identified it as having a wide reach, given its road accessibility, larger precinct size and larger lot sizes. Each of these characteristics was seen to be desirable for industries seeking to serve a larger consumer base across a wider area. The study states that *"the importance of the White Bay industrial precinct's current functions should not be underestimated"*. Key actions include:

- Protect the industrial nature of the precinct from rezoning and non-industrial redevelopment that may be a permitted use within IN2 - Light Industrial zoning.
- Maintain industrial zoning of White Bay industrial precinct

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In 2016, a subsequent SGS Economics study reaffirmed that this precinct should be retained as industrial and protected from rezoning.

Issues and recommendations

Protect white bay precinct for industrial uses

SGS Economics flagged in its report in 2014 that, *"the redevelopment of the Bays Precinct is likely to place pressure on the adjacent industrial-zoned land through increases to property values. Maintaining current zoning will protect these lands, however in light of these anticipated pressures, establishing multi-stakeholder engagement at the commencement of the Bays precinct project will make clear the importance of this precinct, anticipate the effects it will have and aid the redistribution of local services, where required, throughout the rest of the LGA."*

Action 2.2.1, in the Strategy addresses the protection of industrial land, while Action 2.5.1 and 2.5.2 addresses this precinct specifically in the context of potential future plans in the Bay Precinct.

Conflict between land uses

White Bay Industrial is identified as being a location at high risk of land use conflict, with examples documented by Council. Surrounding streets are narrow and access to Victoria Road is challenging. The implications of this mean that the range of businesses that can operate within the existing sites are limited by the access arrangements. Larger vehicles are limited in terms of access.

These limitations do not restrict the precinct from functioning well and attracting a wide range of businesses. Ultimately, in the longer term there is opportunity to address these matters through site amalgamation and redevelopment incorporating vehicular access.

Council will continue to work with businesses, residents and Transport for NSW to ensure that vehicular access arrangements for all can be maximised and land use conflict can be minimised. This is supported by Action 3.1.3 and 3.1.4 of the Strategy.

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9.1.8 St Peters Triangle

Role and function.

The St Peters triangle precinct is primarily located along both sides of the Princes Highway between Campbell Street and St Peters Station and provides an estimated 61,302sqm of total floorspace over a land area of 52,495sqm. It also extends along May Street, providing a mix of light industrial, manufacturing, warehousing, retail, food and drink and residential.

Employment zoned land within the precinct have a strong urban service/light industrial function however this is being diminished with considerable mixed-use development replacing warehouse buildings. Residential zoned land adjacent the precinct contain urban services activity within warehouse buildings, however this is also being converted to residential over time.

The precinct has good access to major arterial roads and Sydney's motorway network. It is adjacent to the St Peters Station and the St Peters Interchange for WestConnex. Currently, it is also well serviced by buses, providing rapid CBD access. The precinct is in close walking distance to King Street, Newtown.

The precinct incorporates a unique mix of land uses. Sites fronting the Princes Highway are a mix of commercial terraces, warehouses and mixed use residential flat buildings. A number of sites along the Princes Highway are being redeveloped from warehouses and commercial premises into mixed use commercial/residential buildings.

The character of the sites fronting Hutchinson and Applebee Streets is different again with a significant amount of redevelopment underway, especially to the rear of sites fronting the Princes Highway. Uses include light industry, commercial premises and residential. A site currently under construction at the apex corner of Applebee and Hutchinson Street is a mixed use commercial and residential development with commercial tenancies throughout the ground, first and second floors and residential on the second and third floors.

Multiple new developments in this area feature live-work apartments whereby a residential unit has a purpose built commercial or industrial component.

The precinct is strategically located, being adjacent to major infrastructure including the Sydney Trains network and the St Peters WestConnex interchange (under construction). WestConnex, when completed, will offer motorway connections to the north, south and west from the St Peters interchange. The precinct will also benefit from upgraded road connections to the airport and Port Botany as part of the WestConnex project.

The precinct was the subject of a master planning process by Council in 2009. It identified a vision that included a mixed use precinct that could provide urban support services, light industry, service industry and creative industries.

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Precinct map



Planning Controls

Planning controls throughout the precinct are highly varied and reflect the intentions of the St Peters Triangle master plan adopted in 2009. Zones in the precinct include B7 - Business Park in the centre, B6 – Enterprise Corridor along the Princes Hwy, B4 - Mixed Use in a specific and already developed site on the Princes Hwy and B5 - Business Development along May Street and the northern section of the Princes Highway near King Street.

Collectively, the zones permit a wide range of uses including residential, limited commercial and light industrial. The B7 - Business Park and parts of the B6 – Enterprise Corridor zone permit residential uses, but only to a certain threshold of a development's GFA, being a max of 40% in the B7 -Business Park and 60% in the B6 -Enterprise Corridor.

The St Peters triangle has become somewhat of test case in the concept of live-work units. This is due to the extensive use of the B7 - Business Park zone in a developable area and the minimum commercial thresholds required in this zone, as well as the part of the B6 - Enterprise Corridor zone along the Princes Highway. This is discussed further below.

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Non-residential floorspace requirement in the B7 -Business Park zone (live-work)

Under the Marrickville Local Environmental Plan 2011 (MLEP 2011), specific clauses are in place to limit residential land uses to ensure commercial uses are the predominant land use. The objective of this is to revitalise employment areas, include small scale live-work enterprises and provide transitions between adjoining land uses.

St Peters triangle is largely zoned B7 - Business Park within the centre of the triangle along Applebee and Hutchinson Streets. Development standards within the B7 - Business Park zone range from 14m to 23m height limits and FSR limits between 1.3:1 and 2.2:1. These standards are typically above the existing improvements on site which has triggered development throughout the zone.

Much of this development is underway or has been completed, with many sites incorporating live-work units to fulfil the 60% commercial floorspace quota made under Clause 6.13 of the MLEP 2011. Two notable completed examples are discussed below.

19 Hutchinson Street, St Peters, also known as *Rinato* is a five storey building approved in 2014 (DA201300249). It comprises 9 commercial spaces on the ground floors and 32 apartments above, seven of which are live-work dwellings. The development was approved through a Section 34 agreement through the Land and Environment Court and analysis of the gross floor area share between residential and commercial is not readily available. There are no recent sales of listing of properties available to confirm whether the live-work dwellings are being advertised and marketed as such.

7-9 Hutchinson Street, St Peters, also known as *Art House,* is a four storey building approved by Council in February 2016 (DA201500373). It comprises one commercial tenancy on the ground floor and seven live-work dwellings above. The Planning Officers report to Council recommended refusal of the application due to, amongst other issues, non-compliance with the 60% minimum non-residential GFA requirement as only 47.3% of the GFA is dedicated for non-residential purposes. A review by Council of real estate leasing advertisements revealed that multiple advertisements referred to the studio space provided as a bedroom/studio space. One advertisement stipulated it was for work-related purposes only.

A compliance and review process could be put in place to determine the operational success of the non-residential GFA quota and specifically the live-work component. This process could monitor the use and whether the intent of the zone is being achieved. Expansion of the clause across the LGA could be considered if the clause is deemed successful.

Other live-work developments in planning or under construction are described below.

- **47-61 Princes Highway, St Peters,** also known as *Brick Lane,* is a part three, part seven storey mixed use building approved by the Land and Environment Court through a Section 34 Agreement in February 2017. It contains four commercial tenancies, 12 live-work dwellings and 46 dwellings. Due to the Section 34 approval, there is limited information on the compliance with the required 60% non-residential GFA requirement on the B7 - Business Park zoned land.
- **63-81 Princes Highway, St Peters** also known as *Orico,* is a part 3, part 6 storey mixed use building approved by the Land & Environment Court on 2 March 2018. It contains 12 commercial tenancies, five live-work units and 81 residential units and two levels of basement car parking. Calculations provided on the approved set of plans indicate that non-residential GFA on the B7 - Business Park zoned part of the site makes up 62% of the floorspace, achieving the minimum 60%. They also indicate that only 15% of the B6 - Enterprise Corridor zoned portion of the sites GFA is for non-residential purposes, below the 40% required.
- **2-22 Hutchinson Street, St Peters** is another development currently under construction in the B7 - Business Park zone. It was approved by the Court through a Section 34 agreement on 7 March 2018. It

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contains one industrial premise, 21 commercial tenancies and 19 apartments. It achieves the 60% non-commercial GFA share required under the MLEP 2011 through the provision of commercial and industrial floorspace not tied to individual dwellings.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**9,780**	**16%**
Administrative and Support Services	596	1%
Financial and Insurance Services	52	0%
Information Media and Telecommunications	3,800	6%
Professional, Scientific and Technical Services	4,740	8%
Public Administration and Safety	240	0%
Rental, Hiring and Real Estate Services	352	1%
Health and Education	**870**	**1%**
Education and Training	394	1%
Health Care and Social Assistance	476	1%
Population Serving	**19,023**	**31%**
Accommodation and Food Services	1,304	2%
Arts and Recreation Services	2,332	4%
Construction	1,790	3%
Other Services	7,740	13%
Retail Trade	5,857	10%
Industrial	**23,256**	**38%**
Electricity, Gas, Water and Waste Services	830	1%
Manufacturing	12,044	20%
Transport, Postal and Warehousing	1,732	3%
Wholesale Trade	8,650	14%
Total occupied floorspace	**136**	**0%**
Vacant	**8,237**	**13%**
Total	**61,302**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections in Section 7 demonstrate that unless current planning controls are fully utilised, especially FSR, there will be a shortfall of industrial and urban services floorspace in the St Peters Triangle precinct of 21,505sqm or a surplus of 11,303sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The current zoning and recently proposed development may limit additional industrial or urban services floorspace in the precinct, even though this is an important employment precinct or the LGA. The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are contributing to an overall shortfall in employment land across the Inner West. Limiting further residential development in this precinct may help protect the long term use of the precinct for employment uses.

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Development activity

St Peters Triangle has experienced significant development activity from 2014-2019. Numerous large developments have been completed or are currently under construction. These are made up of a range different types of land use, with commercial, live/work, mixed-use and residential developments all contained in the precinct. Recently completed projects include:

- 7-9 Hutchinson St (numbered on the 3 contextual map below)
- 60-68 Hutchinson St (numbered 1 on the contextual map below)
- 44-56 May Street & 19 Hutchinson St (numbered 2 on the contextual map below)
- 38-42 Princes Hwy (numbered 4 on the contextual map below)
- 84-88 Princes Hwy (numbered 5 on the contextual map below).

Recently approved developments include:

- 2-22 Hutchinson St & 27-33 Applebee St (numbered 1 on the contextual map below)
- 641-657 King St (numbered 2 on the contextual map below)
- 44-46 Princes Hwy & 3 Barwon Park Rd (numbered 5 on the contextual map below)
- 47-61 Princes Hwy & 36-44 Applebee St (numbered 3 on the contextual map below)
- 63-81 Princes Hwy (numbered 4 on the contextual map below)

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Contextual map



Non-residential floorspace requirements for key sites

That part of the precinct zoned B6 - Enterprise Corridor, which fronts the Princes Highway, is identified as key site "F" under the Marrickville LEP 2011. In accordance with Clause 6.16 of the Marrickville LEP 2011, 40% of the total GFA of the building must be used for non-residential purposes. This clause was gazetted on 2 June 2017. Two developments are currently under construction within this key site area, discussed above with addresses to the Princes Highway. Only the latter site at 63-81 Princes Highway was assessed against this LEP clause with the other site, 47-61 Princes Highway, being assessed against a similar control in a DCP. The remaining two sites, 41-45 Princes Highway and 31 Princes Highway are yet to be redeveloped and no DAs have been submitted.

Whilst analysis is limited as both applications were approved by the Land and Environment Court under Section 34 agreements, the non-residential GFA minimums of both approved sites do not appear to have been achieved. Further analysis should be completed along with the analysis of the B7 - Business Park zone requirements detailed above to ensure the policy is executed to its intent over the remaining sites.

Previous and other relevant studies

A *Marrickville Employment Lands Study* 2014 was commissioned to peer review a 2008 Employment Lands Study adopted by former Marrickville Council. The peer review focuses provides strategic directions as a guide for employment lands planning.

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The 2014 study discusses live work as part of Action 3.1, *"The introduction of a zone allowing residential activity within the industrial precinct needs to be carefully managed so that encroachment of straight residential activity does not jeopardise the role and function of the industrial precinct."*

Issues and recommendations

- Live-work developments

Redevelopment of the St Peters Triangle for mixed use and live-work development has compromised the industrial role and function of the precinct. Most traditional industrial uses have been displaced as a result of redevelopment of land for mixed-use. Remaining industrial uses in older properties report that they have lost local suppliers and have uncertainty around tenure due to the risk of future redevelopment of sites by landowners.

Live-work as a concept is incompatible with an industrial precinct as they are sensitive to amenity impacts from nearby industrial uses. Permitting live work developments in an employment zone also creates the risk of industrial sites being redeveloped for non-industrial uses. This can compromise the industrial role and function of a precinct.

Existing employment precincts in the Inner West LGA currently permitting live-work and mixed residential/office development should be identified, with the suitability of the existing zoning reviewed as part of future reviews of the LEP.

Rezoning of employment lands for these purposes should not be repeated elsewhere, given the implications for supply of land for industrial uses and urban services.

The live-work concept could, however, be explored for lands that already permit residential such as residential zones at the periphery of centres and land zoned B1 - Neighbourhood Centre, B2 - Local Centre and B4 - Mixed Use that may be suitable for live-work type development.

Action 2.3.3 and 3.2.4, of the Strategy provides future direction on Council's approach to these uses.

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9.1.9 Canal Road Arts Precinct

Role and function

The precinct is a creative arts cluster covering a land area of approximately 47,030sqm, providing an estimated 33,943sqm of total floorspace. The businesses and activity mix includes film studios, theatre companies, art gallery support facilities, prop suppliers, film services, wig making and a costume rental service. The precinct services a wide catchment offering specialist services to Greater Sydney and supporting the NSW film and production industry and major art gallery storage facilities.

Access to the precinct is via Canal Road and Lilyfield Road. The precinct has relatively direct connections to the City-West Link Road and the Leichhardt North light rail station. The connections to the active transport network and particularly to the Greenway and Bay Run are strong.

The precinct has a variety of old and new industrial warehouses, between one and three storeys high. The built form is suitable for the types of uses that are currently present in the precinct, providing opportunities for employment space at varying price points. Most buildings are in reasonable condition and well maintained.

The core elements include:

- Canal Road Film Centre (CRFC) which houses 75 film production related businesses and is leased from the State government through the NSW Department of Property and Finance. An initial 5+5+5 year lease expired in 2016. It is understood that, at this stage, the State Government has declined to offer a new 5+5 year lease. The current agreement is for a 5 year lease, which expires in 2021.
- 91 Canal Rd, Lilyfield is an arts complex with various arts and theatre companies based there, including Legs on the Wall, Art Gallery of NSW, Museum of Contemporary Art, Sydney Theatre Company and Bangarra Dance Company. The site is owned and run by NSW Ministry of the Arts through Create NSW. This area promotes the clustering of cultural uses. It can provide arts and live music spaces without the need for development consent, as such uses are considered as incidental or ancillary to these approved arts-related uses.

The mini case study below explains how important the Legs on the Wall Theatre Company and its Red Box building at 91 Canal Road are to the Sydney, NSW and Australian economy.

> *Established in 1984 by a group of young artists busking on the streets of Sydney, the company was incorporated as an association in 1992. In 2004 the NSW Government leased the company their own purpose-built home in the Red Box at Canal Road.*
>
> *Legs on the Wall are head tenants in the building, which has become home to four other companies and 7,000 artists who use the Red Box and Warehouse Studios each year. This hub has become a stable, creative professional environment where experimentation is encouraged and celebrated.*
>
> *Legs on the Wall is a mature global cultural ambassador for Australia. It performs around the world to outdoor audiences in their thousands and to millions of television viewers for events such as the opening night of the London Cultural Olympiad in 2012 (The Voyage), Homelands in the Sydney CBD, and the Commonwealth Games in Glasgow (Perch). It also reaches thousands of others through theatre work such as All of Me, Bubble and Puncture.*
>
> *It is estimated that over its lifetime 680,000 people have attended a Legs on the Wall show.*
>
> *In a broad sense Legs on the Wall is representative of how important the Canal Road Precinct is to the Sydney metropolitan region. The arts and genuinely important, substantial creative operations such as Legs on the Wall and the CRFC film studios are influencers on behalf of Sydney that help put projects like the Camperdown Biotechnology Precinct on the world map in terms of attracting high*

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–flying young scientists to live and work here. The success of Legs on the Wall in this respect has been defined by persistence, change, reinvention and achievement. Their local, national and international success has made them a leader in physical theatre delivering a powerful Australian exuberant synergy of circus, theatre and dance.

Precinct map



Planning controls

The area is zoned SP1 - Special Activities -Canal Road Arts Precinct in the Leichhardt LEP 2013, which allows development for the purpose shown on the land zoning map with consent, including any development that is ordinarily incidental or ancillary to development for that purpose. It has a floorspace ratio control of 1:1.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**10,805**	**32%**
Financial and Insurance Services	129	0%
Information Media and Telecommunications	1,935	6%
Professional, Scientific and Technical Services	8,354	25%
Rental, Hiring and Real Estate Services	387	1%
Health and Education	**5,000**	**15%**
Education and Training	5,000	15%
Population Serving	**17,493**	**52%**

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Category	GFA (sqm)	Proportion
Accommodation & Food Services	1,003	3%
Arts & Recreation Services	15,329	45%
Construction	1,161	3%
Industrial	645	2%
Manufacturing	**516**	**2%**
Wholesale Trade	129	0%
Total occupied floorspace	**33,943**	**100%**
Vacant	**0**	**0%**
Total	**33,943**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections in section 7 demonstrate that there is likely to be a shortfall in industrial and urban services floorspace by 2036 of between 10,260sqm or a surplus of 8,552sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

This shortfall will contribute to an overall shortfall of employment floorspace in the LGA which is arising from a growing population and the loss of employment land to infrastructure construction and residential development. The implications of the shortfall in this precinct could be particularly relevant to the creative industries given the strong demand and success of the creative industries cluster in this precinct.

Development activity

No recent development activity identified.

Previous and other relevant studies

The *Leichhardt Employment and Economic Development Plan 2014* identified the CRFC as an innovative concept initiated by a group of tenants making use of a former public works depot located in Canal Road, Leichhardt. This existing creative cluster combined with the major infrastructure investment in the light rail extension was highlighted as a significant opportunity for further growth of the creative industry sector within the Leichhardt area.

Issues and recommendations

There are two issues for the precinct:

- Uncertainty regarding the State government's willingness to enter into a long term lease agreement for the CRFC premises is reducing confidence in the long term future of the of the site as a special activities hub.
- The need for the businesses to apply for development consent for live performances and arts events.

Action 3.4.5 of the Strategy supports retention of this precinct for specialist film and arts uses as well as reducing approval requirements for events relating to the uses on the site, affordability, tenure length and overall marketing of the precinct.

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9.1.10 Stanmore Bridge Road West Precinct

Role and Function

The Stanmore Bridge Road West Precinct has an Urban Services role and function with 3,799sqm of gross floor area over approximately 3,700sqm of land. It is served by frequent buses on Parramatta Road and a wide range of retail and services at Stanmore Centre and Parramatta Road. Car parking is limited in the area but properties do have side and rear lane access. The precinct consists of five key sites:

- strata residential mixed use development with two retail tenants
- standalone head office of a building and facility services company
- building supply retailer
- large standalone child care centre
- packaging business run by St Vincent De Paul.

The built form varies from older warehouse stock to recent, purpose built multi-storey buildings. Businesses benefit from exposure to high vehicle volumes around Bridge Road.

The precinct is well located, close to the Parramatta Road Corridor and the Camperdown Industrial precinct, areas on increasing strategic importance. The businesses along Bridge Road provide essential, nearby services for the operation of nearby employment areas. This includes the child care centre, building supplies and packaging services.

Precinct map



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Planning controls

Under Marrickville LEP 2011, a mix of B5 - Business Development and B4 - Mixed Use zonings are applied to properties along Bridge Road. 'Light Industry' and 'artisan food and drink industry' are only permitted within the B4 - Mixed Use portion of the centre. Local distribution premises are only permitted within the B5 - Business Development part of the centre.

The B5 - Business Development permits serviced apartments, specialised retail premises, food and drink premises, garden centres, hardware and building supplies, landscaping material supplies, office premises, health services facilities, and business premises. It does not however, permit shop. No additional permitted uses apply to these properties.

Floorspace – B5 - Business Development

Category	GFA (sqm)	Proportion
Urban Services	**3,798**	**100%**
Construction	1,535	40%
Retail trade	302	8%
Transport, Postal and Warehousing	1,961	52%
Total	**3,799**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Floorspace – B4 - Mixed Use

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**528**	**15%**
Convenience Store	264	7%
Speciality Food	264	7%
Occupied Non-Retail Floorspace	**3,063**	**85%**
Car Park	1,231	34%
Commercial general	1,832	51%
Total	**3,590**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 floorspace and employment projections up to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Stanmore Bridge Road West precinct of between 2,896 and 1,637sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The shortfall will contribute to an LGA wide shortfall arising from population growth, the loss of employment land to infrastructure construction and residential development.

Development activity

- 1-7 Albany Road Stanmore
  On 21 December 2016 the New South Wales Land and Environment Court (NSW LEC) grated approval for a proposed development subject to a number of Conditions of Consent (Case Number 2016/00250036).

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Development consent was granted to DA201600306 to demolish the existing improvements and construct a 3 part 4 storey long day care centre for 103 children aged from 0 to 5 years at 1-7 Albany Road, Stanmore.
This centre has now been built and is operational.

Issues and recommendations

- Permissibility of serviced apartments in B5 - Business Development

Permitting serviced apartments in zones where residential accommodation is generally prohibited creates a risk that employment land could be lost to residential type uses. Serviced apartments are not a mandated permitted with consent use in the B5 - Business Development zone and removing this as a permitted use would secure the land for employment uses.

Action 2.2.2 of the strategy addresses removal of 'serviced apartments' as a permitted use from the B5 - Business Development zone to maximise the potential of the precinct for employment uses. The rationale behind this action is addressed in Section 8.1.4.

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9.1.11 Terry Street Industrial Precinct

Role and function

Terry Street precinct is an isolated employment precinct located on the northern side of Victoria Road in Rozelle and fronting Wellington and Crystal Streets with a land area of approximately 18,090sqm. It provides approximately 15,159sqm of total floorspace. The precinct has good access to major arterial roads and Sydney's motorway network. It is near the Bays Precinct, which is expected to undergo major redevelopment in the near future, with a possible metro station at this location. Currently, it is also well serviced by buses, providing rapid CBD access. The precinct is in close walking distance to Rozelle Centre.

The built form is varied, with the major industrial site being a two-storey brick storage facility. The industrial functions are interspersed with several residential dwellings which appear to be original building stock (consisting of workers cottages and terraces). The more modern light industrial site on Terry Street is the largest in scale with three storeys. Most lots are 100sqm to 500sqm. The large lots located along Victoria Road, and their proximity to port and arterial road infrastructure mean that the precinct is appropriately located to continue to accommodate for industrial uses.

Properties fronting Victoria Road and a number of properties along Wellington Street perform an urban services role and function. They are on large landholdings, which accommodate for urban services uses. Key businesses include auto repairs, auto parts, trade supplies, car sales and household storage. While zoned differently to properties in the B2 -Local Centre zone along Victoria Road and the properties in Robert Street Industrial, these properties together form an effective enterprise corridor. The IN2 - Light Industrial zone protects these properties from conversion to retail and residential uses.

A number of properties within the precinct fronting Crystal and Wellington Streets are residential dwellings on very small blocks of land that operate under existing use rights. Given the fragmented ownership, low floorspace Ratio control, existing use rights and location constraints (eg narrow streets) there is currently limited potential for intensification for employment purpose without site amalgamation.

The precinct is in close proximity to surrounding residential areas to the north, east and west. While proximity creates risk of amenity impacts, the precinct fronts a major arterial road and creates a buffer between surrounding residential areas and Victoria Road.

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Precinct map



Planning controls

The precinct is zoned IN2 - Light Industrial under Leichhardt LEP 2013. The floorspace ratio control applying to the precinct is 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP (cl. 6.9) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusements centres, function centres and general industries. These uses make the Leichhardt IN2 - Light Industrial zone quite broad in its range of permitted uses.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**3,863**	**25%**
Administrative and Support Services	3,863	25%
Population Serving	**3,345**	**22%**
Accommodation and Food Services	77	1%
Arts and Recreation Services	314	2%
Construction	203	1%
Other Services	1,629	11%
Retail Trade	1,122	7%
Industrial	**7,487**	**49%**

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Category	GFA (sqm)	Proportion
Electricity, Gas, Water & Waste Services	52	0%
Manufacturing	1,937	13%
Transport, Postal & Warehousing	5,498	36%
Total occupied floorspace	14,695	97%
Vacant	**464**	**3%**
Total	**15,159**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 floorspace and employment projections to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Terry Street Industrial precinct of 6,582sqm or a surplus of up to 654sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

Consistent with many other precincts, the shortfall is part of an overall shortfall in the LGA arising from a growing population and the loss of employment land to infrastructure construction and residential development. The precinct is particularly attractive to urban services due to the excellent accessibility and range of lot sizes and this is expected to continue.

Development activity

Two properties (consisting of two houses) were listed for sale in early 2019, comprising a total of 508sqm. It was advertised as having development potential for commercial/light industrial uses.

Previous and other relevant studies

SGS Economics completed the *Leichhardt Industrial Lands Study* in December 2014. SGS Economics described the precinct as a small population-serving light industrial precinct. Recommendations included:

- Protect Leichhardt's industrially-zoned precincts for their important employment and service functions.
- Ensure adequate provision of industrial land for population-serving industries
- Maintain current provision of IN2 - Light Industrial zoned land
- Prohibit large-format retail in industrial zones
- Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts

In 2016, a subsequent study by SGS Economics reaffirmed that this precinct should be retained as industrial and protected from rezoning. It flagged its strategic location, *"Given the road's arterial nature and location at the edge of the predominantly residential area, it is an important precinct as it has good transport access and the ability to operate with minimal direct contact with residential uses."*

Issues and recommendations

- Risk of further loss of industrial zoned land

The recent rezoning of land for residential uses at 120-122 Terry Street effectively halved the size of this industrial precinct, leaving it fragmented and exacerbating the risk of further speculation. While there are a number of dwelling houses within the precinct on small lots, there are also a number of sites that currently perform a crucial urban services role. These must be managed to address potential conflict arising from

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encroachment by residential or office based uses. Action 2.2.1 of the Inner West Employment and Retail Lands Strategy address this further.

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9.1.12 Canterbury Road Enterprise Corridor

Role and function

Canterbury Road Enterprise Corridor stretches 500m along the northern side of Canterbury Road and Old Canterbury Road between Hanks Street and Princess Street at the south-western edge of the LGA. The precinct covers an area of approximately 14,754sqm and has approximately 5,576sqm of total floorspace. Directly to the east of the centre is Dulwich Hill West local centre, running along New Canterbury Road. On the southern side of Canterbury Road is Canterbury-Hurlstone Park RSL, which is located within the Canterbury Bankstown Local Government Area. The role and function of the corridor varies considerably due to the wide variety of building typologies, lot sizes and land uses. The strip has adjacent bus routes and is within walking distance of Hurlstone Park and Canterbury Station.

The northern portion of the corridor consists of a large site containing a McDonalds, houses converted to retail including a chemist and a doctor's surgery. The remaining narrow strip of land to the south contains houses, older shops, and old former industrial buildings between Watkin Street and Princess Street. This area was formerly an IN2 - Light Industrial zone in the Ashfield LEP 1985.

Due to the small size of sites, their site configuration and busy road location most sites have difficulty attracting new non-residential building uses.

Precinct map



Planning Controls

Under Ashfield LEP 2013, the precinct is zoned B6 - Enterprise Corridor with a maximum floorspace ratio control of 1.5:1 and maximum building height of 13 m.

The development standards for maximum floorspace ratio control and maximum building height have been determined to ensure that there is a satisfactory building height relationship with adjacent houses to the west,

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noting that in many areas the strip street level is substantially lower. Also maximum building height allows tall ground level storeys with remaining floorspace ratio consumed by two levels of residential above which is shown in the DCP and which also requires apartments to be oriented to the western quiet side.

Permitted commercial uses include shops, pubs, specialised retail premises. Food and drink premises (other than pub) are prohibited but permissible on one specific site through additional permitted uses. Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, and landscape material supplies are notable permitted uses in the zone. Permitting these uses accommodates for a range of retail options within the zone but restricts uses such as restaurants and cafes.

An additional permitted use applies to land in this precinct, permitting shop-top housing. The group term, tourist and visitor accommodation and serviced apartments are also permitted in the zone. Permitting these uses increases pressure on the precinct with regard to fragmentation and encroachment of residential and residential type uses.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**232**	**4%**
Professional, Scientific & Technical Services	232	4%
Health & Education	**319**	**6%**
Health Care & Social Assistance	260	5%
Education & Training	59	1%
Population Serving	**4,653**	**83%**
Accommodation & Food Services	817	15%
Other Services	1,906	34%
Retail Trade	1,930	35%
Total occupied floorspace	**5,204**	**93%**
Vacant	**372**	**7%**
Grand Total	**5,576**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections in Section 7 demonstrate that by 2036, depending on how much of the available capacity under current planning controls is taken up, there would be a surplus of industrial and urban services floorspace in the precinct of between 7,109sqm and 15,962sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

Factors contributing to this surplus include:

- A number of sites in the precinct with detached dwellings
- The relatively high floorspace control, creating a large floorspace capacity.

Much of the floorspace capacity however, would most likely be taken up with residential uses rather than employment uses due to shop-top housing being permitted along Canterbury and New Canterbury Road making the above surplus unlikely in practice.

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Development activity

Recent development applications in the precinct have sought to utilise shop-top housing provisions and maximise residential floorspace. There have not been applications for new buildings for major business uses.

Major development activity from 2014-2019 are listed below:

- 310 Old Canterbury Road (DA2015/119.1) comprised a three storey mixed use development approved by Council in 2015 which is yet to be completed. It consists of a ground floor commercial space and 8 apartments. These will replace a single residential dwelling
- 322 Canterbury Road – Proposed demolition of existing structures and construction of a four storey mixed use development with 28 units and ground floor commercial space
- 354 Canterbury Road (DA2017/144.1) for a four storey shop top housing development with a ground floor commercial space and child care centre. The application was refused by Council in 2017.

Previous and other relevant studies

The *Ashfield Urban Planning Strategy 2010* identified land fronting Canterbury Road at Hurlstone Park as an enterprise corridor. The plan suggested Council should encourage renewal of this area for primarily business uses, by permitting a wide range of business, retail and employment generating uses and built form controls to ensure new development is compatible with adjoining residential properties.

Issues and Recommendations

- Site constraints

This precinct's location, small lot size, lot configuration and frontage to a busy main road makes it difficult for some sites to achieve outcomes that cater for substantial new business uses suited to an Enterprise zone.

The structure of existing planning controls, including the permissibility of shop-top housing has the potential to compromise the opportunity for usable, flexible employment floor space.

As discussed in Section 8.1.14, it is recommended to review this corridor as part of a wider master planning process. This may provide an opportunity to consider part of the corridor away from centres as where some of the industrial-style uses could go into ground floor uses as discussed in previous recommendations. See actions 3.1.1, 3.2.1, 3.2.2 and 3.2.3 in the Strategy.

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9.1.13 Lewisham Industrial Precinct

Role and function

The Lewisham Industrial precinct is a small local population serving precinct on the western edge of the Petersham town centre. The precinct is approximately 14,500sqm in size and centred on the corner of New Canterbury and Wardell Road with approximately 7,900sqm of floorspace. New Canterbury Road is a state classified road with high volumes of traffic being funnelled from the west from two directions at the corner of Wardell Road. Petersham station is within walking distance and there are bus routes travelling to the city along New Canterbury Road. There is a shortage of on-street parking; however this does not significantly impact the operation of a light industrial zone.

The precinct primarily contains light industry activities that provide essential urban services, with low levels of retail. Existing businesses within the IN2 - Light Industrial zone include stonemasons and supply check, office and stationary retail, tile retail, car mechanics, businesses occupying small/narrow lot shop types. Businesses within the B5 - Business Development zone include storage buildings supplying retail outlets and retail selling rugs.

The precinct is isolated from the major strategic industrial precinct of Sydenham-Marrickville. However, it is well located to provide for essential urban services into the future. The adjacent Petersham centre precinct is having significant additional apartments constructed and so increased population will assist in contributing to demand for more local services and required building space. Its proximity to Petersham centre provides employees of the precinct with close access to services and amenities.

Most sites have rear lane access, except for 183 New Canterbury Road, which facilitates the ability to function and deal with serving, deliveries and transfer of goods not being overly hindered by considerable road traffic.

Retail trade total floorspace (45.1%) is the dominant land use category in the precinct by a significant margin. None of the properties in the precinct on the northern side of New Canterbury Road are used for purposes permitted in the IN2 - Light Industrial zone applying to the land under Marrickville LEP 2011.

This precinct is identified within the strategy as having an urban services role and function.

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Precinct map



Planning controls

The majority of the precinct is zoned IN2 - Light Industrial under Marrickville LEP 2011. The floorspace ratio control applying to the precinct is 0.95:1. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct. While specialised retail premises are prohibited, garden centres and hardware and building sites are permitted.

Marrickville LEP 2001 (Amendment No. 2) gazetted on 17 August 2001 broadened the range of uses permitted on the property 163A-181 New Canterbury Road to permit "development for the purposes of the retailing of office furniture and stationery". (That property now contains an Officeworks).

Land at 141-161 New Canterbury Road, Lewisham was rezoned from IN2 - Light Industrial to B5 -Business Development in January 2016 with an additional permitted use of residential flat building as part of a mixed use development. This site has an FSR of 1.5:1 and height limit of 14 metres.

Floorspace

Category	GFA (sqm)	Proportion
Health and Education	**400**	**5%**
Education and Training	200	3%
Health Care & Social Assistance	200	3%
Population Serving	**5,400**	**68%**
Arts and Recreation Services	200	3%
Construction	100	1%

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Category	GFA (sqm)	Proportion
Other Services	1,400	18%
Retail Trade	3,700	47%
Industrial	**1,700**	**22%**
Transport, Postal and Warehousing	1,600	20%
Wholesale Trade	100	1%
Total occupied floorspace	**7,500**	**95%**
Vacant	**400**	**5%**
Total	**7,900**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections in Section 7 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a surplus of between 74 and 6,010 sqm based on several factors of potential future capacity as detailed in Section 7.2.5. The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

Development activity

In 2016 a Planning Proposal for 183- 205 New Canterbury Road was lodged initially seeking an amendment to change the land use zoning to permit residential. A Gateway Determination in 2017 from the Department of Planning reduced the applicable site to 183 New Canterbury Road, required site specific economic impact study which was subsequently produced.

A Gateway Determination was recently issued for a planning proposal (Classic Tiles site) to rezone the site to accommodate mixed use activities including residential apartment dwellings, retail and business uses, and open space.

Previous and other relevant studies

A report by SGS Economics (2018), *Rezoning Lewisham*, states that the precinct should "remain light industrial considering future demand for industrial floorspace in the LGA." Council has questioned whether that is appropriate, particularly for the properties on the northern side of New Canterbury Road, considering the number of rezonings that have occurred (and been proposed) in recent years.

Issues and recommendations

- Maintain potential for manufacturing associated with light industry

While the northern side of New Canterbury Road is currently dominated by retail uses, the existing IN2 - Light Industrial zone could be retained to allow for these sites to accommodate industrial and urban services in the future.

Any proposal to rezone the land to align with existing retail uses would reduce the chance of these sites being used for industrial and urban services.

Action 2.2.1 of the Inner West Employment and Retail Lands Strategy identifies Council's position of retaining and managing these lands for industrial uses, consistent with the requirements of the Greater Sydney Commission Eastern City District Plan.

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Attachment 1

9.1.14 Balmain Road Industrial Precinct

Role and function

The Balmain Road Industrial Precinct is located between Rozelle and Balmain centres, on Balmain Road opposite Callan Park. It is a predominantly urban services precinct that accommodates industrial trade suppliers, small scale manufacturing, artists, shops and offices.

The precinct is performing well with 23 businesses occupying an estimated 18,073sqm of total floorspace over an area of approximately 13,800sqm. The largest single property in the precinct at 469 -483 Balmain Road is occupied by several businesses that employ approximately 26 people. The building includes a large first floor shared studio space for approximately 50 artists.

The precinct's built form is a range of older warehouses, modern warehouse/offices and shop top retail premises. Further west, along Balmain Road, single-storey brick buildings present a long blank wall to the street. The frontage to Alberto Street presents an attractive ivy-covered green wall with vehicular access to the industrial buildings. The two to three storey blank brick facades facing Cecily and Fred Streets enable industrial functionality within the building but present a bland street frontage opposite the vernacular working cottages. Additional car parking is located to the rear off Alberto Street.

Many of the older warehouses are well maintained and in very good condition, while the majority of the other buildings are in a poor condition. The area's public domain is poor, with little tree cover and low quality paving.

Despite its relatively small size, the precinct has large floorplates. It also has useful access on three sides, which mean that vehicles do not have to travel along many local roads to access the precinct.

Precinct map



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Planning controls

The precinct is zoned IN2 - Light Industrial under Leichhardt LEP 2013. The floorspace ratio control applying to the precinct is 1:1.

Depots, industrial training facilities, light industry, neighbourhood shops, warehouses are permitted in the zone. In addition clause 6.9 of the Leichhardt Local Environmental Plan 2013 allows business and office premises if the proposed development will be used for a creative purpose such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**5,679**	**31%**
Administrative and Support Services	3,101	17%
Professional, Scientific and Technical Services	2,578	14%
Health and Education	**495**	**3%**
Health Care and Social Assistance	495	3%
Population Serving	**2,215**	**12%**
Accommodation and Food Services	133	1%
Construction	293	2%
Other Services	293	2%
Retail Trade	1,496	8%
Industrial	**7,844**	**43%**
Manufacturing	1,307	7%
Transport, Postal and Warehousing	5,833	32%
Wholesale Trade	704	4%
Total occupied floorspace	**16,233**	**90%**
Vacant	**1,840**	**10%**
Total	**18,073**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The section 7 floorspace and employment projections up to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Balmain Road industrial precinct of between 12,627sqm and 7,107sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

Development activity

A favourable Gateway Determination was granted in 2017 to a Planning Proposal to amend Leichardt LEP 2013 to allow an additional permitted use for residential accommodation in the IN2 - Light Industrial zoning for the large site at 469–483 Balmain Road, Lilyfield. The Rezoning Review was considered by the Sydney Eastern City Planning Panel (the Panel) on the 12 October 2017. It determined that the Planning Proposal should proceed to Gateway subject to a number of concerns being considered, including land use conflicts between industrial and

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residential uses and the rationale for height. Council's submission to the Panel recommended that should the Proposal proceed to Gateway a favourable Determination should address the following issues:

- A proposal should develop the 469-483 Balmain Road site in its entirety
- If the purpose is to be for light industry and residential development not less than 6000sqm of the total gross floor area of the development must be used for light industry as defined by permissible uses in LLEP 2013, in the land use table for Zone IN2 - Light Industrial and in Part 6.9
- Protection and conservation of the heritage significant buildings
- A pedestrian through site link between Fred Street and Balmain Road
- The height of the development should be specified in metres and AHD with provision for greater floor to ceiling heights in the light industrial component
- Affordable housing provided to comply with the Inner West Council's Affordable Housing Policy.

Council has advised that the Planning Proposal is expected to proceed to public exhibition shortly. It is understood that the Planning Proposal also seeks to introduce new development standards for building heights up to 23m (6 storeys) with a Floorspace Ratio of 2.54:1. The Planning Proposal would retain 6,000sqm of light industrial floorspace, keep the heritage character buildings and provide 142 apartments (11,325sqm).

Council declined the invitation to be the Planning Proposal Authority (PPA) so that role has been given to the Panel. The Panel will put the Proposal on exhibition and deal with submissions that arise from that process. However, the Gateway Determination conditions were onerous and the version to be exhibited has responded to these requirements positively.

Previous and other relevant studies

SGS Economics completed the *Leichhardt Industrial Lands Study* (2014) which includes the following actions and recommendations

- Protect Leichhardt's industrially-zoned precincts for their important employment and service functions
- Ensure adequate provision of industrial land for population-serving industries
- Maintain current provision of IN2 - Light Industrial-zoned land
- Prohibit large-format retail in industrial zones
- Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts.

The report identified Balmain Road Industrial precinct as predominantly a local service industrial trade supplies, with small scale manufacturing, retail and office functions.

A subsequent report by SGS in 2016 reaffirmed that this precinct should be retained as industrial and protected from rezoning.

Issues and recommendations

- Development pressure to rezone part of the precinct.

The current Planning Proposal to rezone the largest site within the precinct reflects the market pressure to introduce residential development in the precinct. The Proposal has a long history with Council with the version to be exhibited incorporating some of Council's previous recommendations to the Planning Panel.

Action 2.2.1 of the Inner West Employment and Retail Lands Strategy identifies Council's position of retaining and managing these lands for industrial uses, consistent with the requirements of the Greater Sydney Commission Eastern City District Plan.

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9.1.15 Precinct 75

Role and function

"Precinct 75" is a 13,375sqm site with 3,062sqm of total floorspace located between Mary Street and Edith Street in St Peters. It is located 800m from Sydenham Station or 300m from bus services on Princes Highway.

Precinct 75 was originally a paint manufacturer's site. It currently contains numerous older buildings ranging from one to three storeys, a carpark area and on grade servicing area. The precinct has approximately 13, 300sqm of leasable space. Currently, the buildings are occupied by over 70 small businesses (according to Planning Proposal Town Planners report- October 2015). This includes unique or innovative start-up businesses (creatives industries), offices, urban services, shops, brewery, hairs studios and cafes in suites range from 50sqm to 740sqm in 2019. Some building spaces also have capacity for creative arts such as performance spaces or studios.

The site's uses contend with the surrounding operational constraints which are impacted by road conditions. This includes bounding Mary Street which is a major west bound high volume one way traffic route from Princess Highway and which will have in the future more westbound traffic from the nearby WestConnex motorway. Also bounding the site is Edith Street which is narrow and leads to the south to a neighbourhood. Currently, the non-residential uses on the site are naturally of a type that can contend with very high noise levels generated by the directly overhead Sydney Airport flight path.

The site is a premier example of an IN2 - Light Industrial zone which has buildings adapted with ancillary permitted uses to maintain economic viability and provide substantial business opportunities in line with previous former Marrickville Council planning strategies. The site also has capacity for future expansion of these business activities by better utilising underdeveloped parts of the site, capitalising on the historic character and environment of existing buildings, feeding into the established Sydenham - Marrickville economy agglomeration.

It is evident that any loss of employment floorspace on Precinct 75 would mean that numerous existing businesses would find it impractical to locate to Western Sydney and will cease trading or leave the region.

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Precinct map



Planning controls

The precinct is zoned IN2 - Light Industrial under Marrickville LEP 2011. The floorspace ratio control applying to the precinct is 0.95:1. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**417**	**14%**
Financial and Insurance Services	92	3%
Information Media and Telecommunications	57	2%
Professional, Scientific and Technical Services	268	9%
Health and Education	**75**	**2%**
Education and Training	75	2%
Population Serving	**1,125**	**37%**
Accommodation and Food Services	144	5%
Arts and Recreation Services	175	6%
Other Services	772	25%

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Category	GFA (sqm)	Proportion
Retail Trade	34	1%
Industrial	**882**	**29%**
Manufacturing	665	22%
Transport, Postal and Warehousing	29	1%
Wholesale Trade	188	6%
Total occupied floorspace	2,499	82%
Vacant	**563**	**18%**
Total	**3,062**	**100%**

Source: HillPDA Desktop Audit, 2019 -Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections to 2036 (see Section 7) demonstrate that, depending on how much of the available capacity under current planning controls, especially FSR, is taken up there is projected to be a surplus of industrial and urban services floorspace in Precinct 75 of between 4,051 and 9,123 sqm.

An at-grade car park that covers the south eastern portion of the site is utilised to support the businesses within the precinct and may contribute to the surplus of industrial and urban services land. The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West. Areas with surplus should be protected in order to meet the demand of the wider LGA into the future.

Development activity

A planning proposal for the precinct is currently under consideration. It includes the following:

- Rezone the site from IN2 - Light Industrial and R2 - Low Density Residential, to B4 - Mixed Use
- A Maximum Floorspace Ratio (FSR) of 2.20:1
- A range of Maximum Building Heights, varying from 3 metres, 17 metres, 20 metres and 23 metres to 29 metres.

Previous and other relevant studies

Previous and other relevant studies include:

- Marrickville Urban Strategy 2007.
- Marrickville Employment Lands Study 2008
- Marrickville Employment Lands Study 2014

In the Marrickville Urban Strategy 2007, Precinct 75 was not identified as one of the sites to be converted to a residential use. These studies confirmed and provided evidence for the need to retain Industrial zoned land, including to cater for the space needs of related subregional activities, urban services, local services and to sustainably maintain employment levels and their further opportunities.

Various studies associated with a 2016 Planning Proposal indicated that the site is contaminated and within an ANEF area prohibiting residential and a Heritage Conservation study identified various parts of site and buildings as culturally significant.

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Issues and recommendations

- Development pressure to rezone part of the precinct.

The current Planning Proposal to rezone the precinct reflects the market pressure to introduce residential development in the precinct. The Proposal has a long history with Council with the version to be exhibited incorporating some of Council's previous recommendations to the Planning Panel.

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9.1.16 Summer Hill Industrial (Lewisham West Precinct)

Summer Hill Industrial – Lewisham West is located on either side of the Inner West light rail line, between the centres of Lewisham and Summer Hill. The precinct covers an area of approximately 52,309sqm and has approximately 9,911sqm of total floorspace. The area is serviced by Lewisham West light rail stop, while both Summer Hill and Lewisham railway stations are less than 500m away. The area is planned to be served by the proposed Greenway active transport link extension that will link Iron Cove to the Cooks River. This industrial precinct has undergone high density residential and mixed use development in the past ten years which has resulted in fragmentation. It effectively consists of three distinct precincts:

- Land to the north of Smith Street is zoned IN2 - Light Industrial and serves an urban services role
- Land on the corner of Edward Street and Old Canterbury Road is zoned B4 – Mixed Use but currently consists of employment uses and single storey residential dwellings
- The remainder of the precinct has either been redeveloped, or has approved applications, for high density residential or mixed use development. Many of these developments contain, or are planned to contain, ground floor commercial spaces.

Much of this centre is zoned IN2 - Light Industrial but is occupied by high density residential. Consequently, the Strategy has not nominated a role and function for this precinct.

Precinct map



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Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**2,023**	**20%**
Professional, Scientific and **Technical Services**	2,023	20%
Health and Education	**500**	**5%**
Health Care and Social Assistance	500	5%
Population Serving	**3,776**	**38%**
Accommodation and Food Services	150	2%
Arts and **Recreation Services**	2,192	22%
Other Services	197	2%
Retail Trade	1,237	12%
Industrial	**3,112**	**31%**
Transport, Postal and Warehousing	2022	20%
Wholesale Trade	1,090	11%
Total occupied floorspace	**9,411**	**95%**
Vacant	**500**	**5%**
Total	**9,911**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation. Note the yellow hatched area in the precinct profile map is the land excluded from floorspace audit and demand modelling.

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Edward Street Mixed Use Precinct

Role and function

Edward Street Mixed Use precinct is a small precinct located to the south-west of Lewisham West light rail stop that provides an estimated 5215sqm of employment floorspace. It contains a number of offices and light industrial premises, as well as single storey residential dwellings.

Precinct map



Planning controls

Edward Street Mixed Use precinct is zoned B4 - Mixed Use under Ashfield Local Environmental Plan 2010. Under this zone, residential accommodation is permitted as well as retail premises, business premises and office premises. While storage premises are permitted, light industries are prohibited in the zone. The floorspace ratio control applying to the precinct is 1.5:1 and the height control is 13 metres.

Development activity

Edward Street Mixed Use precinct has seen modest development activity. A recent Development Application applying to 46 Edward Street seeks consent to the use and fitout of the lower ground floor of a building as an educational establishment. At the time of writing the DA is yet to be determined

Issues and recommendations

The precinct is currently zoned B4 -Mixed Use which could encourage mixed use development that may lead to the loss of the current non-residential uses on most of the area. There is evidence of investment in existing building stock for employment activity. Planning controls should support further employment growth.

The location is attractive, given its proximity to heritage conservation areas, the light rail and the Greenway and would appeal to those seeking to open a business.

Action 1.7.8 of the Strategy recommends the development of planning controls for properties along Edward Street currently zoned B4 -Mixed Use to deliver appropriate employment outcomes.

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Lewisham West Renewal Precinct

Role and Function

Lewisham West Renewal Precinct is located on either side of the Inner West light rail line, between Lewisham and Summer Hill centres, and provides an estimated 6,292sqm of employment floorspace. The Lewisham West Renewal Precinct was rezoned from IN2 - Light Industrial to B4 - Mixed Use and B5 - Business Development. Most sites have since been redeveloped, primarily with residential apartment buildings, some with ground floor commercial uses. These new commercial spaces are located approximately 300m from the under-performing centre at Lewisham railway station.

The precinct contains general retail, services, commercial offices, a gym, and cafes. The still to be fitted out Mungo Scott commercial office building is planned to be a hub for creative industries.

The large redevelopment on the western side of the light rail line includes the former Allied Flour Mill site for which development consent required a minimum amount of business floorspace, a large forecourt open space area, and a publicly accessible park. Nearly 85% of the business floorspace of this site is located in the recently refurbished, heritage listed, Mungo Scott 5 storey commercial office building, which will also contain ground floor retail and restaurant spaces.

The precinct has a generally high quality public domain.

Precinct map



Planning controls

Lewisham West is zoned B4 - Mixed Use, B5 - Business Development, and IN2 - Light Industrial. The floorspace ratio control applying to the precinct ranges from 1:1 – 3:1.

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Development activity

- The 5 storey heritage building located at 2 – 32 Smith Street – is ready for occupation and up for sale (December 2019).
- 120C Old Canterbury Road - A planning proposal is currently in the process of finalisation for this site (December 2019). It proposes the following:
  - Apply a B4 land use zone to all of site.
  - Apply a maximum height of buildings of RL 38.0 to all of site
  - Apply a maximum floor space ratio of 2.5:1 to all of site.

Issues and recommendations

Reviewing role of centre

The Lewisham West precinct contains significant amount of commercial floor-space as part of the mixed-use developments that have been completed, approved or under construction. This includes the multi-storey heritage listed commercial building located on the western side of the light rail line as well as a number of ground floor commercial spaces.

The total estimated newly created floorspace within the mixed-use precinct alone amounts to approximately 6,000sqm.

The Strategy contains an Action (1.7.8) which recommends rezoning the precinct to reflect the role of Lewisham West in the retail hierarchy.

Mungo Scott Building

Alongside the Edward Street properties discussed earlier, the adaptively reused Mungo Scott building is recommended for rezoning to B5 – Business Development to reflect its employment role and prevent conversion to residential (refer to Action 1.7.8 of the Strategy) .

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Smith Street Industrial Precinct

Role and function

Smith Street Industrial precinct is approximately 7,600sqm in size and is located north-west of Lewisham West light rail stop and provides an estimated 7,211sqm of employment floorspace. It is a small local population serving area that mostly performs an urban services role and contains a mix of warehouses, residential dwellings, and a petrol station.

Precinct map



Planning controls

Smith Street Industrial is zoned IN2 - Light Industrial. The floorspace ratio control applying to the precinct is 1:1. A wide range of employment uses are permitted in the zone including business premises, office premises, specialised retail premises, wholesale supplies, entertainment facilities, garden centres, hardware and building supplies, kiosks and landscaping material supplies, light industries and warehousing or distribution centres.

Development activity

No recent development activity identified.

Issues and recommendations

Smith St industrial precinct is performing well and is providing a range of urban services and light industries to serve the local area and beyond. The area is likely to feel pressure related to future residential development, due to the nearby redevelopment and this should be discouraged by retaining the current IN2 - Light Industrial zone of the precinct.

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Action 2.2.1 of the Inner West Employment and Retail Lands Strategy identifies Council's position of retaining and managing these lands for industrial uses, consistent with the requirements of the Greater Sydney Commission Eastern City District Plan.

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9.1.17 Lilyfield Employment Precinct

Role and function

This precinct contains two separate live-work developments and light industry, providing an estimated 7,256sqm of total floorspace within a land area of approximately 10,510sqm. The precinct is serviced by light rail and is close to the City West Link road.

The industrial portion of the precinct consists of one substantial warehouse property of approximately 2000sqm as well as smaller lots housing office/warehouse developments and a limited number of dwellings. The precinct specialises in fashion with a wholesale distributor of textiles as well as an embroidery business both located within this small industrial area.

The recently built two-three storey terraces in the areas zoned B7 - Business Park and part of the B2 - Local centre zones are live-work dwellings. They usually have ground floor office space and upper level/s dedicated to residential use. A majority of these terraces appear to only operate as residential premises, with limited evidence of commercial operations occurring.

A single property at 60-62 Justin Street, immediately to the north of the live-work precinct is zoned B2 - Local Centre. It contains a number of business premises including psychology, counselling and photography.

Precinct map



Planning controls

Part of the precinct zoned IN2 - Light Industrial under Leichhardt LEP 2013 has a FSR control of 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP 2013 (cl. 6.9) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted. Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusements centres, function

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centres and general industries. Hence the IN2 - Light Industry zone in Leichhardt LEP 2013 is quite broad in its range of permitted uses.

Part of the precinct zoned B7 - Business Park under Leichhardt LEP 2013 benefits from Clause 6.12 (which is similar in its intent to Clause 6.13 of Marrickville LEP 2011), by enabling live-work arrangements. The objective of Clause 6.12 in Leichhardt LEP 2013 is to, *"provide for ancillary residential accommodation for small-scale live-work enterprises, to assist in the revitalisation of employment areas and to provide a transition between adjoining land use zones."* This clause enables dwellings to be built if: *the dwelling is part of a mixed use development that includes office premises or light industries on the ground floor, and (b) the dwelling and ground floor premises will be occupied by the same person or persons*. All other forms of residential accommodation and business premises are prohibited in the zone. Office premises, shops, garden centres, hardware and building supplies, and light industries are permitted in the zone. Notably, business premises are prohibited in the zone. There are some distinct differences regarding how the B7 - Business Park zone in Leichhardt operates compared with Marrickville. This includes the permissibility of shop, residential flat buildings and the restriction of business/office premises to creative uses.

A small portion of the precinct is zoned B2 - Local Centre. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**3,063**	**42%**
Administrative and Support Services	1,794	25%
Professional, Scientific and Technical Services	944	13%
Rental, Hiring and Real Estate Services	325	4%
Population Serving	**2,143**	**30%**
Other Services	2,143	30%
Industrial	**1,950**	**27%**
Manufacturing	538	7%
Transport, Postal and Warehousing	1,079	15%
Wholesale Trade	333	5%
Total occupied floorspace	**7,156**	**99%**
Vacant	**100**	**1%**
Total	**7,256**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The floorspace and employment projections to 2036 (see Section 7) demonstrate that depending on how much of the available capacity under current planning controls is taken up, there is a forecast shortfall of industrial and urban services floorspace in the Lilyfield Industrial precinct of up 1,842sqm or a surplus of up to 2,362sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

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Development activity

- 55 Justin Street Lilyfield (D/2014/574)
  A development application was approved by the Land and Environment Court on 8 September 2015 for the demolition of an existing dwelling house on land zoned B7 - Business Park for the construction of three live-work terraces. Construction is yet to commence. The property is located adjacent to the existing live-work development on Justin Street.

Previous and other relevant studies

SGS Economics completed the *Leichhardt Industrial Lands Study* in December 2014. Its recommendations included:

- Protect Leichhardt's industrially-zoned precincts for their important employment and service functions
- Ensure adequate provision of industrial land for population-serving industries
- Maintain current provision of IN2 - Light Industrial zoned land
- Prohibit large-format retail in industrial zones
- Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts

In its specific assessment of the Lilyfield precinct, SGS Economics identified it as a small population-serving light industrial precinct.

In 2016, a subsequent Study by SGS Economic reaffirmed that this precinct should be retained as industrial and protected from rezoning.

Issues and recommendations

- Appropriateness of B2 - Local Centre zone for 77-79 Lilyfield Road

Land known as 77-79 Lilyfield Road consists of Torrens title live-work dwellings yet is zoned B2 - Local Centre.

Action 4.1.3 of the Strategy recommends rezoning 77-79 Lilyfield Road from B2 - Local Centre that better aligns with its role and function.

- Appropriateness of B2 - Local Centre for 60-62 Justin Street

Land known as 62 Justin Street comprises a dwelling house yet is currently zoned B2 -Local Centre. It would be more appropriate for this site to be zoned B7 - Business Park, consistent with the zoning of adjoining land, to apply an employment zone that is more suited to its context.

Action 4.1.3 of the Strategy recommends rezoning 60-62 Justin Street from B2 - Local Centre that better aligns with its role and function.

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9.1.18 Balmain East Working Waterfront

Role and function

This precinct on Mort Bay is a waterfront employment area providing services to harbour-wide maritime businesses. Mort Bay is one of the few remaining working bays in Sydney Harbour. The precinct covers an area of approximately 8,517sqm and has approximately 4,775sqm of total floorspace

There are three IN2 - Light Industrial sites and one SP2 - Infrastructure zoned site in the Balmain East Working Waterfront Precinct.

The SP2 - Infrastructure Balmain Shipyard is the anchor land use, is owned by the government and used for maintenance, logistics and to dock ships for Sydney Ferries public transport services. Sydney Ferries services are operated under franchise by Harbour City Ferries, who lease both the Balmain facility and the vessel fleet from Sydney Ferries.

The largest of the three IN2 - Light Industrial sites at the intersection of Cooper and Walumil Streets contains a modern two to three storey maritime services office building with a jetty. The smallest IN2 - Light industrial site at 57 Campbell Street has a sailing school and associated jetty. The other IN2 - Light Industrial site at Duke Street is now used for residential.

The surrounding built form is varied, with a mixture of new waterfront terraces, industrial warehouses converted to residential and original weatherboard and brick workers cottages.

The precinct has strategic transport connections to the Sydney CBD, Parramatta and North Sydney via the ferry from Balmain Wharf 350m to the north-west of the SP2 - Infrastructure site, which is 350m to Darling Street with bus services to the Balmain East ferry Wharf, Sydney CBD and Leichhardt. The nearest major arterial road is Victoria Road 2.2km south-west. Heavy vehicle access is constrained by narrow, steep local streets.

The Balmain East Working Waterfront is an important element of the LGA and Sydney Harbour industrial land stock, specializing in maritime services for Greater Sydney.

Precinct map



Planning controls

The precinct employment sites are zoned SP2 - Infrastructure or IN2 - Light industrial with an FSR of 1:1.

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Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	1,298	27%
Administrative and Support Services	1,298	27%
Industrial	3,477	73%
Transport, Postal and Warehousing	3,477	73%
Total occupied floorspace	4,775	100%
Vacant	0	0%
Grand Total	4,775	100%

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The section 7 floorspace and employment projections up to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Balmain East employment precinct of between 2,532sqm or a surplus of 875sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

This precinct includes land used for residential which is unlikely to convert to employment uses in the future, which further constrains capacity.

The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

Development activity

The Duke Street IN2 - Light Industrial zoned area has a history of complex development applications, modifications and consents occurring between 2000 and 2006.

The most recent consent for 5 and 7 Duke Place and 41 Duke Street was for demolition of existing buildings, remediation of the site, Torrens title subdivision into four lots, the erection of three dwellings with seven parking spaces and three swimming pools, boundary adjustments, removal of a slipway and provision of foreshore timber decking.

The application was for modifications to the original 2000 consent. The proposed modifications included boundary adjustments between Nos 7 and 41 Duke Street, relocation of land to be dedicated to Council, demolition of existing boardwalk over 5 and 7 Duke Place and construction of a new boardwalk along the north-eastern boundary of No 7 Duke Place, creation of a public right of access connecting the dedicated land to the north-eastern corner of the property, retention of the slipway, removal approved foreshore timber decking and other amendments to or deletion of conditions of consent.

It is unclear to what extent this consent has been fully implemented or whether it was subsequently modified, but three dwellings have been constructed.

Previous and other relevant studies

In 2016, SGS Economics undertook a *Light Industrial Lands Study* for the former Leichhardt Council which recommended that this precinct should be retained as industrial and protected from rezoning.

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Issues and recommendations

This precinct as a whole has limited opportunities for expansion, due to the relatively poor road access, limited car parking, a substantial heritage legacy and an important section of foreshore. Conversely it also has good access to Sydney Harbour, with highly specialised uses and redevelopment at the Bays Precinct potentially generating demand for waterfront sites with employment land zonings.

The precinct, in its current form, is highly dependent upon existing operations continuing. There is a risk of some objections to operations from neighbouring residential uses on the grounds of noise.

Around 2004/2005, NSW Maritime objected to draft Leichardt LEP 2000 Amendment 5 that proposed to change the industrial zoning of the Duke Street site to residential. This amendment did not proceed and the industrial zoning was translated into Leichhardt LEP 2013. There may be opportunities to extend public access to the foreshore at Duke Street and Duke Place as evidenced by the 2006 development consent described above under Development Activity.

Action 4.1.4 of the Strategy makes recommendations regarding rezoning key sites within the precinct to better align with their role and function.

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9.1.19 Gladstone Street Business Precinct

Role and function

Gladstone Street Business Precinct is a tract of land typically running along Gladstone Street, Enmore, l between Enmore Road and Inner West railway corridor. Notable landmarks in the area include a former grain silo that has been converted into residential apartments and the flour mill studios commercial building. The precinct provides an estimated 9,774sqm of total floorspace over a land area of approximately 7,136sqm.

The precinct incorporates a mix of land uses including residential, commercial and industrial uses. Residential land uses are spread out through the centre in both the forms of single dwellings and apartments within mixed use buildings. Commercial uses are contained to the ground floor of these new mixed use developments as well as within solely commercial buildings like the Flour Mill Studios on Gladstone Street. Industrial uses are becoming increasingly limited due to the redevelopment of the area, however there is a significant industrial site remaining at the bend in Wilford Street. A notable tenant within this site is the Young Henry's Brewery. Two other industrial sites also remain on Gladstone Street.

The built form is a mix of warehouses and a redeveloped heritage flour mill, interspersed with medium to high density live/work and residential development. Most of the warehouses are in a reasonable condition, while the flour mill site is in a very good condition. The public domain ranges from poor to high quality, with a high degree of street art located on the areas walls.

The precinct is well tenanted with few lease or sale signs posted on buildings. On online search of commercial properties shows only one tenancy for sale and one tenancy for lease.

The precinct is well serviced by public transport. Newtown train station is located 400m to the west of the site. It provides frequent train services to the CBD and Parramatta. Enmore Road, which is directly to the south of the precinct, is a major bus corridor providing frequent services to a number of local destinations.

Precinct map



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Planning controls

Gladstone Street Business precinct is zoned B5 -Business Development and B7 - Business Park under Marrickville LEP 2011.

The B5 - Business Development zone permits serviced apartments, specialised retail premises, food and drink premises, garden centres, hardware and building supplies, landscaping material supplies, office premises, health services facilities, and business premises. It does not however, permit shops. This limits use of ground floor commercial tenancies which are appropriately designed for shops.

Land zoned B5 - Business Development at 76 Wilford Street is specifically identified in Clause 6.16 of the Marrickville LEP 2011. The clause requires that any development on that site must have a non-residential component of at least 30% of the developments gross floor area.

Land zoned B7 - Business Park zoned by Marrickville LEP 2011, are affected by clause 6.13 which restricts residential development to 40% of any sites GFA. This clause also encourages the development of live-work units. These units are commonly seen in the St Peters Triangle, which is governed by similar controls.

FSR controls in the precinct are consistently 1.5:1 for the B5 - Business Development and B7 - Business Park sites. The height control varies slightly from 14m along Gladstone Street to 17m for the 76 Wilford Street site. The FSR and height limits are considered appropriate for the precinct.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**4,762**	**49%**
Administrative and Support Services	131	1%
Financial and Insurance Services	653	7%
Information Media and Telecommunications	393	4%
Professional, Scientific and Technical Services	2,541	26%
Rental, Hiring and Real Estate Services	1,044	11%
Health and Education	**758**	**8%**
Education and Training	393	4%
Health Care and Social Assistance	365	4%
Population Serving	**859**	**9%**
Accommodation and Food Services	131	1%
Arts and Recreation Services	236	2%
Construction	129	1%
Other Services	105	1%
Retail Trade	258	3%
Industrial	**2,751**	**28%**
Electricity, Gas, Water and Waste Services	456	5%
Wholesale Trade	2,295	23%
Total occupied floorspace	**9,130**	**93%**
Vacant	**644**	**7%**
Total	**9,774**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

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Employment floorspace demand

The section 7 floorspace and employment projections up to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Gladstone Street precinct of between 4,507sqm and 225sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

Given the current zoning, recent development and proposed developments, the precinct is unlikely to accommodate further industrial or urban services floorspace. This shortfall would need to be accommodated elsewhere in the LGA.

Development activity

- 2 – 2A Gladstone Street (DA201600060)- approved January 2017

  Demolition of existing improvements on site and the construction of a four storey mixed use development including up to 10 commercial tenancies and 18 residential apartments, three of which are live-work units. It also includes a level of basement car parking and a through site link. The FSR control on site is 1.5:1. The approved FSR is 1.64:1. This exceeds the control by 9.49%.

  It is zoned B7 -Business Park, with a required non-commercial GFA provision of at least 60%. At the time of assessment, the control was contained in the DCP and not the LEP as it is currently. The development achieves a 51% non-residential floorspace allocation, 9% below what was and is currently required.

- 2C Gladstone Street (DA201600628) – refused May 2017

  Demolition of existing improvements on site and the construction of 16 individual subdivided shop-top housing units with basement car parking. Proposal breached FSR, not meeting the objectives of the B7 - Business Park zone and not complying with the minimum non-residential GFA mix.

  This was subsequently appealed through the Land and Environment Court with the refusal upheld due to the breach in FSR causing unreasonable bulk on the streetscape.

- 1/2C Gladstone Street (DA201900038) – lodged Feburary 2019, under assessment
  Proposed alterations and additions to an existing warehouse and use as a brewery and ancillary restaurant/taproom with tasting facilities. No residential uses are proposed.

- 39 Phillip Street (DA201400388)
  In May 2015, the Land and Environment Court through a Section 34 agreement approved demolition of existing improvements on site and the construction of a four storey mixed use building comprising of a ground floor commercial tenancy and 11 apartments, of which five are live-work units. It also includes a level of basement car parking. This building recently finished construction and is currently operational.

Previous and other relevant studies

The precinct was not covered in the recent studies.

Issues and recommendations

There has been a significant encroachment of residential uses in the precinct. This re-development has lessened the availability of affordable, versatile and all round desirable tenancies for industrial and creative uses. Action 2.3.3 of the Employment and Retail Lands Strategy recommends a review of the business zones.

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9.1.20 Marion Street Industrial Precinct

Role and function

The Marion Street industrial area in west Leichhardt provides an estimated 4,064sqm of employment floorspace across a 13,470sqm size area (land size includes aged care facility). It is adjacent to the Marion Street light rail stop and bus routes. There is on-site parking in the precinct, with limited on-street parking.

The precinct has two properties. One is a modern aged care facility and the other a substantial, single storey warehouse currently housing a car servicing and parts centre. The latter has a large area of hard standing to the rear and accessed from Walter Street.

Future expansion of commercial and residential development at Market Place block would reinforce need for urban services land at 245 Marion Street.

Precinct map



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Planning controls

The precinct is zoned IN2 - Light Industrial under Leichhardt LEP 2013. The floorspace ratio control applying to the precinct is 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP (cl. 6.9) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusements centres, function centres and general industries. These uses make the Leichhardt IN2 - Light Industrial zone quite broad in its range of permitted uses.

An additional permitted use for the larger second site in this precinct under Leichhardt LEP 2013 Schedule 1 enabled the construction of an aged care facility at 237 Marion Street.

Floorspace

Category	GFA (sqm)	Proportion
Population Serving	**4,064**	**100%**
Arts and Recreation Services	346	9%
Other Services	3,718	91%
Total occupied floorspace	4,064	100%
Vacant	**0**	**0%**
Grand Total	**4,064**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation. Note the aged care site is excluded from floorspace audit and demand modelling.

Employment floorspace demand

The section 7 floorspace and employment projections up to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up, there is a forecast shortfall of industrial and urban services floorspace in the Marion Street industrial precinct of up to 2,040sqm and surplus of up to 56sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

Capacity modelling has excluded the aged care facility, which covers a large portion of this precinct. Additionally, the growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

Development activity

In August 2014 a Planning Proposal seeking to rezone the site from IN2 - Light Industrial to R1 - General Residential with a maximum Floorspace Ration of 3.3:1 and a maximum height of 50m was lodged with the former Leichhardt Council. Council declined to support the Proposal because in the context of persistent demand and a low and decreasing supply of industrial land, a rezoning would dilute Council's ability to provide sufficient industrial land to accommodate demand. The other main reason for Council's decision was that the proposed residential Floorspace Ratio and building heights would result in unacceptable amenity impacts on the local area.

The proponent submitted a pre-Gateway review request to the then NSW Department of Planning and Environment in 2015. The Department determined that the Proposal did not have sufficient merit to proceed to Gateway. The decision letter did suggest that "The site could be appropriate for renewal and the proposed development should be reconsidered in the context of adjoining uses. A broader mix of uses on the site which

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include employment generating uses should also be considered as part of any future planning proposal for the site."

Council expects to receive a new Planning Proposal for the site in the future.

Previous and other relevant studies

SGS Economics completed the *Leichhardt Industrial Lands Study* in December 2014. Its overall actions and recommendations included:

- Protect Leichhardt's industrially-zoned precincts for their important employment and service functions
- Ensure adequate provision of industrial land for population-serving industries
- Maintain current provision of IN2 - Light Industrial-zoned land
- Prohibit large-format retail in industrial zones
- Refuse any proposal to rezone land from Council's small pool of industrial land within any of the industrial precincts

In its specific assessment of the Marion Street precinct, the study identified it as a mixed commercial-industrial precinct.

In its subsequent report in 2016, SGS Economics reaffirmed the need to retain IN2 - Light Industrial zoning in the precinct and protect from rezoning.

Issues and recommendations

- Appropriateness of zoning – Uniting Care Aged Care Site

Existing aged care facilities at 237 Marion Street have been approved via an additional permitted use provision in Leichhardt LEP 2013. This does not align with the objectives of the IN2 - Light Industrial zone. Action 4.1.6 of the Strategy recommends rezoning the site from IN2 - Light Industrial to R1 - General Residential to reflect its use as an aged care facility.

- Existing industrial land at 245 Marion Street

Land known as 245 Marion Street is well located to serve an urban services role and function into the future, to support a growing population in the area.

Action 2.2.1 of the Inner West Employment and Retail Lands Strategy identifies Council's position of retaining and managing these lands for industrial uses, consistent with the requirements of the Greater Sydney Commission Eastern City District Plan.

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9.1.21 Dulwich Hill Industrial Precinct

Role and function

The Dulwich Hill Industrial precinct is a small local population serving precinct comprising an estimated 4,486sqm of total floorspace over approximately 4,764sqm of land zoned IN2 - Light Industrial. The precinct is located adjacent to Dulwich Grove light rail station, which provides connections between Dulwich Hill railway station and Central The precinct is serviced by bus connections and fronts New Canterbury Road, which is a state classified road. The proposed Greenway corridor runs along the light rail corridor and will provide an active transport connection between the Cooks River and Iron Cove.

The precinct primarily contains light industry activities, with low levels of retail, and provides essential urban services for the growing population of Dulwich Hill. The precinct is isolated from the major strategic industrial precinct of Sydenham-Marrickville, however, is well located to provide for essential urban services into the future, for an area undergoing considerable population growth. Its proximity to the Dulwich Hill centre provides employees of the precinct with close access to services and amenities.

Buildings within the precinct are primarily two storey warehouses with several terrace shops. An existing residential dwelling house and a Greek Orthodox church are located on the south east corner of the precinct. Dulwich Hill Public School is located to the south on the opposite side of Hercules Street.

Precinct map



Planning controls

The precinct is zoned IN2 - Light Industrial under Marrickville LEP 2011. The floorspace ratio control applying to the precinct is 0.95:1.

While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts

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and craft, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

While specialised retail premises are prohibited, garden centres and hardware and building sites are permitted.

Floorspace

Category	GFA (sqm)	Proportion
Knowledge Intensive	**873**	**19%**
Administrative & Support Services	562	13%
Professional, Scientific & Technical Services	311	7%
Population Serving	**1,342**	**30%**
Accommodation & Food Services	125	3%
Arts & Recreation Services	125	3%
Construction	356	8%
Other	736	16%
Industrial	**2,271**	**51%**
Manufacturing	677	15%
Transport, Postal & Warehousing	1,594	36%
Total occupied floorspace	**4,486**	**100%**
Vacant	**0**	**0%**
Total	**4,486**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 floorspace and employment projections to 2036 demonstrate that depending on how much of the available capacity under current planning controls, especially FSR, is taken up there will be a shortfall of industrial and urban services floorspace in the Dulwich Hill industrial precinct of between 2,588sqm and 777sqm based on several factors of potential future capacity as detailed in Section 7.2.5.

The growing population of the LGA and the loss of employment land to infrastructure construction and residential development are leading to an overall shortfall in employment land across the Inner West.

Development activity

The precinct is subject to a planning proposal to rezone industrial land on 466-480 New Canterbury Road and 26-38 Hercules Street, Dulwich Hill. The proposed planning controls aims to redevelop the precinct for a mixed use development containing residential apartment dwellings, with retail and commercial spaces below, and private open space; and dedication of land to Council for an expanded public domain along the light rail corridor.

On 2 November 2018, a Gateway Determination was issued for this planning proposal. The planning proposal is currently awaiting public exhibition. Outcomes of the public exhibition are yet to be considered in which the gazettal of the plan remains uncertain. The timeframe imposed for completion of the plan is 24 months.

Previous and other relevant studies

A Marrickville Employment Lands Study 2014 was commissioned to peer review a 2008 Employment Lands Study adopted by former Marrickville Council. The peer review provides strategic directions as a guide for employment lands planning.

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The 2014 Study categorises Dulwich Hill Industrial Precinct as a 'small population serving industrial precinct'. An action to protect population-serving industrial land is identified in the Study to ensure there is adequate capacity to meet 'local service industry' need. The 2014 Study outlines that the population in the former Marrickville LGA is expected to rise considerably and that demand for population serving industrial activity will be closely linked to this increase.

Issues and recommendations

Council will consider the outcomes of the public exhibition of the planning proposal and make recommendations in alignment with the Local Strategic Planning Statement, *Inner West Local Housing Strategy* and Employment Lands Strategy.

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9.1.22 Milton Street North Industrial Precinct

Role and function

Milton Street North is a small industrial precinct with an urban services role and function, approximately 3,161sqm in land area, providing an estimated 1,791sqm of total floorspace in Ashfield towards the western edge of the LGA. It is served by buses along Liverpool Road and is walking distance from Ashfield Town Centre.

The precinct specialises in automotive repair, an essential urban service supporting the growing population of the inner west. The precinct has shrunk in size, due to the rezoning of 17 Wetherill Street from IN2 - Light Industrial to B4 - Mixed Use. This displaced a major motor mechanics and repairs business.

The stock consists of lower-scale buildings, with open paved areas, suitable for the businesses that operate at this location.

Note that development activity and employment floorspace demand and floor space numbers are not available for this centre.

Precinct map



Planning controls

Milton Street North Precinct is zoned IN2 - Light Industrial under Ashfield Local Environmental Plan 2010. The floorspace ratio control applying to the precinct is 1:1. A wide range of employment uses are permitted in the zone including business premises, office premises, specialised retail premises, wholesale supplies, entertainment facilities, garden centres, hardware and building supplies, kiosks and landscaping material supplies, light industries and warehousing or distribution centres.

Previous and other relevant studies

Ashfield Urban Planning Strategy 2010 acknowledged the State Government policy at the time to retain Light Industry zonings.

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Issues and recommendations

Milton Street north is the last remaining area of industrial land on the western edge of Inner West Local Government Area. A number of urban services have been displaced from the Liverpool Road corridor Between Thomas Street and Milton Street, through rezoning over the past 10-15 years.

This remaining industrial land is well placed to serve the needs of a growing population and is well located near Ashfield and Burwood town centres. Current building areas accommodate for motor vehicle repairs and maintenance.

Protection of land for urban services formed a key part of the Directions for a Greater Sydney (2017), A Metropolis for Three Cities (2018) and Eastern City District Plan (2018).

Action 2.2.1 of the Inner West Employment and Retail Lands Strategy identifies Council's position of retaining and managing these lands for industrial uses, consistent with the requirements of the Greater Sydney Commission Eastern City District Plan.

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9.2 Commercial centres overview

This section provides a profile of significant business centres in the LGA. The profiles are intended to provide a summary of the existing uses in the centres, the development outlook, and key opportunities for the future. The information has been compiled from a variety of sources including previous studies on the centres and precincts, a floorspace audit, development applications registers and the Australian Bureau of Statistics.

Proposed centres hierarchy

This Study identifies the need to establish a clear hierarchy of centres. The retail hierarchy below has been determined having regard for the mix of existing uses in centres, the scale of the centres and outlook for future growth. All development proposals should support the recommended retail hierarchy.

Note that the below differs from the hierarchy used by the Greater Sydney Commission. The Greater Sydney Region Plan does not include any centre within the Inner West as a Strategic Centre.

Recommended centre hierarchy

Hierarchy	Centres	Future role
Major centre	Ashfield	The major centre is the highest order centre in the Inner West LGA, comprising the largest mix of retail, commercial, administrative and community facilities. The centre will emerge into an employment and economic generator servicing an LGA wide catchment. Ashfield has the best public transport access in the LGA, both on the rail line and with feeder buses.
Town centre	Balmain Marrickville Newtown -Enmore Norton Street, Leichhardt Rozelle	These town centres provide essential access to goods and services close to where people live. They are serviced by good public transport which increases their accessibility from the surrounding community. The town centres provide a mix of retail, commercial and community space with retail space and are usually anchored by a supermarket of 1,000sqm or over. They generally contain over 10,000sqm of retail, business premises and office premises.
Local centre	Annandale Croydon Dulwich Hill Dulwich Hill Station Haberfield Marion Street Norton Street North Petersham Summer Hill Stanmore Balmain East	Local centres provide a range of business, retail and community uses that serve the local community. The centres generally range in size from 3,000sqm to 10,000sqm of floorspace associated with retail, business premises and small-scale office premises.
Neighbourhood centre	Addison Road Rozelle West (Terry Street) Lewisham West Lilyfield Road Orange Grove Catherine Street Dulwich Hill West Lewisham Sydenham	Neighbourhood centres provide a range of small-scale retail and other services that serve the convenience needs of people that live and work in the surrounding neighbourhood. Higher order retail and commercial uses that serve the wider community are not located in neighbourhood centres. Neighbourhood centres generally comprise less than 3,000sqm of overall floorspace associated with retail, business premises and office premises.

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Hierarchy	Centres	Future role
		Note: All other existing B1 - Neighbourhood Centre zoned centres not listed
Stand Alone Shopping Centre	Marrickville Metro	Stand-alone centres provide for the weekly or monthly shopping needs of the local community. They generally serve a broader catchment and provide a diversity of retail uses including department and grocery stores. The size and offering of stand alone shopping centres needs to be carefully managed to avoid adverse impacts on nearby street- based centres.

Table 44 lists commercial centres in terms of size, based on floor space (sqm). It demonstrates that Ashfield is the largest commercial centre in the Inner West.

Table 44: Commercial centres in the Inner West LGA by size (sqm)

Hierarchy	Centres	Floorspace (sqm)	Floorspace %	Vacancy rate (%) (Mid 2019)
Major centre	Ashfield	110,575	20.2	7
Town centre	Newtown - Enmore	71,120	13	5
	Rozelle	62,152	11.4	15
	Norton Street centre (Parramatta Road to Marion Street)	58,743	10.7	12
	Balmain	54,510	10	10
	Marrickville	44,550	8.1	5
Local centre	Norton Street North (Marion Street to Lilyfield Road)	38,423	7	6
	Dulwich Hill (centre, station, west)	25,225	4.6	4
	Petersham	21,060	3.9	15
	Marion Street Centre	16,774	3.1	4
	Annandale	14,055	2.6	0
	Summer Hill	13,360	2.4	2
	Haberfield	8,525	1.6	6
	Balmain East	5,107	0.9	2
	Stanmore	2,730	0.5	0
	Croydon	Data unavailable		

Figure 14 provides an overview of the employment precincts.

Figure 15: Commercial centre overview

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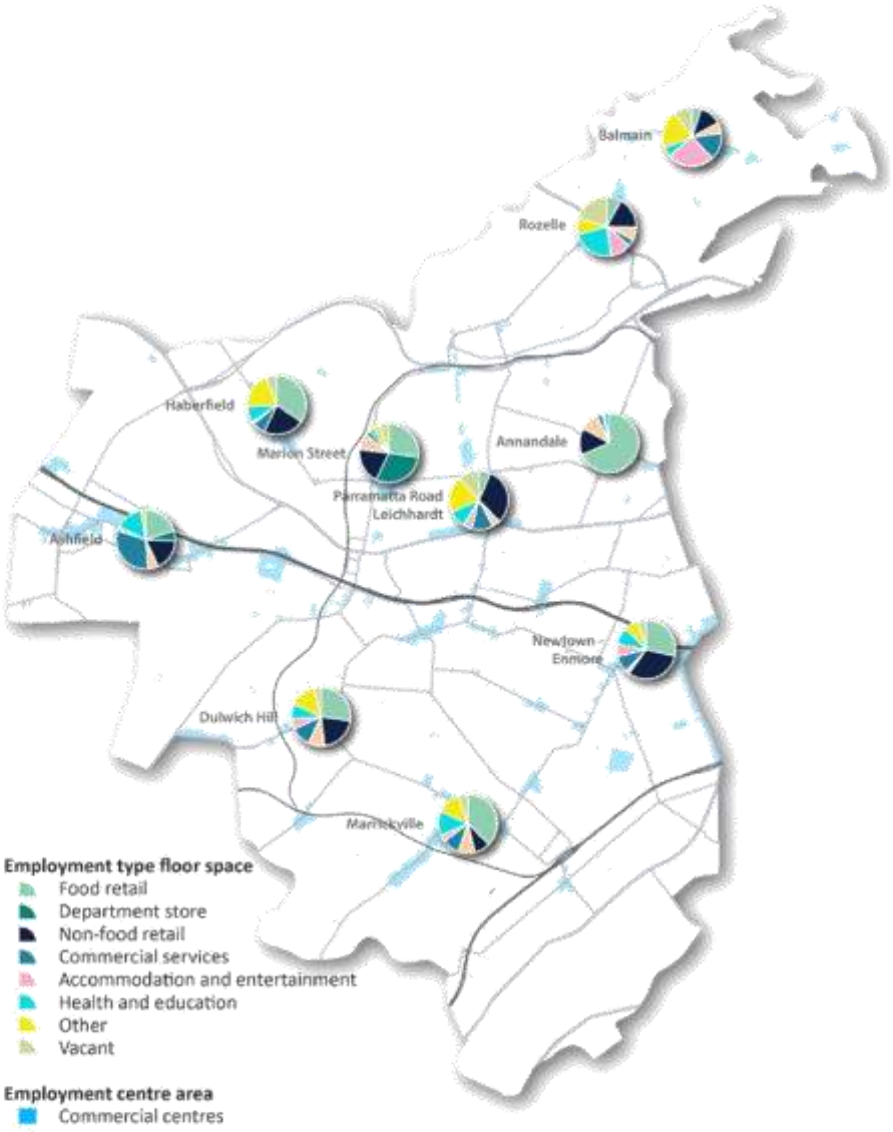

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9.2.1 Ashfield Centre

Role and function

Ashfield is the primary business and administration centre of the Inner West LGA, providing an estimated 110,575sqm of employment floorspace. The centre is mainly located on the southern side of Ashfield Railway Station along either side of Liverpool Road for approximately 1.5kms. Ashfield station sited between Sydney CBD and the Strategic Centres of Burwood and Parramatta, is in a highly accessible location and connects to two rail lines, the North Shore and Western line; and the the Inner West and Leppington lines.. The centre has more than 1,000 parking spaces. Ashfield Centre is also close to an entry portal of the WestConnex motorway.

Ashfield consists of commercial office space, general retail, services, administration, clubs, pubs, restaurants and cafes. Approximately half of Ashfield's retail floorspace (equalling 24,791sqm of net leasable area) is 'Ashfield Mall,' a three level shopping centre that contains an ALDI, Coles, Woolworths and Tong Li supermarket, as well as a Kmart discount department store. The shopping centre (shown on the contextual map below) is south of Liverpool Road and is the largest landholding in the centre on 21,890sqm of land.

The other half of Ashfield centre's retail floorspace (approximately 25,000sqm) is characterised by restaurants and cafes. There is also a large presence of retail including food retail, and other medical/professional services.

Apart from Ashfield Mall, the rest of commercial floorspace is located largely within early 20th century two to three storey buildings, dispersed throughout the centre. These buildings provide Ashfield with considerable character, with a number of properties listed as heritage items. Council's compliance team have identified that Ashfield is experiencing severe non-compliance issues, primarily in relation to the early 20th century two storey shop top housing. Restaurants are at risk of being closed due to the condition of buildings. There is an apparent non-willingness of landowners to update existing stock.

Parts of the centre possess poor public domain characteristics, particularly to the south of Liverpool Road, dominated by narrow footpaths that are interrupted by large driveway crossings, waste collection bays and loading zones. A recent revamp and expansion of public spaces north of Liverpool Road has increased the usability of the public domain and made this locality more appealing. Liverpool Road is a State classified road, which has a negative public amenity impact on the centre, introducing noise, dust and pollution, while also impeding the ability to widen footpaths for activities such as outdoor dining and footpath trading.

Ashfield has a strong Chinese, particularly Shanghainese, retail and restaurant presence. This gives the area a distinct personality which attracts people from areas outside the traditional catchment zone. This has led to the area having a healthy night time economy, which is reflected in the later than usual trading hours of a number of the Ashfield Mall retail outlets.

Ashfield has eight major standalone office buildings which are shown on the contextual map below. Total office floorspace is approximately 57,000sqm, which is by far the largest cluster of office space in the Inner West LGA. A number of these buildings house state government department tenants. Inner West Council occupies the Ashfield Civic Centre building.

Ashfield also contains a number of significant food and entertainment venues including Ashfield Leagues Club, Ashfield RSL, Club Ashfield and the Polish Club. These venues provide performance spaces, supporting the live music industry in the Inner West. These venues are sited on substantial landholdings and are shown on the contextual map below. Another significant landholding within the centre is the Exodus Foundation precinct.

The centre has been experiencing declining office space, largely as a result of market forces and alternative higher intensity commercial locations having emerged over the last 20 years, such as at Burwood and Parramatta.

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Centre map



Planning controls

Ashfield centre is primarily zoned B4 -Mixed Use, with a small section of B2 - Local Centre north of the railway line, and B1 - Neighbourhood Centre at Thomas and Frederick Street. Under the Ashfield LEP, the floorspace ratio control ranges from 1.5:1 to 3:1 and a height ranges from 13m to 23m. 'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within both zones.

The draft Inner West Local Environmental Plan is proposing to rezone the core of Ashfield from B4 – Mixed Use to B2 – Local Centre.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**53,205**	**45%**
Supermarkets and Grocery Stores	10,330	9%
Specialty Food Stores	2,975	2%
Fast Food Stores	825	1%
Cafés/Restaurants	7,800	7%
Department Stores	6,475	5%
Clothing Stores	800	1%
Hardware and Bulky Goods Stores	11,125	9%
Other Personal and Household Goods	6,775	6%
Selected Personal Services	6,100	5%
Occupied Non-Retail Floorspace	**57,370**	**48%**
Pubs, Taverns and Clubs	800	1%
Rental, Hiring and Real Estate Services	11,100	10%

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Category	GFA (sqm)	Proportion
Health Care and Social Assistance	13,100	12%
Financial and Insurance Services	3,325	3%
Administrative and Support Services	2,700	2%
Arts and Recreation Services	1,625	1%
Education and Training	3,200	3%
Public Administration and Safety	17,000	14%
Industrial	1,520	1%
Other	3,000	3%
Occupied floorspace total	110,575	93%
Vacant floorspace	8,500	7%
Total floorspace	119,075	100%

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an additional 9,741sqm of GFA is required by 2036 across Ashfield.

In addition to the above, it is forecast (Table 24) that an additional 17,511sqm of non-retail commercial GFA (predominantly office space) will need to be accommodated across Ashfield between 2016 and 2036. This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development activity

Ashfield has experienced considerable development activity from 2014-2019. Within this period, 13 redevelopments involving more than five storeys have occurred (as shown in the contextual map). Key redevelopments that have had major implications for the centre are discussed below.

- 445-455 Liverpool Road (DA2015/46) (numbered 1 on the contextual map below). 4 storey mixed use building containing 3 ground floor commercial spaces (340sqm total) and 46 apartments above. Replaced a large lot with various light industrial and urban services premises
- 380-382 Liverpool Road (DA2014/12) (numbered 3 on the contextual map below). 7 storey mixed use development, approved by Council 2012, containing 2 ground floor commercial spaces (434sqm total) and 60 apartments
- 425 Liverpool Road (DA2014/12) (numbered 2 on the contextual map below). 2-5 storey mixed use building, approved by Council 2016 and completed 2017, containing 192sqm of ground floor commercial space and 42 apartments. Replaced open space
- 2 Thomas Street (DA2015/156) (numbered 4 on the contextual map below). 2-5 storey residential flat building, approved by Council 2015 and completed 2018, containing 42 apartments. Replaced 3 single residential dwellings
- 371-377 Liverpool Road (DA2014/345) (numbered 5 on the contextual map below). 6 storey residential flat building, approved by Council 2015 and completed 2017, containing 50 apartments. Replaced a single residential dwelling and urban services premises (car service centre)
- 1 Markham Place (DA2014/326) (numbered 6 on the contextual map below). 8 storey mixed use development, approved by Joint Regional Planning Panel 2014 and completed 2019, containing 4 ground

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floor commercial spaces (187sqm total) and 91 apartments. Replaced 2 single residential dwellings and a row of commercial terraces

- 270 Liverpool Road (DA2014/9) (numbered 7 on the contextual map below). 8 storey mixed use development, approved by Joint Regional Planning Panel 2014 completed 2017, with 2 ground floor retail spaces. Replaced large single storey retail premises
- 168 Liverpool Road (DA2014/242) (numbered 13 on the contextual map below). Conversion of office block to an 8-storey mixed use development, approved by Joint Regional Planning Panel 2015 and completed 2016, with 3 ground floor retail spaces (202sqm) and 100 apartments above. Replaced an existing standalone office building containing 6,524sqm of net leasable area[31]
- 11-13 Hercules Street (DA2013/176) (numbered 8 on the contextual map below). 2-8 storey mixed use building with 2 ground floor commercial spaces (359sqm total) and 52 apartments. Adaptively reused a heritage commercial building
- 15-17 Hercules Street (DA2015/29) (numbered 9 on the contextual map below). 7 storey mixed use development, approved by Council 2015 and completed 2018, with 3 ground floor commercial spaces (142sqm total) and 23 apartments above. Replaced a Commonwealth Bank building
- 244-256 Liverpool Road (DA2013/114) (numbered 10 on the contextual map below). 3-10 storey mixed use development, approved by Joint Regional Planning Panel 2014 and completed 2018, containing 3 ground floor commercial spaces (259sqm total) and 140 apartments. Replaced 3 single storey commercial premises
- 8 Murrell Street (DA2016/127) (numbered 11 on the contextual map below). 8 storey residential flat building, approved by Council 2017 and completed 2018, with 42 apartments. Replaced 3 single residential dwellings
- 2-4 Murrell Street (DA 2017/172) (numbered 12 on the contextual map below). 9 storey residential flat building, approved by Inner west Planning Panel 2018 and yet to be completed, containing 40 apartments. Replaces 2 single residential dwellings
- 1 Victoria Street (DA2011/89) (numbered 14 on the contextual map below). 6 storey residential flat building, approved by Joint regional Planning Panel 2012 and completed 2017, containing 62 apartments. Replaced a car park

The two redeveloped Hercules Street sites, both fronting Fox Lane, listed above have enabled the activation of pedestrian thoroughfare and the creation of attractive new retail spaces, including an adaptive reuse of a heritage building. This has resulted in the dedication of land to Council, resulting in an expanded and enhanced public domain, including new pedestrian connectivity

There has been pressure for standalone office buildings, other than the ones listed above, to be redeveloped for primarily residential use in recent years. While many of these new mixed-use buildings have added new quality retail spaces, none have provided non-residential uses above the ground floor

Contextual Map

The map below provides context behind Ashfield Town Centre. Notably, there are a number of standalone commercial office buildings, standalone entertainment venues, and a shopping mall on a large landholding.

[31] Stockland annual report 2001 p27

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- Ashfield Mall
- Inner West Council offices
- Recently completed developments
- Recently approved developments
- Major entertainment venues
- Major commercial office buildings

Previous and other relevant studies

Ashfield Town Centre Strategy 2008 presents a series of strategic principles and actions for Ashfield. This Strategy informed the Ashfield LEP 2013 and corresponding DCP. Key recommendations relevant to this Study are summarised below:

- developments are to be required to have active street frontages
- require in a DCP minimum amounts of ground level commercial floor space
- encourage commercial and mixed development proposals by applying development incentives
- identify key potential development sites for additional commercial/retail uses, including new retail frontages along The Esplanade.

In addition, the *Ashfield Urban Planning Strategy 2010* recommended the Ashfield LEP apply a two storey bonus principle and additional FSR to achieve 8 storeys on the proviso that there was a community benefit or affordable housing provided. This Strategy informed the Ashfield LEP 2013 and corresponding DCP. Key recommendations relevant to this Study are summarised below:

- Promote new retail and business opportunities as part of mixed use developments within the town centre and within the western and eastern fringes of the centre
- Simplify the planning controls for Ashfield Town Centre to facilitate more opportunities for standalone and mixed use business development
- Ensure that planning controls provide opportunities for new small businesses to occupy the ground level of buildings and to ensure that parking requirements are not overly onerous.
- Promote mixed-use development with ground level active, non-residential uses.
- Consolidate fragmented miscellaneous zoning into a single B4 - Mixed Use zone.

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- Maintain the existing predominant 6-8 storey height limit across the central area. The building height controls should reflect the 'Street Wall Height Zone' as identified within the Ashfield Development Control Plan -Part C3 Ashfield Town Centre Part 2.

Following the *Ashfield Urban Planning Strategy 2010*, a B4 - Mixed Use zoning was applied to the centre to acknowledge its status as a Local Strategic Centre within former Ashfield LGA under the then Sydney Metropolitan Strategy. Features that led to this designation included having major six storey office buildings, government departments, a large shopping mall, long commercial strip for local services and various businesses, several clubs, several schools and upgraded accessible train station with public transport interchange.

Prior to adoption of the Ashfield LEP, feasibility testing by the then Department of Planning confirmed the viability of the FSR to enable new development as has been since realised by several new buildings.

The *Ashfield Public Domain Strategy* (2016) provided detailed designs for several themes. The majority of the works have been constructed to enhance the place character and further facilitate the town centre as an attractive location for both businesses and increased residential growth.

Inner West Local Housing Strategy

The *Inner West Local Housing Strategy* was updated in early 2020 to identify Ashfield as a short term opportunity for additional dwellings. Action 2G of the Strategy states, *"Investigate boosting some planning controls in the Ashfield Town Centre and extend to the west along Liverpool Road and Norton Street. Consider a bonus approach for commercial floorspace to maintain the commercial function of the centre."* The timing for delivery of this action is 2020-2021.

Action 2H of the Strategy refers to, *"Investigate boosting planning controls in the North Ashfield investigation area earlier, ie within the "from 2019" timeframe, subject to open space access/provision."*

Subject to further studies and development of planning controls, floor space uplift for new housing in Ashfield within the existing mixed use zone and surrounding residential zones provides opportunity for improved public domain, pedestrian links, provision of tree canopy and new retail and office floor space.

It is essential that new uplift is predicated upon delivering employment floor space and/or positive public domain outcomes flagged as being important for this centre in the Employment and Retail Lands Strategy.

Action 1.7.2 of the strategy addresses the above. It is anticipated that delivery of this action will be predicated on place based studies, local character statements, and analysis associated with Phase II of the LEP.

Issues and recommendations

The issues below require investigation to define the nature and details of future planning actions. Some require planning control review, urban design studies and feasibility analysis. A shift in policy direction is necessary for the projected floorspace requirements to be met within the centre.

Other issues to be resolved through the harmonisation of planning instruments (eg permissibility of 'artisan food and drink industry' in centres) are explored in detail in Section 8.1.7.

- Traffic Calming Liverpool Road

Liverpool Road is an impediment to enhanced amenity for pedestrians and businesses fronting the road, due to its high speed limit and status as a classified road. It discourages outdoor dining, footpath trading and creates noise and air pollution impacts. The road is not under the control of Council and is classified under the Roads Act 1993.

Action 1.3.5 of the Strategy advocates for Council to work with Transport for NSW under the 'Movement and Place Framework' to deliver the land use planning vision for employment lands located along Classified Roads.

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In the instance of Ashfield, Council could explore options with Roads and Maritime Services to reduce the speed limit of the road and introduce calming measures to reduce the amenity impacts of this road on the centre and pedestrian priority provided at key points on Liverpool Rd.. As a longer term aim, Council could work with Roads and Maritime Services to have the portion of Liverpool Road running through the centre returned to Council and managed as a local road.

- Delivering a pipeline of non-retail commercial floorspace

Projections suggest that Ashfield will require over 17,511sqm of non-residential floorspace by 2036. Development in the past five years has only provided ground floor retail space. If this pattern continues, there will be a substantial loss of office space as the largely ground floor only commercial replacement space is not compensating for this trend.

To ensure that appropriate employment floorspace is provided to meet the projected demand for employment uses, LEP mechanisms should be implemented to require an appropriate proportion of non-residential floorspace to be provided in each mixed use development.

Action 1.2.2 of the Strategy recommends a number of amendments to planning controls, to protect and grow office floor space within Ashfield Centre. The rationale behind this action is explained further in Section 8.1.1.

- Capitalising on public space

The *Ashfield Public Domain Strategy* resulted in a successful improvement to the public domain on the northern side of Liverpool Road, with new public plazas and through site linkages achieved through use of Section 7.11 contributions and utilisation of Council land.

Action 1.7.2 of the Strategy makes recommendations to continue this programme of public domain improvement in Ashfield which are detailed below:

- Short term:
  - Continue to utilise contributions and Council land to enhance pedestrian amenity and tree canopy.
  - Review DCP controls to incorporate improved public domain and pedestrian amenity controls as part of future developments to further increase foot traffic for ground level business.
- Medium/long-term
  - Undertake a place-based study to provide a programme of public domain improvements for the centre, including south of Liverpool Road and Cavill Lane.

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9.2.2 Marrickville Centre

Role and function

Marrickville Centre is oriented along a 2km stretch of both Marrickville and Illawarra Roads and provides an estimated 44,500sqm of employment floorspace. The centre is serviced by Marrickville railway station and numerous bus routes. In 2024 the railway line serving Marrickville will be converted to a metro line, improving frequencies and travel times to the Sydney CBD and beyond. Council owns a number of properties in the centre, including Marrickville Town Hall, the new Marrickville library site and three car parks.

The centre consists of general retail, services, commercial offices, pubs, restaurants and cafes. Marrickville has a number of, both Asian and European, specialist supermarkets and independent grocers, including the large Banana Joe's Foodworks store. The centre also contains a large standalone Woolworths supermarket.

Marrickville Centre's general retail outlets serve a primarily local catchment area, as the large Marrickville Metro shopping centre is situated just over a kilometre away. The centre's speciality food outlets, restaurants and cafes draw visitors from further afield. Marrickville Centre's significant late-night and live music offerings also attract patrons from outside the traditional catchment area. The centre serves the nearby Carrington Road and the Marrickville-Sydenham industrial precincts with services and amenities.

Marrickville centre is partially located within a heritage conservation area. The built form is varied, with a predominance of older low scale buildings and new higher density mixed use developments. The public domain of the centre is of a reasonable standard. The 2019 redevelopment of the former Marrickville Hospital site with a new plaza, library, multipurpose pavilion, public park, cafe and children's play area (shown on the contextual map below) provides an attractive new addition to the Centre. Council's *Marrickville Road (East) Public Domain master plan* (2018) provides for upgrades along Marrickville Road, while Council also plans to upgrade Alex Trevallion Plaza.

The area has a strong Greek and Vietnamese presence, which is reflected in the areas speciality food retailers, restaurants and cafes. This gives the area a distinct personality which attracts people from outside the local catchment area.

Marrickville Centre also has an important late-night trading and live music sector. These venues vary in terms of their size and characterisation, with some involving pubs with live music while others are more specialised live music venues. The specialised live music venues are shown on the contextual map below and include Marrickville Ritz (1), Lazybones (2) and Gasoline Pony (3). The healthy nigh-time economy of the centre attracts visitors from far outside the traditional catchment zone. Parking needs are met by on-street parking in surrounding streets as well as council owned carparks.

There is demand for office and retail floor space within Marrickville Centre however a proportion of the existing stock is ageing and there is a lack of attractive space in some parts. There is however recent evidence of vacant run-down spaces being refurbished for new tenants.

Strategic context

Marrickville is undergoing considerable change, with investment in new transport infrastructure, notably the construction of the Sydenham to Bankstown Metro conversion, which will result in Marrickville Station at the southern end of the Centre, being only 10 minutes from Central station and between 19 and 36 minutes from the strategic centres of North Sydney, Chatswood and Macquarie University.

A large number of new residential flat buildings and mixed-use developments have been built within Marrickville and neighbouring Dulwich Hill. The *Inner West Local Housing Strategy* has flagged the need for additional dwellings to be accommodated in the vicinity of transport nodes in the Marrickville area. A substantial number of new dwellings are proposed at the recently rezoned Victoria Road precinct.

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The District Plan describes Marrickville as "*emerging as a focal point for boutique breweries, coffee roasters and other artisans, and there is a breadth of unique, small-scale cultural and arts experiences. These assets have the potential to add a new and unique face to the tourist economy.*"

Centre map



Planning controls

Under Marrickville LEP 2011, Marrickville centre is zoned B2 - Local Centre. The majority of the area has an FSR of 2:5:1. The centre has height limits that range from 20-26m.

Unlike B2 - Local Centre zoned land in the former Leichhardt LGA, the B2 - Local Centre zone in Marrickville does not permit light industry, including artisan food and drink industry. This places pressure on these low impact activities to locate in the industrial zones rather than within Marrickville Centre. 'Local distribution premises' uses are also prohibited in the zone.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**27,650**	**62%**
Supermarkets and Grocery Stores	5,050	11%
Specialty Food Stores	5,010	11%
Café/Restaurants	4,295	10%
Clothing Stores	2,240	5%
Hardware and Bulky Goods Stores	1,950	4%
Other Personal and Household Goods	5,610	13%
Selected Personal Services	3,495	8%
Occupied Non-Retail Floorspace	**14,830**	**33%**

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Category	GFA (sqm)	Proportion
Rental, Hiring and Real Estate Services	900	2%
Health Care and Social Assistance	5,000	11%
Financial and Insurance Services	2,655	6%
Arts and Recreation Services	1,400	3%
Other	4,875	11%
Occupied floorspace total	**42,480**	**95%**
Vacant floorspace	2,070	5%
Total floorspace	**44,550**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an additional 19,902sqm GFA is required by 2036 across Marrickville Centre. Demand for retail floorspace already outstrips supply. This is understandable given the current strong trading levels for Marrickville Metro and the high forecast of population growth in the locality.

In addition to the above, it is forecast (Table 24) that an additional 28,426sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Marrickville between 2016 and 2036. This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development activity

From 2014-2019 Marrickville centre has experienced significant, mostly mixed-use and residential, development activity. Major redevelopments are shown on the contextual map and listed below. Recently completed major developments include:

- 2 -8 Arthur Street (DA201500242) (numbered 4 on the contextual map below)
  Approved in November 2016; demolition of improvements on site, consolidation of land into one allotment and construction of a seven storey residential flat building with 38 dwellings and two basement parking levels. The site has a frontage of 43m to Arthur Street. Construction was completed in July 2019.The site was formally a row of single storey post war dwellings.
- 236 Illawarra Road (DA 201500628) (numbered 3 on the contextual map below)
  Approved in March 2017; demolition of improvements on site, consolidation of lots into a single allotment and construction of a six storey mixed use development including a 223sqm commercial tenancy, 30 residential apartments and two basement car parking levels. The site has a frontage of 18.2m to Illawarra Road. Construction is currently underway at the time of writing. The site was formally a pair of two storey commercial buildings including ground floor retail.
- 380-382 Illawarra Road (DA201400110) (numbered 5 on the contextual map below)
  Land & Environment Court approved in July 2015; demolition of improvements on site, consolidation of two lots in one and construction of a six storey mixed use development comprising four ground floor commercial providing 243sqm of commercial floorspace, 31 residential apartments and 27 parking spaces across two basement levels. The site has a frontage of 62.8m to Illawarra Road and Church Street on a corner site. The site was formally a pair of single storey dwellings.
- 392 Illawarra Road (DA201600221) (numbered 10 on the contextual map below)
  Approved November 2016; partial demolition of existing improvements on site, consolidation of three lots into one, retention and restoration of two, two storey traditional shopfronts and construction of a

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six storey mixed use development containing 98.6sqm of commercial floorspace across two ground floor tenancies, ground floor car parking for 11 cars and 14 residential apartments. The site has a 51.5m frontage to Illawarra Road and Warren Road. Construction is underway at time of writing. The site was previously occupied by a row of two storey traditional shop fronts.

- 401-405 Illawarra Road (DA201600021) (numbered 6 on the contextual map below)
  Approved in November 2016; demolition of existing improvements on site and construction of a six storey mixed use building providing 98sqm of commercial floorspace in a ground floor tenancy, 21 residential apartments and a basement car parking level. The site has a 10.75m frontage to Illawarra Road. Construction is underway at time of writing. The site was previously occupied by a row of two storey shopfronts.
- 407-409 Illawarra Road (DA201400549) (numbered 7 on the contextual map below)
  Approved in July 2015; partial demolition of improvements on site and construction of a five storey mixed use development including 175sqm of commercial floorspace across two ground floor tenancies, 12 residential apartments and four car parking spaces on ground floor. The site has a 12.4m frontage on Illawarra Road. Construction was completed in May 2019. The site was previously occupied by a row of two storey traditional shop fronts.
- 411-413 Illawarra Road (DA201200601) (numbered 8 on the contextual map below)
  Approved in July 201; demolition of existing improvements on site and construction of a four storey mixed use development including 81.8sqm of commercial floorspace in a ground floor tenancy, 11 residential apartments and five parking space on the ground floor. The site has a 12m frontage on Illawarra Road. Construction was completed in June 2015. The site was previously occupied by a pair of semi-detached dwellings.
- 415-421 Illawarra Road (DA201200486) (numbered 9 on the contextual map below)
  Approved June 2013; demolition of existing improvements on site and construction of a six storey mixed use development including 404sqm of commercial floorspace across four ground floor tenancies, 32 residential apartments and a basement parking level. The site has a 24.4m frontage to Illawarra Road. Construction was completed in September 2016. The site was formally a row of two, two storey commercial buildings.
- 313-319 Marrickville Road & 174-186 Livingstone Road (DA201600434) (numbered 1 on the contextual map below)
  Approved in August 2017; redevelopment of the former Marrickville Hospital site, including alterations and adaptive reuse of the former hospital buildings into a new community hub, library, pavilion, café, and children's play area. Also includes the development of three residential flat buildings ranging from 12 to nine storeys with a total of 223 residential apartments (9 affordable). A new public square is also to be provided at the corner of Marrickville Road and Livingston Road. The site has a frontage of 368m, fronting Lilydale Street, Marrickville Road and Livingston Road. Construction was completed in August 2019.
- 326-330 Marrickville Road (DA201500499) (numbered 2 on the contextual map below)
  Approved in April 2016; retention of existing front portion of the building and demolish remainder and construction of a six storey mixed use development including 300sqm of commercial floorspace across two commercial tenancies, one facing each street frontage, 39 residential apartments and 2 basement car parking levels. The site has a 15.49m frontage to Marrickville road and the same to Touhy Lane. Construction is underway at time of writing. The site was previously occupied by a single storey commercial building.

Recently approved major developments include:

- 412-414 Illawarra Road (DA201800042) (numbered 1 on the contextual map below)

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Land & Environment Court approved in December 2018; demolition of existing improvements on site and construction of a five storey mixed use development including 208sqm of commercial floorspace across two commercial tenancies, one on each frontage, nine residential apartments and a level of basement car parking. The site frontage is approximately 43.3m to Illawarra Road and Warren Road. Construction had not yet commenced at time of writing. Existing improvements of site include two, two storey shopfronts.

- 423-425 Illawarra Road (DA201600550) (numbered 3 on the contextual map below)
  Approved in April 2017; demolition of existing improvements on site and construction of a six storey mixed use development including 131.3sqm of commercial floorspace across two Illawarra Road facing tenancies, 18 residential apartments and a basement car park. The site frontage is 12.19m on Illawarra Road. Construction had not yet commenced at time of writing. The site formally accommodated two semi-detached dwellings.
- 59 Warren Road (DA201800235) (numbered 2 on the contextual map below)
  Approved in November 2018; demolition of existing improvements on site and construction of a five storey mixed use development including 71sqm of commercial floorspace within a ground floor tenancy and a 20 room boarding house with ground level car parking. The site has a frontage of 12m to Warren Road. At time of writing construction had not commenced. The site is occupied by a single detached dwelling.
- 265-273 Illawarra Road (DA201700349) (numbered 4 on the contextual map below)
  Land & Environment Court approved in October 2018; demolition of existing improvements on site and construction of a six storey mixed use development including 596sqm of commercial floorspace across four ground floor tenancies, 47 residential apartments and two levels of basement car parking. The site has a frontage of 70.6m to Illawarra Road and Marrickville Lane. At time of writing, construction had not commenced. The site is occupied by a two storey commercial building.

Currently being assessed developments include:

- 391 Illawarra Road (DA201800498) (numbered 2 on the contextual map below)
  Proposes a five storey mixed use building including retention of the existing two storey commercial shopfront on site and the 54.7sqm commercial tenancy and five residential apartments above. The site has a frontage of 5.3m to Illawarra Road and is currently occupied for a two storey traditional shop front.
- 437 Illawarra Road (DA201800560) (numbered 1 on the contextual map below)
  Proposes partial retention of the traditional shop fronts on site and construction of a six storey mixed use development including 111sqm of commercial floorspace within a ground floor tenancy, 18 residential apartments and two levels of basement car parking. The site has a frontage of 56.6m to Illawarra Road and Warren Road.
- 387-389 Illawarra Road (DA201900287) (numbered 3 on the contextual map below)
  Proposes demolition of improvements on site and construction of a six storey mixed use development comprising 171sqm of commercial floorspace across two ground floor tenancies, a 55 room boarding house and ground floor motorcycle and go get car parking. The site has a frontage of 25.3m to Illawarra Road and is currently occupied by a church and a commercial building.

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Contextual map



- Recently completed developments
- Recently approved developments
- Currently being assessed developments
- New library and plaza
- Specialised live music venues

Issues and recommendations

A strategic planning vision for the sprawling Marrickville Centre is required, considering the substantial recent increase in residential population.

- Residential zoned land with employment uses

A number of residential properties adjacent to the Marrickville centre have been identified as containing employment activities, including purpose-built developments.

Action 1.2.3 in the Strategy recommends that residentially zoned properties adjacent to the centre that comprise employment uses should be considered for rezoning to B2 - Local Centre.

- Opportunity to utilise Council land and assets

Council has recently prepared and endorsed the *Inner West Land and Property Strategy and Policy* (2019) that provides strategic direction for the management, review and decision making around Council assets. Action 1.5.1 in the Strategy outlines how Council assets could facilitate or support employment uses and amenity. Section 6.1.9 provides examples of how this has occurred elsewhere.

- Introduction of office floorspace in close proximity to Marrickville Station

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Action 1.2.2 of the Strategy recommends a number of amendments to planning controls, to protect and grow office floor space within Marrickville Centre. The rationale behind this action is explained further in Section 8.1.1.

- Foster Marrickville's vibrancy

The Marrickville centre provides essential services close to where people live and is well serviced by public transport, making it accessible for the surrounding community. The mix of uses and late night activities contribute to the vibrancy of the centre. Actions listed under Strategy 1.4 of the ERLS contain a number of initiatives to create a vibrancy and visual amenity for centres across the Inner West LGA.

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9.2.3 Newtown-Enmore Centre

Role and function

Newtown-Enmore is one of the major centres of the Inner West LGA and provides an estimated 71,000sqm of employment floorspace. It stretches, predominately along King Street and Enmore Road, for 2.5kms. The centre is serviced by Newtown train station and numerous bus routes, running along the length of both King Street and Enmore Road. Two Council owned carparks are located in the centre, one on Edgeware Road and the other on the corner of Church and Lennox Street.

Newtown-Enmore is split between the Inner West and City of Sydney, with more than half of the overall centre in the City of Sydney. It is the Inner West LGA's main entertainment and tourism destination. The Newtown-Enmore centre consists of general retail, commercial offices, services, restaurants and cafes. The centre has a strong boutique and alternative retail offering with a variety of speciality stores and services. The area's pubs, bars, restaurants and cafes, are a major component of the local economy. The Enmore Theatre, one of Sydney's major entertainment venues, is located in the centre. There are a number of supermarkets including two IGAs and two Foodworks.

Newtown-Enmore centre has a large catchment area. The centre's historical and characterful streetscape, as well as the wide range of retail offerings, attracts visitors from far outside the local area. The many cafes, restaurants, pubs and bars, as well as the Enmore Theatre and other live music venues, draw patrons from across the Sydney metropolitan area. This makes the Newtown-Enmore centre is one of the most important nodes in greater Sydney's night-time economy.

The private venues that form part of the centre form part of the Inner Wests LGA's cultural infrastructure, with the provision of these spaces for live music and arts supporting creative enterprises. Venues vary in terms of their size and characterisation, with some involving pubs with live music while others are more specialised live music venues. Venues generally along King Street and Enmore Road include Kelly's on King, Botany View Hotel, Corridor, Enmore Theatre, Leadbelly, Marlborough hotel, Union Hotel, Newtown Hotel, The Bank, Town Hall Hotel, Cooper's hotel, Sly Fox, The Midnight Special, St Luke's Anglican Church and The Hideaway Bar.

Continued residential development in and around the centre continues to increase the population of the local catchment. This includes infill development in surrounding residential streets as well as larger development sites like 32-70 Alice Street, development in and around Wilford and Gladstone Streets and Along Wilson Street and Erskineville Road. Shop top housing developments along King Street and Enmore Road also continue to provide a slow supply of housing to the centre.

Located almost entirely within a heritage conservation area, Newtown-Enmore has an individual and historical local character. The retention of 19th and early 20th Century architecture and its mostly low scale built form provides a sense of place, while a number of public plazas and murals also enhance the centre and add to its distinctiveness.

Numerous public parks are located within walking distance of centre, providing spaces for recreation and public events, including Camperdown memorial Rest Park to the north, Lillian Fowler Reserve to the east and Sydney park at the southern end.

King Street and Enmore Road are both State classified roads and are notorious for high levels of traffic, noise and pollution. These streets are limited in width whilst high in light vehicle, heavy vehicle, bus, cycling and pedestrian traffic. This impedes opportunity for place making through substantial footway dining and trading, as well as other amenities like a tree canopy and street furniture.

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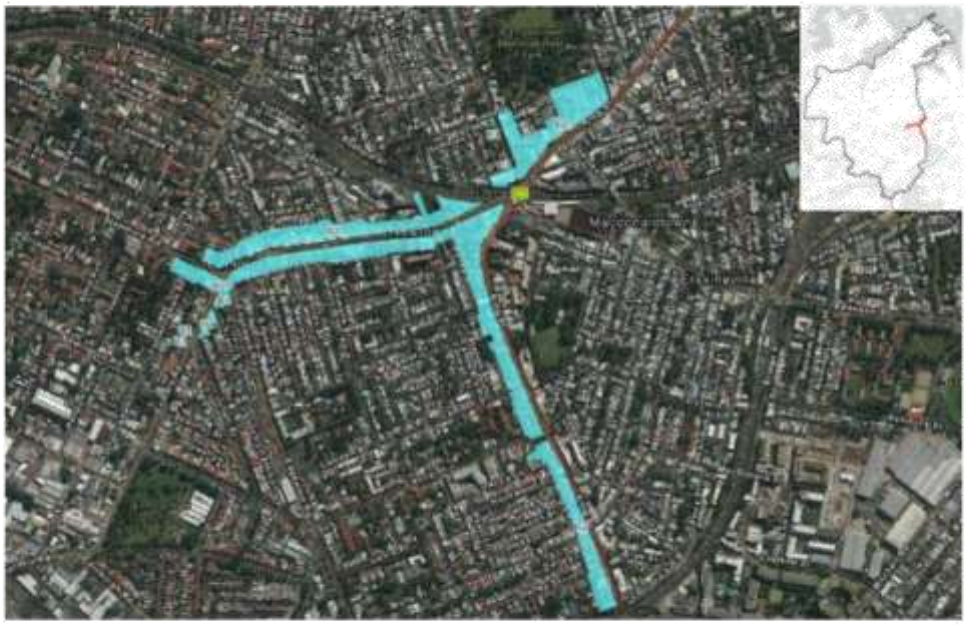
Centre map



Planning Controls

Under Marrickville LEP 2011, the centre is predominantly B2 - Local Centre with some areas zoned B1 - Neighbourhood Centre.

FSR on land zoned B2 - Local Centre is 1.5:1 while the limited areas of B1 - Neighbourhood Centre have an FSR control of 0.85:1. Most of the centre has a height of 14m. 'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre. In contrast, City of Sydney applies FSR controls on a lot by lot basis, mostly ranging from 1.5:1 to 2:1 in FSR and 12-18 metres in height. Both the Inner West and City of Sydney LGA components of the Newtown Centre are in heritage conservation areas.

Compared with other centres in the Inner West LGA, FSR and height controls are more aligned with centres such as Rozelle and Balmain rather than Petersham, Dulwich Hill and Marrickville.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**43,730**	**61%**
Supermarkets and Grocery Stores	1,700	2%
Specialty Food Stores	4,420	6%
Restaurants/Cafes	14,150	20%
Clothing Stores	7,030	10%
Hardware and Bulky Goods Stores	4,525	6%
Other Personal and Household Goods	10,525	15%
Selected Personal Services	1,380	2%
Occupied Non-Retail Floorspace	**24,115**	**34%**

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Category	GFA (sqm)	Proportion
Rental, Hiring and Real Estate Services	1,270	2%
Health Care and Social Assistance	2,600	4%
Financial and Insurance Services	1,525	2%
Administrative and Support Services	1,100	2%
Arts and Recreation Services	4,775	7%
Education and Training	4,200	6%
Public Administration and Safety	2,700	4%
Industrial	600	1%
Other	5,345	8%
Occupied floorspace total	**67,845**	**95%**
Vacant floorspace	**3,275**	**5%**
Total floorspace	**71,120**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 forecast for demand and supply of retail floorspace shows that an additional 3,137sqm of retail GFA is required by 2036 across Newtown-Enmore. Currently, there is sufficient supply of retail floorspace. Newtown currently lacks a full-line anchor supermarket which is unusual for its size and trading position.

In addition to the above, it is forecast (Table 24) that an additional 8,088sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Newtown-Enmore between 2016 and 2036. This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development Activity

From 2014-2019 Newtown-Enmore centre has experienced a relatively small amount of development activity for a centre of its size. Recently completed projects include:

- 601 King Street (DA201600669). This four-storey 18 room boarding house including a reconfiguration of the existing ground floor commercial space, was approved by Council in 2017 and completed in 2018. The development has not significantly decreased the previous commercial space of the site
- 43 Enmore Road (DA201500083). This four-storey mixed use development was approved by Council in 2016 and completed in 2018. It contains a commercial tenancy on the ground floor and five apartments above. The development has not significantly decreased the previous commercial space of the site
- 177 Enmore Road (DA201500739). This four-storey addition to the rear of the site was approved by Council in 2016 and completed in 2018. It consists of a ground floor commercial space and three apartments above. The development has not significantly decreased the previous commercial space of the site.

Approved developments that are currently under, or yet to commence, construction include:

- 595 King Street (DA201900013). This mixed use development was approved on appeal by the Land and Environment Court in 2018. It is proposed to contain a ground floor commercial space and five apartments above and will replace an existing shop top commercial building

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- 351 King Street (DA201500253). This four-storey mixed use development was approved by Council in 2016. It is proposed to consist of two ground floor commercial spaces and 11 apartments above and will replace an existing shop top commercial building.

Issues and recommendations

- Designate King Street and Enmore Road as Vibrant Streets

King Street and Enmore Road are significant thoroughfares with peak hour clearways on each side. It carries large volumes of light and heavy vehicles, as well as buses. It's also a significant place and has a high level of pedestrian traffic and street life. This creates a conflict in the use of the roadway. In its current state, the thoroughfare of vehicles is dominating the space, impeding the ease of pedestrian movements and footway dining, as well as creating significant noise and air pollution. Through delivery of Action 1.3.5 of this Strategy, Council should designate King Street and Enmore Road as 'Vibrant Streets' as part of the 'Movement and Place Framework,' developed with Transport for NSW.

- Secure additional and diverse employment floorspace

Newtown-Enmore is a highly attractive location for businesses to establish, due to the vibrancy and uniqueness of the area. As the Sydney CBD reaches saturation, opportunities for additional office space arise in Newtown due to the excellent public transport and proximity to the CBD.

A number of constraints are reducing the potential for delivery of new commercial floorspace above the ground floor. This includes general constraints on development feasibility (eg lot fragmentation, lack of rear-lane access) as well as high demand for residential. Delivery of above-ground floor commercial space (for offices and business services) would have the potential to strengthen Newtown as a centre.

It is important that the type of office floorspace being provided aligns with the likely type of demand from specific industries or business sizes. The centre's proximity to larger commercial precincts such as the CBD and nearby innovation clusters (e.g. Eveleigh and Camperdown) would suggest that commercial office floorspace in Newtown be relatively small-scale.

While Enmore Road and the core of King Street have a strong retail presence, other sections are not as successful. South King Street is an example of this, with noticeably higher numbers of vacant and run down shop fronts, as well as a lower pedestrian numbers.

A 2018 count of vacant premises by the Newtown Precinct Business Association indicated 46 are empty (24 in City of Sydney and 22 in Inner West) out of 785; a vacancy rate of 5.85 per cent which is regarded as an indicator of a very successful retail strip. A number of these vacancies are under redevelopment from specialty shops to food and beverage outlets, a reaction to the growth of the night-time economy. Small office spaces are understood to be available at reasonable prices and there are no current indications that any of the larger footprint businesses are about to be converted into commercial office space.

There are also key sites that create opportunities through redevelopment. For example, the abandoned hub theatre is located, close to Newtown Station and adjacent to Newtown Square. This is a prominent site within the centre and a redevelopment for appropriate employment uses could create an appealing new destination to draw in visitors to Newtown.

There are also opportunities present to harness the unique nature of the centre and support the growth of unique business models that are suitable for this area like co-working spaces. There are a small number of spaces like this throughout the centre, and in adjoining Erskineville.

The spaces are well suited to Newtown as:

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- These spaces provide affordable and flexible working spaces that are better suited to smaller and starting businesses, aligning with the demographic that identify with Newtown,
- Co-working spaces are by their nature flexible businesses, with no set number of work stations required. They would be able adapt to many of the unique buildings and spaces in the centre, without significant costs,
- The area is well located and accessible by public transport, however far enough from the CBD to have its own identity that differentiates businesses, and
- The centre is adjacent and linked by public transport to multiple universities such as Sydney, UTS and Notre Dame, as well as the Camperdown-Ultimo innovation corridor. The knowledge, culture and enterprise that comes from these institutions and designated corridors creates an entrepreneurial culture and encourages the establishment of enterprises that would be well suited to these types of working environments.

Future planning for Newtown- Enmore should be undertaken in collaboration with the City of Sydney, given a large portion of the centre is within their boundaries. Refer to Action 1.8.6 of the Strategy.

- Support a night-time economy

Newtown-Enmore is the Inner West's most significant night time economy, providing a range of entertainment, retail, hospitality and business services throughout various times of the night. It not only serves the local population, but is also a regional night time attractor of visitors and workers. It also provides employment opportunities for creative and cultural producers, whether they be artists, entertainers, musicians or related fields. It also makes efficient use of public spaces, with use of spaces and infrastructure spread over more hours of the day.

Operating during the night however, present numerous challenges not experienced by trading during typical business hours. Central to these issues are the conflicts arising in the amenity requirements of land uses. Night time uses are typically loud, as they involve people socialising and entertainment noise during hours where many residents are at home and sensitive to noise. This is especially realised in places like the Newtown-Enmore centre which is surrounded by and mixed in with sensitive residential uses.

Finding solutions to these issues is therefore paramount to keeping existing businesses open and expanding, as well as for the formation of new and diverse night time businesses.

This strategy identifies a number of actions related to managing noise related issues in the Newtown-Enmore night time economy, addressing agent of change principle and managing expectations of noise to existing and future residents in and around these areas.

Onerous development approval pathways, planning conditions and building regulations impose significant burdens on the night time economy, and often make activities financially unviable. Cultural uses like small theatres and live music venues are examples of businesses which struggle to establish due to regulations, however they are crucial to establishing an identity in the centre and wider Inner West. Actions listed under Strategy 1.8 of ERLS strategy address these matters. Section [illegible] of the Study provides supporting discussion for this action.

Current DCP provisions governing the assessment and determination of trading hours for businesses in Newtown and Enmore are highly qualitative and open to wide interpretation. They lack clarity and certainty for all stakeholders in the development assessment process including the applicant (business), residents and Council as the consent authority. To better manage both business and community expectations of the strategic intent of the area and including the extent to which businesses may trade and the types of uses and activities supported, this must be addressed. Action 1.8.5 within this strategy directly addresses this issue:

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Development of the late night trading management DCP should be done in consultation with the community, businesses and adjoining Councils. Collaboration and where feasible, alignment with the City of Sydney Council is critical to the success of the DCP as Newtown-Enmore straddles the border with the City of Sydney. This is reflected in Action 1.8.6 of the Strategy.

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9.2.4 Balmain Centre

Role and function

The Balmain centre provides an estimated 54,510sqm of employment floorspace and is oriented along a 1,300m stretch of Darling Street. The centre is serviced by numerous bus routes and is close to a number of ferry wharfs. Council owns several properties in the centre including Balmain Town Hall, Balmain Library, Balmain Depot and two car parks. Parking is in short supply along Darling Street as well as in surrounding residential streets and existing car parks are at capacity. Most properties in the centre do benefit from rear lane access however narrow side streets make vehicle manoeuvrability difficult.

The centre consists of general retail, services, restaurants and cafes. The centre has a strong presence of independent boutique retail outlets, pubs also form a significant part of the district. Commercial offices, often creative based and located in terrace houses, also have a substantial presence. Balmain has a large, standalone Woolworths supermarket and also supports a number of independent grocers.

Balmain serves a primarily local catchment area but is also a destination for visitors, particularly due to the range of pubs, cafes and restaurants. The Balmain peninsula is relatively affluent compared with other parts of the Inner West and this is reflected in its unique retail offering. For example, there is a strong presence of fashion retail. The peninsula also has higher proportions of employed persons that work from home compared with other parts of the inner west. Residents that also work from home can help to boost the daytime trade of local centres.

Located entirely within a heritage conservation area, the centre has a distinctive historic character. The retention of 19th and early 20th Century architecture and its low scale built form provides a sense of place. There are also many historic pubs in the area, which also make the centre distinctive. Many of these historic pubs, and a number of community spaces, provide space for live music and arts. They include the Balmain Town Hall, Unity Hall Hotel, Cat and Fiddle Hotel, Riverview Hotel, Cottage Bar and Kitchen, and Lara Scolari Gallery.

The public domain is of a high standard, with large public spaces well located throughout the centre. This includes Loyalty Square, Gladstone Park, Balmain Town Hall and Balmain Library. Darling Street benefits from having primarily local traffic and no clearways which results in a higher amenity outdoor environment compared with other centres in the Inner West LGA.

In future, if the two at-grade Council car parks or depot site were considered for redevelopment, they could provide new employment floorspace within the centre and/or other public amenities.

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Centre map



Planning Controls

Under Leichhardt LEP 2013, the centre is zoned B2 - Local Centre. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations, including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**19,627**	**36%**
Supermarkets and Grocery Stores	1,800	3%
Specialty Food Stores	1,098	2%
Cafés/Restaurants	7,140	13%
Clothing Stores	3,750	7%
Hardware and Bulky Goods Stores	1,389	3%
Other Personal and Household Goods	1,500	3%
Selected Personal Services	2,950	5%
Occupied Non-Retail Floorspace	**29,308**	**54%**
Pubs, Taverns and Clubs	6,070	11%
Rental, Hiring and Real Estate Services	1,700	3%
Health Care and Social Assistance	2,500	5%
Financial and Insurance Services	1,500	3%
Administrative and Support Services	730	1%
Arts and Recreation Services	850	2%
Public Administration and Safety	4,368	8%
Industrial	690	1%

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Category	GFA (sqm)	Proportion
Other	10,900	20%
Occupied floorspace total	48,935	90%
Vacant floorspace	5,575	10%
Total floorspace	54,510	100%

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an oversupply of 392sqm of retail floor space would exist in 2036 across Balmain based on current forecasts.

In addition to the above, it is forecast that an additional 2,019sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Balmain over the next 17 years (2019-2036). This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development activity

From 2014-2019 Balmain has seen moderate development activity. Completed developments include:

- 357 Darling Street (D/2015/740). This project was approved by Council in 2016 and completed in 2019. It consists of alterations and additions to the existing building to provide a 3 storey mixed use development with an 115sqm commercial tenancy, that is currently vacant, and two residential dwellings.

Approved, but yet to be commenced, developments include:

- 359-361 Darling Street (D/2018/259). This project was approved on appeal by the Land and Environment Court in 2019. It is a mixed-use development with 2 ground floor retail spaces and 5 apartments. It will replace an existing 2 storey shop top mixed use building.

Recent development activity in the centre has been of a small scale, but small scale developments can benefit the centre through the introduction of newer commercial floorspace.

Issues and recommendations

- High vacancy

The centre has a high number of buildings that are currently vacant. Reasons for vacancies are many and varied, including lack of investment and strategic decisions of landowners, competition between centres, suitability of tenancies, decline in visitation, accessibility of the centre and individual properties, availability of parking, and increasing rents.

Vacancies can also be caused by a range of factors and increased demand may have an impact on these, however it should be noted that wider systemic issues such as quality and appropriateness of stock, and the challenges of online retail to specialty stores can also create issues regarding vacancies.

Market forces and overall initiatives by Council to make the Centre more attractive can reduce vacancies.

- Opportunity to utilise Council land and assets

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Council has recently prepared and endorsed *Land and Property Strategy and Policy* (2019) that provides strategic direction for the management, review and decision making around Council assets. Action 1.5.1 in the Strategy outlines how Council assets could facilitate or support employment uses and amenity. Section 6.1.9 provides examples of how this has occurred elsewhere.

- Parking

Businesses in Balmain are likely to have catchments that extend beyond the local context. The centre suffers from significant access issues due to its location on a peninsula that does not have a rail connection. Streets are narrow and there is limited space for parking and vehicle circulation. Changes to local bus routes have also reduced connectivity between ferry links and the bus network. These matters can be addressed by the future review of the *Balmain Precinct Parking Strategy* recommended in Action 1.3.6 of the Strategy addresses this review.

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9.2.5 Rozelle Centre

Role and function

Rozelle Centre is located at the junction of Victoria Road and Darling Street, and provides an estimated 62,000sqm of employment floorspace. It runs along approximately 850m of Darling Street and 750m of Victoria Road. The centre is well serviced by buses, with rapid access to the Sydney CBD via the Anzac Bridge. Four council owned car parks are located in the centre. Parking is limited within the centre, due to the general lack of off-street parking within the centre and surrounding residential areas.

The centre has two distinct roles: properties along Darling Street and the intersection with Victoria Road have a distinct centre role, similar to Balmain while employment space along Victoria Road performs a predominantly urban services function. The Woolworths Metro supermarket is the anchor supermarket within the centre. Darling Street consists of a number of restaurants, cafes, business services and small commercial offices. There are also a number of boutique fashion, art retail outlets and building supply/hardware stores along the main street.

The portion of the centre along Victoria Road, further from the Darling Street intersection has a distinct urban services role with little to no residential. It consists of number petrol stations, car servicing, industrial retail and building supplies. Properties tend to have on-site at grade carparks to accommodate customers and staff. There are also a limited number of office premises and business services.

A key site in the centre, the former Balmain Leagues Club is currently vacant and derelict. It is located on the corner of Victoria Road and Darling Street. There is uncertainty around the timing of redevelopment of the site, however site specific planning controls recently adopted include requirements for a new town square, a new Balmain leagues club site, a supermarket and limited specialty retail.

Rozelle centre has a primarily local catchment area, though the strong restaurant and café offering attracts visitors from outside the local area. Residential redevelopment of formerly industrial sites on the north-western edge of the centre has increased the catchment area population.

This nearby development has also included a cluster of new retail floorspace outside of the Rozelle Centre located 400m to the west of Darling Street. It has been successful in attractive restaurants, fresh food grocers and cafes as tenants due to its layout, less restricted parking, appealing public domain and space for outdoor dining and footpath trading.

Victoria Road is a State classified road and has had a negative impact on the centre, introducing noise and air pollution. The road width is particularly wide at the corner of Darling Street. Building typologies along the corridor as discussed earlier are more in line with an enterprise corridor character, rather than retail. Compared with Victoria Road, the public domain of Darling Street is appealing and at a more human-scale. While outdoor dining and footpath trading exists, there is limited presence of widened footpaths, with road space prioritised for parking.

Stage 3B of WestConnex proposes a bypass for those using Victoria Road via a tunnel under Rozelle. This has the potential to significantly reduce traffic congestion along the corridor. A Metro station at Bays Precinct is another possibility as part of the West Metro project. This station may be walking distance from Rozelle Centre (approximately 15 minutes' walk).

Potential redevelopment of the Bays Precinct for residential and/or employment uses has the potential to increase the catchment of customers within the centre, however if competing commercial space is proposed this also has the potential to negatively impact on the performance of the centre.

Most of Rozelle centre is located within a heritage conservation area. The retention of 19th and early 20th Century architecture and the areas historical pubs are a major contributor to the centre's urban fabric. The building stock is in varied condition. A significant proportion of the properties along Darling Street lack rear lane

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access but the centre does benefit from a number of cross streets. Vehicular access for deliveries is challenging due to the narrowness of streets in the area and lack of parking.

Rozelle is a hub for arts and live music. Cultural infrastructure within the centre is provided within a number of private venues including the Merton, Bridge, Garry Owen, Red Lion, Ruby and Sackville hotels. The Council owned Hannaford Community Centre is an important community space located on Darling Street. The Centre has two car parks on Merton Street and one on Victoria Road.

Centre map



Planning controls

Under Leichhardt LEP 2013, the centre is zoned B2 - Local Centre. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

Site specific controls apply to the Balmain Leagues Club site located near the corner of Victoria Road and Darling Street. The controls allow for considerably higher height and FSR compared with the rest of Rozelle Centre. The recently approved site-specific DCP allows for a supermarket, new club facility and limited restaurant/café retail space.

Floorspace

Category	Floorspace	Proportion
Occupied Retail Floorspace	**18,520**	**30%**
Supermarkets and Grocery Stores	500	1%
Specialty Food Stores	1,890	3%
Café/Restaurants	5,110	8%
Clothing Stores	1,920	3%

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Category	Floorspace	Proportion
Hardware and Bulky Goods Stores	3,500	6%
Other Personal and Household Goods	2,500	4%
Selected Personal Services	3,100	5%
Occupied Non-Retail Floorspace	**34,321**	**55%**
Accommodation	6,000	10%
Pubs, Taverns and Clubs	6,250	10%
Rental, Hiring and Real Estate Services	922	1%
Health Care and Social Assistance	5,681	9%
Financial and Insurance Services	380	1%
Administrative and Support Services	495	1%
Arts and Recreation Services	3,825	6%
Education and Training	4,795	8%
Industrial	1,873	3%
Other	4,100	7%
Occupied floorspace total	**52,841**	**85%**
Vacant floorspace	**9,311**	**15%**
Total floorspace	**62,152**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an additional 558sqm of GFA is required by 2036 across Rozelle. Demand for retail floorspace already outstrips supply.

The proposed Balmain Leagues Club redevelopment at Rozelle will provide approximately 5,000sqm of retail floorspace as part of a supermarket and other retail options.

In addition to the above, it is forecast (Table 24) that an additional 46,350sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Rozelle between 2016 and 2036. This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development activity

A number of recent developments have been approved including:

- 731-735 Darling Street (D/2017/491). 4 storey mixed use development, approved by Council in 2017, proposed to consist of 370sqm of ground floor retail space and 16 apartments above. It will replace a large 1 storey commercial building
- 112 Victoria Road (D/2015/738). 3 storey mixed use development, approved by Council in 2016, proposed to contain a ground floor commercial space and 5 apartments above. It will replace an existing 1-2 storey commercial building
- 114 Victoria Road (D/2017/98). 2 storey conversion, approved by Council in 2018, to change use to a mixed use development containing a boarding house and ground floor commercial tenancies. The development will not significantly decrease the previous commercial space of the site
- 70 Victoria Road (-D/2013/570). 3 storey mixed use development, approved by the Land and Environment Court in 2015, and currently (September 2019) under construction, it will consist of ground

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level commercial space and 2 apartments above. The development will not significantly decrease the previous commercial space of the site.

These developments will provide the centre with revitalised commercial floorspace.

Notably the Balmain Leagues Club redevelopment, currently proposed could provide:

- 5,093sqm retail – including a 2,886sqm supermarket
- 3,010sqm club
- 173 residential units (18,528sqm)
- 1,251sqm non-retail commercial floorspace

If built, this would result in a substantial increase in employment floorspace in the Rozelle centre, as well as providing a new town square.

Issues and recommendations

A number of issues and recommendations in Rozelle Centre relate to the appropriateness of zoning within the centre and surrounds. The map below provides more detailed context behind this discussion.



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- Formation of a nearby centre

The recent redevelopment around Nagurra Place and Terry Street, on the north-western edge of the centre, contains general retail, services and numerous restaurants and cafes. This area has been successful and is performing well, though it may compete with Darling Street. Its success in attracting tenants is associated with a quality public domain fronting a quiet street, well designed retail space with well-designed loading facilities. Aspects of this development should be explored when reviewing existing centres.

Considering this area now includes employment floorspace, this will need to be reflected in the LEP. Therefore, future investigation to establish the appropriate zoning for this precinct is required. The precinct is illustrated on the contextual map above. Action 1.7.5 of the Strategy recommends this centre be acknowledged within the LEP and within the centre hierarchy of the Inner West.

- Appropriateness of B2 - Local Centre zone along Victoria Road

The majority of the centre along Victoria Road does not contribute to the function of Rozelle Centre and is more representative of an enterprise corridor function.

Retaining this strip as B2 - Local Centre could result in the further loss of industrial and urban services uses over time, through the redevelopment of sites to mixed use. Potential new retail spaces along this strip as part of redevelopment would have a negative impact on the performance of Rozelle Centre.

The corridor is also not an attractive location for retail or residential due to the poor amenity environment and take-up of this corridor for mixed-use would only fragment retail further.

Action 3.1.2 of the Strategy recommends that this strip (identified in the map above) be rezoned to B6 – Enterprise Corridor.

- Calming Victoria Road

The Darling Street strip is bisected by Victoria Road, a major arterial road. Delivery of Stage 3B of the WestConnex Motorway project will result in a need for a review of the role of Victoria Road due to the major shifts in traffic flows. There is an opportunity for the Darling Street and Victoria Road intersection and surrounds to be calmed to prioritise pedestrians. Calming traffic and improving amenity around the intersection will strengthen Rozelle as a centre by improving pedestrian access between the eastern and western side of the suburb.

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9.2.6 Annandale Centre

Role and function

The Annandale centre is located at the intersection of Booth and Johnston Streets and provides an estimated 14,055 sqm of employment floorspace. It is serviced by bus routes, is close to parklands and adjoins a major northerly active transport link along Johnston's Creek. The southern section of this link will be completed as part of the Parramatta Road Urban Amenity Improvement Program. The Annandale Community Centre is located nearby, however Annandale does not have a council owned carpark or town square. A widened footpath on Johnston Street provides some public open space within the centre.

The Annandale centre consists of general retail, boutique retail, services, pubs, restaurants and cafes. The area has an IGA and SupaBarn supermarket, as well as a garden centre and petrol station. The North Annandale Hotel has been identified as a live music venue and forms part of the Inner West LGA's cultural infrastructure.

It has a primarily local catchment area while also servicing the nearby Camperdown and Moore Street industrial areas. The construction of a number of significant developments over the past decade in neighbouring Glebe and Camperdown has resulted in a significant population increase in the catchment area.

The public domain of the centre is of a high standard and is an attractor to the area. The centre is in a Heritage Conservation Area. The building stock is generally older, giving the centre a mostly cohesive appearance. The building stock is generally in a good condition. Notably, during the time of the floor space survey, no vacant premises were identified.

Centre map



Planning controls

Under *Leichhardt Local Environmental Plan 2013*, the centre is zoned B2 - Local Centre. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry'

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and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	7,250	52%
Supermarkets and Grocery Stores	2,200	16%
Specialty Food Stores	700	5%
Fast Food Stores	100	1%
Café/Restaurants	2,300	16%
Clothing Stores	550	4%
Hardware and Bulky Goods Stores	100	1%
Other Personal and Household Goods	500	4%
Selected Personal Services	800	6%
Occupied Non-Retail Floorspace	6,805	48%
Pubs, Taverns and Clubs	1,850	13%
Rental, Hiring and Real Estate Services	1,040	7%
Health Care and Social Assistance	975	7%
Financial and Insurance Services	440	3%
Arts and Recreation Services	200	1%
Industrial	1,300	9%
Other	1,000	7%
Occupied floorspace total	14,055	100%
Vacant floorspace	0	0%
Total floorspace	14,055	100%

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Development activity

No recent development activity identified.

Issues and recommendations

Ten properties along Booth Street zoned R1 - General Residential were identified as commercial buildings. This includes a former Commonwealth Bank commercial office building.

Action 1.2.3 in the Strategy recommends that residentially zoned properties adjacent to or within the centre that comprise employment uses should be considered for rezoning to B2 - Local Centre.

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Attachment 1

9.2.7 Croydon Centre

Role and function

Croydon is a small centre located adjacent to Croydon Station, fronting Edwin Street and part of Elizabeth Street. It has a distinctive role in providing office space and other specialist local services, including medical uses. This contrasts with role of the centre on the southern side of the train station, located within Burwood LGA. The southern centre, located on The Strand, contains a number of shops and cafes and for this reason is more vibrant. There is limited parking within the centre.

Croydon is located adjacent to a large private school campus, which owns land within the western part of the centre. To the east of the centre is the Council owned Ashfield Pool site, which is currently undergoing a major redevelopment.

While primarily consisting of local services and office premises, there is a small presence of restaurants and cafes. The lack of retail makes the centre appear less active and vibrant compared with the centre on the southern side of the station; however it has a distinctive role as a location for office and local services. There is also a car servicing centre and petrol station located on Elizabeth Street.

The heritage character benefits the visual appeal of the centre, with properties fronting Edwin Street located within a heritage conservation area. They are primarily two storey shop and residence type properties, apart from one recent mixed use development. A number of properties in the centre are in a poor condition.

The public domain of Edwin Street is appealing with street tree planting and upgraded paving. There is limited room for outdoor dining due to the narrowness of the street but it is well suited to the types of businesses currently operating. Elizabeth Street is a less appealing environment. Most properties benefit from rear lane access.

PLC Croydon, located to the west of the centre own property along College Street. Its continued expansion may reduce the size of the centre, as it is assumed the properties would be used for the expansion of the school campus.

Note: A floor space audit was not undertaken for this Centre, however observations have been made on the nature of businesses operating from the Centre.

Centre map



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Planning Controls

The centre is zoned B2 - Local Centre under Ashfield LEP 2011. The floorspace ratio is 1.5:1 across the centre. The height control is 10m. 'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre.

Development activity

No recent development activity identified.

Issues and recommendations

While there are vacancies within the centre, this is not considered to detract from the centre, given its primarily non-retail function. There is a perception however, that the centre does not have a defined role, due to office and business services being the predominant employment activity within the centre.

Action 1.6.1 in the Strategy acknowledges the office/specialist service role and function of this centre.

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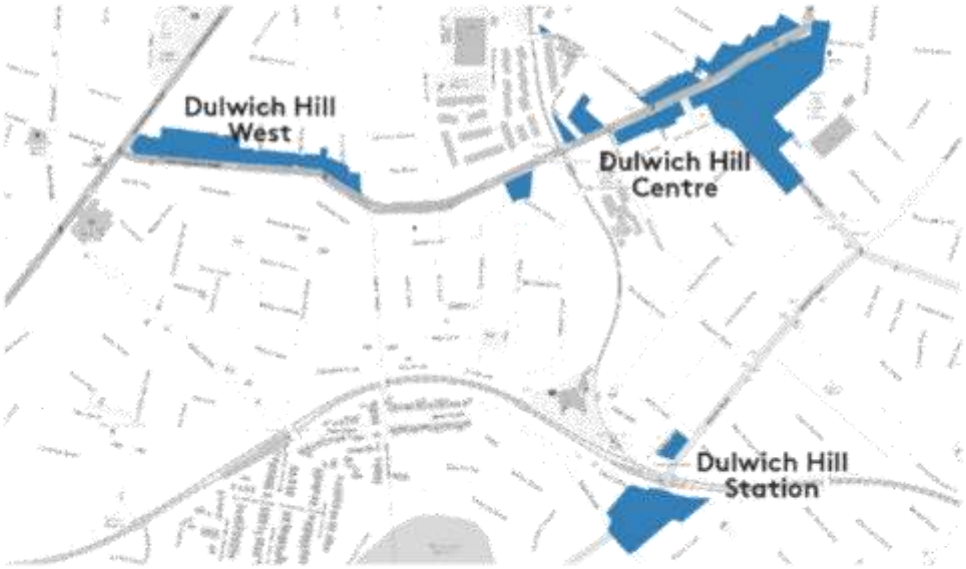
9.2.8 Dulwich Hill Centres

Dulwich Hill consists of the three centres as shown in the map below: Dulwich Hill centre, Dulwich Hill West and Dulwich Hill Station. The centres of Dulwich Hill West and Dulwich Hill centre are focussed along the New Canterbury Road corridor and are only separated by 300m Canterbury Road Enterprise Corridor adjoins Dulwich Hill West. While zoned B6 – Enterprise Corridor, it permits shop-top housing. This profile is discussed in Section 9.1.12. Dulwich Hill Station is separate from the New Canterbury Road corridor.



Dulwich Hill is undergoing considerable investment in transport infrastructure:

- Opening of the Inner West Light Rail line in 2014 connecting Dulwich Hill Station with key centres in the Inner West, Pyrmont and the Sydney CBD
- Construction of the Greenway, an active transport corridor, linking the three centres of Dulwich Hill and connecting them to the Cooks River and Iron Cove via the suburbs of Leichhardt, Lewisham, Haberfield and Summer Hill
- Construction of the Sydenham to Bankstown Metro conversion, which will result in Dulwich Hill Station being only 12 minutes from Central station and between 21 and 38 minutes from the strategic centres of North Sydney, Chatswood and Macquarie Park.

A large number of new residential flat buildings and mixed-use developments have been built within Dulwich Hill, neighbouring Hurlstone Park and Canterbury. The *Inner West Housing Strategy* flagged the need for additional dwellings to be accommodated in the vicinity of transport nodes in the Dulwich Hill area.

Of the three centres, Dulwich Hill centre has the most developed local character, being the oldest and most established. The centre is sited on Marrickville Road and preceded the centre at Dulwich Hill train station. Dulwich Hill West has historically had deteriorated building stock with high vacancy rates but has experienced major renewal with new commercial floorspace attracting tenants.

Section 8.1.14 identified the need for an overall planning/urban design review of the New Canterbury/Canterbury Road corridor and the centres discussed in this section.

A combined floorspace audit has been prepared for the three centres and is shown below:

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Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**14,135**	**56%**
Supermarkets and Grocery Stores	1,150	5%
Specialty Food Stores	2,245	9%
Fast Food Stores	600	2%
Café/Restaurants	2,755	11%
Clothing Stores	705	3%
Hardware and Bulky Goods Stores	1,635	6%
Other Personal and Household Goods	2,800	11%
Selected Personal Services	2,245	9%
Occupied Non-Retail Floorspace	**10,100**	**40%**
Pubs, Taverns and Clubs	600	2%
Rental, Hiring and Real Estate Services	1,100	4%
Health Care and Social Assistance	2,000	8%
Financial and Insurance Services	900	4%
Administrative and Support Services	700	3%
Arts and Recreation Services	800	3%
Industrial	500	2%
Other	3,500	14%
Occupied floorspace total	**24,235**	**96%**
Vacant	**990**	**4%**
Grand Total	**25,225**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Chapter 7.4 identifies Dulwich Hill is a key location where the approximately 8,000sqm of additional retail floor space should be accommodated for by 2036. It also flags the need for a full line supermarket in the vicinity of Dulwich Hill.

Dulwich Hill Centre

Role and function

Dulwich Hill Centre is the largest of three centres within Dulwich Hill, providing an estimated 15,000sqm of employment floorspace. It is located at the junction of New Canterbury and Marrickville Road. The precinct is well serviced by buses and the Dulwich Grove light rail stop is located on the western edge of the centre. Dulwich Hill Station is located a 10 to 15 minute walk from most locations within the centre and provides rapid CBD access. The smaller centres of Dulwich Hill Station and Dulwich Hill west are within easy walking distance. The centre is also serviced by three at-grade council carparks.

The centre is made up of general retail, services, restaurants and cafes. The area has an IGA supermarket and a large specialist tool store. The centre includes three gyms, multiple bakeries, two butchers, two chemists, a florist, two fruit and vegetable shops, two bottle shops, two dry cleaners, many hairdressers, and beauticians. The number of butchers has declined over the years. There tend to be more vacancies on the shops on New Canterbury Rd compared with Marrickville Road.

Dulwich Hill centre serves a primarily local catchment, though the centre's artisan food and restaurant sector draws visitors from further away. There have been a number of recent high density developments to the north and west of the centre, which has significantly increased the local catchment area population.

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The built form comprises two and three story buildings featuring ground floor retail and commercial uses and residential or storage premises on the first and second floor. Due to the strong historic local character of the centre, a large part of it sits within a heritage conservation area. A number of these properties are in a poor condition. Newer development has resulted in the introduction of new retail spaces.

Commercial spaces orientated on busy New Canterbury Road are affected by poor ambience, clearways, access and parking difficulties. The road has a general negative impact on the centre, impeding the ability to widen footpaths for activities such as outdoor dining and footpath trading. Marrickville Road has a better amenity due to lower traffic volumes. Dulwich Hill benefits from significant Council landholdings, currently used as carparks. These assets may provide future opportunities to enhance the centre's public domain.

Dulwich Hill Centre has experienced significant growth in the number of small bars and restaurants operating in the centre in recent years. Many of these premises include late trading hours. Dulwich Hill also has two live music venues including the Gladstone Hotel and Butchers Brew Bar.

Centre map



Planning Controls

Under Marrickville LEP 2011, the centre is predominantly B2 -Local Centre with some areas zoned B1 - Neighbourhood Centre and B4 - Mixed Use. FSR ranges from 1.2:1 to 2.2:1 and height controls range from 11m to 17m. 'Light Industry' and 'artisan food and drink industry' are only permitted within the B4 - Mixed Use portion of the centre. Local distribution premises are prohibited within the centre.

Development activity

Dulwich Hill has experienced considerable development activity from 2014 to 2019. Five major redevelopments have occurred during this period. Key points associated with this recent activity include:

- 503-507 Marrickville Road (DA201300264) (numbered 2 on the contextual map below)
  Approved by Council on December 2013; a four-storey mixed use development containing a 277sqm ground floor commercial tenancy and a boarding house with 32 self-contained boarding rooms and

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communal living area. The site is approximately 19m wide with a frontage to Marrickville Road. Construction was completed in March 2017. The site was previously a single storey shopfront.

- 524 Marrickville Road (DA201400190) (numbered 4 on the contextual map below)
  Approved by Council in December 2014; demolish part of the existing premises and carry out alterations and additions to the premises to create a four-storey mixed use development containing a ground floor commercial tenancy and four dwellings. The site is approximately 4.56m wide with a frontage to Marrickville Road. Construction was completed in March 2017. The site was previously a two storey shopfront, which has been partially retained.
- 550 Marrickville Road (DA201300339) (numbered 3 on the contextual map below)
  Approved by Council in June 2014; a part five-part six storey mixed use development containing three ground floor commercial tenancies totalling approximately 229sqm of commercial floorspace and 18 residential apartments over two levels of basement parking for 15 cars. The site has a 9.21m frontage to Marrickville Road. Construction was completed in June 2017. The site was previously a part two, part three level commercial building.
- 370 New Canterbury Road (DA201300222) (numbered 5 on the contextual map below)
  Approved by Council in October 2013; a part five-part six storey mixed use development containing six ground floor commercial tenancies, totalling 668sqm of commercial floorspace, and 68 residential apartments. The site has a wide 115sqm frontage which fronts New Canterbury Road, Herbert Street and Seaview Street on a corner site. Construction was completed in February 2016. The site was previously a series of two storey shopfronts wrapping around the corner
- 429 – 449 New Canterbury Road (DA201400477) (numbered 1 on the contextual map below)
  Approved by Council in October 2015; alterations and additions to an existing building to develop a mixed use six storey development with seven commercial tenancies totalling 882sqm of commercial floorspace, 70 residential apartments and 2 basement parking levels. The site has a wide frontage of approximately 13m fronting Dulwich Street, New Canterbury Road and Lewisham Street on a corner site. The site was previously a row of two storey commercial terraces.

The above developments have provided the centre with new commercial floorspace as well as upgrades to the public domain which have benefitted the amenity of the centre.

The centre has seen a recent significant increase in small bars and restaurants, many of which operate late trading hours. Key late trading locations include:

- 514 Marrickville Road (numbered 1 on the contextual map below)
- 499 Marrickville Road (numbered 2 on the contextual map below)
- 380 New Canterbury Road (numbered 3 on the contextual map below).

The properties listed above all currently operate until 10pm or later. The operators of 514 Marrickville Road have recently changed their focus from being an all-day restaurant to a late night bar. 499 Marrickville Road has been operating as a small bar since 2018 and is approved for live music and other performances. 380 New Canterbury Road was originally opened as an artisan food manufacturer, retailer and restaurant; this has since been expanded to also include a micro-brewery.

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Contextual Map



Recently completed developments

Recently approved late night trading premises

Issues and recommendations

A number of issues described below require further investigation. Some require planning control review, urban design studies and feasibility analysis. There is significant opportunity for the provision of large floor plate employment uses within the centre, through the utilisation of Council car parks and other key sites.

- Zoning rationalisation

Dulwich Hill currently consists of a mix of B2 - Local Centre, B1 - Neighbourhood Centre and B4 - Mixed Use zonings. There may be a need to consolidate and rationalise the zoning of this centre, as well as expanding permissible uses. This can be addressed as part of the future study foreshadowed in Action 1.7.1 of the Strategy.

It is also noted one property adjacent the Dulwich Grove Light Rail Station currently houses employment uses. Action 1.2.3 in the Strategy recommends that residentially zoned properties adjacent to or within the centre that comprise employment uses should be considered for rezoning to align with the zoning of the centre.

- Council assets

The presence of three large car parks owned by Council provides an opportunity to further enhance this centre. Council has recently prepared an Inner West Land and Property Strategy that provides strategic direction for the management, review and decision making around Council assets. These assets can generate opportunity for increased utilisation for employment purposes. Strategy 1.5 in the ERLS addresses how Council assets could facilitate or support employment uses and amenity.

- Amenity impacts – New Canterbury Road

New Canterbury Road is acting as an impediment to enhanced amenity for pedestrians and businesses fronting the road, due to its high speed limit and status as a classified road. It impedes opportunity for outdoor dining, footpath trading and creates noise and pollution impacts.

Action 1.3.5 of the Strategy advocates for Council to work with Transport for NSW under the 'Movement and Place Framework' to deliver the land use planning vision for employment lands located along Classified Roads.

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Dulwich Hill West Centre

Role and function

Dulwich Hill West centre is split between the Inner West and Canterbury Bankstown LGAs. The Inner West portion runs along the northern side of New Canterbury Road between the Canterbury Road intersection and Garnet Street. The centre is serviced by buses and Dulwich Grove Light Rail stop and Hurlstone Park railway station area both approximately 800m away. There is limited parking along this corridor.

The Dulwich Hill West centre consists of general retail, services, restaurants and cafes. It holds an ancillary role to Dulwich Hill Centre, with no major supermarket anchoring the centre.

The centre serves a local catchment area. There has been significant redevelopment within this centre, with high density mixed use development now dominating the streetscape on both sides of the road. This has increased the local catchment area population.

The centre is a mix of newer ground floor commercial floorspace and older stock. The older stock is mostly in a poor condition. No heritage provisions apply to this centre.

All commercial spaces are orientated on busy New Canterbury Road which is affected by poor ambience, clearways, access and parking difficulties. Properties do not have rear-lane access which results in the need for driveway crossings. Clearways, at certain times of the day, impact on the ability for customers and suppliers to access businesses.

A role for this precinct is yet to be established due to the extent of change in the past few years. The recent development has resulted in the closure of many businesses and the loss of urban services floorspace. Many commercial spaces are still to be occupied, though there is evidence of recent take-up, and further redevelopment of key sites will add to new commercial floorspace.

Centre map



Planning controls

Under Marrickville LEP 2011, the centre is predominantly zoned B2 - Local Centre with a small portion zoned B1 - Neighbourhood Centre. FSR ranges from 1.2:1 to 1.75:1 and height controls range from 11m to 14m. 'Light Industry', 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre.

Development activity

Dulwich Hill West has experienced considerable development activity from 2014-2019. Within this period five major redevelopments have occurred. Key points associated with this recent activity include:

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- 843 New Canterbury Road (numbered 1 on the contextual map below) - Approved by Council on 21 July 2017; a four to five storey mixed use development containing a 84 sqm ground floor commercial tenancy and 20 apartment dwellings. The site is approximately 13m wide with a frontage to New Canterbury Road Road. Construction was completed in late 2019. The site was previously a single storey dwelling house.
- 803-807 New Canterbury Road (numbered 2 on the contextual map below) - Approved by Panel on 28 October 2015; a four storey residential flat building and a mixed use building containing 3 ground floor retail tenancies, totalling 577sqm, and a total of 67 apartment dwellings. The site is approximately 51m wide with a frontage to New Canterbury Road A modification (DA201500081.01) was approved on 19 May 2016 to allow an additional fifth storey to the development, with additional 10 residential units. The site previously contained a single storey dwelling house, 1-2 storey commercial buildings and an at-grade car park with sheds at rear.
- 743 New Canterbury Road (numbered 3 on the contextual map below) - Approved by Council on 24 December 2013; a 4 storey mixed use development containing a 38sqm ground floor retail tenancy and 10 apartment dwellings. The site is approximately 14m wide with a frontage to New Canterbury Road. Construction was completed in 2015. The site was previously a single storey retail building and a 2 storey mixed use building.
- 727 New Canterbury Road (numbered 4 on the contextual map below) - Approved by Council on 9 May 2016; a four storey mixed use development comprising a 40sqm ground floor retail tenancy and 5 apartment dwellings. The site is approximately 7.55m wide to New Canterbury Road and approximately 5.8m to Kroombit Lane. Construction was completed in 2017. The site was previously a 2 storey commercial building.
- 827 New Canterbury Road (shown on the contextual map below). - Approved by Council on 11 May 2017; a four to five storey mixed use building containing 2 commercial tenancies and 1 retail tenancy, totalling 223 sqm and 22 apartment dwellings. The site is approximately 18.3m wide to New Canterbury Road. The site previously contained two attached double storey commercial buildings.

There are also a number of DAs involving large mixed use developments currently being assessed by Council in the Dulwich Hill West area. Key points associated with this recent activity include:

- 819 New Canterbury Road (numbered 3 on the contextual map below) - Approved by Council on 21 October 2018; a four storey mixed use building containing a 83sqm commercial tenancy and 20 apartment dwellings. The site is approximately 15m wide to New Canterbury Road. The site previously contained two single storey commercial buildings.
- 829A New Canterbury Road (numbered 2 on the contextual map below) - Approved by Council on 12 December 2019; a 4 storey mixed use building containing 3 retail tenancies, totalling 244sqm, and 42 apartment dwellings. The site is approximately 32.2m wide to New Canterbury Road. The site previously contained one to two storey commercial buildings and sheds at the rear of the site.
- 875-877 New Canterbury Road (numbered 1 on the contextual map below) - A Development Application for a 4 storey mixed use building containing a 105sqm commercial tenancy and 14 boarding house rooms. The site has a circumferential frontage of 48m to New Canterbury Road and Old Canterbury Road. The site currently contains three attached commercial buildings. This application was withdrawn on 13 December 2019.

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Contextual Map



Recently completed developments
Recently approved developments
Currently being assessed developments

Refer to Section 8.1.14 for detailed consideration of the New Canterbury/Canterbury Road corridor, Dulwich Hill centres and the need for a master plan.

Dulwich Hill Station Centre

Role and function

Dulwich Hill Station centre is located along a small stretch of Wardell Road on either side of the railway station, with the majority of the centre located on the southern side. Prior to 2014 the centre was served solely by Dulwich Hill train station but is now a light rail to rail interchange. In 2024 the railway line serving Dulwich Hill will be converted to a metro line, improving frequencies and travel times to the Sydney CBD and beyond. The centre has a carpark located along Ewart Lane, owned by Transport for NSW. The centre serves a primarily local catchment area.

The Dulwich Hill Station centre consists of general retail, services, restaurants and cafes. The small business sector of the centre is growing due to recent developments and is expected to experience continued growth in the future. The area has a small retail sector including also has laundromat, newsagency, two hairdressers, childcare centre & two health service businesses. The small business sector is growing due to recent developments and will continue to grow, with many of the local business operators moving into the retail spaces.

The northern portion of the centre is comprised of intact 20th Century buildings that are located within a heritage conservation area. The southern section is a mix of old, aging one story commercial buildings and five and six story recent developments that contain retail businesses on the ground floor and residential apartments above. The southern side of the rail line does not have heritage restrictions and has a different character and scale from the north.

Unlike other centres in Dulwich Hill, this centre does not experience the amenity and accessibility impacts associated with being located on a main road, though the centre's existing public domain is fragmented and generally in poor condition. The southern portion of the centre is located on steep topography. There is currently

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limited capacity to accommodate outdoor dining or provide a focal point or gathering space for the centre. Connectivity between the two sections of the centre is poor.

Council is currently planning for upgrades to the public domain through the implementation of the *Dulwich Hill Station Detail Master Plan*. Upgrades to the Station are also planned, including a second western entry between Bedford Street and Ewart Lane will greatly improve pedestrian connectivity across the centre.

Centre Map



Planning controls

Under Marrickville Local Environmental Plan 2011, the centre is zoned B1 - Neighbourhood Centre. FSR ranges from 1.2:1 to 3:1 and height controls range from 14m to 23m. 'Light Industry', 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre.

Development Activity

Dulwich Hill Station has experienced considerable development activity, with four major redevelopments from 2014-2019. Key points associated with this recent activity include:

- 263 Wardell Road (numbered 1 on the contextual map below) - Approved by Council on 13 February 2013; a four to five storey mixed use building containing a 126sqm ground floor retail tenancy and 11 apartment dwellings. The site is approximately 15m wide with a frontage to Wardell Road. Construction was completed in 2014. The site previously contained a two storey mixed use development comprising a ground floor shop and first floor dwelling, and a two storey commercial building. A modification to include an additional level, containing 3 additional apartment dwellings, was approved by Council on 16 December 2013.
- 264 Wardell Road (numbered 4 on the contextual map below) - Approved by Council on 19 August 2015; a 6 storey mixed use development with a 188sqm ground floor retail tenancy and 22 apartment dwellings. The site is approximately 15.5m wide to Wardell Road and has a secondary frontage of approximately 15.5m to Murray Lane. Construction completed in 2018. The site previously contained 3 double storey attached mixed use buildings comprising ground floor commercial tenancies and residential above.
- 252-258 Wardell Road (numbered 3 on the contextual map below) - Approved by Council on 13 June 2014; a 6 storey mixed use development with two retail tenancies, totalling 141sqm, and 17 apartment dwellings. The site is approximately 24.4m wide to Wardell Road and has a secondary frontage of 24.4m

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to Murray Lane. Construction completed in 2015. The site previously contained a two storey commercial building. A modification to include an additional level, containing 3 additional apartment dwellings, was approved by Council on 15 April 2015.

- 6-12 Dudley Street (numbered 2 on the contextual map below) - Approved by Council on 15 June 2017; a five to 7 storey mixed use building with a 91sqm ground floor retail tenancy and 35 boarding rooms. The site is approximately 43.5m wide to Dudley Street. Construction completed in 2020. The site previously contained a single storey commercial building and a single storey dwelling house.

Contextual Map



Recently completed developments

Issues and recommendations

The issues below require investigation to define the nature and details of future actions. Some require planning control review, urban design studies and feasibility analysis.

Other issues to be resolved through the harmonisation of planning instruments (eg permissibility of 'artisan food and drink industry' in centres) are explored in detail in section 9 Planning Review.

Rezone Centre from B1 - Neighbourhood Centre to B2 -Local Centre

The delivery of Sydney Metro Sydenham to Bankstown will increase the capacity of the exiting public transport network creating opportunity to grow housing and jobs near transport services. The growth of the centre would also be consistent with the *Inner West Local Housing Strategy*, which is proposing an additional 380 to 460 dwellings.

The centre is currently zoned B1 - Neighbourhood Centre and considering the growth that has occurred in the area, it may be appropriate to align zoning with other centres, with B2 – Local Centre being the most appropriate zone.

Action 1.7.1 of the Strategy recommends a planning and urban design study consider the role and interrelationships of the three Dulwich Hill centres.

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9.2.9 Haberfield Centre

Role and function

Haberfield centre is located at the intersection of Ramsay and Dalhousie Streets and provides an estimated 8,000sqm of employment floorspace. The centre is serviced by a number of bus routes. Council owns three properties within or adjacent to the centre, used as at-grade open car parks as well as providing recreational space.

The Haberfield centre contains general retail, boutique retail, services, restaurants and cafes. The area has an Italian speciality IGA supermarket, restaurants, cafes, a bottle shop, pharmacy, post office and butcher shop. The centre specialises in independent food retail including a large deli, cheese shop, three cake stores, two pasta retailers and two bread shops. The precinct also features two high end designer jewellery stores, four hairdressers, tailor, nail shop and a large gym.

It has a primarily local catchment area, though a number of Italian speciality shops and restaurants attract visitors from outside the local area.

Haberfield has experienced an increasing number of commercial vacancies. There has been limited growth in the population in the suburb of Haberfield with minimal growth identified in the *Inner West Local Housing Strategy*. This creates longer term challenges in terms of attracting visitors from further afield.

The low scale and largely original early 20th Century architecture provides the centre with appeal. The properties are also well serviced by rear lane access. The centre does not experience the level of through traffic experienced by other centres within the Inner West LGA which means fewer customers from passing trade but also provides the centre with better amenity.

The suburb, including the local centre is a heritage conservation area. The public domain is of a high standard. The building stock consists mostly of aging one and two story commercial buildings. Many of these buildings are currently vacant.

Centre map



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Planning controls

Under Ashfield LEP 2013, Haberfield is zoned B2 - Local Centre. The centre has a height limit of 10m and a floorspace ratio of 1:1. 'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within the zone.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**4,685**	**55%**
Supermarkets and Grocery Stores	1,360	16%
Specialty Food Stores	620	7%
Café/Restaurants	870	10%
Clothing Stores	75	1%
Hardware and Bulky Goods Stores	835	10%
Other Personal and Household Goods	925	11%
Occupied Non-Retail Floorspace	**3,340**	**39%**
Rental, Hiring and Real Estate Services	200	2%
Health Care and Social Assistance	700	8%
Financial and Insurance Services	300	4%
Administrative and Support Services	100	1%
Arts and Recreation Services	100	1%
Industrial	300	4%
Other	1,640	19%
Occupied floorspace total	**8,025**	**91%**
Vacant floorspace	**500**	**6%**
Total floorspace	**8,525**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Development activity

No recent development activity has been identified.

Issues and recommendations

Outdoor dining

Haberfield would be an attractive location to expand footpaths to accommodate for outdoor dining and footpath trading. Given the relatively high level of vacancies, the flexibility of use of these spaces should be explored so that the widened footpaths are put to use even when the adjoining properties are vacant.

Action 1.4.1 of the Strategy addresses the need for new spaces for outdoor dining subject to stakeholder feedback.

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9.2.10 Norton Street North Centre (Leichhardt)

Role and function

Norton Street North precinct consists of several isolated B2 - Local Centre zoned areas. Residential dwellings, Pioneers Memorial Park and the City West Link create barriers along the corridor which do not allow for a continuous retail strip. Norton Street is well served by buses and Leichhardt North Light Rail stop is located at the northern end of the strip. There is a lack of on-street parking in this section of Norton Street, particularly near Marion Street. The City West Link is an area of low amenity and a poor pedestrian environment due to high traffic volumes, noise and air pollution.

This precinct does operate cohesively and has two distinct functions. The southern portion operates as a main street, with retail and food and drink premises while the northern portion having an office/business services function. Medical uses form a strong anchor for the entire centre, observed throughout the precinct and identified in the floorspace audit (26 per cent of occupied retail floorspace).

The southern portion of this precinct between Macaulay Street and Marion Street specialises in cafés and restaurants as well as specialty food retail. It retains its distinct specialisation in Italian cuisine and has a large range of cake and desert businesses. There are also a small number of retail premises, commercial offices and services in this area. A large standalone medical centre operates on Short Street, adjoining the Centre. There is also a dental surgery on Wetherill Street (zoned R1 - General Residential). These medical uses complement a number of medical uses north of Macauley Street.

It has a distinct character, quality public domain, low-scale built form and space for outdoor dining and footpath trading. This portion is located within a heritage conservation area and contains intact rows of original early 20th century two-storey shop top housing. The Town Hall and Public School creates physical separation (approx. 250 metres) between this lower-scale, pedestrian friendly part of Norton Street and the denser southern end of Norton Street which is anchored by Norton Plaza. Unlike most properties on the southern end of Norton Street, most properties between Marion and Macauley Streets benefit from rear/side vehicular access.

The northern portions of B2 - Local Centre zoned land between Macaulay Street and the City West Link has a limited retail/food role, is fragmented and are largely office and business services based. A number of properties are existing dwellings and are currently used solely as residential. A cluster of medical uses exist north of Allen Street including a dentist, general practitioner, pathologist, cosmetic surgeon, speech therapist and natural therapist. There are purpose built, standalone office and business services developments in this portion of Norton Street, including the Immanuel Centre which also contains a restaurant and liquor store. A standalone Dan Murphys store is located adjacent to the light rail stop on Darley Road. Most properties in this section do not benefit from rear lane/side street access.

North of the City West Link, there are a number of business services and offices. They are in close proximity to two small neighbourhood centres, located to the north of Lilyfield Road and Perry Street.

A number of employment uses exist in non-residential buildings outside of the land zoned B2 - Local Centre. They include 249 Norton Street, 256-258 Norton Street and 182-184 Lilyfield Road. A number of child-care centres, offices and medical related uses operate along Wetherill Street in the residential zone some in purpose built properties and repurposed houses.

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Centre map



Planning controls

Under Leichhardt LEP 2013, the centre is zoned B2 - Local Centre. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

A number of sites between Wetherill and Marion Streets are zoned SP2 - Infrastructure, primarily Council owned as well as the Uniting Church, State Government owned Fire Station, Leichhardt School of Arts and properties owned by Uniting Care.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	13,090	34%
Supermarkets and Grocery Stores	713	2%
Speciality Food Stores	1,371	4%
Café/Restaurants	7,104	18%

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Category	GFA (sqm)	Proportion
Clothing Stores	477	1%
Hardware and Bulky Goods Stores	484	1%
Other Personal and Household Goods	1,691	4%
Selected Personal Services	1,250	3%
Occupied Non-Retail Floorspace	**23,215**	**60%**
Pubs, Taverns and Clubs	1,100	3%
Rental, Hiring and Real Estate Services	820	2%
Health Care and **Social Assistance**	9,435	25%
Financial and Insurance Services	1,316	3%
Administrative and Support Services	1,630	4%
Arts and Recreation Services	227	1%
Public Administration and Safety	3,730	10%
Other	4,957	13%
Occupied floorspace total	**36,305**	**94%**
Vacant floorspace	**2,118**	**6%**
Total floorspace	**38,423**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an additional 11,511sqm (approx.) of retail floorspace (gross leasable area) is required by 2036 across Leichhardt Core (i.e. Norton Street South of Marion Street).

In addition to the above, it is forecast that an additional 20,065sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Leichhardt core, over the next 18 years (2018-2036). This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Norton Street North, given its proximity to the has the capacity to accommodate some of this future demand, particularly non-retail floor space.

Development activity

A number of development proposals have recently been approved and built. They will provide new retail spaces, replacing dilapidated building stock. They will also introduce a number of new residents to the centre, increasing the local catchment.

- 143 Norton Street Leichhardt - D/2018/427
  A development application to demolish existing structures and construct a three storey mixed use development was approved by the Inner West Planning Panel on 28 May 2019.
  The proposal will replace the four existing retail tenancies with two, each comprising approximately 70 square metres
- 168 Norton Street Leichhardt – Harold Hawkins Court
  Harold Hawkins Court is a dilapidated site owned by Uniting Care. It has been vacant for a long period of time. It is subject to site specific controls, with higher FSR and Height controls applying. Recently a development application was approved by Inner West Planning Panel on 4 July 2019 for the construction of 50 self-care units

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A retail space comprising 153sqm is proposed and will front the entire Norton Street portion of the site. As a condition of the approval, amended plans providing an exhaust vent for the retail component of the development to the roof were requested.
It is currently under construction

- 173 Norton Street – Former Civic Video site
  This mixed use development replaced the old Civic Video site. It has since been built (approved June 2015) and comprises one retail tenancy and 15 dwellings over basement parking. Currently the ground floor retail space is tenanted by a dog grooming business
- 322-322A Norton Street – D/2014/354
  A development application was approved by the Inner West Planning Panel for the demolition of structures (originally a mechanic) and construction of a three storey mixed use development comprising two commercial tenancies (each approximately 100sqm) and nine apartments.
  The width of this site is twenty metres and it does not have side or rear lane access. While a portion of the frontage is used up by vehicular access and servicing, the visual impact is less significant due to the wider frontage
- 324 Norton Street - D/2018/184
  A development application was approved by the Land and Environment Court on 14 May 2019 for the demolition of an existing early 20th Century two storey shop and construction of a four storey shop top housing with a 22 square metre retail tenancy on the ground floor and five apartments.
  The width of this site is ten metres and it does not have side or rear lane access. As a result the street frontage of the approved development is dominated by vehicular access and fire booster assemblies
- 364 Norton Street - D/2019/138
  A development application was submitted to Inner West Council on 9 April 2019 for the demolition of existing structures and the construction of a five storey mixed use development with an 84 square metre retail tenancy on the ground floor and four apartments above.
  The width of this site is 10.6 metres and it does not have side or rear lane access. As a result the street frontage of the proposed development is dominated by vehicular access and supporting services for the building. The frontage of the retail shopfront is proposed to be three metres.

Issues and recommendations

- Appropriateness of B2 - Local Centre zone north of Allen Street

Properties north of Allen Street are zoned B2 - Local Centre but do not form a main street function. They consist of existing dwelling houses used for residential purposes, purpose built office and business service developments and a limited number of 20th century two storey shop-top buildings housing business services. The mix of residential and office/business services, including a specialisation in medical uses does not align with a B2 - Local Centre zoning. This stretch of Norton Street is also physically detached from the denser more functional retail strip south of Macauley Street.

The centre has two large-scale standalone commercial buildings including the Dan Murphys site and the Immanuel Centre at 277 Norton Street. They are currently zoned B2 - Local Centre but would be more appropriately zoned for non-residential uses

The evolving development pattern north of Allen Street does not accurately reflect the existing zonings. The rationale for these zonings should be reviewed. Action 1.7.6 of the Strategy identifies the need for a planning review of Norton Street North (north of Allen Street).

- Parking constraints

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A number of businesses in Norton Street North are likely to have catchments that extend beyond the local context. For example, a restaurant in the centre is likely to require availability of parking to accommodate visitors from other parts of Sydney. The centre is not served by train access and while there are bus services, they do not provide fast public transport access from other parts of the Inner West LGA or the general Sydney metropolitan area. Increasing turnover of on-street car parking, improving circulation and encouraging active and public transport are options to consider. These matters can be addressed by the future review of the *Leichhardt Precinct Parking Strategy* recommended in Action 1.3.6 and 1.2.4 of the Strategy.

- Lack of secondary vehicular access

A number of properties in the corridor lack rear lane or side vehicular access. This is resulting in poor outcomes with regard to development applications for mixed-use development. The narrow frontage of these new developments means that what was could be an active street frontage is instead dominated by driveway crossings and building services.

One potential solution is for redevelopments of sites that only front Norton Street do not need to provide off-street parking or direct vehicular access to the site. This would reduce development costs significantly and encourage retention of an active street frontage. On-street deliveries and collections could potentially exacerbate parking challenges. This is addressed by Actions 1.3.6 and 1.2.4 of the Strategy.

- R1 - General Residential with employment uses

A number of properties within and adjacent to the Norton Street North centre have been identified as containing employment activities, including purpose-built developments. Similarly, to the point raised above regarding the appropriateness of B2 - Local Centre zone north of Allen Street, the zonings for these properties should be reviewed. Action 1.2.3 in the Strategy recommends that residentially zoned properties adjacent to or within the centre that comprise employment uses should be considered for rezoning to B2 - Local Centre.

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9.2.11 Petersham Centre

Role and function

The precinct is a large local centre providing an estimated 21,000sqm of employment floorspace. The centre is located along both sides of New Canterbury Road and Stanmore Roads between Hunter Street and Marshall Street for approximately 950m. The centre benefits from a railway station and a number of connecting bus routes. This precinct profile includes lands currently zoned B1 - Neighbourhood Centre, located to the east of Crystal Street to reflect major growth occurring between Audley and Crystal Street. Parking primarily is off street (apart from two small Council car parks) and is limited.

Petersham comprises of a variety of retail outlets including long established food related businesses and pubs. Businesses specialising in Portuguese cuisine make the centre a cultural destination, drawing in a large number of visitors. Restaurants, cafes and other retail particularly are concentrated close to the intersection of New Canterbury Road and Audley Street. The centre lacks a major supermarket and is currently serviced by a convenience store and a long established fresh food grocer on the eastern edge of the centre on Stanmore Road.

Petersham consists of a significant proportion of office floorspace, largely attributed to the Inner West Council offices.

The bulk of the precinct is within the Petersham Commercial Precinct Heritage Conservation Area, which is reflected in the historic nature of the building stock. While some buildings have been consolidated and redeveloped with larger floorplates, the precinct's buildings are generally limited in size and are of mixed quality. A number of redevelopments within the centre have provided new retail floorspaces. The majority of properties within the centre benefit from rear lane access.

New Canterbury Road and Stanmore Road are state classified roads, creating negative impacts on the centre, introducing noise and pollution while impeding the ability to widen footpaths for activities such as outdoor dining and footpath trading. Audley Street has better amenity due to lower traffic volumes and the ability to widen footpaths for outdoor dining purposes. Petersham benefits from Council landholdings, currently used as carparks. These assets may provide future opportunities to enhance the centre's public domain.

High density mixed use developments within the centre are either under construction or recently completed. This will increase the local catchment area population, particularly between Audley and Crystal Streets. The redevelopment of the Petersham RSL sites, located on both sides of Fisher and Regent Streets, is currently underway. 357 apartments, a new registered club premises and café are to be constructed across the three sites.

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Centre Map



Planning controls

Under Marrickville LEP 2011, the centre is predominantly B2 - Local Centre with some areas zoned B1 - Neighbourhood Centre and B4 -Mixed Use. FSR ranges from 0.85:1 at the eastern end of the centre along Stanmore Road to 3.3:1 adjacent to Crystal Street. The FSR of the Centre is predominantly 2.2:1. Height controls range from 9.5m to 26m, with a 17m height limit applying to the majority of the centre.

'Light Industry' and 'artisan food and drink industry' are only permitted within the B4 -Mixed Use portion of the centre. Local distribution premises are prohibited within the centre.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**5,751**	**27%**
Supermarkets and Grocery Stores	415	2%
Speciality Food Stores	389	2%
Café/Restaurants	2,172	10%
Clothing Stores	327	2%
Hardware and Bulky Goods Stores	181	1%
Other Personal and Household Goods	1,859	9%
Selected Personal Services	408	2%
Occupied Non-Retail Floorspace	**12,100**	**57%**
Pubs, Taverns and Clubs	3,288	16%

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Category	GFA (sqm)	Proportion
Rental, Hiring and Real Estate Services	150	1%
Health Care and Social Assistance	463	2%
Financial and Insurance Services	770	4%
Administrative and Support Services	864	4%
Arts and Recreation Services	550	3%
Public Administration and Safety	4,410	21%
Other	1,605	8%
Occupied floorspace total	**17,851**	**85%**
Vacant floorspace	**3,209**	**15%**
Total floorspace	**21,060**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floor space demand

It is forecast (Table 24) that an additional 10,543sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Petersham and Stanmore combined between 2016 and 2036. This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development activity

Petersham has experienced considerable development activity within the centre itself and areas adjacent. Including:

- 31 New Canterbury Road (DA201400211). 5 storey mixed use development, approved by Council 2015 and completed 2018, contains 3 ground floor retail (246sqm total) spaces and 33 apartments. It replaced a service station.
- 78-80 New Canterbury Road (DA201500711). 5 storey mixed use development, approved by Council 2016 and completed 2019, containing a 44sqm ground floor commercial space and 14 apartments. It replaced a 2 storey commercial building.
- 114 New Canterbury Road (DA201400146). 6 storey mixed use development, approved by Council 2014, containing 2 ground floor commercial spaces (250sqm total) and 15 apartments. Adaptive reuse of a heritage building.

Petersham RSL (DA201800173)

In June 2019, the Sydney Eastern City Planning Panel approved the redevelopment of multiple sites in Petersham owned by the Petersham RSL. The development is in three stages, over three sites. It includes 357 apartments, a registered club, a food and drink premises and new public domain works.

The registered club proposed will replace the one that is slated for demolition currently at 3-7 Regent Street.

Issues and recommendations

Opportunity to utilise Council land and assets

A number of Council owned properties are located adjacent to the centre, including carparks and the Petersham Customer Service Centre. Council has recently prepared and endorsed the *Inner West Land and Property Strategy and Policy* that provides strategic direction for the management, review and decision making around Council

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assets. Action 1.5.1 in the Strategy addresses how Council assets could facilitate or support employment uses and amenity. Section 6.1.9 provides examples of how this has occurred elsewhere.

Designate New Canterbury Road as a Vibrant Street

New Canterbury Road is currently a classified road under the *Roads Act 1993*. The high speed limits and proximity of moving vehicles are an impediment to enhancing the amenity for pedestrians and businesses.

Action 1.3.5 of the Strategy advocates for Council to work with Transport for NSW under the 'Movement and Place Framework' to deliver the land use planning vision for employment lands located along Classified Roads.

Size of Petersham centre

The boundaries of Petersham centre used for this Study include two strips of commercial floor space; one along New Canterbury Road and another along Stanmore Road and Crystal Street. The majority of land between these two clusters of employment space is currently zoned residential. A large proportion of this space is subject to a major redevelopment which will include apartments, a registered club, a food and drink premises and new public domain works.

The floor space audit identified 15 per cent of floor space in the Centre as vacant. It is apparent that there is a lack of commercial activity in the Centre.

The construction of 357 apartments as part of the RSL redevelopment may create additional demand for retail and commercial uses in the centre and this may reduce the vacancy rates within the Centre. This along with the future of Council owned land adjacent to Crystal Street will have implications for the employment density and the physical boundaries of Petersham centre.

The *Inner West Local Housing Strategy* recommends that *'a place-based analysis of the Petersham Station Precinct/Crystal Street Precinct'* is undertaken. It is essential that this future study consider the future of the centre with regard to supply of retail and office floor space and how this would integrate with the existing employment floor space extending along New Canterbury Road and Stanmore Road.

This strategy identifies that Petersham centre will need an additional x sqm of office floor space and x sqm of retail floor space. Providing for this space can occur as part of the place-based analysis of the Petersham Station Precinct/Crystal Street Precinct. The Study also identifies underlying demand for a full line supermarket. This could also potentially be accommodated within an expanded Centre.

Any future a place-based analysis of Petersham Centre will need to deliver an integrated approach to accommodate the following:

- housing recommended in the area as part of the Inner West Local Housing Strategy
- potential to grow the footprint of the centre while considering impact on existing commercial space
- providing a large public domain space
- delivering cultural infrastructure within the centre
- accommodating for long-term supply of office and retail floor space
- underlying demand for a full line supermarket
- future decisions on Council owned assets and its impact on employment in the Centre

Action 1.7.7 of the Strategy recommends reviewing the Centre based on the above considerations, as part of a future place-based analysis recommended by the *Inner West Local Housing Strategy*.

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9.2.12 Summer Hill Centre

Role and function

Summer Hill centre is a smaller centre with an estimated 13,000sqm of employment floorspace. It is situated on both sides of the railway line with most of the centre located on the southern side. The centre is serviced by Summer Hill railway station and also has a large council owned at-grade open car park, which is located adjacent to the Darrell Jackson Gardens.

The centre is consists of general retail, services, pubs, restaurants, cafes and a large gym. The centre also has a strong assemblage of independent boutique retail outlets, including clothing and toys. The area has a large IGA supermarket that has a distinctive offering, specialising in cheese and gourmet products, as well as hosting an in-store café.

Summer Hill centre has a primarily local catchment area. The nearby Lewisham Station precinct has resulted in the construction of a large number of apartments only 300m from the centre. This has significantly increased the local catchment population.

Located largely within a heritage conservation area, the centre has a distinctive historic character. The retention of 19th and early 20th Century architecture and its low scale built form provides a sense of place which attracts visitors. It has an attractive public plaza that features outdoor dining set amongst public art murals. The centre also hosts several community events throughout the year.

Notably, the centre also features office space, including a standalone commercial office building on the northern side of the train station.

Centre map



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Attachment 1

Planning controls

The centre is zoned B2 - Local Centre and is primarily located within a heritage conservation area. Under Ashfield Local Environmental Plan, the Centre has an FSR of 1.5:1 and a height limit of 10m. 'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within the zone.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**7,700**	**58%**
Supermarkets and Grocery Stores	3,150	24%
Specialty Food Stores	820	6%
Café/Restaurants	1,020	8%
Clothing Stores	400	3%
Hardware and Bulky Goods Stores	170	1%
Other Personal and Household Goods	2,140	16%
Occupied Non-Retail Floorspace	**5,440**	**39%**
Pubs, Taverns and Clubs	300	2%
Rental, Hiring and Real Estate Services	400	3%
Health Care and Social Assistance	2,700	20%
Financial and Insurance Services	250	2%
Administrative and Support Services	240	2%
Arts and Recreation Services	200	1%
Education and Training	100	1%
Industrial	250	2%
Other	1,000	7%
Occupied floorspace total	**13,140**	**96%**
Vacant floorspace	**220**	**2%**
Total floorspace	**13,360**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Development activity

No recent development activity has been identified.

Issues and recommendations

Summer Hill centre is performing its designated function within the Centre's Hierarchy.

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9.2.13 Stanmore Centre

Role and function

Stanmore Centre is located on either side of the railway line, with the majority of the centre situated on the northern side. The centre provides an estimated 2,730sqm of employment floorspace and is serviced by Stanmore railway station and bus routes. The centre also contains a Council owned car park.

The centre consists of general retail, boutique retail, services, pubs, restaurants and cafes. There is also an IGA supermarket. Stanmore has been observed to have a growing cluster of small-scale office and specialist services. It is an attractive location for such uses.

Stanmore centre has a primarily serves the local catchment.

The centre is primarily located in a heritage conservation area, though there are some large newer developments. The building stock is generally in a reasonable to good condition. The public domain is of a reasonably high quality, though the centre lacks a public focal area. Stanmore Reserve, which includes a small library, adjoins the centre.

Centre map



Planning controls

Stanmore is located within a heritage conservation area. The centre is zoned B1 - Neighbourhood Centre. Under Marrickville LEP 2011, the Centre has an FSR of between 0.85:1 and 1.2:1 and a height of 9.5-11 metres. This does not allow light industry within the zone. With the recent amendments to the Standard Instrument, neighbourhood supermarkets are now permitted within the zone.

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Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**2,510**	**92%**
Supermarkets and Grocery Stores	490	18%
Specialty Food Stores	350	13%
Café/Restaurants	70	3%
Other Personal and Household Goods	1,600	59%
Occupied Non-Retail Floorspace	**220**	**8%**
Other	220	8%
Occupied floorspace total	**2,730**	**100%**
Vacant floorspace	**0**	**0%**
Total floorspace	**2,730**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Development activity

From 2014-2019 Stanmore centre experienced low development activity, including:

- 105-107 Percival Road (DA201500013). 3 storey development, approved by Council in 2008 and completed in 2016, which consists of 2 ground floor retail spaces and 9 apartments. It replaced a former service station.

Issues and recommendations

Stanmore is performing its designated function within the Centre hierarchy.

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9.2.14 Lilyfield Road Precinct

Role and function

The Lilyfield Road Precinct represents three sites on the corner of Gordon Street and Lilyfield Road Rozelle. It is in close proximity to Victoria Road and opposite land that has been acquired for the construction of the Rozelle Interchange as part of the final stage of WestConnex.

Currently, the precinct contains a block of 35 apartments with ground floor office space and two large warehouse buildings.

Centre map



Planning controls

The precinct is zoned B2 - Local Centre under Leichhardt LEP 2013. The floorspace ratio control applying to the precinct is 1:1. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

Issues and recommendations

Rezone precinct appropriately

A B2 - Local Centre zone is not appropriate for these three isolated sites. Action 4.1.3 of the Strategy recommends rezoning:

- 47-51 Lilyfield Road from B2 - Local Centre to B1 - Neighbourhood Centre to better reflect its role
- 55 Lilyfield Road and 30 Gordon Street (currently zoned B2 - Local Centre) in line with their current uses and the proposed retail hierarchy.

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9.2.15 Orange Grove Centre

Role and function

Orange Grove is a small centre located on Balmain Road, Rozelle that provides an estimated 2,500sqm of employment floorspace. The centre is serviced by numerous bus routes.

The centre consists of general retail, services, commercial offices, a pub, restaurants and cafes.

The centre has a primarily local catchment area. The Orange Grove Markets, held every Saturday in the adjacent Orange Grove Public School, provide the centre with a larger catchment of potential visitors.

There is a small plaza and park in the middle of the centre, though the quality of this public domain is not high. The building stock is generally in a good condition.

The Orange Grove Hotel is a venue for arts and live music. No recent development activity has been identified.

Centre map



Planning controls

Orange Grove centre is zoned B2 - Local Centre and has a floorspace ratio of 1.5:1. The 'warehouse or distribution centre' use is prohibited, while the 'light industry' and 'artisan food and drink industry' uses are permitted.

Issues and recommendations

Appropriateness of Local Centre classification

The centre currently has poor public domain and a lack of active transport links. Given the small size of the centre, improving the public domain could be relatively easily achieved. Further, the centre's location opposite the south-eastern edge of Callan Park allows for an opportunity to improving the centre's active transport links.

Action 1.7.10 in the Strategy recommends rezoning from B2 - Local Centre to B1 - Neighbourhood Centre.

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9.2.16 Catherine Street Centre

Role and function

Catherine Street consists of two small centres located on Catherine Street, Lilyfield, one is located near the corner of City West Link and the other at the corner of Piper Street. These two centres provide an estimated 3700sqm of employment floorspace. They are serviced by bus routes and Lilyfield light rail stop.

The City West Link portion hosts an IGA supermarket, while the Piper Street section consists of general retail, commercial offices, services and a café. Both centres serve the local catchment area.

The building stock is generally in a good condition. No recent development activity identified.

Centre map



Planning controls

The Leichhardt LEP 2013 zones these centres B1 - Neighbourhood Centre and B2 - Local Centre. The floorspace ratio is 1.5:1. 'Warehouse or distribution centre' is prohibited, while 'light industry' and 'artisan food and drink industry' are permitted.

Issues and recommendations

Action 1.7.10 in the Strategy recommends rezoning from B2 - Local Centre to B1 - Neighbourhood Centre.

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9.2.17 Lewisham Station Centre

Role and function

Lewisham is a small centre located adjacent to the southern side of Lewisham Station, with an entrance to the station located on the footpath adjacent a row of commercial premises. It is located on Victoria Street, Lewisham, extending from Railway Terrace to Jubilee Street, with an additional site at the corner of Victoria Street and Henry Street. It provides approximately 2,500sqm of employment floorspace. Street parking is available. Other public transport options available to the centre include Lewisham West light rail stop, approximately 500m or a six minute walk to the west as well as bus services along Parramatta Road.

The centre is relatively minor, providing retail and business services to the local population including two cafes, a grocery store, a laundromat, two convenience stores and two other shops. Of the 24 lots within the centre, eight are readily identified as being utilised for retail or business services, six for residential purposes and the remaining 10 are either vacant, or are former shopfronts being utilised for residential purposes.

The centre benefits from passing foot traffic accessing Lewisham Station, specifically coming from the local residential population, Christian Brothers High School, Lewisham Public School and the increasing residential density at Lewisham West.

The majority of the centre is located within the Lewisham Estate heritage Conservation Area. There are no specifically listed items within the centre. The public domain is in an acceptable condition. Improvements would be beneficial to the amenity of the centre. Building stock is largely made up of single and two storey early 20th century shop fronts which are mostly in poor condition. A number of the shopfronts retain their original ground floor shop frontage to the street, a unique feature of the centre.

Commercial uses in the centre have seen a relative decline, with a number of businesses closing and shop fronts appearing to be vacant, including five shops in a row along the western side of Victoria Street.

Centre map



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Planning Controls

The centre is zoned B1 - Neighbourhood Centre under Marrickville LEP 2013. The floorspace ratio and height controls range from 11m-17m and 1.2:1-2:1.

'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre.

Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**1,965**	**73%**
Supermarkets and Grocery Stores	350	13%
Specialty Food Stores	25	1%
Café/Restaurants	50	2%
Clothing Stores	800	30%
Hardware and Bulky Goods Stores	515	19%
Other Personal and Household Goods	225	8%
Occupied Non-Retail Floorspace	**520**	**19%**
Rental, Hiring and Real Estate Services	170	6%
Health Care and Social Assistance	150	6%
Arts and Recreation Services	200	7%
Occupied floorspace total	**2,485**	**93%**
Vacant floorspace	**200**	**7%**
Total floorspace	**2,685**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Development activity

A development application was approved in 2016 for 29-31 Railway Terrace, application - DA201500333. The five-storey project is to consist of four retail spaces on the ground floor and 18 apartments above. It will replace a single storey commercial building. Construction has yet to commence.

Issues and recommendations

Action 1.7.9 in the Strategy recommends a review of this Centre, focussing on planning controls, public domain and connectivity. The review would seek to resolve the issues discussed below:

FSR and height mismatch

Height and FSR development standards throughout the centre vary greatly and have little relationship to heritage constraints and existing improvements to sites.

The sites 14, 16 and 18 Victoria Street are single detached dwellings, located in a conservation area and have heritage significance. The height limit for these sites is 17m and the FSR limit is 2:1. These limits seem excessive for single dwellings and are unlikely to ever be realised. The typical height and FSR limits for single dwellings of this character in the surrounding area are 9.5m and 0.6:1 (up to 1.1: under clause 4.4(2A) of the MLEP 2011).

The sites 3, 5, 7, 9 and 11 Victoria Street are a row of two, two storey shopfronts and two single storey dwellings. These sites are also located in the conservation area. Similarly, these sites also have a 17m height limit, however the FSR limit is lower, at 1.8m. All improvements on these sites display heritage significance and like the previous case, are unlikely to reach these development standards.

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Sites that are considered to have more appropriate development standards are those on the northern corner, 2, 6, 6A, 8 and 8A Victoria Street and 11 and 13 Victoria Street. These sites contain two storey federation shopfronts, are located in the conservation area and have a height of 11m and an FSR of 1.2:1. This is considered appropriate for a conservation area, as the sites are heritage significant and this is protected by the controls.

A review of LEP and DCP controls applying to this centre is required.

Purpose built dwellings within the centre

There are a number of purpose-built dwellings within the centre that are zoned B1 - Neighbourhood Centre. These include Victorian and Federation detached and attached dwellings. The sites are located within a conservation area and are unlikely to be substantially redeveloped. The building typologies do not lend themselves to commercial uses, unlike other dwellings in the centre that have been converted from shopfronts. Zoning will need to be reviewed, considering the existing boundaries of the centre.

High vacancies

Historically, this centre has had a high number of vacancies. The centre faces competition from the more vibrant and attractive Summer Hill and Petersham centres. Even with strong population growth, it now has additional competition from the new retail spaces in Lewisham West. The new retail spaces at Lewisham West are more attractive, with new space fronting a more attractive, north facing public domain.

Lewisham is highly constrained due to limited pedestrian and vehicle access from surrounding areas, narrowness of footpaths and negative impacts from the train line elevated above the centre.

There is the possibility to explore ways to improve connectivity between Lewisham West and the rail station, so that a formalised pedestrian route runs along Victoria Street. In addition, there is potential for the closure of the end of Jubilee Lane to provide new public space.

Two key public domain solutions to consider as part of a review include:

- Improving pedestrian connectivity and amenity between the centre and Lewisham West.
- Considering the closure of Jubilee Lane to provide for enhanced public domain.

Role of centre

Due to the constraints associated with the Centre and competition from surrounding centres, there is the potential that Lewisham could specialise in office space and business services rather than retail. The appeal of this centre for these uses could grow following site redevelopment. There is a need to strengthen the role of this centre as it currently does not have a defined role. Its proximity to the emerging Lewisham West centre needs to be considered:

- Develop long term plan to consolidate the centre as a locally relevant destination
- Encourage conversion of dwellings back to shops or specialised offices/services.

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9.2.18 Sydenham Centre

Role and function

Sydenham is a relatively small centre located around the intersection of Unwins Bridge Road, Railway Road and Gleeson Avenue. Commercial properties within the centre are contained to addresses fronting Unwins Bridge Road, Railway Road, Gleeson Avenue, Burrows Avenue and Swain Street. The commercial properties are a mix of traditional shopfronts within two storey terraces, modern shop top housing developments, a converted cinema, specific purpose industrial buildings and a corner pub. The buildings vary from good to poor condition, across approximately 13,000sqm.

Limited street parking is available, including timed parking for visitors on Unwins Bridge Road and Burrows Avenue. Surrounding streets either have no parking or the parking is timed and included in the residential parking permit scheme.

The centre is well serviced by public transport, being directly adjacent Sydenham Station. It offers frequent connections on the T3, T4 and T8 rail lines. The station is also a bus interchange for the 418, 425 and M30 services. The centre is also a short distance from the 422 and 348 bus services running along the Princes Highway.

Sydenham Station is currently undergoing redevelopment to convert the T3 line into a metro, scheduled to be operation by 2024. This will provide more frequent train services. A new concourse connecting the platforms is also being constructed at the northern end which will also create new entrances to the station and activate the public realm at this end of the station.

The centre is considered relatively minor, providing retail and business services to the local residential and working population. Businesses in operation include four cafes, business services, an indoor recreation facility, take away food and drink premises, medical consulting rooms, a liquor shop, a vehicle repair centre and some shops. There are also a number of dwellings within the centre, including multiple houses on Unwins Bridge Road zoned B1 - Neighbourhood Centre.

Whilst there are a number of established businesses, there are also a number of properties, particularly on the eastern extent of Railway Road opposite Sydenham Green that are in poor condition, seem poorly tenant and are likely being used as residential without authorisation. In July 2018, the long operating General Gordon Hotel was significantly damaged by fire during extensive renovations. A DA has since been approved in August 2019 to complete the renovations, as well as restoring the heritage façade and awning.

The public domain in the area is also of relatively poor quality with narrow footpaths. This is due to the area being a busy traffic thoroughfare along Railway Road, Gleeson Avenue and Unwins Bridge Road. The centre has good access to quality open spaces including Sydenham Green, Tillman Park and small green reserve on the corner of Unwins Bridge Road and Gleeson Avenue.

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Centre map



Development activity

There are a number of recent developments in the area, typically being shop top housing development on Unwins Bridge Road. Some notable developments are discussed below.

- 264 Unwins Bridge Road, Sydenham (DA201400349)
  In November 2016 Council approved the demolition of a two storey shopfront and construction of a three storey shop-top housing development including four one bedroom apartments and a ground floor commercial tenancy. It was completed in February 2018. The ground floor commercial space is currently vacant.
- 266 Unwins Bridge Road, Sydenham (DA201500550)
  In February 2016 Council approved the demolition of existing improvements on site and the construction of a three storey shop top housing development including four dwellings on the upper floors and a ground floor commercial tenancy fronting Unwins Bridge Road. It was completed in February 2018. The ground floor tenancy is currently tenanted as a barber (business premises).
- 268-270 Unwins Bridge Road, Sydenham (DA201100036)
  In September 2011 Council approved the demolition of existing improvements on site and the construction of the three storey shop top development including seven dwellings on upper floors and a ground floor commercial tenancy fronting Unwins Bridge Road. It was completed in 19 December 2012. The ground floor tenancy is currently tenanted by a massage parlour (business premises).
- 20 Swain Street, Sydenham, the General Gordon Hotel (DA201900071)
  In august 2019 Council approved alterations and additions to the General Gordon Hotel, including a full restoration of the building that was significantly damaged from fire. Works also included renovations on the Hotel and updating the interior from its original layout prior to the fire. The majority of these works were previously approved under another DA prior to the fire. It will continue to operate as a pub on the ground floor with tourist and visitor accommodation on the first floor. Hours approved are between 10am and 3am, with a 12-month trial for hours between midnight and 3am.

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Planning controls

The centre is predominantly zoned B1 - Neighbourhood Centre, and is surrounded by R2 - Low Density Residential, SP2 - Infrastructure, RE1 - Public Recreation and a patch of R3 - Medium Density Residential. The limits of precinct are confined to the B1 - Neighbourhood Centre zoned area, as well as a tract of dwellings with additional permitted uses for business and office premises on Railway Road and two sites, 11 Swain Street and 136 George Street which are zoned R2 - Low Density Residential although improvements on site are current and former shopfronts.

The zoning reflects the strategic intent of the area, as well permitting the range of uses that suit the precinct. Consideration should be given to extending the B1 - Neighbourhood Centre zone along Burrows Avenue. This should include the few purpose-built shopfronts that are zoned R2 - Low Density Residential, as well as other sites so as to take advantage of the new Sydney metro concourse and public plaza currently under construction.

FSR controls are typically 1.5:1 within the B1 - Neighbourhood Centre zone. Height limits are typically 11m. These controls are consistent and appropriate within the precinct. Consideration should be given to increasing the FSR and height of sites along Burrows Road if they are re-zoned to B1 - Neighbourhood Centre.

Consideration could also be given to raising the height and FSR controls applying to the R2 - Low Density Residential zoned sites along Railway Avenue to be in line with the heights and FSRs in the commercial area of the centre.

Additional permitted uses

The residential zoned land on Railway Road, which includes 34, 36, 38, 40, 42, 44, 46, 48, 50, 52, 54 and 54A Railway Road has been specifically included within this precinct due to additional permitted uses on these properties. In accordance with Clause 19 under Schedule 1 of the MLEP 2011, business premises and office premises are permitted on these R2 - Low Density Residential zoned sites.

These buildings are typically single or two storey period terraces and all seem to be utilised for residential purposes. Two of the sites, 34 and 36 Railway Road, are former shopfronts that could more readily accommodate such uses.

Due to the location of these dwellings, directly under a low flying flight path and fronting a busy road making it a poor amenity area for residential uses, it is not unlikely that if required, the floorspace could be utilised for office or business premises.

Issues and recommendations

The precinct is considered resilient and maintains a relatively low number of vacancies. There are several food and drink premises in the centre that have operated for some time and are considered established.

The Sydney Metro South West project and the new concourse associated with it present opportunities for further commercial growth in the Centre. This will create a significant interchange between various modes and its likely additional bus services will connect to Sydenham in conjunction with this project.

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9.2.19 Balmain East Centre

Role and function

The Balmain East centre is located towards the eastern end of Darling Street. It provides an estimated 5,107 sqm of potential employment floorspace. A high proportion of this floorspace is currently occupied by dwellings benefiting from existing use rights, including former shops. It is serviced by bus routes and is within easy walking distance of the Balmain East ferry wharf with services to the CBD and North Sydney.

The Balmain East centre consists of general retail, boutique retail, pubs, small offices, services, restaurants and cafes, servicing the local catchment.

The centre is in a Heritage Conservation Area and many of the properties are heritage items. It is also close to waterfront parks on either side of the Balmain East ferry wharf. The building stock is generally in a good condition.

Centre map



Planning controls

Under Leichhardt LEP 2013, Balmain East is zoned B1 - Neighbourhood Centre. The centre's floorspace ratio is predominantly 1.0:1 with 1.5:1 available for active street frontage developments. 'Warehouse or distribution centre' developments are prohibited. 'Light industry,' 'business premises,' 'child care centres,' 'community facilities,' 'medical centres,' 'respite day care centres,' 'shop top housing' and 'artisan food and drink industry' are permitted.

Leichhardt Development Control Plan 2013 aims to encourage social and community activities as an anchor and attractor for this village area.

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Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**650**	**13%**
Supermarkets and Grocery Stores	150	3%
Cafe/Restaurants	200	4%
Other Personal and Household Goods	300	6%
Occupied Non-Retail Floorspace	**4,372**	**86%**
Pubs, Taverns and Clubs	890	17%
Rental, Hiring and Real Estate Services	80	2%
Health Care and Social Assistance	367	7%
Financial and Insurance Services	286	6%
Administrative and Support Services	318	6%
Arts and Recreation Services	511	10%
Other	1,920	38%
Occupied floorspace total	**5,022**	**98%**
Vacant	**85**	**2%**
Grand Total	**5,107**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Development activity

No recent development activity identified.

Issues and recommendations

No issues have been identified.

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9.2.20 Marrickville Metro

Role and function

Marrickville Metro centre is located between Edinburgh, Edgeware and Victoria Roads at the eastern edge of Marrickville and currently provides an estimated 20,500sqm of employment floorspace. The precinct wholly accommodates the Marrickville Metro Shopping Centre. The centre acts a regional shopping centre for the area. It consist of approximately 94 stores. These include small speciality stores, food and drink premises, business premises, medical consulting facilities and larger supermarkets and retailers including, Woolworths, Aldi and Kmart. The centre also has large rooftop car park.

The centre is currently undergoing an expansion which includes alterations and additions to the existing centre, as well as construction of the site across the road known as the Edinburgh Road site. The expansion will add 21,780sqm to the employment floorspace of the centre, more than doubling the current provision.

The expanded centre will have a new focus on restaurants, cafes and other food and drink premises as well as a number of shop or business premises and a Coles supermarket. It is scheduled to be completed in late 2020.

Marrickville Metro centre has a wide catchment area that draws from Marrickville itself, surrounding suburbs, and further afield. It competes with other local centres including Marrickville, Newtown, as well as other shopping centres further afield including Leichhardt Marketplace, Broadway and Ashfield.

The building stock is a mix of the original wool mill brick buildings, a heritage listed old Mill House and the newer additions added when the site was converted into a mall in the 1980s. The building stock is in a poor condition, while public domain is of a reasonable quality, both of these will be upgraded as part of the 2020 extension and redevelopment.

The site is generally well tenanted with a low vacancy rate. The expansion can be considered a product of the success of the centre and the increasing demand for employment floorspace of this type.

The centre is serviced directly by two bus routes which stop directly at the centre, the 308 with connections to Redfern and the 352 to Bondi Junction. A number of other bus stops are also in walking distance to the centre. St Peters railway station is located approximately 1km east of the centre, an approx. 13 minute walk.

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Centre map



Planning controls

The precinct consists of only two sites, the larger Victoria Road site which hosts the existing Marrickville Metro Centre and the smaller Edinburgh Road site which will accommodate the expansion of the centre currently under construction.

The Victoria Road site is zoned B2 - Local Centre. This permits a wide range of commercial land uses which are appropriate for the centre. The B2 -zoning also permits residential land uses on the site, however an application has not been lodged for such uses and the owners of the site, AMP Capital, have previously stated they do not anticipate taking advantage of this permitted land use. It has a floorspace ratio of 0.75:1 and a height control of 14m. Both of these standards would either be reached or exceeded by the current improvements on site.

The Edinburgh Road site is zoned IN1 - General Industrial. This zoning is a hangover from the previous use of the site prior to the Part 3A approval of the site to expand the shopping centre. This zone no longer reflects the intended use of the site.

In order to address this, a planning proposal is currently under consideration by Council to include the following additional permitted uses on site; retail premises, business premises and medical centres. This will permit the desired land uses on site, whilst not leaving the site open to the potential for conversion into residential.

Alike the rest of the IN1 - General Industrial zoned land adjacent and throughout Marrickville, there is no height limit assigned to the site, only an FSR development standard of 0.95:1. The inclusion of a height limit would be considered suitable, as the use on site will no longer be industrial.

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Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**19,136**	**94%**
Supermarkets and Grocery Stores	5,767	28%
Specialty Food Stores	750	4%
Fast Food Stores	750	4%
Café/Restaurants	850	4%
Department Stores	7,019	34%
Clothing Stores	1,500	7%
Other Personal and Household Goods	1,400	7%
Selected Personal Services	1,100	5%
Occupied Non-Retail Floorspace	**1,080**	**5%**
Health Care and Social Assistance	390	2%
Financial and Insurance Services	490	2%
Other	200	1%
Occupied floorspace total	**20,216**	**99%**
Vacant floorspace	**200**	**1%**
Total floorspace	**20,416**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an additional 9,777sqm of GFA is required by 2036 across Marrickville Metro centre. Demand for retail floorspace already outstrips supply.

The proposed Marrickville Metro expansion will provide 21,780sqm in floorspace.

Development activity

There has been major development activity on site with a state significant development being approved through the Part 3A mechanism. This approval and modifications are discussed below.

MP09_0191 – Marrickville Metro

On 19 March 2012 the NSW Planning Assessment Commission (PAC) approved "Extension to the existing Marrickville Metro Shopping Centre to include an additional level of retail floorspace with an additional level of parking above, construction of a new building comprising 2 levels of retail with 2 levels of parking above (12-55 Edinburgh Road)."

There have since been eight modifications to the approval. Some of the key changes include;

- Removal of additional street trees,
- Administrative errors on the consent,
- Introduction of a pedestrian bridge between the two buildings,
- Extension of hours for ground floor premises facing Smidmore Street
- Introduction of a paid parking scheme,
- Changes to the road alignment and public domain on Smidmore Street, and

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- Redistribution of floorspace from the Victoria Road site to the Edinburgh Road site.

At the time of writing this, another modification was lodged with the department of planning. Details are limited to the conditions of approval that will be affected. These include the development description and GFA allocation, the design plans approved and the traffic committee approval requirements.

Issues and recommendations

The IN1 - General Industrial zoning of the Edinburgh Road site is no longer appropriate and does not permit the wide range of retail and other commercial uses that the site is being developed for. While a planning proposal is currently under consideration to allow additional permitted uses on site, amending the zone so that it aligns with the intent of the site is considered more appropriate. The zoning should allow the widest range of retail and other commercial uses possible, whilst limiting residential uses.

Action 4.1.5 of the Strategy recommends that the land comprising the extension of Marrickville Metro be rezoned from IN1 - General Industrial to B2 - Local Centre and that a site specific clause for the shopping centre (e.g. limiting residential floor space or having a minimum commercial floor space ratio requirement), be considered reflecting its role as a centre for employment.

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9.2.21 Marion Street Centre

Role and function

Marion Street Centre is located along Marion and Flood Streets in Leichhardt and provides an estimated 16,774sqm of employment floorspace. The centre is dominated by Leichhardt Marketplace shopping centre. It is serviced by numerous bus routes and is situated approximately 500m from Marion light rail stop. Leichhardt Marketplace contains a large car park. Marion Street centre benefits from being in close proximity to the inner west greenway, which makes it an appealing location for employment due to proximity to active transport.

The centre consists of general retail, services, a pub, restaurants and cafes. Leichhardt Marketplace has a Woolworths and Aldi supermarket, as well as a Target discount department store.

Marion Street has a wide catchment area that draws from Leichhardt itself, surrounding suburbs, and further afield. Major redevelopment of a former industrial site south of the centre, located between George and Upward Streets, has increased the local catchment area population. The Centre also draws customers from key surrounding industrial precincts.

The centre building stock is made up of older shop top commercial buildings and the newer Marketplace shopping centre. The building stock is generally in a reasonable condition. The public domain is of a good standard, though the centre lacks an outdoor public meeting space. Currently, the front entrance and forecourt of the mall itself acts as an important meeting place for the community.

Centre map



Planning controls

Under Leichhardt LEP 2013, the centre is zoned B2 - Local Centre. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

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Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**14,934**	**89%**
Supermarkets and Grocery Stores	5,623	34%
Specialty Food Stores	400	2%
Fast Food Stores	500	3%
Café/Restaurants	650	4%
Department Stores	3,961	24%
Clothing Stores	1,300	8%
Other Personal and Household Goods	1,200	7%
Occupied Non-Retail Floorspace	**1,150**	**7%**
Health Care and Social Assistance	350	2%
Financial and Insurance Services	350	2%
Other	450	3%
Occupied floorspace total	**16,084**	**96%**
Vacant floorspace	**690**	**4%**
Total floorspace	**16,774**	**100%**

Source: HillPDA Desktop Audit, 2019- Refer to section 7.1 for audit method and interpretation

Employment floorspace demand

The Section 7 (Table 32) forecast for demand and supply of retail floorspace shows that an additional 12,697sqm of GFA is required by 2036 in the centre.

Additionally, it is forecast that approximately 32,000sqm of non-retail commercial space (predominantly office space) will need to be accommodated across Leichhardt generally between 2016 and 2036. Some of this could be accommodated within Marion Street Centre. This forecast will need to be reviewed to carefully understand the nature of the demand and how to accommodate for this.

Development activity

No significant redevelopment has occurred within the centre in the past five years. There has been a recent development application submitted by the owners of Marketplace Leichhardt to have trading hours within the shopping centre extended. Currently, trading hours are limited.

Issues and recommendations

Inner West Local Housing Strategy

The *Inner West Local Housing Strategy* identifies Marion Street Centre as an opportunity for additional 300 to 700 dwellings (noting the key determining site will be what occurs at Leichhardt Marketplace). The *Inner West Local Housing Strategy* recommends a place based study be prepared for this precinct.

Rezone commercial properties zoned R1 - General Residential

Three commercial buildings, currently zoned R1 - General Residential, located from 47-59 Flood Street adjoin the centre. Action 1.2.3 in the Strategy recommends that residentially zoned properties adjacent to or within the centre that comprise employment uses should be considered for rezoning to align with the zoning of the centre.

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9.2.22 Waterview Wharf Workshops

Role and function

Waterview Wharf Workshops is a heritage listed former shipping company workshop at 37 Nicholson Street, Balmain. It is a small precinct comprising 28 separate office spaces, primarily comprised of boutique consulting firms. Examples of types of industries that the office precinct comprises of include graphic design, architecture, finance and marketing.

The location is highly attractive for office tenants, due to the waterfront location the appeal of the adaptively reused heritage buildings. Its proximity to the Balmain East shops and ferry wharf provides employees of the precinct with close access to transport, services and amenities.

Centre map



Planning controls

The precinct is zoned B2 - Local Centre under Leichhardt LEP 2013. The floorspace ratio control applying to the precinct is 1:1. A maximum floorspace ratio of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

The site is listed as a State heritage item.

Issues and recommendations

Rezone precinct appropriately

A B2 - Local Centre zone is not appropriate to support this standalone employment precinct. A different zone should apply to exclude its use for residential accommodation. Action 2.3.5 of the Strategy recommends the rezoning of this precinct to B5 – Business Development, provided the future zone does not include residential uses.

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9.3 Parramatta Road Corridor Urban Transformation Strategy Precincts

This set of precinct profiles relates to the Parramatta Road Corridor and is divided in accordance with the precincts identified in the Parramatta Road Corridor Urban Transformation Strategy (PRCUTS). A number of these precincts contain both industrial lands and commercial lands, and in these instances the floorspace audit tables are separated accordingly.

PRCUTS was released in 2016 and is the NSW Government's 30-year plan to drive and inform land use planning and development decisions as well as long-term infrastructure delivery programs in the Parramatta Road Corridor. Implementation of PRCUTS would involve changes to land use zoning, FSR and height controls which would result in additional population, residential and employment growth. This can influence the type of employment floorspace as well as the demand and supply of employment floorspace in the area. PRCUTS is given statutory weight through a Section 9.1 Ministerial Direction 7.3 (EP&A Act). Under clause 5(b) of the Direction if studies, such as this one, demonstrate better outcomes, an alternative that is inconsistent with PRCUTS's recommendations can be implemented.

The Eastern City District Plan, released in 2018, recommends retention of all industrial and urban services in the district except in the PRCUTS corridor. Acknowledging the critical shortfall of industrial land in the Inner West LGA as identified in this study, Council has concerns with implementing PRCUTS and rezoning industrial lands in the corridor. Council has requested consideration of an alternate scenario as part of this study, which is more consistent with the overarching approach of Eastern City District Plan to retain and manage industrial lands.

This section considers the potential of the employment and retail zoned land located in the PRCUTS precincts having regard to:

- The proposals set out in the Parramatta Road Corridor Urban Transformation Strategy (2016)
- Subsequent Government Policy including the Greater Sydney Commission's Eastern City District Plan and policy paper A Metropolis that Works which supports the retention of industrial and urban services land (see Section 3.3)
- The lack of capacity of Inner West LGA to accommodate future demand for employment land.

Council has advised that their previous research has identified inaccuracies in PRCUTS dwelling and job projections. Details of the method and assumptions used in the original PRCUTS projections are not available, making a critical analysis of the projections challenging. Consequently, Council has independently identified floorspace capacity with the PRCUTS area, to better understanding of the potential impacts of PRCUTS on the supply of employment floorspace. The NSW Department of Planning, Industry and Environment's Economics, Population and Land Use Analytics team has refined and confirmed the broad accuracy of Council's dwelling projections. These in turn demonstrate that PRCUTS dwelling projections can be achieved without re-zoning any industrial zoned land in the IWC PRCUTS precincts.

In addition to the theoretical gross floor area calculated under existing controls (see section 7), two additional theoretical scenarios of floorspace capacity have been prepared for each PRCUTS precinct, described below.

- Theoretical employment gross floor area capacity based on the planning controls recommended in PRCUTS. These figures differ to what is in the PRCUTS documentation due to apparent inaccuracies in the PRCUTS projections as identified through the work done by Council for a joint Council/DPIE PRCUTS Traffic study (currently underway).
- Theoretical employment gross floor area capacity based on amended planning controls as defined by Council. This alternative approach seeks to protect existing employment zoned land for industry and urban services while still enabling the area to meet PRCUTS dwelling projections. Council has identified an alternative scenario to PRCUTS in some precincts only.

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This section identifies potential employment capacity based on the above scenarios of floorspace capacity. The analysis is based on the capacity and demand projections in Section 7 of this study. The analysis is intended to allow a comparison of the potential impact of each scenario on future employment potential.

The analysis has some limitations. In particular, it is not possible to draw a direct comparison between the anticipated floorspace demand within precincts as they exist currently, and the floorspace capacity associated with each scenario that involves a rezoning. This is because the floorspace demand is tied to the uses associated with the zone (e.g. demand for 1,000 sqm of industrial floorspace is unlikely to be met with 1,000 sqm of retail floorspace). The ongoing impact of any rezonings on employment land and floorspace supply will need to be monitored.

Council has not yet adopted a formal policy position on the future of the PRCUTS precincts. It is anticipated that a policy position will be informed by this analysis and other work including the findings of Council's draft Local Housing Strategy and the current Camperdown Land Use and Strategic Employment Study. Future planning controls for the Corridor will need to be developed by Council to meet the requirements of 9.1 Ministerial Direction 7.3 (5) (b).

The gross floor area modelling for the precincts under PRCUTS that are detailed below were prepared by Council and used by HillPDA to calculate job projections.

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9.3.1 Kings Bay Precinct (part in Inner West LGA)

The Inner West LGA portion of the Kings Bay Precinct, as defined by PRCUTS, is subdivided into Kings Bay Core Precinct and Kings Bay Frame Area as defined in the map below. The precinct defined by PRCUTS also includes land located within Burwood and Canada Bay Local Government Areas.

Figure 16: Kings Bay Precinct (core + frame area) context map



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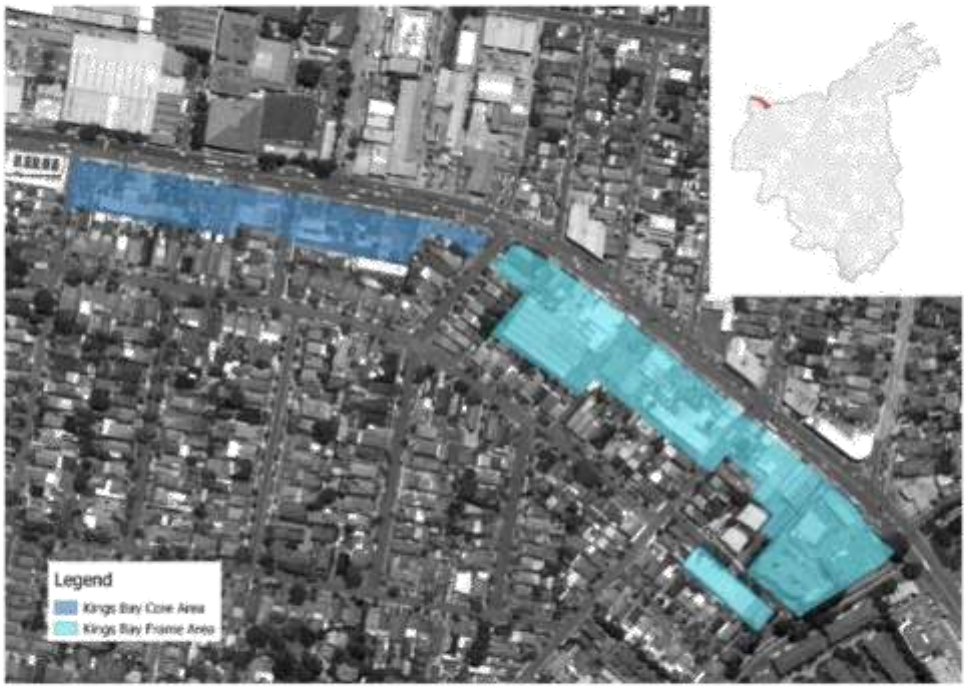
Figure 17: Kings Bay Precinct (Core + Frame Area) employment zoned land



The precinct serves a local catchment and is currently characterised by low scale light industrial, commercial and a limited number of dwellings.

PRCUTS Vision

The PRCUTS vision for the precinct is a compact local centre, with mixed uses and new high streets located around Spencer Street in Canada Bay Council. Within Inner West Council, the precinct is expected to support six to seven storey commercial frontages along Parramatta Road, with low density residential areas transitioning to medium density.

The PRCUTS anticipated growth in the precinct to 2050 is 4,400 jobs and 206,000 sqm employment GFA.

The assumptions for these projections are not provided in the PRCUTS documentation. As the precinct is split between multiple LGA's, these headline figures are of limited relevance for direct analysis. However, a consideration of potential jobs and additional floorspace arising for the proposed changes is provided below.

The proposed zoning for the precinct is shown in the figure below, with land outside the Inner West LGA shaded white.

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Figure 18: Kings Bay Precinct (core + frame area) PRCUTS recommended zoning



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9.3.1.1 Kings Bay Core Precinct

Role and function

Kings Bay Core Precinct is located along 400 metres of the southern side of Parramatta Road between Lang and Scott Streets at the western edge of the Inner West LGA. The precinct consists of around 13,000 sqm of land, provides around 16,850 sqm of employment floorspace and is operating in line with the B6 Enterprise Corridor zone intent. The corridor is served by buses but lacks nearby train services.

It serves an urban services role, dominated by car dealerships, auto repairs and other urban services. These sites have minimal buildings and largely consist of open paved areas. While this reduces the observed employment floorspace of the area, the sites support employment. There has been some recent redevelopment in the corridor with new automotive dealerships opening.

Building height in the precinct is generally one storey. The exception to this is a row of 20th century two storey shop-top buildings. They provide a range of specialised retail, office and business services. While not located within or close to a centre, these buildings accommodate businesses that may not afford the rents of commercial spaces within centres.

The corridor is constrained by a lack of rear vehicular access for a number of properties, with vehicle crossovers accessing Parramatta Road. This creates an unpleasant urban environment with potentially complex vehicle movement impacting pedestrian and vehicle traffic. The precinct is sited to the north of an adjoining low-density residential area.

Precinct Map

Figure 19 - Kings Bay Core Precinct employment zoned land



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Floorspace

Category	GFA (sqm)	Proportion
Knowledge intensive	**537**	**3%**
Financial and Insurance Services	72	0%
Professional, Scientific and Technical Services	184	1%
Rental, Hiring and Real Estate Services	281	2%
Population serving	**12,321**	**73%**
Accommodation and Food Services	1,193	7%
Arts and Recreation Services	88	1%
Construction	512	3%
Other Services	487	3%
Retail Trade	10,041	60%
Industrial	**2,513**	**15%**
Electricity, Gas, Water and Waste Services	2,308	14%
Manufacturing	205	1%
Total occupied floorspace	15,371	91%
Vacant	1,473	9%
Total	**16,844**	**100%**

Source: HillPDA Desktop Audit, 2019

Planning controls

Existing Controls

Under Ashfield LEP 2013, the precinct is zoned B6 Enterprise Corridor with a maximum FSR control of 1.5:1 and maximum building height of 10 m.

The development standards for maximum FSR control and maximum building height have been developed with the goal of maintaining building height relationships with adjacent houses to the south.

Permitted commercial uses in the zone include shops, pubs, specialised retail premises. Food and drink premises (other than pub) are prohibited. Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, landscape material supplies are notable permitted uses in the zone. Permitting these uses accommodates for a range of retail options within the zone but restricts uses such as restaurants and cafes.

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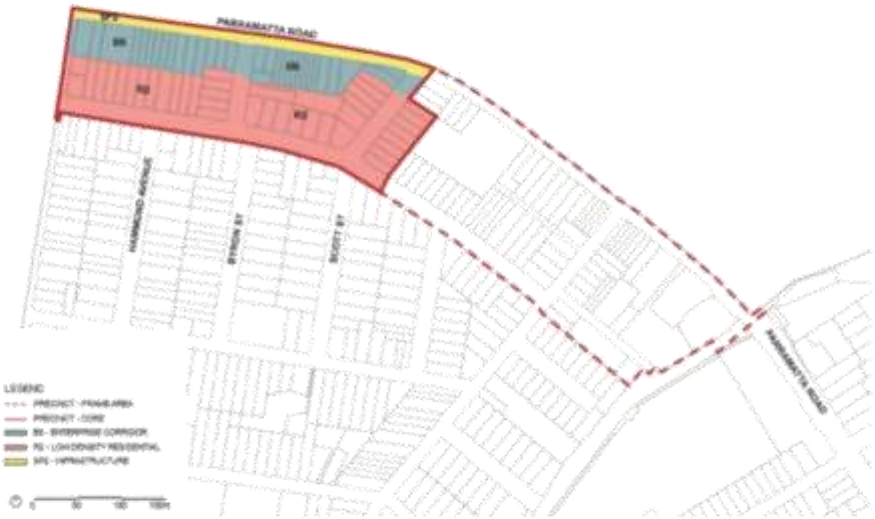
Figure 20: Kings Bay Core Precinct existing LEP zoning



Planning controls recommended under PRCUTS

PRCUTS recommendations for the precinct are unclear with references to a proposed B5 Business Development zone in text while the relevant map indicates a B6 Enterprise Corridor zone. This analysis assumes that the status quo of B6 Enterprise Corridor is recommended to be maintained.

Areas currently zoned as B6 Enterprise Corridor are recommended to have an increased height and FSR controls of 21 m and 2.4:1. The B6 Enterprise Corridor zone is also to be expanded to several residential properties on Scott Street. R2 Low Density Residential zoned land is recommended to be up zoned to R3 Medium Density Residential, with increased heights and FSRs of 12 m and 1.4:1.

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Figure 21: Kings Bay Core Precinct PRCUTS recommended zoning



Development activity

No recent development activity.

Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently around 16,850 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is approximately 18,500 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Kings Bay Core Precinct has been calculated under existing controls as well as controls under PRCUTS. This is shown in Table XX and detailed below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate 25,594 sqm of employment floorspace and 674 jobs.
- If planning controls proposed under PRCUTS were fully utilised, hypothetically the precinct could accommodate 36,067 sqm of employment floorspace and 949 jobs.
- Compared to current planning controls (base case) the PRCUTS recommendations would increase the theoretical floorspace capacity by 10,473 sqm and job capacity by 275 in the precinct.

Additional detail regarding the scenarios is provided below.

Table 45: Kings Bay Core Precinct capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B6 Enterprise Corridor	38	25,594	674

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Total		**25,594**	**674**

Source: Inner West Council, 2019, HillPDA

Table 46: Kings Bay Core Precinct capacity– PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B6 Enterprise Corridor	38	36,067	949
Total		**36,067**	**949**

Source: Inner West Council, 2019, HillPDA

Table 47: Kings Bay Core Precinct scenario comparison

	Base case	PRCUTS recommendation	
	Capacity	Capacity	Change from Base
GFA	25,594	36,067	+10,473 sqm +40.9%
Jobs	674	949	+275 +40.9%

Source: Inner West Council, 2019, HillPDA

The realisation of this floorspace would require conversion of businesses that currently have floorspace below the maximum FSR control expanding to full FSR utilisation. These businesses dominate the corridor (e.g. car dealerships, car servicing facilities). Full FSR utilisation would potentially involve showrooms with above ground floor uses for offices, however, the likelihood of this occurring is subject to development feasibility. It would also require the existing row of eight shops and residences to be converted into employment areas.

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9.3.1.2 Kings Bay Frame Area

Role and function

Kings Bay Frame Area extends 450 metres along the southern side of Parramatta Road from Scott Street and Iron Cove Creek. The precinct consists of around 34,200 sqm of land, provides around 13,100 sqm of employment floorspace and is largely operating in line with the B6 Enterprise Corridor zone intent. The corridor is served by buses but lacks nearby train services.

The frame area has an urban services role, dominated by car dealerships and auto repairers. These sites have minimal buildings and largely consist of open paved areas. While this reduces the observed employment floorspace of the area, the sites support employment. There has been some recent redevelopment in the corridor with new automotive dealerships opening. Building height is generally one storey.

The exception to this is a row of 20th century two storey shop-top buildings. They provide a range of specialised retail, office and business services. While not located within or close to a centre, these buildings accommodate businesses that may not be able to afford the rents of commercial spaces within centres. A cluster of dwelling houses exist within the precinct, including some that have recently been redeveloped.

There is a large cluster of take-away retail premises and an electricity substation on the eastern edge of the precinct. Multi-storey shop-top housing forms part of this development which also contains a petrol station.

There is an isolated IN2 Light Industrial zone is at the southern edge of the precinct, containing warehouses with access past several residential properties and through West Street, a narrow side street.

Precinct map

Figure 22: Kings Bay Frame Area employment zoned land



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Floorspace

Category	GFA (sqm)	Proportion
Knowledge intensive	353	3%
Administrative and Support Services	-	0%
Financial and Insurance Services	72	1%
Information Media and Telecommunications	-	0%
Professional, Scientific and Technical Services	-	0%
Public Administration and Safety	-	0%
Rental, Hiring and Real Estate Services	281	2%
Health and education	-	0%
Education and Training	-	0%
Health Care and Social Assistance	-	0%
Population serving	8,266	63%
Accommodation and Food Services	551	4%
Arts and Recreation Services	-	0%
Construction	321	2%
Other Services	478	4%
Retail Trade	6,916	53%
Industrial	3,393	26%
Agriculture, Forestry and Fishing	-	0%
Electricity, Gas, Water and Waste Services	2,308	18%
Mining	-	0%
Manufacturing	607	5%
Transport, Postal and Warehousing	-	0%
Wholesale Trade	478	4%
Total occupied floorspace	12,012	92%
Vacant	1,099	8%
Total	13,111	100%

Source: HillPDA Desktop Audit, 2019

Development activity

31 and 33 Scott Street Croydon

31 and 33 Scott Street are zoned B6 – Enterprise Corridor. They were redeveloped in approximately 2012 from single storey Californian bungalows to two storey modern dwellings. This reinforces the use of the land as residential, which does not align with the intent of the zone.

Planning controls

Existing Controls

Under Ashfield LEP 2013, the majority of the precinct is zoned B6 Enterprise Corridor with a maximum floorspace ratio control of between 1.5:1 and 2:1 and a maximum building height of between 10 m and 15 m.

The development standards for maximum FSR control and maximum building height have been developed with the goal of maintaining building height relationships with adjacent houses to the south.

Permitted commercial uses in the frame area generally include shops, pubs and specialised retail premises. Food and drink premises (other than pub) are prohibited with the exception of additional permitted uses that apply to one site. Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, landscape material supplies are notable permitted uses in the zone. Permitting these uses accommodates a range of retail options within the zone but restricts uses such as restaurants and cafes.

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One site set back from Parramatta Road is zoned B4 Mixed Use with an FSR of 1.5:1 and maximum height of 23 m.

Another site to the south of West Street is zoned IN2 Light Industrial with an FSR of 1.5:1 and a height limit of 10 m. A wide range of employment uses are permitted in the light industrial zone including business premises, office premises, specialised retail premises, wholesale supplies, entertainment facilities, garden centres, hardware and building supplies, kiosks and landscaping material supplies, light industries and warehousing or distribution centres.

Figure 23: Kings Bay Frame Area existing LEP zoning



Controls recommended under PRCUTS

PRCUTS recommends that the B4 Mixed Use and B6 Enterprise Corridor portions of the precinct transition to a single business zone. The recommended zone is not clear with a B5 Business Development zone being proposed in text while the relevant map indicates a B6 Enterprise Corridor zone. For this analysis, it has been assumed that the status quo of B6 Enterprise Corridor is maintained. Areas currently zoned as B4 Mixed Use and B6 Enterprise Corridor are recommended to have increased height and FSR controls of 21 m and 2.4:1. Land zoned R2 Low Density Residential to the south of the enterprise corridor as well as one site zoned IN2 Light Industrial are recommended to be rezoned to R3 Medium Density Residential, with height and FSR controls of 12 m and 1.4:1.

PRCUTS does not specify the uses that would be permitted and/or prohibited under these zones.

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Figure 24: Kings Bay Frame Area PRCUTS recommended zoning



Alternative scenario to PRCUTS

HillPDA have undertaken analysis of the alternative scenario requested by Council, which modifies the PRCUTS recommendations by retaining the IN2 Light Industrial and B4 Mixed Use sites.

This scenario would maintain the focus on increasing employment floorspace density along Parramatta Road, aligning with the intention of PRCUTS. It would also retain the IN2 Light Industrial zoning along West Street, adjacent to Iron Cove Creek, at its current density. This scenario also assumes that the current mixed use development at the eastern side of the precinct will retain its focus on retail uses, as opposed to the enterprise uses associated with B6 Enterprise Corridor.

Following assumptions are used:

- B6 Enterprise Corridor land is retained with an increased FSR of 2.4:1, and no residential uses permitted as also recommended in PRCUTS
- IN2 Light Industrial land is retained with the current FSR of 1.5:1
- Retain B4 Mixed Use as existing with an FSR of 1.5:1.

Note that the assumed floorspace ratio controls above have not been subject to place making and feasibility testing.

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Figure 25: Kings Bay Frame Area Alternative Scenario



Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently around 13,100 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is approximately around 14,500 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Kings Bay Frame Area has been calculated under existing controls and PRCUTS scenarios. This is detailed below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 53,380 sqm of employment floorspace and around 1,370 jobs.
- PRCUTS scenario at full utilisation:
    - Around 64,130 sqm of employment floorspace and 1,690 jobs.
    - Increase of around 10,740 sqm and job capacity of around 320 in the precinct over the base case.

Table 48: Kings Bay Frame Area Precinct capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B4 Mixed use	28	1,825	65
B6 Enterprise Corridor	38	48,127	1,267
IN2 Light Industrial	98	3,430	35
Total		**53,382**	**1,367**

Source: Inner West Council, 2019, HillPDA

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Table 49: Kings Bay Frame Area Precinct capacity – PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B6 Enterprise Corridor	38	64,126	1,688
Total		**64,126**	**1,688**

Source: Inner West Council, 2019, HillPDA

The PRCUTS recommendation would significantly increase the theoretical floorspace capacity of the precinct, with the potential for an additional 10,744 sqm employment GFA and 321 jobs in the precinct. This would also result in 3,430 sqm of IN2 Light Industrial being rezoned to residential uses.

Table 50: Kings Bay Frame Area capacity – Alternative Scenario

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B4 Mixed Use	28	1,825	65
B6 Enterprise Corridor	38	62,301	1,640
IN2 Light Industrial	98	3,430	35
Total		**67,556**	**1,740**

Source: Inner West Council, 2019, HillPDA

Under this alternative scenario, there is capacity for an additional 14,174 sqm employment GFA and 373 jobs compared with existing controls. These assumptions represent a significant increase in the provision of employment land in the precinct, with an anticipated employment capacity higher than the PRCUTS scenario by 3,430 sqm. This is driven by retaining IN2 Light Industrial zoning which can continue to provide employment floorspace.

As with the PRCUTS scenario, full utilisation of the 2.4:1 FSR would likely be delayed to the medium to long-term and require amalgamation of lots.

Under both hypothetical scenarios, realisation of floorspace would require conversion of businesses that currently have very low FSR controls to full FSR utilisation. These businesses dominate the corridor and range from fast food outlets, petrol stations, car dealerships, car servicing facilities. It would, hypothetically, also require shop-top housing to be converted into employment areas. A full FSR utilisation could potentially involve showrooms with above ground floor uses for offices, when applying the PRCUTS recommendations to the existing situation, the likelihood of this occurring is subject to feasibility.

The table below presents a comparison of employment capacity estimates based on existing controls, proposed PRCUTS controls and under the assumptions put forward by Council in the alternative scenario.

Table 51: Kings Bay Frame Area capacity comparison

	Base case	PRCUTS recommendation		Alternative scenario	
	Capacity	Capacity	Change from Base	Capacity	Change from Base
GFA	53,382	64,126	**+10,744 sqm +20.1%**	67,556	**+14,174 sqm +26.6%**
Jobs	1,367	1,688	**+321 +23.5%**	1,740	**+373 +27.3%**

Source: Inner West Council, 2019, HillPDA

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9.3.1.3 Issues and recommendations

PRCUTS envisages a major transformation for Kings Bay with employment uses accommodated within a denser built form. The table below provides a comparison of employment capacity for the whole Kings Bay precinct (core + frame area) under the existing controls, proposed PRCUTS controls and Council alternative scenario.

Table 52: Kings Bay Precinct (Core + frame area) employment capacity comparison

	Base case	PRCUTS recommendation		Alternative scenario	
	Capacity	Capacity	Change from Base	Capacity	Change from Base
GFA	78,976	100,193	**21,217** **26.87%**	103,623	**24,647** **31.21%**
Jobs	2,040	2,637	**596** **29.23%**	2,689	**649** **31.79%**

The discussion below concludes that planning controls should not change for the precinct without resolution of site-specific constraints which may limit uptake of higher floorspace controls and compromise Kings Bay as an employment area.

Appropriateness of rezoning of sites under PRCUTS

Given the proposed expansion of the B6 Enterprise Corridor zone to include existing residential and mixed-use buildings, there may be impacts on development potential and land values. Loss of industrial land, while minor in size and restricted in access, would remove the only industrial zone land in Kings Bay (IWC).

1-9 West Street Croydon is proposed to be rezoned from IN2 Light Industrial to R3 Medium Density Residential under PRCUTS. This is inconsistent with the overarching approach of Eastern City District Plan, which requires the retention and management of existing industrial lands. ECDP 2018 section on managing industrial land and urban services land notes that land in the PRCUTS area is not subject to the District Plan's industrial lands strategies and actions. This is qualified in the same section by stating that 'there is also a need from time to time to, to review the list of appropriate activities within any precinct in consideration of evolving business practices and how they can be supported through permitted uses in local environmental plans.'

Retention of IN2 Light Industrial land along West Street would promote retention of existing light industrial use, though it is noted that access and potential for redevelopment is limited due to the size of the lot and surrounding residential uses. Further consideration should be given to the viability of non-warehouse IN2 Light Industrial uses in the area, with the potential to transition to B6 Enterprise Corridor, which allows for warehousing and business premises activities similar to the existing use.

It is also noted that PRCUTS recommends rezoning a site currently zoned B4 Mixed Use, occupied by a four-storey mixed use development, to B6 Enterprise Corridor. Given the established and residential nature of the site, it is highly unlikely that this development would transition to a strictly commercial development within the 2050 horizon.

While PRCUTS recommends a green edge setback to Parramatta Road, and high pedestrian movement, a commercial and vehicle-oriented frontage is anticipated to remain. This would likely conflict with the current dealerships and zero-setback shops in the precinct, which rely on ground-floor commercial areas and street presentation.

There is a need to review land use zoning, floorspace ratio and building height controls through detailed precinct planning (discussed below).

Recommendation: Retain the following zones within the Kings Bay Precinct, pending the outcome of detailed precinct planning:

- 1-9 West Street, Croydon as IN2 Light Industrial

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- 586 Parramatta Road Croydon as B4 Mixed Use.

Detailed precinct planning required for Kings Bay Precinct

Take-up of the higher floorspace ratio controls as recommended by PRCUTS would likely occur over the medium to long term, given the recent development along the eastern side of the precinct and more established premises at the western side. While the central areas of the precinct may be suited for redevelopment, the fragmented lot size and ownership, combined with the requirement for green edge setbacks to Parramatta Road, would require lot consolidation and longer term planning to be achieved.

The PRCUTS controls would result in a substantial increase in theoretical floorspace and job capacity across Kings Bay. Currently, employment floorspace is well below capacity due to low-density built form and residential uses. Given the existing uses that operate at the location, which do not require high amounts of employment floorspace, the corridor is well utilised by businesses.

Take-up of PRCUTS controls is likely to change the nature of the businesses that operate in the corridor. The PRCUTS vision would transition the current smash repairers, stand-alone fast food outlets and car dealerships to a multi-storey built form. While there is potential under existing controls for capacity to meet 2036 floorspace demand across the combined precinct, this would require a major change in the built form characteristics of the area.

The PRCUTS scenario would result in a higher theoretical employment floor area and potential job capacity in the precinct. The realisation of the PRCUTS vision within the precinct would require an evolution of the existing low-density automotive-centric and shop uses to larger and taller built forms that are setback from the street.

The capacity increases proposed by PRCUTS would result in a significant change in character, with a fundamental shift away from the existing low-density uses and introduction of large green setbacks. Realisation of the green setbacks would be dependent on a reduction of vehicle crossovers, which may require fundamental changes to how sites are accessed.

Further precinct planning is required to better understand the constraints that exist, which would limit transformation of the corridor for the higher density built form.

Recommendation: Prior to any changes to planning controls, undertake coordinated and detailed precinct planning for Kings Bay to resolve site specific constraints which may limit uptake of higher floorspace controls. This may include:

- Reviewing height and FSR controls, green edge setbacks and lot consolidation required for redevelopment
- Engaging with landowners, Burwood Council and State agencies to arrange for side and rear access to reduce vehicle crossovers on Parramatta Road
- Considering expansion of the B6 Enterprise Corridor zone in consultation with affected landowners
- Undertaking feasibility testing, to determine the viability of redevelopment for employment uses.

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9.3.2 Taverners Hill Precinct

The Taverners Hill Precinct as defined by PRCUTS is subdivided into Taverners Hill Core Precinct and Taverners Hill Frame Area as defined in the map below.

Figure 26: Taverners Hill Precinct (Core + frame area) context map

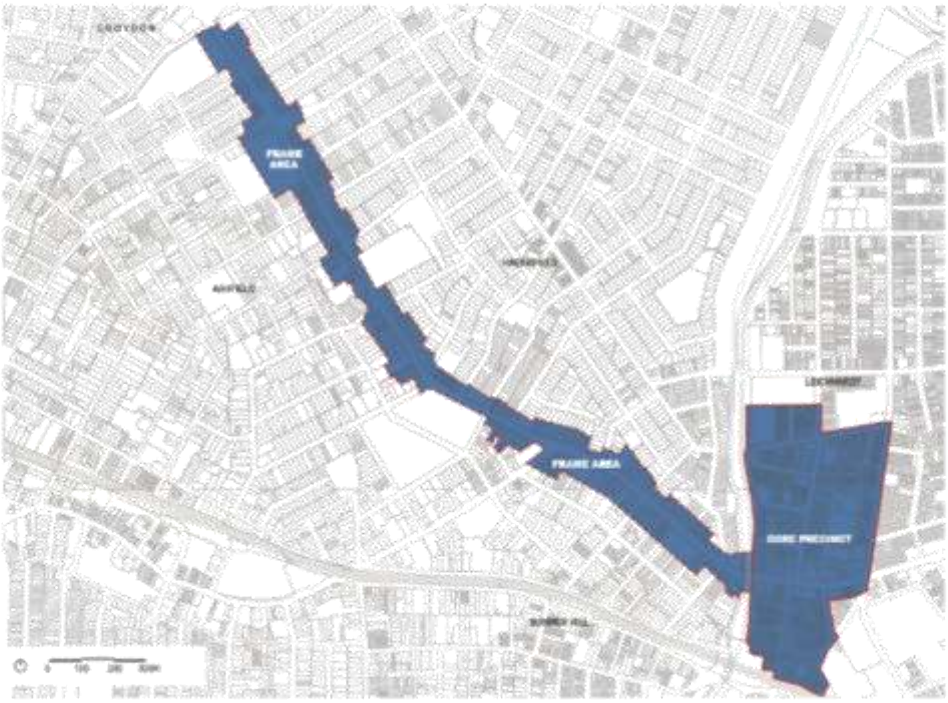

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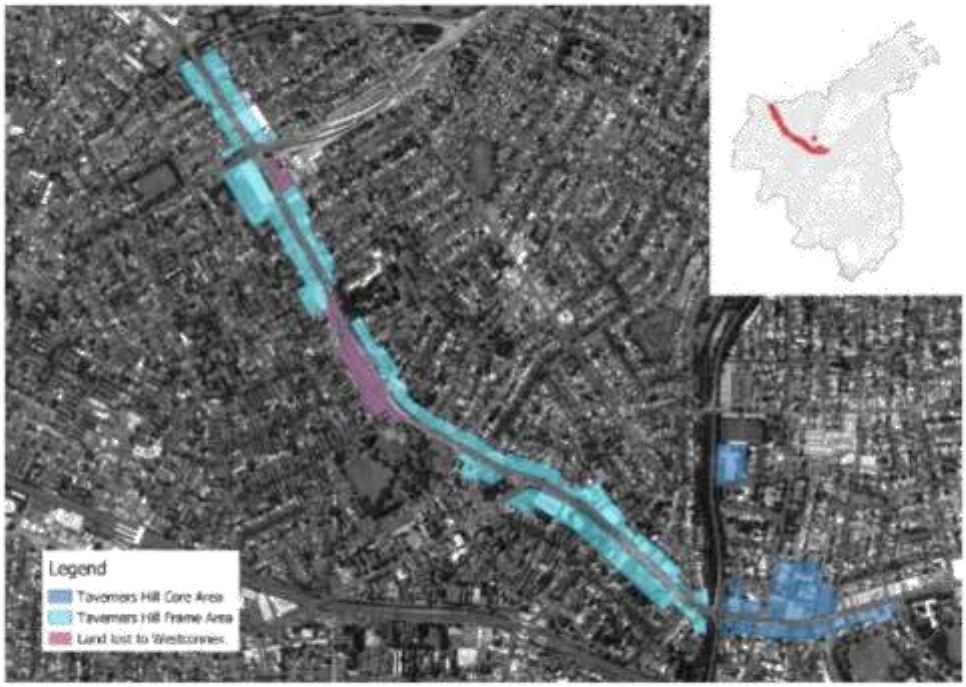
Figure 27: Taverners Hill Precinct (Core and Frame Area) employment land



The core and frame areas serve two distinct purposes:

- Core Precinct is a mixed commercial and industrial precinct, focusing on Parramatta Road, surrounded by low-density dwellings, with access to light rail at Taverners Hill and rail at Lewisham station
- Frame Area is a mixed residential and commercial corridor with alternating clusters of low/medium density housing and shops/urban services. It has been fragmented by the construction of the WestConnex motorway.

PRCUTS Vision

The PRCUTS vision for the precinct focuses on Taverners Hill as an urban village, capitalising on public and active transport links to support future mixed-use character. This is expected to be complemented by neighbourhood parks, squares and leafy streets. Tebbutt Street is anticipated to be lined with small-scale retail, catering to an expanded residential population with the establishment of a main-street environment. Creative industries are expected to become more popular in the area, uplifting existing and supporting new building stock.

This future development is expected to be supported by:

- Strong regional active transport links via the adjoining GreenWay and Hawthorne Canal
- A revitalised neighbourhood centre supported by mixed-use development
- Investment in public transport modes and high amenity public open space.

In the 2050 long term horizon, PRCUTS identifies a:

- Proposed growth projection of 4,100 jobs
- Proposed indicative land use mix (additional employment GFA) of 70,000 sqm in Taverners Hill Core Precinct and 315,000 sqm in Taverners Hill Frame Area.

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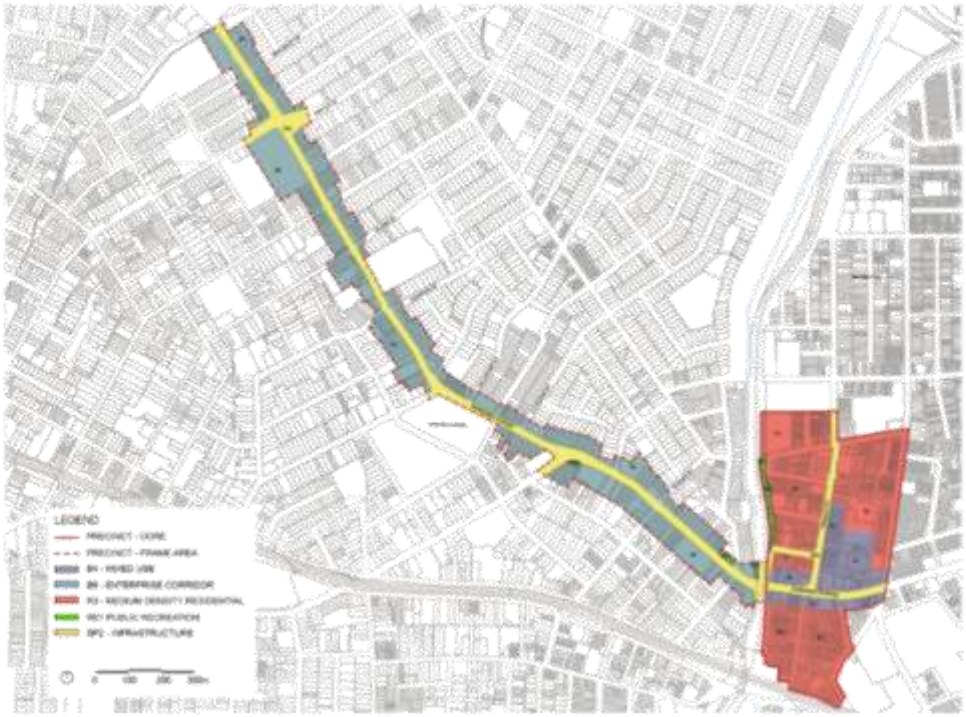
The assumptions for PRCUTS projections are unclear from the available documentation. However, a consideration of potential jobs and additional floorspace arising for the proposed changes is provided below. The proposed additional employment GFA of 385,000 sqm in the Taverners Hill Precinct is indicated in PRCUTS to provide 4,100 jobs, suggesting an unusually high workspace ratio (sqm per employee) of approximately 94 sqm per employee. This is inconsistent with the non-industrial uses proposed by PRCUTS. Due to these inconsistencies, Council has recalculated GFAs based on PRCUTS land use recommendations which have been analysed below.

The proposed zoning for the precinct is shown below.

Figure 28: Taverners Hill Precinct (core + frame area) PRCUTS recommended zoning



9.3.2.1 Taverners Hill Core Precinct

Role and function

The Taverners Hill Core Precinct is located along a 450 m section of Parramatta Road between the Hawthorne Canal and West Street. Lands within the precinct zoned for employment uses also extend 180 m along the eastern side of Tebbutt Street. The precinct also includes a large industrial site fronting Lords Road.

The precinct contains around 58,200 sqm of land, provides around 38,000 sqm of employment floorspace. It is an urban services precinct with industrial, office, creative enterprises and world leading biotechnology research and development activities. The precinct is near motorway connections, Taverners Hill light rail station, Lewisham railway station and bus services.

Types of businesses operating within the precinct include workshops, industrial premises, a meat supplier, smash repairers, stone mason, car dealership, offices, printers, warehouses, hotel, a biotechnology centre, fitness

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facilities, catering supplier, builder and plumber supplies, photographic studio and the multi-use Lords Road industrial and urban services estate. The core precinct also contains residential uses including apartments, low scale workers cottages and terrace housing.

The built character of the area includes one and two storey light industrial warehouses with zero setbacks from the street, single houses and a modern mixed-use apartment block. There are distinct patterns of land use through the Precinct, with industrial buildings fronting Parramatta Road, the Lords Road industrial estate and residential uses on Hathern and Tebbutt Streets. There are ground floor shops in the recent B4 Mixed Use development between George Street and Upward Street. These have been available since early 2018, but as of March 2020 remain vacant.

Subdivision and ownership patterns vary considerably, ranging from residential lots of approximately 275 sqm to large single owned industrial lots of around 6,350 sqm near Parramatta Road and one significant landholding of approximately 10,000 sqm at Lords Road. Many properties benefit from dual street access, or wide frontages.

The precinct has a distinct character, with several older style warehouse buildings and dense subdivision pattern of surrounding residential dwellings. This differentiates the core precinct from the frame area, located to the west of the light rail line.

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Precinct map

Figure 9: Taverners Hill Core Precinct employment zoned land (existing)



Floorspace

Table 53: Taverners Hill Core Precinct existing employment floorspace

Category	GFA (sqm)	Proportion
Knowledge intensive	1,387	4%
Professional, Scientific and Technical Services	1,387	4%
Health and education	1,786	5%
Education and Training	1,786	5%
Population serving	19,805	52%
Accommodation and Food Services	3,221	8%
Arts and Recreation Services	3,687	10%
Construction	2,597	7%
Other Services	9,184	24%
Retail Trade	1,116	3%
Industrial	14,494	38%
Electricity, Gas, Water and Waste Services	1,134	3%
Manufacturing	3,416	9%
Transport, Postal and Warehousing	602	2%
Wholesale Trade	9,342	25%
Total occupied floorspace	37,472	98%
Vacant	644	2%
Total	38,116	100%

Source: HillPDA Desktop Audit, 2019 Refer to section 7.1 for audit method and interpretation

Development activity

The precinct has been subject to two large scale rezoning and redevelopment proposals in recent years. The first was for a residential and mixed use apartment development at the combined former Kolotex and Labelcraft

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industrial sites. The second has taken the form of two Planning Proposals in 2014 and 2018 to rezone the Lords Road industrial estate from IN2 Light Industrial to R3 Medium Density Residential.

Kolotex and Labelcraft site

The recent residential and mixed use development between George and Upward Streets is the tallest building within the precinct, with a central eight storey element.

776 Parramatta Road, Lewisham

There is a development application for proposed alterations and additions to an existing three storey commercial building at 776 Parramatta Road for the purpose of a boarding house consisting of 17 single boarding rooms.

Lords Road Planning Proposals 2014/2018

The Lords Road 2014 Planning Proposal was not adopted after a re-zoning review, Gateway determination and public exhibition. This is largely due to being unable to meet PRCUTS Implementation Plan requirements.

The Lords Road 2018 Planning Proposal was not supported by Council and proceeded to the rezoning review process. In June 2019, the Sydney Eastern City Planning Panel determined that the rezoning review was not supported for a Gateway Determination as it did not demonstrate strategic merit. It was the Panel's view that the proposal did not meet the Out of Sequence Checklist requirements for proposals outside of the 2016-2023 release area.

In its assessment of the planning proposal, Council found that the dwellings that could be built at Lords Road are not required to meet PRCUTS dwelling targets and that the industrial zoning is necessary to maintain employment and provide urban services in the Taverners Hill precinct.

Planning controls

Existing Controls

The employment areas of the precinct north of Parramatta Road are generally zoned IN2 Light Industrial under Leichhardt LEP 2013. The FSR control applying to the IN2 zoned land is 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP (cl. 6.9) restricts business and office premises to those that serve creative purposes, as explained in Section 8.1.11. Light industry and artisan food and drink industries are also permitted within the precinct. Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusement centres, function centres and general industries. These uses make the Leichhardt IN2 Light Industrial zone quite broad in its range of permitted uses.

Two sites to the north of Parramatta Road are zoned B4 Mixed Use and R3 Medium Density Residential, following rezoning of the former Kolotex and Labelcraft industries in 2014. This is the only site zoned B4 Mixed Use in the former Leichhardt LGA. Generally, the height control for the site is between 16 and 32 m and the FSR control is 2.15:1. Light industries are not permitted in the B4 zone, reducing the range of businesses that can utilise the ground floor employment space.

Land to the south of Parramatta Road is zoned B6 Enterprise Corridor zone under Marrickville LEP 2011, with a FSR control of 0.95:1. It refers to residential uses in its objectives as part of mixed use developments and permits both 'hotel or motel accommodation' (mandated under the Standard Instrument LEP) and 'serviced apartments.' Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, landscape material supplies and food and drink premises are notable permitted uses in the zone. Specialised retail premises and shops are prohibited in the zone. In terms of industry, the B6 Enterprise Corridor permits light industry including artisan food and drink industry. It also permits 'warehouse or distribution centres.' One site at 776–798 Parramatta Road, Lewisham has an additional permitted use applicable, which allows for boarding houses to be permitted with consent.

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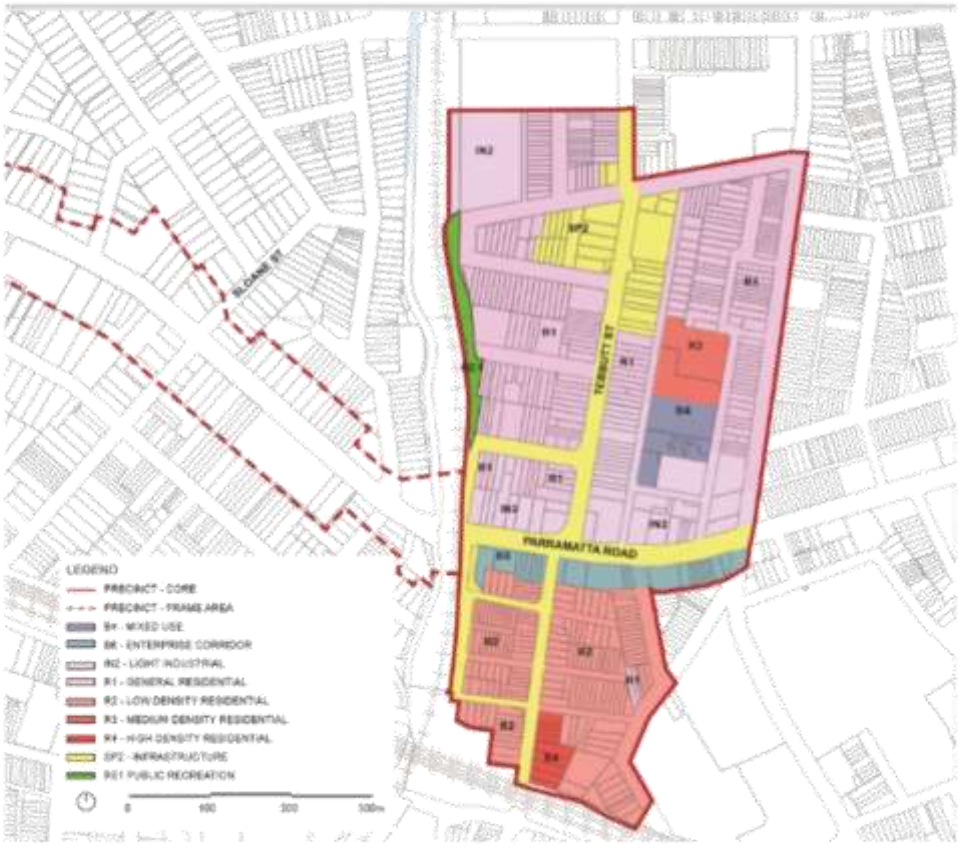
Figure 29: Taverners Hill Core Precinct existing LEP zoning



Controls recommended under PRCUTS

PRCUTS recommends rezoning IN2 Light Industrial, B6 Enterprise Corridor and certain R1 General Residential lands to B4 Mixed Use and R3 Medium Density Residential. This would mean a shift from urban services land to mixed-use/shop-top housing or medium density housing.

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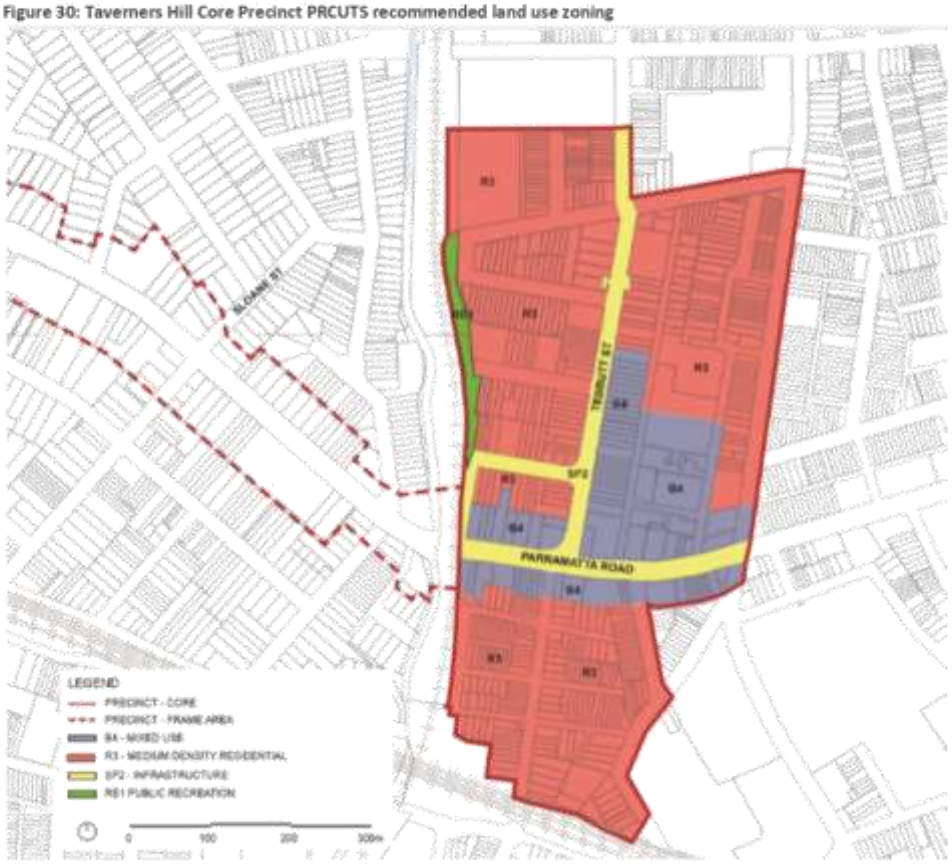
Figure 30: Taverners Hill Core Precinct PRCUTS recommended land use zoning



Consideration of alternative option to PRCUTS

An alternative to the PRCUTS recommendations has been considered below to potentially address the anticipated shortfall of urban services and employment lands which would result from PRCUTS implementation. The following assumptions are used in developing this scenario:

- Land currently zoned B6 Enterprise Corridor:
  - Retain as existing
  - Increase FSR from 0.95:1 to 1.5:1
  - Prohibit all residential uses
- Land currently zoned IN2 Light Industrial
  - Retain as existing
  - Increase FSR from 1:1 to 1.5:1
- Land currently zoned R1 General Residential:
  - Portion of land between 41-59 Tebbutt Street, Leichhardt rezoned to B4 Mixed Use with FSR of 1.5:1 (as recommended in PRCUTS)

Note that the assumed FSR controls above have not been subject to place making and feasibility testing.

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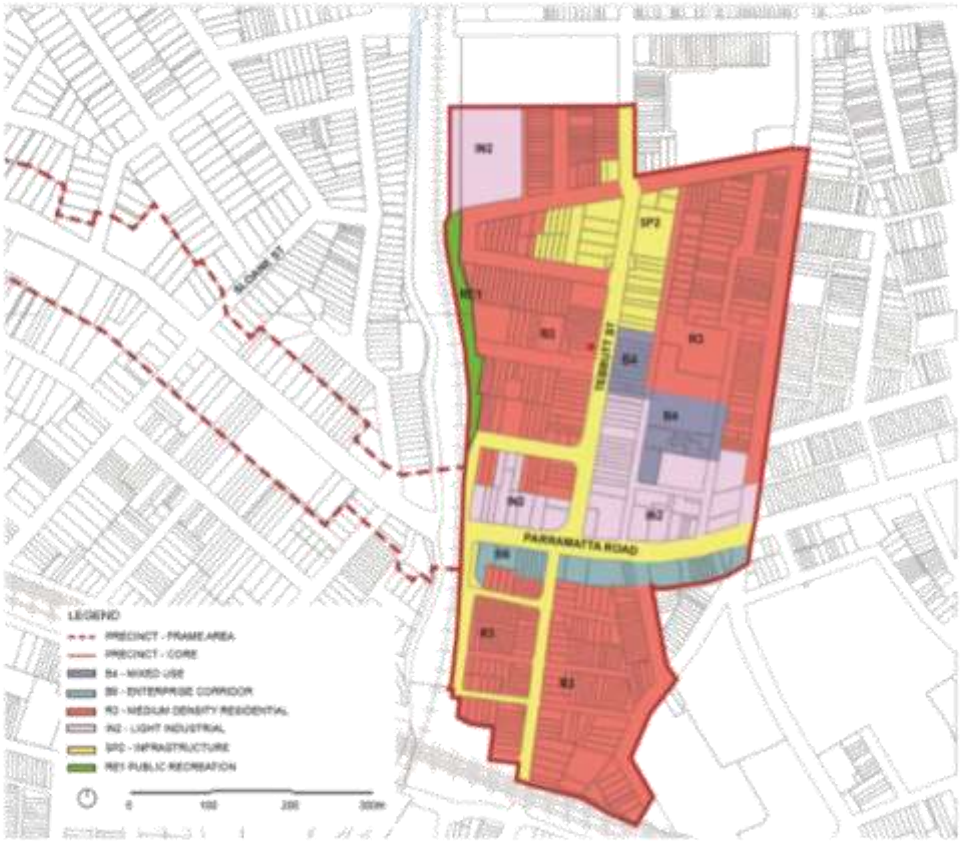
Figure 31: Taverners Hill Core Precinct Alternative scenario land use zoning



Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently around 38,000 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is approximately 45,000 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Taverners Hill Core Precinct has been calculated under existing controls and PRCUTS scenarios. This is detailed below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 48,800 sqm of employment floorspace and 750 jobs.
- PRCUTS scenario full utilisation:
    - Around 28,000 sqm of employment floorspace and around 1000 jobs.
    - Decrease of around 20,900 sqm and job capacity increase of around 250 in the precinct over the base case.
- Council alternative scenario full utilisation:
    - Around 71,600 sqm of employment floorspace and around 1,090 jobs

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- Increase of around 22,760 sqm and job capacity of around 340 in the precinct over the base case.

Table 54: Taverners Hill Core Precinct GFA capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B4 Mixed Use	28	4,391	157
B6 Enterprise Corridor	38	8,665	228
IN2 Light Industrial	98	35,780	365
Total		**48,836**	**750**

Source: Inner West Council, 2019, HillPDA

Table 55: Taverners Hill Core Precinct GFA capacity – PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B4 Mixed Use	28	27,948	998
Total		**27,948**	**998**

Source: Inner West Council, 2019, HillPDA

Table 56: Taverners Hill Core Precinct capacity – Alternative scenario

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B6 Enterprise Corridor	38	13,682	360
IN2 Light Industrial	98	52,426	535
B4 Mixed Use	28	5,484	196
Total		**71,592**	**1,091**

Source: Inner West Council, 2019, HillPDA

The PRCUTS recommendation would reduce the theoretical employment floorspace capacity in the precinct by around 20,900 sqm compared with existing controls. About half of this is associated with the loss of the Lords Road industrial site. Further, there would be a change in emphasis arising from employment lands that currently permit limited dwelling uses (e.g. MLEP 2011 B6 Enterprise Corridor lands) being replaced with B4 Mixed Use lands, typically characterised by primary residential use with ground floor businesses and shops.

The theoretical job capacity would increase by approximately 250 through implementation of PRCUTS recommendations. This is driven by the higher employment densities associated with B4 Mixed Use lands, compared to B6 Enterprise Corridor and IN2 Light Industrial lands. However, the B4 Mixed Use employment land associated with the Kolotex development has remained vacant for approximately two years. While an isolated case, this raises questions over the demand for this type of floorspace in the precinct. Further, the types of jobs would be different, primarily in retail and serviced based industries.

Under both hypothetical scenarios, realisation of floorspace would require conversion of businesses to full FSR utilisation, including the conversion of dwellings currently zoned IN2 Light Industrial.

The actual outcome would likely be less floorspace provided, with existing commercial, industrial and residential land not being converted to denser employment uses. As such, there would likely be a need to increase floorspace capacity across the LGA to meet projected future needs.

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The alternative scenario assumptions would significantly increase the provision of employment land in the precinct, with an anticipated employment capacity higher than the existing and PRCUTS scenarios. The scenario would deliver employment floorspace capacity to approximately meet the 2036 demand (see Chapter 7) and encourage redevelopment by increasing FSRs. This would help offset fragmentation and constraints of land within the precinct. It would allow for demand to be met by opportunistic development across the precinct in the medium term, without relying on specific sites to redevelop in a short period.

Retention of IN2 Light Industrial and B6 Enterprise Corridor land along Parramatta Road would allow for a continued focus on urban services. This would be reinforced by the removal of residential accommodation as a permissible use in the B6 Enterprise Corridor zone, requiring entire buildings to be dedicated to employment generating uses. Full utilisation of the 1.5:1 FSR would likely require amalgamation of lots given the mix of building stock and generally small lot size may make full utilisation on individual lots unfeasible.

Restriction of B4 Mixed Use land to the area south of the Kegworth Public School playground is a reasonable short-term implementation of the main-street use proposed by PRCUTS, providing an opportunity of a through site link between Upward Street and Tebbutt Street. Limited implementation of the ground-floor retail uses associated with the B4 Mixed Use would help prevent over-provision of floorspace and long-term vacancies.

Under the above assumptions, there is capacity for around an additional 22,760 sqm employment GFA and around 340 jobs compared with existing controls. These assumptions would allow for a significant increase in the provision of employment floorspace in the precinct, with a theoretical floorspace of around 43,640 sqm beyond what PRCUTS controls would likely allow for. The uses would also more closely align with existing uses and contribute to meeting the demand for urban services and similar uses.

This is driven by:

- Retaining B6 Enterprise Corridor zoned land
- Prohibiting residential accommodation in B6 Enterprise Corridor land
- Increasing the FSR of IN2 Light Industrial and B6 Enterprise Corridor land from approximately 1:1 to 1.5:1
- Rezoning a portion of R1 General Residential to B4 Mixed Use land adjacent to Kegworth Public School playground with an FSR of 1.5:1.

The table below presents comparison of employment capacity estimates based on existing controls, proposed PRCUTS controls and under the assumptions put forward by Council in the alternative scenario.

Table 57: Taverners Hill Core Precinct scenario comparison

	Base case	PRCUTS recommendation		Alternative scenario	
	Capacity	Capacity	Change from Base	Capacity	Change from Base
GFA (sqm)	48,836	27,948	**- 20,888 sqm -42.8%**	71,592	**+22,756 +46.6%**
Jobs	750	998	**+248 +33.1%**	1,091	**+341 +45.5%**

Source: Inner West Council, 2019, HillPDA

The alternative scenario offers the highest employment capacity, both in terms of GFA and job capacity. While the PRCUTS scenario would also offer an increased job capacity with a smaller increase in GFA, it is unclear if there is short to medium term demand for the type of employment floorspace associated with the B4 Mixed Use land proposed. If delivered, the use would also mean a loss in the types of urban services, industrial and innovation uses and similar land uses that currently exist and could potentially exist in the future.

The alternative scenario increases the theoretical employment GFA and job capacity by almost half, though the job density is lower than PRCUTS. This is due to the large proportion of floorspace associated with the existing IN2 Light Industrial zone. This does not mean the IN2 Light Industrial zoned land has lower economic value

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compared to the B4 Mixed Use or B6 Enterprise Corridor zones. As noted in the Greater Sydney Region Plan, urban services land, such as IN2 Light Industrial, provides economic benefits beyond jobs, supporting residents and businesses.

This alternative approach would increase theoretical employment land capacity, protect important existing businesses such as the biotechnology hub and is more appropriate to help drive Council's desired redevelopment outcomes. This position is:

- Consistent with the overall approach in the district and regional strategies which strongly promote the retention of urban services land (noting the exemption for PRCUTS land)
- Important for the protection of urban services land for its role and function, as indicated in *A Metropolis that Works*
- Necessary to avoid further shortfalls in the supply of employment lands such as IN1 General Industrial, IN2 Light Industrial and B6 Enterprise Corridor.

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9.3.2.2 Taverners Hill Frame Area Precinct

Role and function

The Taverners Hill Frame Area Precinct is located along a 2.4 kilometre section of Parramatta Road between the Iron Cove Creek and Hawthorne Canal. The precinct contains around 195,400 sqm of land, provides around 70,000 sqm of employment floorspace and apart from residential uses within the precinct, it aligns with an urban services role. The precinct is close to motorway connections and served by buses.

This precinct has a diversity of uses extending beyond traditional urban services in the Kings Bay precinct, with a notable presence of aged care facilities, hotel and motel accommodation, modern office space, residential detached dwellings, residential flat buildings and fast food retail. It also contains major features such as a NSW Ambulance Superstation and a large Bunnings Warehouse. A large proportion of employment floorspace within the precinct has been lost to the recently completed interchange, servicing the M4 East motorway.

The overall precinct can be broken down as follows:

- Eastern portion (Hawthorne Canal to Ashfield Park): has access to the public transport with the Taverners Hill Light Rail and Summer Hill train stations being within worker walking distance. This area also has good visual exposure and vehicular access. Businesses range from successful industrial, commercial and retail premises within both new and older building stock. Building heights generally range between two to three storeys. Newer large three storey buildings have located to this place to take advantage of large lots found to the west of Battle Bridge. There is a large amount of residential within the precinct including residential flat buildings, some of which are in heritage conservation areas.
- Middle portion (Frederick Street to Ashfield Park): this section has experienced significant change recently. A 500 m stretch along the southern side has been absorbed into the M4 East Interchange. Combined with Ashfield Park this creates a significant 700 m disruption to any business activity. The northern part has three significant vacant sites (residual land from WestConnex), mixed amongst urban services and a State heritage item site *Yasmar* which has an important cultural presence. Other notable uses include a nursing home, service station, several apartment buildings from the 1960s /70s which will likely remain in the medium to long term, and a fast food takeaway. This strip lacks a distinct employment role. The main employment use is the Bunnings Warehouse on the corner of Frederick Street. A proposed Woolworths has recently been approved on the corner of Bland Street.
- Western portion (west of Frederick Street): currently has poor public transport access suggesting low potential for office type buildings and instead has potential for buildings and associated uses reliant on deliveries from large vehicles utilising the major road. There have been past development applications for lighting showrooms and a private hospital (cosmetic surgery). At present there are large parcels of land being used for the construction of the WestConnex project until its completion which will become available as residual lands after 2023.

Commercial building heights generally range between two to three storeys. With the exception of the residential uses in the zone, the types of uses currently in operation are generally in line with the objectives of the B6 Enterprise Corridor zone. The enterprise corridor would service both a local and broader district function considering its strategic location and important role of the Parramatta Road as an east-west link.

There are a number of constraints that apply to this precinct. Several properties within the precinct have heritage conservation area and heritage item status. The majority of residential properties to the north and south of the precinct are within heritage conservation areas. Almost the entire precinct directly abuts adjoining residential properties and is reliant on vehicular access from Parramatta Road constraining potential for redevelopment. The extent of residential that exists within the precinct is considerable, and there is little evidence of redevelopment of these sites for employment uses.

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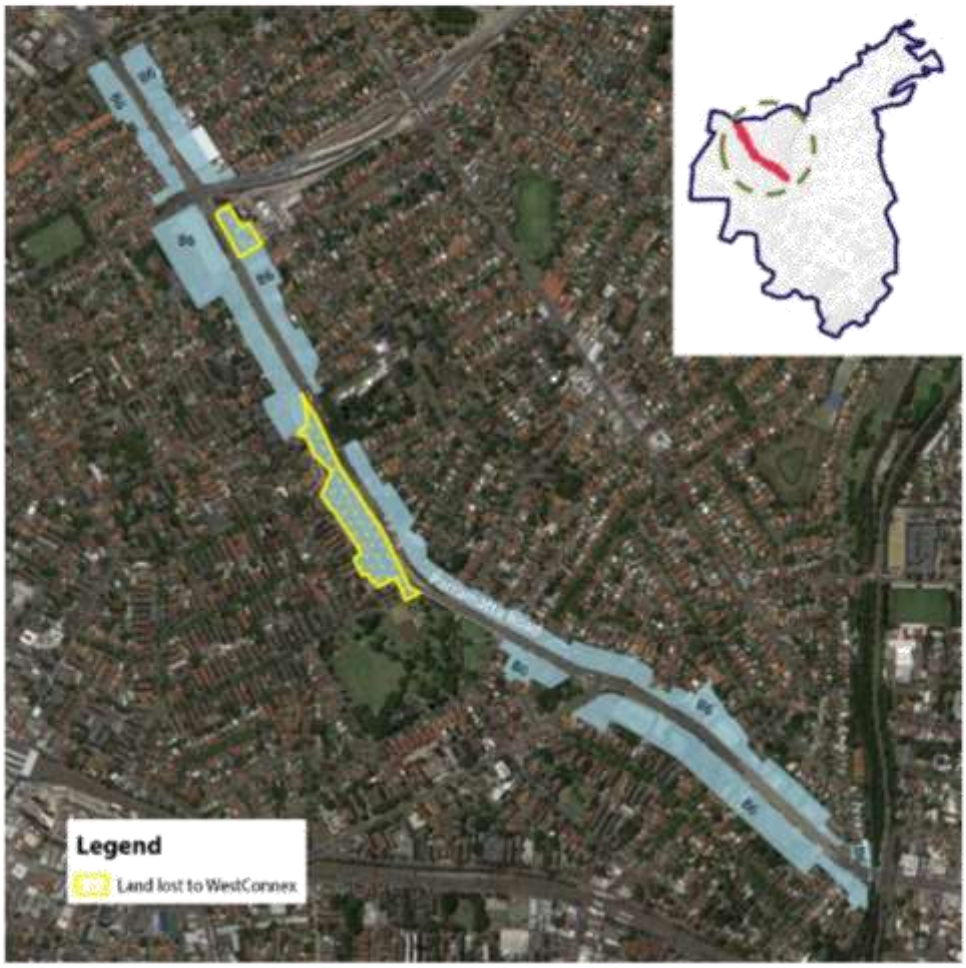
Precinct map

Figure 32: Taverners Hill Frame Area employment zoned land



Floorspace

Category	GFA (sqm)	Proportion
Knowledge intensive	7,256	10%
Administrative and Support Services	-	0%
Financial and Insurance Services	-	0%
Information Media and Telecommunications	-	0%
Professional, Scientific and Technical Services	5,463	8%
Public Administration and Safety	1,793	3%
Rental, Hiring and Real Estate Services	-	0%
Health and education	8,572	12%
Education and Training	2,471	4%
Health Care and Social Assistance	6,101	9%
Population serving	20,939	30%
Accommodation and Food Services	6,419	9%

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Arts and Recreation Services	292	0%
Construction	175	0%
Other Services	5,541	8%
Retail Trade	8,512	12%
Industrial	**22,690**	**32%**
Agriculture, Forestry and Fishing	-	0%
Electricity, Gas, Water and Waste Services	66	0%
Mining	-	0%
Manufacturing	1,075	2%
Transport, Postal and Warehousing	797	1%
Wholesale Trade	20,752	30%
Total occupied floorspace	**59,457**	**85%**
Vacant	**10,602**	**15%**
Total	**70,059**	**100%**

Source: HillPDA Desktop Audit, 2019

Development activity

- 202 Parramatta Road, Ashfield – Woolworths - DA 10.2019.13: Development application approved for the following:
  - 'Woolworths' supermarket with 3690 sqm of retail floor area
  - 'BWS' liquor outlet with 169 sqm of retail floor area
  - Café/kiosk with 80 sqm of retail floor area
- 45 Parramatta Road NSW Ambulance Station: The NSW State Government recently constructed an ambulance 'superstation' on a substantial 3,255 sqm parcel of land in Haberfield. This station is a crucial piece of health infrastructure serving the Inner West.
- 6-8 Parramatta Road Summer Hill 2130 DA2017/71: completed - Construction of a four storey, 55 room, motel development. It replaces a number of single residential dwellings.
- 124-126 Parramatta Road Ashfield NSW 2131 DA2018/140 - under assessment - Demolition of existing structures and construction of a mixed-use development comprising 43 serviced apartments, 132.2 sqm of ground floor retail, basement car parking and landscaping. It replaces a residential flat building and a single residential dwelling.
- 57-61 Parramatta Road Haberfield 2045 DA2018/109.1 - approved - Demolition of existing structures and construction of a 3-storey mixed-use building with basement car parking, a 419 sqm ground floor vehicle sales or hire premises, and 8 serviced apartments on the upper levels. It replaces a car yard.
- 181 Parramatta Road Haberfield 2045 DA2017/159.1 - approved - Demolition of existing structures, and construction of a mixed-use building comprising a three-storey development consisting of 473 sqm of vehicle sales/hire premises on ground floor and 19 serviced apartments on two levels above with two levels of basement car parking. It replaces a car yard.
- 113 Dobroyd Parade Haberfield 2045 - DA2017/151.1 – refused March 2019 - Demolition of existing structures and construction of a three-storey private hospital including medical suites and kiosk, in addition to two basement levels for parking.

Planning controls

Existing controls

Under Ashfield LEP 2013, the precinct is zoned B6 Enterprise Corridor with a maximum FSR control of between 1.5:1 and 2:1 and a maximum building height of 10 to 15 metres. The development standards for maximum FSR

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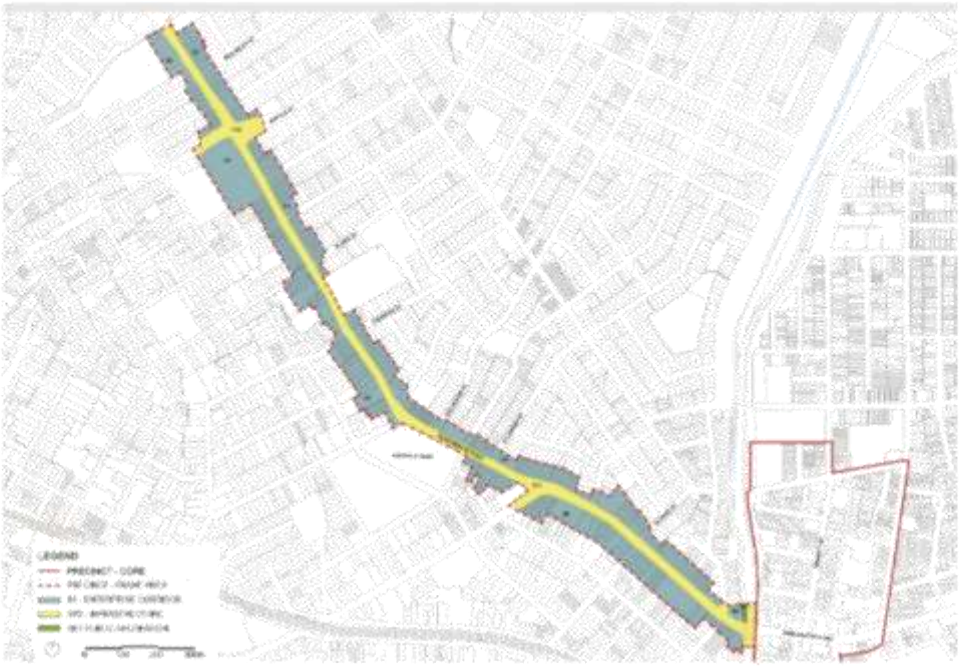
control and maximum building height have been determined to ensure that there is a satisfactory built form relationship with adjacent houses to the south.

Permitted commercial uses include shops, pubs, specialised retail premises. Food and drink premises (other than pubs) are prohibited but permissible on one specific site through additional permitted uses. Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, landscape material supplies are notable permitted uses in the zone. Permitting these uses accommodates for a range of retail options within the zone but restricts uses such as restaurants and cafes.

The group term tourist and visitor accommodation, which includes serviced apartments is also permitted in the zone. Permitting serviced apartments tends to increase land use pattern fragmentation by encroachment of this semi-residential form of development.

Figure 33: Taverners Hill Frame Area existing LEP zoning



Controls recommended under PRCUTS

PRCUTS recommends retention of the B6 Enterprise Corridor zoned land - increasing the height to 16 m and FSR up to 2:1 on the north and south side of Parramatta Road.

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Figure 34: Taverners Hill Frame Area PRCUTS recommended zoning



Employment floorspace demand and supply

The employment precinct capacity has been assessed below.

- Existing gross floor area in the precinct is currently around 70,000 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is approximately around 80,000 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Taverners Hill Frame Area Precinct has been calculated under existing controls as well as controls under PRCUTS. This is shown below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 334,500 sqm of employment floorspace and around 8,800 jobs.
- If planning controls proposed under PRCUTS were fully utilised, hypothetically the precinct could accommodate around 373,100 sqm of employment floorspace and around 9,820 jobs.
- Compared to current planning controls (base case) the PRCUTS recommendations would increase the theoretical floorspace capacity by around 38,600 sqm and job capacity by around 1,020 in the precinct.

Additional detail regarding the scenarios is provided below.

Table 58: Taverners Hill Frame Area capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B6 Enterprise Corridor	38	334,452	8,801
Total		**334,452**	**8,801**

Source: Inner West Council, 2019, HillPDA

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Table 59: Taverners Hill Frame Area capacity – PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B6 Enterprise Corridor	38	373,071	9,818
Total		**373,071**	**9,818**

Source: Inner West Council, 2019, HillPDA

Based on the above, the precinct has excess capacity to meet 2036 demand. As explained above, the exceedance is overstated due to the loss of land to the newly constructed WestConnex interchange being included in the capacity. This needs to be corrected by remaining WestConnex land.

In practice, this floorspace may be difficult to achieve, given the high level of vacancies in the area, and the low potential for residential building stock to transition to employment land. Realisation of theoretical capacity that relies on conversion of these properties to employment lands is unlikely in the medium to long term, without significant market demand or large-scale development associated with higher FSRs. As discussed in Section 7.2, significant long-term employment land shortfalls are expected in the LGA. The long term and planned development of floorspace in the Taverners Hill Frame Area Precinct could help address this shortfall. Transformation of the Taverners Hill Frame Area Precinct will require dedication of significant time and resources to achieve this vision. Further, the outcomes of land current lost to WestConnex infrastructure is unclear. The employment land lost for the operational purposes of the motorway should be rezoned to SP2 Special Infrastructure zoning. The residual lands may provide short to medium term opportunities to develop employment lands.

Table 60: Taverners Hill Frame Area capacity comparison

	Base case	PRCUTS recommendation	Change from Base
	Capacity	Capacity	
GFA	334,452	373,071	+38,619 sqm +11.5%
Jobs	8,801	9,818	+1,017 +11.6%

Source: Inner West Council, 2019, HillPDA

PRCUTS has identified two separate visions for the Taverners Hill Precinct. The first, Taverners Hill Core Precinct, is a transition from an established commercial/industrial area to mixed-use precinct where mixed and creative uses are supported by an increased residential population and proximity to transit options. The second, Taverners Hill Frame Area Precinct, is anticipated to transition from a mixed residential and commercial area to a movement corridor that supports medium density enterprise corridor uses.

PRCUTS anticipates around 4,100 new jobs in the Taverners Hill Precinct, with around an additional 350,000 sqm of employment floorspace. There is currently theoretical capacity for around 383,300 sqm and around 9,560 jobs. With PRCUTS recommendations applied, this capacity is expected to increase to approximately 401,000 sqm and around 10,820 jobs. However, the bulk of this growth is along the frame area, which has lower demand for floorspace and is not as accessible as Taverners Hill core precinct. The alternative scenario for Taverners Hill seeks to balance this by maintaining the employment-centric nature of current business and industrial zones, increasing the theoretical capacity to around 446,700 sqm GFA and 10,930 jobs.

In addition, in this context of the PRCUTS recommended reduction in employment floorspace (in the core precinct), and the consequent estimated job capacity of around 1,260 in the Precinct (core + frame), it is difficult to identify how the PRCUTS growth projection of around 4,100 jobs by 2050 was arrived at given the PRCUTS recommended reduction in employment floorspace in the core precinct and the consequent estimated job capacity of around 1,260 in the Precinct (core and frame).

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Note the estimated number of jobs in both PRCUTS recommended and alternative scenario is much lower than what was envisaged by PRCUTS employment projections

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9.3.2.3 Issues and recommendations

PRCUTS envisages a major transformation for Taverners Hill with employment uses accommodated within a denser built form in the frame area and mixed use development in the core. The table below provides the employment capacity comparison for the whole Taverners Hill Precinct (core + frame area) under existing controls, proposed PRCUTS controls and alternative scenario.

Table 61: Taverners Hill Precinct (core + frame) scenario comparison

	Base case	PRCUTS recommendation		Alternative scenario	
	Capacity	Capacity	Change from base	Capacity	Change from base
Core Precinct GFA	48,386	27,948	-20,438	71,592	23,206
Frame Area Precinct GFA	334,452	373,071	38,619	373,071	38,619
Total GFA	**382,838**	**401,019**	**+18,181 +4.7%**	**444,663**	**+61,825 +16.1%**
Core Precinct jobs	756	998	242	1,091	335
Frame Area Precinct jobs	8,801	9,818	1,017	9,818	1,017
Total Jobs	**9,557**	**10,816**	**+1,259 +13.2%**	**10,909**	**+1,352 +14.1%**

Source: Inner West Council, 2019, HillPDA

The discussion below identifies challenges with implementation of the vision and concludes that:

- Planning controls should not change for the frame area without resolution of site-specific constraints which may limit uptake of higher floorspace controls and compromise the corridor as an employment area.
- Alternative planning controls for the core area should be investigated further with the goal of increasing or maintaining employment floorspace within the precinct, particularly functional and well-located industrial and urban services lands.

Loss of industrial and urban services land under PRCUTS scenario in Taverners Hill Core Precinct

Considering capacity take up, it is estimated that there will be a shortfall of at least 5,500 sqm employment GFA in the precinct under the existing zoning controls (base case). Adoption of PRCUTS recommendation to rezone IN2 Light Industrial and B6 Enterprise Corridor land to residential and mixed use under PRCUTS would further worsen this shortfall and result in a loss of established and functional industrial and urban services land. It may result in a loss of employment zoned floorspace exacerbating the projected shortfall of employment floorspace in the Inner West LGA.

While adoption of the PRCUTS recommendations could increase the number of jobs in the precinct, this take-up would likely eliminate a substantial quantity of urban services land including creative and innovative uses in the precinct. This increase in number of jobs would rely on the take-up of ground floor commercial space in these mixed-use developments. As described in the *Greater Sydney Region Plan* (Greater Sydney Commission, 2018), urban services lands may have a lower number of associated jobs but provide significant operational and functional benefits for surrounding businesses and residents.

This proposal is also inconsistent with the findings of this study which demonstrates shortage of industrial land in the LGA. This is particularly true north of Parramatta Road, where Tebbutt Street is proposed to transition to a main-street environment.

The proposed transition from B6 Enterprise Corridor to B4 Mixed Use land appears to conflict with anecdotal evidence that there is not sufficient demand for significant increases in the employment uses associated with B4

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Mixed Use land within the precinct. As discussed in Section 8.1.4, it is recommended that B6 Enterprise Corridor land prohibit residential uses. Inclusion of residential uses would reduce the theoretical employment capacity of all B6 Enterprise Corridor zoned land, including the precinct.

Capacity modelling identifies that the current supply of industrial zoned land in the LGA is insufficient to meet future demand. In part, the projected shortage of industrial land arises from the cumulative effect of recent centre-based rezonings. Future rezoning of industrial land in the LGA in this way is not supported,

Loss of flexible and affordable employment floorspace under PRCUTS in Taverners Hill Core Precinct

Land within the Taverners Hill Core precinct zoned B6 Enterprise Corridor and IN2 Light Industrial primarily serves employment roles. Rezoning to B4 Mixed Use would shift the focus of the precinct to residential and retail uses, as outlined in the PRCUTS vision. Assuming employment floorspace above the ground level was not replaced in new developments, this would likely compromise the affordability and flexibility of employment floorspace within the precinct.

It has been observed in recent mixed-use redevelopments within the Inner West and across Sydney that ground floor employment uses forming part of mixed-use developments have been unable to accommodate the diversity of land uses that can be achieved on sites that only permit employment uses. A large example of this is located in the Taverners Hill Precinct at the Kolotex development, where ground floor commercial space has remained vacant for approximately two years. In addition, ground floorspace employment floorspace tends to be less flexible and smaller in size due to driveway crossings, basement ramps, separate entries and servicing for supporting infrastructure for residential uses.

The transition of B6 Enterprise Corridor to B4 Mixed Use land on the south side of Parramatta Road would likely limit employment capacity to ground levels. This would shift uses to retail and business services uses, with office, warehousing uses, or other urban services uses difficult to deliver due to permissibility issues.

Retention of the B6 Enterprise Corridor zoned land would help retain and expand the existing mix of uses in the future as land consolidated is redeveloped.

Recommendation: An alternative to the PRCUTS recommended planning controls for Taverners Hill Core should be developed by Council with the goal of addressing the projected shortfall of employment floorspace in the Inner West LGA by maintaining and increasing the supply of functional and well-located industrial and urban services lands. This is addressed further through Action 3.1.6 and 2.2.1 of the Employment and Retail Lands Strategy.

Case Study: The Connectory biotechnology hub

The Connectory biotechnology hub at 701-703 Parramatta Road, Leichhardt epitomises some of the key problems that arise from PRCUTS recommendation that IN2 Light Industrial and B6 Enterprise Corridor land in the precinct be rezoned to R3 Medium Density Residential, B4 Mixed Use or residential uses be permitted in B6 Enterprise Corridor.

The Connectory cluster of biotechnology businesses at 701 – 703 Parramatta Road, Leichhardt is made up of the IDE group Horten Medical and Atomo Diagnostics and of global importance. When it opened in 2015, the Connectory was described as a new space where businesses and entrepreneurs can connect and cross-pollinate to discover new opportunities, develop new ideas and build better futures for health. It has a vision to become Australia's leading centre for design, innovation and advanced manufacturing, The Connectory offers new capabilities for 3D printing, large scale prototyping and pilot assembly.

This site has been recommended for rezoning in PRCUTS from IN2 Light Industrial to B4 Mixed Use on the Parramatta Road frontage and R3 Medium Density Residential zone. The Connectory site would be half in the B4 Mixed Use and half in the R3 Medium Density Residential. That rezoning could put the operation of this

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innovation centre and the businesses it houses at risk as they occupy an older, industrial, inexpensive building and would find it difficult to maintain their presence in this location should the site be the subject of a rezoning.



Source: IDE Group

Consideration of site and feasibility constraints

Take-up of higher FSR controls recommended by PRCUTS at Taverners Hill Precinct (core and frame area precincts) on employment zoned land is constrained by feasibility and fragmentation constraints. Floor space ratio uplift would increase the theoretical employment potential in Taverners Hill, but there are significant barriers to large-scale redevelopment in the precinct, largely related to land fragmentation, residential uses, permissibility of higher and better uses such as serviced apartments and street frontages.

PRCUTS recommends an increase in the height and FSR controls in the Taverners Hill Core Precinct, with mixed use development of between four and six storeys and over double (2.2 to 2.4:1) the current FSR. The alternative option to PRCUTS recommends a FSR increase to 1.5:1 and applies to zones that would only allow employment uses. A review of the built form in the IN2 Light Industrial lands shows that sites either meet or exceed the 1.5:1 FSR currently (east of Upward Street), or are fragmented to the point where a 1.5:1 FSR development would be difficult to achieve without consolidation (west of Upward Street, particularly dwellings opposite Hathern Street). Frontages range from approximately six metres on IN2 Light Industrial zoned with existing residential dwellings to between 12m and 20m on active employment generating land.

The potential for an increased FSR beyond 1.5:1 to encourage redevelopment should be considered as a base, with the potential for additional floorspace for applications that reduce fragmentation and increase site access.

There are risks associated with introducing FSR uplifts, without determining whether there is evidence that this type of development is feasible. The increased density could potentially result in land speculation, which could delay development. Alternatively, land speculation may have already occurred, with the expectation that PRCUTS controls would be delivered as written in the near term. These matters should be considered as an informed feasibility analysis.

As for the Taverners Hill Frame Area Precinct, the realisation of the theoretical capacity is largely anticipated in the long term, with PRCUTS anticipating development post 2023. The realisation of that capacity will require a major change in character, from a mix of residential and commercial uses to a green-edged movement corridor that supports over three times the current employment in the immediate area. Table 61 shows that this growth estimate is incorrect with the actual likely increase in job numbers likely to be no more than 13.2%.

PRCUTS recommended controls in the Taverners Hill Frame Area Precinct are modest, with a 0.5:1 increase in the FSR of land to the north of Parramatta Road. This is unlikely to result in large-scale delivery of employment floorspace in the near term but will help achieve the long term vision. Before the potential capacity is delivered, unique challenges for revitalisation will need to be addressed, with historic residential land uses and WestConnex construction resulting in an inconsistent character.

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There is potential for the Taverners Hill Frame Area Precinct to make significant contribution to meeting future expected LGA-wide employment floorspace demand. Adoption of increased height and FSR controls along the northern side of Parramatta Road has the potential to encourage opportunistic redevelopment. Additional steps are required to:

- Promote the corridor as a suitable alternative for floorspace demand shortfalls across the LGA
- Arrange for side and rear access to help achieve the Parramatta Road 'movement' function
- Undertake precinct-wide feasibility site testing to determine appropriate long-term design and planning controls.

Further feasibility and site testing should be undertaken across the entire PRCUTS Taverners Hill Precinct to determine the height and FSR necessary to balance the need for a financial return on development with the need to achieve good urban design outcomes. Noting that there will likely be a need to consolidate multiple lots, Council should review height/GFA/FSR in the context of enabling lot consolidation in IN2 Light Industrial areas, in order to prioritise the long-term functionality of the industrial zoned land. Potential incentives to encourage lot consolidation should also be considered.

Recommendation: Undertake coordinated and detailed precinct planning for Taverners Hill to resolve site-specific and feasibility constraints to encourage uptake of higher floorspace controls as recommended as an alternative option to PRCUTS. This detailed planning may include:

- Reviewing height and FSR controls and lot consolidation required for redevelopment.
- Engagement with landowners and State agencies to arrange for side and rear access to reduce vehicle crossovers on Parramatta Road.
- Considering expansion of the IN2 Light Industrial and B6 Enterprise Corridor zone in consultation with affected landowners.
- Undertaking feasibility testing, to determine the viability of redevelopment for employment uses.
- How to achieve positive design outcomes that reduce fragmentation, enhance site access and are sensitive to surrounding uses.

Permissibility of serviced apartments

Based on development activity observed, proposals for redevelopment are focussed on mixed use development with ground floor commercial uses with serviced apartments above. These often have driveway crossings on Parramatta Road, which conflicts with the vision of Parramatta Road being a movement corridor with green setbacks. While 'hotel and motel accommodation' is a mandated permissible use in the zone, uses under the broader term of 'tourist and visitor accommodation' should not be permitted in the zone.

Recommendation: Prohibit 'tourist and visitor accommodation' group term in the B6 – Enterprise Corridor zone.

Staging of delivery

Capacity and projected demand in the frame precinct is discussed in Section 7, with the area's capacity expected to exceed demand. In the short to medium term, this would mean a delay in redevelopment to realise the capacity of the area, as new development would not easily attract buyers and tenants. Redirection of LGA-wide demand to the area would require a coordinated and long-term commitment.

Given the PRCUTS's frame area designation, this long-term transformation is reasonable and potentially achievable in the 2050 timeframe outlined in PRCUTS. Coordination would likely require community, local and State partnerships to achieve the PRCUTS vision. Particular attention should be given to the potential of combining lots and promoting off-Parramatta road access to reduce crossovers and improve on-site circulation for future development.

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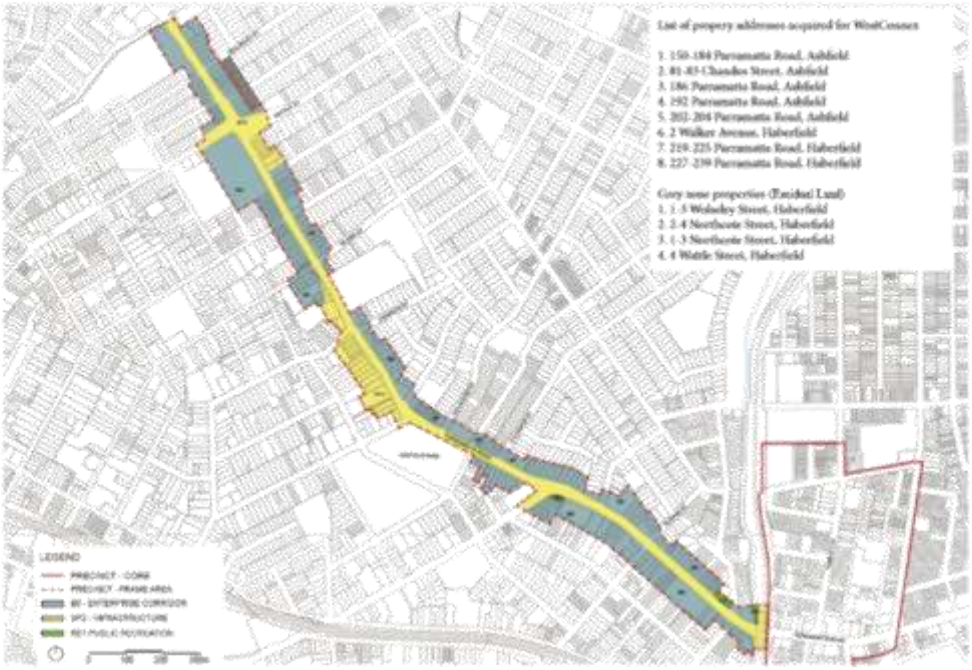
Recommendation: Develop a medium and long term PRCUTS Implementation plan, with staging as a key consideration.

Land lost to infrastructure projects

Land currently zoned B6 Enterprise Corridor has been lost to the recently built M4 tunnel portal. Land that is permanently required to operate and service the tunnel should be zoned accordingly.

Recommendation: Subject to confirmation of list of properties with RMS, rezone land permanently lost to the new M4 interchange, related servicing facilities and parklands from B6 Enterprise Corridor to SP2 Infrastructure and RE1 Public Recreation.

Figure 35: Taverners Hill Frame Area proposed land use zoning recommendations to reflect employment land lost to WestConnex



Large vacant landholdings and opportunity for site amalgamation

A number of opportunity sites along the corridor exist for redevelopment for employment uses. They include at least three sites that are currently owned by Roads and Maritime Services.

Recommendation: Work with State Government to secure for Council the first right to any remaining land after infrastructure projects are complete.

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9.3.3 Leichhardt Precinct

Leichhardt Precinct is located in central portion of the LGA, along Parramatta Road, between Flood Street to the west and Johnston Street/Northumberland Avenue to the east. PRCUTS splits the precinct into two parts: Leichhardt Core Precinct and Leichhardt Frame Precinct.

The Leichhardt Core Precinct comprises the intersection of Norton Street and Parramatta Road, including both sides of Parramatta Road oriented properties between Renwick Street and Balmain Road, and several properties on Crystal Street. The frame area extends to the east and west of the core precinct along Parramatta Road, and generally to the adjoining parallel streets.

Figure 36: Leichhardt Precinct (Core + frame area) context map

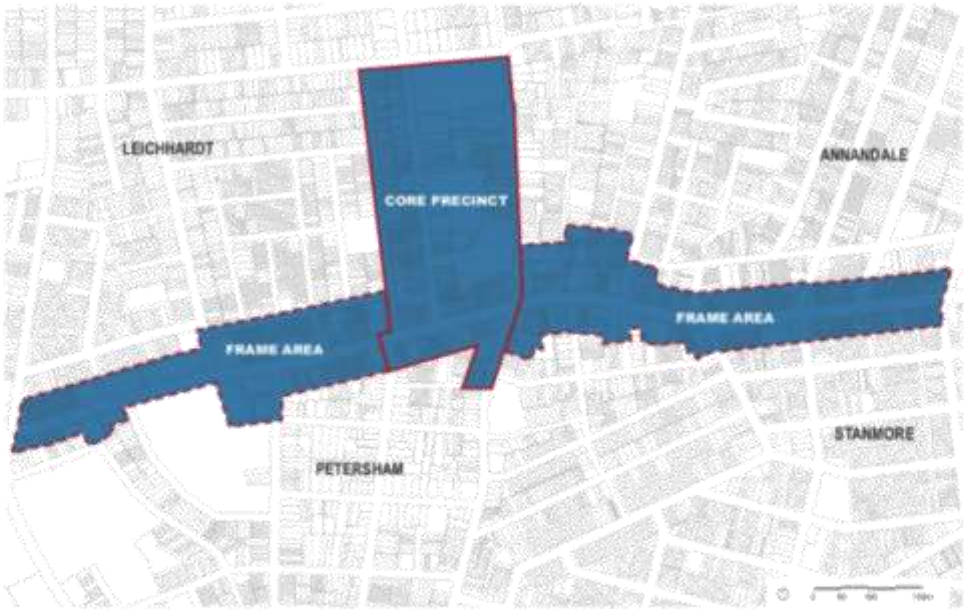

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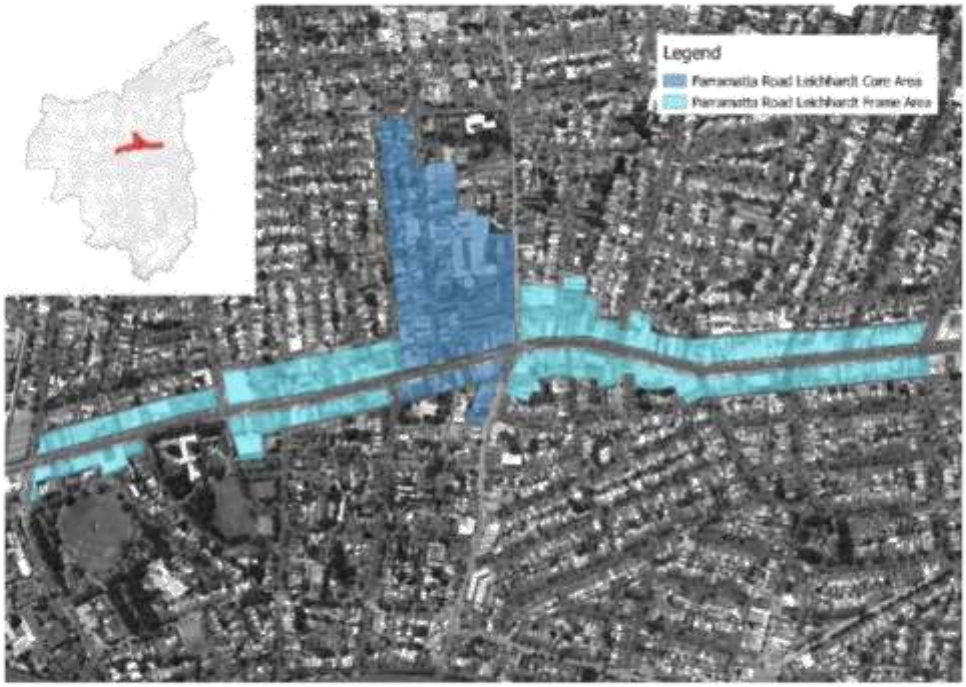
Figure 37: Leichhardt Precinct (Core + Frame Area) employment lands



PRCUTS Vision

The PRCUTS vision for the precinct is a vibrant, mixed use entertainment precinct attracting visitors from the Greater Sydney area. This would be facilitated through redevelopment along Norton Street and Parramatta Road. The northern portion of the precinct will be dedicated to civic uses, while small shop frontages would provide a mix of shops and uses. Norton Street would be further supported by east-west linkages to neighbouring streets, complemented by improvements in the streetscape and additional public open space.

This transition is expected to be supported by:

- Capitalising on improved high-capacity public transport connections along Parramatta Road
- Intensifying residential and retail uses to create a critical economic mass
- Dedication of land to a network of pocket parks, plazas and other connected open spaces
- Breaking up long blocks and creating through-site links perpendicular to Norton Street and Parramatta Road
- Enhancing north-south links to Petersham Station
- Incorporating car parking into future development and repurposing at-grade car parking where possible.

In the 2050 long-term horizon, PRCUTS identifies a:

- Proposed growth projection of around 3,600 jobs
- Proposed indicative land use mix (additional employment GFA) of 74,000 sqm in Leichhardt Core Precinct and 111,000 sqm in Leichhardt Frame Precinct.

The assumptions for these projections are unclear from the available documentation. A consideration of potential jobs and additional floorspace arising for the proposed changes is provided below.

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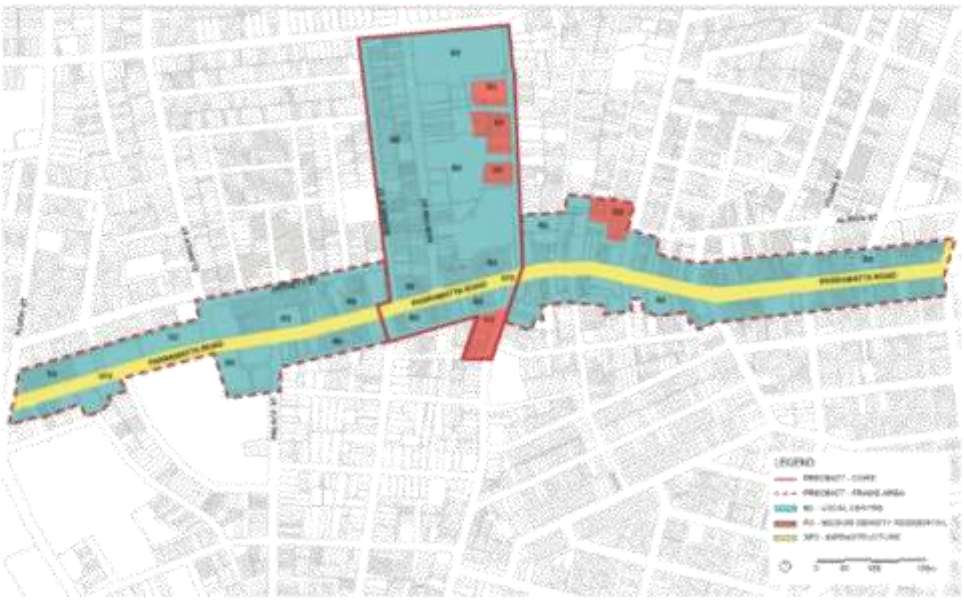
The proposed additional employment GFA of 185,000 sqm in the Leichhardt Precinct associated with 3,602 jobs in PRCUTS appears to be inconsistent. Due to these inconsistencies, Council has provided GFAs based on PRCUTS land use recommendations which have been analysed below. While the Norton Street portion of the Leichhardt Precinct offers many of the benefits associated with a pedestrian-friendly local centre, including a mix of small and large retail and business options, there are major challenges facing the Centre.

The whole of the Leichhardt precinct has experienced considerable decline since its peak in activity in the early 2000s. There are considerable urban design constraints, limited parking and traffic and circulation issues. There are also challenges with regard to suitability and affordability of commercial space within the centre. Parramatta Road also presents several challenges, with poor pedestrian amenity and access, fragmentation, poorly maintained building stock and multiple constraints on new development

Former Leichhardt Council undertook an urban design and local centre study that examined the Parramatta Road and Norton Street areas. This Study can be built on further to determine future planning controls for the centre.

Figure 38: Leichhardt Precinct (core + frame area) PRCUTS recommended zoning



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9.3.3.1 Leichhardt Core Precinct

Role and function

The Leichhardt Core Precinct comprises land zoned B2 Local Centre, between Renwick Street and Balmain Road Leichhardt, between Parramatta Road to the south and Marion Street to the north. It is located to the south of the Norton Street North precinct (refer to Section 9.2.10), which does not fall within the PRCUTS boundaries. Land fronting the southern side of Parramatta Road and a row of properties fronting the north-western end of Crystal Street has also been included within the precinct. The precinct contains around 80,500 sqm of land, provides around 59,000 sqm of commercial floorspace and is operating in line with its role as a town centre.

Leichhardt Core precinct overall consists of residential buildings, restaurants, cafés, and retail outlets. This precinct has a specialisation in wedding related clothing retail and associated wedding services. At least a dozen of these retail outlets are clustered along Parramatta Road. Norton Street contains a cinema complex, a major entertainment destination as well as a standalone JB HiFi.

Norton Plaza is a self-contained shopping centre containing a total net lettable area of 11,800 sqm, which competes with Marketplace Leichhardt, Ashfield Mall and Broadway. Its anchor tenants include a full-line Coles supermarket and a Harris Farm supermarket. It also contains a range of other food retail, personal services and a number of cafes and restaurants primarily on the street frontage.

The Italian Forum contains commercial floorspace over two to three levels, with Leichhardt Library located on the ground floor. A significant proportion of the forum is vacant. Existing uses include health and personal services, offices, medical services, real estate services, restaurants and retail.

There is a significant daytime economy catchment for the centre, served by staff and visitors to Inner West Council offices to the north, Leichhardt Public School, Sydney Catholic Schools offices and a number of childcare centres nearby.

The precinct suffers from poor amenity due to aircraft noise, traffic noise, narrow footpaths and poor pedestrian permeability, both internal and external to the precinct. While the area is well served by buses, on and off-street parking options are limited. Development feasibility is constrained due to lot fragmentation and planning control considerations, such as heritage and car parking requirements. Parramatta Road currently is an area of low amenity and a poor pedestrian environment due to high traffic volumes, noise and air pollution.

Urban design, amenity outcomes associated with redevelopments are constrained due to a lack of rear lane access for most properties within the precinct. As a result, opportunities for new employment floorspace are constrained.

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Precinct map

Figure 39: Leichhardt Core Precinct employment zoned land (existing)



Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	26,707	45%
Supermarkets & Grocery Stores	4,864	8%
Specialty Food Stores	827	1%
Fast-Food Stores	1,006	2%
Café/Restaurants	5,173	9%
Clothing Stores	2,208	4%
Hardware and Bulky Goods Stores	276	0%
Other Personal & Household Goods	4,961	8%
Selected Personal Services	7,392	13%
Occupied Non-Retail Floorspace	25,056	43%
Accommodation	73	0%
Pubs, Taverns & Clubs	2,025	3%
Rental, Hiring & Real Estate Services	1,424	2%
Health Care & Social Assistance	6,444	11%
Financial & Insurance Services	2,502	4%

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Arts & Recreation Services	5,026	9%
Education and Training	1,387	2%
Other	6,175	11%
Occupied floorspace total	51,763	88%
Vacant floorspace	6,980	12%
Total floorspace	**58,743**	**100%**

Source: HillPDA Desktop Audit, 2019

Development activity

This Centre has experienced development application activity from 2014-2016. Key redevelopments during this time period are discussed below. While construction has happened since that time, new applications have been limited.

- 46 Norton Street - D/2016/486. The alterations and additions to the existing building, including a 2 storey rear addition to be used for commercial purposes, were approved by Council in 2017. Construction is yet to commence.
- 47-51 Norton Street - D/2015/348. This 4 storey mixed use project was approved by Council in 2017 and completed in 2019. It consists of one 126 sqm and one 38.5sqm ground floor commercial space and 15 apartments. These replaced a modern 2 storey commercial building.
- 109 Norton Street - D/2015/224. The alterations and additions to level 1 of the existing building and change of use to accommodate two apartments was approved by Council in 2015 and completed in 2019.
- 355-357 Parramatta Road - D/2014/205. This 3 storey mixed use project was approved by the Land and Environment Court in 2015 and completed in 2019. It consists of a ground floor commercial space and 12 apartments. These replaced two shop-top housing commercial buildings.
- 371-375 Parramatta Road – D/2014/390. This 3 storey mixed use development was approved by Council in 2014. It is approved to consist of a 216 sqm commercial space and 10 apartments. The previously existing shop-top housing buildings were demolished in 2018. Construction is yet to commence (November 2019).
- 377 Parramatta Road - D/2016/331. This 5 storey mixed use development was approved by the Land and Environment Court in 2017. Construction is yet to commence (November 2019). It is approved for a 36.7 sqm ground floor commercial space, a 52 sqm first floor commercial space and 7 apartments.

Planning controls

Existing controls

Properties to the north of Parramatta Road are subject to Leichhardt LEP 2013 and are zoned B2 Local Centre. A maximum FSR of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

Marrickville Local Environmental Plan 2011 applies to properties to the south of Parramatta Road and is zoned B2 Local Centre. The FSR control is 1.5:1 and a height control of 14 metres applies. 'Light Industry', 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre.

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Figure 40: Leichhardt Core Precinct existing LEP zoning



Controls recommended under PRCUTS

PRCUTS recommends retaining the bulk of the B2 Local Centre zoned land, with the exception of several properties along Crystal Street and Balmain Road, which are recommended to be rezoned to R3 Medium Density Residential. A portion of R1 General Residential zoned units that back onto B2 Local Centre land on McDonald Street, as well Leichhardt Public School currently zoned SP2 Infrastructure, are recommended to be rezoned to B2 Local Centre.

Densities across the precinct are recommended to be increased under PRCUTS, with the west side of Norton Street increased to 1.9:1 and 17 m, and the eastern side generally increased to 3:1 and 22 m. The exception to this is the Italian Forum, which is to remain 1:1, with a height of 17 m and around the school. Otherwise land fronting Parramatta Road is recommended to be increased to 3:1.

The recommended changes represent a significant uplift to the area, transitioning from one-three stories to five-seven stories. The primary intensification in use would likely be residential, with an increase in shop-top housing.

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Figure 41: Leichhardt Core Precinct PRCUTS recommended land use zoning



Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently around 58,700 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is around 96,100 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Leichhardt Core Precinct has been calculated under existing controls, PRCUTS and Council alternative scenarios. This is shown in Table 62 and Table 63 and detailed below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 25,500 sqm of employment floorspace and around 1,200 jobs.
- PRCUTS scenario full utilisation:
    - Around 41,300 sqm of employment floorspace and around 1,900 jobs.
    - Increase of around 15,800 sqm and job capacity increase of around 720 in the precinct over the base case.

Additional detail regarding the scenarios is provided below.

Table 62: Leichhardt Core Precinct capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2	22	25,492	1,159

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Total		**25,492**	**1,159**

Source: Inner West Council, 2019, HillPDA

Table 63: Leichhardt Core Precinct capacity – PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2	22	41,257	1,875
Total		**41,257**	**1,875**

Source: Inner West Council, 2019, HillPDA

The PRCUTS recommendation has the potential to increase the theoretical employment floorspace capacity in the precinct by approximately 15,800 sqm (over 60 per cent). This increase is associated with new B2 Local Centre lands, assuming 25% of the B2 Local Centre land will be used for commercial purposes. The theoretical job capacity is increased by approximately 720, associated with additional B2 Local Centre floorspace.

PRCUTS suggests rezoning of Leichhardt Public School from SP2 Infrastructure to B2 Local Centre but makes no associated FSR/height recommendations. It is assumed that the rezoning of school does not reflect an intent to increase commercial floorspace, with the current school use to be maintained as shown in the proposed zoning map below.

Figure 42: Leichhardt Core Precinct proposed zoning reflecting retention of existing school zoning as SP2 infrastructure



The effects of rezoning B2 Local Centre land along Crystal Street to R3 Medium Density Residential has been included in the above analysis. This area supports several automotive and other businesses. Rezoning of Crystal Street for residential purposes would result in a loss of approximately 1,800 sqm of theoretical employment floorspace and the potential for around 85 jobs.

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The employment precinct capacity has been assessed below:

- Existing gross floor area in the Precinct is currently around 59,000 sqm (excluding vacant space) based on the HillPDA desktop audit, exceeding current base case capacity of around 25,500 sqm
- The Section 7 forecast for demand and supply of retail floorspace (Table 32) shows that around an additional 11,511sqm of retail floorspace is required by 2036 in this centre.
- In addition to the above, it is forecast that around an additional 20,065sqm of office floorspace will need to be accommodated from 2016 to 2036 (Table 24). This is in addition to the 12,045sqm of office space forecast as needed in Leichhardt Frame.

Under both hypothetical scenarios, realisation of floorspace would require redevelopment of a significant portion of Norton Street, currently characterised by repurposed single story and terrace residential buildings. Some of these opposite Norton Plaza are in a heritage conservation area as are those fronting Parramatta Road.

Redevelopment of these properties may not achieve the full floorspace capacity envisaged by PRCUTS due to these constraints. Given these factors, it appears that the desired outcome of PRCUTS is unlikely to be achieved without significant changes to the character of Norton Street.

Case Study: Leichhardt bridal store cluster

Norton Street and Parramatta Road has a historical and significant bridal store presence. Parramatta Road close to Norton Street has a cluster of around ten bridal stores, with another cluster further east close to the intersection of Parramatta Road and Catherine Street. This second cluster includes five bridal stores. There are also five other bridal stores within a kilometre radius.

These stores support a large number of related businesses in the district. With two wedding focused function centres, a number of jewellers, and over five photography studios. These wedding related businesses are an important part of the local economy attracting visitors from across the wider Sydney metropolitan area.



Source: Amarige Bridal, *Amarige Bridal Facebook page,* Amarige Bridal. Available from: <https://www.facebook.com/Amarige-Bridal-Couture-671170422956874/>

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9.3.3.2 Leichhardt Frame Area Precinct

Role and function

The Leichhardt Frame Area Precinct is an employment corridor stretching for 1.8 kilometres along Parramatta Road between Flood Street to the west and Johnston Street Annandale to the east. The corridor excludes the lands contained in the Leichhardt Core Precinct, which forms the Norton Street town centre. The precinct contains around 119,000 sqm of land, provides around 69,000 sqm of commercial/industrial floorspace and is operating as a mixed retail and service area. The area is well served by buses and most of the corridor is within reasonable walking distance to train stations along the inner west line.

Due to a lack of market demand for retail commonly associated with a centre (e.g. restaurants, cafes, and food retail) and the lower amenity of the Parramatta Road corridor, the employment spaces in the corridor are understood to be relatively affordable compared with the key centres in the Inner West LGA. While there is a relatively high vacancy rate, Parramatta Road has evolved to support a unique range of businesses. It has a distinct retail offering, different to Norton Street. The clusters of bridal and music businesses are particularly significant.

The precinct accommodates a diversity of employment uses ranging from industrial and urban services to specialised retail, restaurants, cafes, pubs, office and business premises. There is a notable amount of vacant floorspace within the corridor, which risks compromising the function of the corridor. The eastern and western portions of this area have two distinct functions:

- The western portion (towards Taverners Hill) has a distinct urban services role. A number of specialised retail premises including furniture stores exist along this corridor as well as car dealerships, car repairers, storage premises, car service centres, retail related to home renovation as well as retail premises associated with the wedding dress and wedding services related cluster closer to Norton Street. Business premises such as upholsterers, hairdressers and massage parlours are also notable along this section of the road as well as medical related uses. Buildings on the western end of the corridor are largely industrial warehouse style buildings or modern showrooms. These are of a flexible format that can accommodate a range of businesses.
- The eastern portion (towards Camperdown) has a mixed urban services and retail/services role. There are several wedding related retail and services, real estate services, fitness and dance studios, renovation suppliers and hardware stores. There is also a major function centre, Centrelink office and two large council owned carparks. The employment spaces are significantly smaller than floorspace in the western portion.

A large portion of commercial floorspace is located within early 20th century two to three storey buildings, predominantly in the eastern portion. A number of these properties are within heritage conservation areas or are heritage items. These buildings provide the corridor with a historic fine grain character, but also limit the potential to consolidate lots and the associated benefits of coordinated redevelopment. The buildings are of aging stock ranging from average to poor condition. The majority of properties benefit from rear lane access.

Parramatta Road currently is an area of low amenity and has a poor pedestrian environment due to high traffic volumes, noise and air pollution. Footpaths are narrow and there is a lack of space for street trees or footpath activities. The western portion of the precinct (west of Palace Street Petersham) has a steep topography, which may also discourage pedestrian movement.

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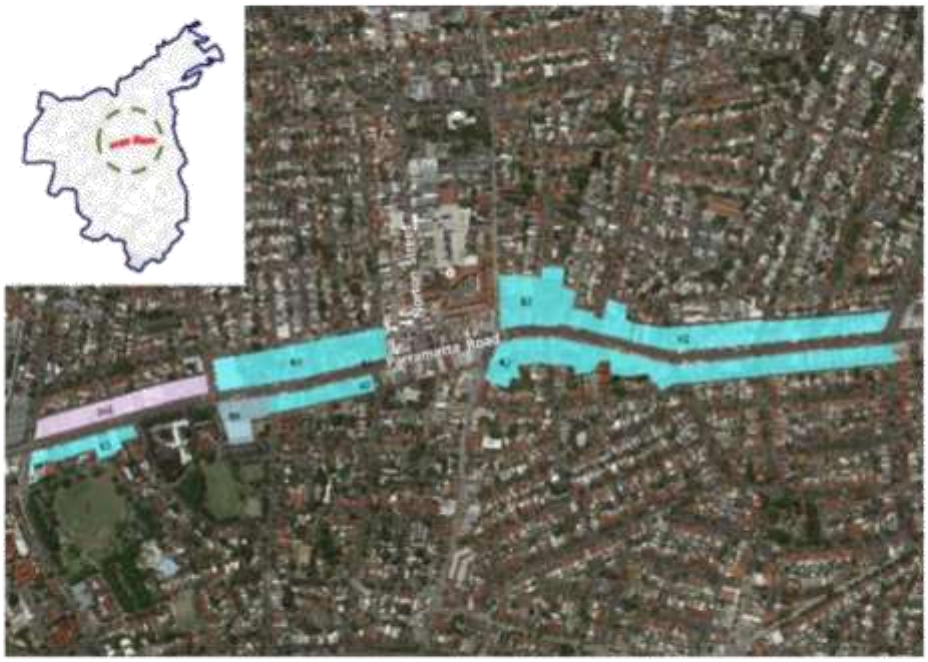
Precinct map

Figure 43: Leichhardt Frame Area employment zoned land



Floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	29,105	42%
Supermarkets & Grocery Stores	-	0%
Specialty Food Stores	2,526	4%
Fast-Food Stores	545	1%
Café/Restaurants	1,476	2%
Department Stores	-	0%
Clothing Stores	3,811	6%
Hardware and Bulky Goods Stores	10,372	15%
Other Personal & Household Goods	7,268	11%
Selected Personal Services	3,107	5%
Occupied Non-Retail Floorspace	31,605	46%
Accommodation	-	0%
Pubs, Taverns & Clubs	2,102	3%
Rental, Hiring & Real Estate Services	2,018	3%
Health Care & Social Assistance	6,309	9%
Financial & Insurance Services	411	1%

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Administrative & Support Services	-	0%
Arts & Recreation Services	1,292	2%
Education and Training	273	0%
Public administration and safety	-	0%
Industrial	6,235	9%
Other	12,965	19%
Occupied floorspace total	60,710	89%
Vacant floorspace	7,868	11%
Total floorspace	68,578	100%

Source: HillPDA Desktop Audit, 2019

Note: Significant 'Other' floorspace associated with car dealerships and professional services

Development activity

This Centre has experienced development application activity from 2015-2018. Key redevelopments within the centre are discussed below.

- 1-3 Charles Street - DA201600419. This 4 storey mixed use development was approved by Council in 2017. Construction is yet to commence (November 2019). It is approved for one 43.8 sqm and one 48.5 sqm ground floor retail space and one 103.4 sqm and one 63.4 sqm ground floor commercial space and 17 apartments. It will part adaptively re-use and part replace a warehouse building.
- 180 Parramatta Road - DA201800149. This 3 storey mixed use development was approved by Council in 2018. Construction is yet to commence (November 2019). It is approved for a 84.3 sqm ground floor commercial space and 4 apartments. It will replace a shop-top housing commercial building.
- 356-372 Parramatta Road - DA201400208. This proposal to demolish the existing showroom and construct new vehicle sales premises with ancillary vehicle repair station was approved by Council in 2015 and completed in 2017.
- 442 Parramatta Road - DA201600094. This 6 storey mixed use development was approved by Council in 2018. Construction is yet to commence (November 2019). It consists of a 74 sqm ground floor commercial space and 21 boarding rooms. It will replace a shop-top housing commercial building.
- 446-448 Parramatta Road - DA201500260. This 5 storey mixed use development was approved by Council in 2015. Construction is yet to commence (November 2019). It is approved for one 103.9 sqm and one 57 sqm ground floor commercial space and 27 apartments. It will replace two 2 storey commercial buildings.
- 447-451 Parramatta Road and 32 Jarrett Street - D/2015/744. This 6 storey mixed use development was approved by the Land and Environment Court in 2017 and completed in 2019. It consists of a 864.2 sqm ground floor commercial space and 36 apartments. These replaced a shop-top housing commercial building.

Planning controls

Existing controls

The majority of properties to the north of Parramatta Road are subject to Leichhardt LEP 2013 and zoned B2 Local Centre. A maximum FSR of 1.5:1 can be achieved, subject to a number of considerations including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

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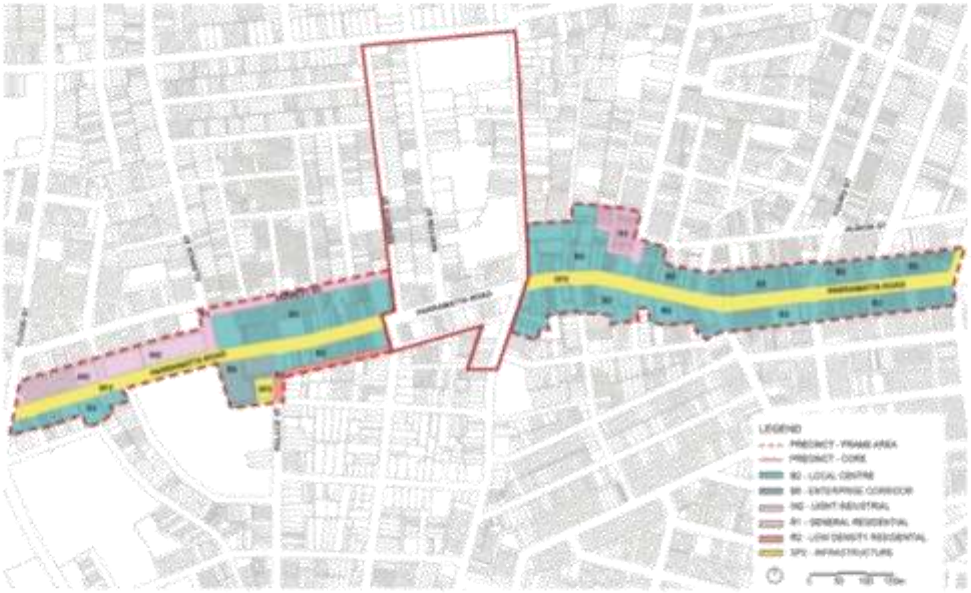
There is a section of land on the western edge of the corridor zoned IN2 Light Industrial under Leichhardt LEP 2013. The FSR control applicable is 1:1. While business premises and office premises are permitted in the zone, Leichhardt LEP (cl.6.9) restricts business and office premises to those that serve creative purposes. Light industry and artisan food and drink industries are also permitted within the precinct. Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusement centres, function centres and general industries. These uses make the Leichhardt IN2 Light Industrial zone quite broad in its range of permitted uses.

Marrickville Local Environmental Plan 2011 applies to properties south of Parramatta Road, the majority of which is zoned B2 Local Centre. The FSR control is 1.5:1 and a height control of 14 metres applies. 'Light Industry', 'artisan food and drink industry' and 'local distribution premises' are prohibited within the centre.

A section of the southern side of Parramatta Road is zoned B6 Enterprise Corridor under Marrickville LEP 2011. The zone refers to residential accommodation in its objectives and permits both 'hotel or motel accommodation' (mandated under the Standard Instrument LEP) and 'serviced apartments.' Business premises, health services facilities, garden centres, hardware and building supplies, plant nurseries, landscape material supplies and food and drink premises are notable permitted uses in the zone. Specialised retail premises and shops are prohibited in the zone. In terms of industry, the B6 Enterprise Corridor permits light industry including artisan food and drink industry. It also permits 'warehouse or distribution centres.' A FSR of 0.95:1 applies at this location.

Figure 44: Leichhardt Frame Area existing LEP zoning



Controls recommended under PRCUTS

PRCUTS recommends retaining and expanding B2 Local Centre zoned land to replace IN2 Light Industrial and B6 Enterprise Corridor zoned land towards the west of the frame area. It also recommends rezoning certain R1 General Residential lands on Catherine Street to R3 Medium Density Residential, which do not form part of the zoned employment land in this precinct. The IN2 Light Industrial zoned land is currently used primarily by speciality auto services and dealerships, with a mix of established and new development. The B6 Enterprise Corridor land is used for self-storage and specialty shops.

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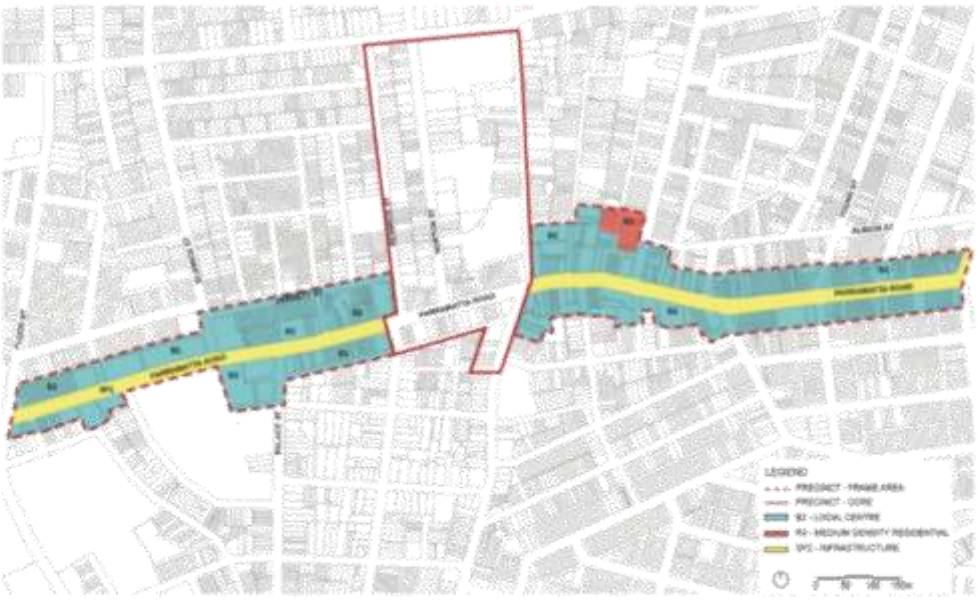
Densities across the frame area are generally recommended to be increased primarily to 3:1 and 22 m. The exception to this is a portion of the western part of the precinct, recommended to be increased to 1.5:1 and 12 m. and lands around Jarrett and Catherine Street that will retain their 1:1 and 0.5:1 FSRs.

PRCUTS recommendations would result in a significant change to the character of the area, currently characterised by one to three storey shops and warehouses.

Figure 45: Leichhardt Frame Area PRCUTS recommended zoning



Consideration of alternative option to PRCUTS

An alternative option has been developed with a focus on employment and retention of industrial land which includes all existing PRCUTS recommendations except the rezoning of IN2 Light Industrial lands in the frame precinct. For the purpose of this scenario, it is assumed to:

- Retain the IN2 Light Industrial zone in the western portion of the frame precinct and increase the FSR to 1.5:1
- Note that the assumed FSR controls above have not been subject to place making and feasibility testing.

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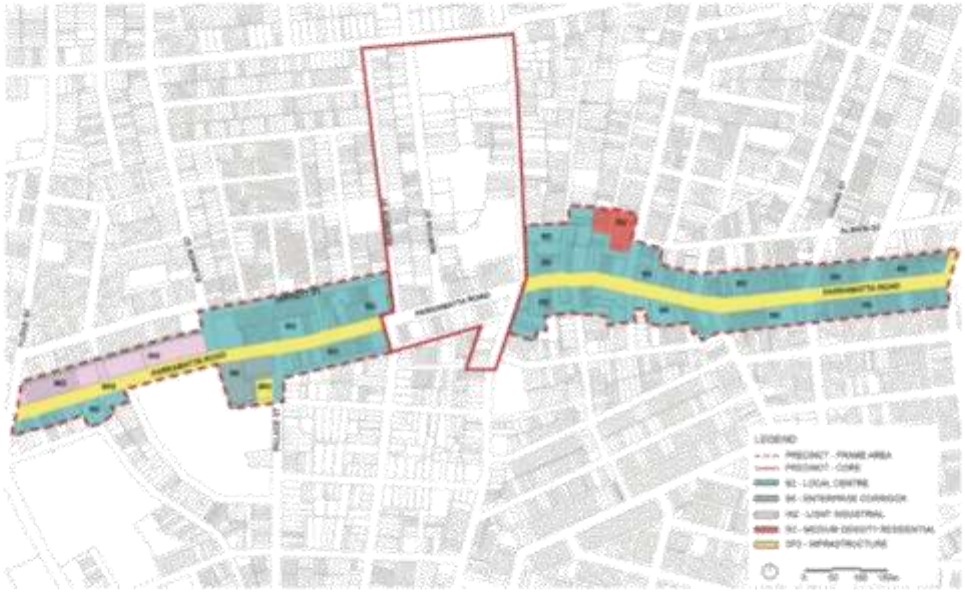
Figure 46: Leichhardt Frame Area Alternative Scenario land use zoning



These assumptions would result in an increase in employment floorspace associated with the densification of IN2 Light Industrial lands. Realisation of this capacity may be difficult, given the established nature of the cluster of businesses. Retention of IN2 Light Industrial land along Parramatta Road would allow for the precinct to be focused on urban services.

Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently 69,000 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is approximately 110,000 sqm.
- 12,045sqm of additional non-retail commercial floorspace demand is forecast to be needed in the precinct by 2036.

Theoretical supply of employment floorspace and the equivalent number of jobs for Leichhardt Frame Area Precinct has been calculated under existing controls, PRCUTS and Council alternative scenarios. This is shown below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 57,000 sqm of employment floorspace and around 2,050 jobs.
- PRCUTS scenario full utilisation:
    - Around 79,300 sqm of employment floorspace and 3,600 jobs.
    - Increase of around 22,300 sqm and job capacity of around 1,550 in the precinct over the base case.
- Council alternative scenario full utilisation:
    - Around 90,500 sqm of employment floorspace and around 3,450 jobs

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- Increase of around 33,400 sqm and job capacity of around 1,400 in the precinct over the base case.

Additional detail regarding the scenarios is provided below.

Table 64: Leichhardt Frame Area capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2 Local Centre	22	39,395	1,791
B6 Enterprise Corridor	38	5,136	135
IN2 Light Industrial	98	12,498	128
Total		**57,029**	**2,053**

Source: Inner West Council, 2019, HillPDA

Table 65: Leichhardt Frame Area capacity – PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2	22	79,319	3,605
Total		**79,319**	**3,605**

Source: Inner West Council, 2019, HillPDA

The PRCUTS recommendation would increase the theoretical floorspace capacity in the frame precinct by approximately 22,300 sqm. This is associated with significant increases in floorspace associated with B2 Local Centre. Approximately 12,500 sqm of existing IN2 Light Industrial floorspace would transition to B2 Local Centre.

The theoretical job capacity is increased by approximately 1,550, associated with the increase in ground and first floor commercial uses. The proposed loss of IN2 Light Industrial land would reduce floorspace capacity for that land use but would increase overall job capacity due to higher employment densities.

Table 66: Leichhardt Frame Area capacity – Alternative Scenario

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2 Local Centre	22	71,717	3,260
IN2 Light Industrial	98	18,747	191
Total		**90,464**	**3,451**

Source: Inner West Council, 2019, HillPDA

Under the alternative scenario, there is capacity for around an additional 33,400 sqm of floorspace and around 1,400 jobs compared with existing controls. These assumptions would result in a significant increase in the provision of employment floorspace in the precinct, with an anticipated employment capacity higher than the PRCUTS scenario by around 11,150 sqm, but with around 150 fewer jobs, due to lower density employment uses being retained.

The table below presents a comparison of employment capacity estimates based on existing controls, proposed PRCUTS controls and under the assumptions put forward by Council in the alternative scenario.

Table 67: Leichhardt Frame Area capacity comparison

	Base case	PRCUTS recommendation		Alternative scenario	
	Capacity	Capacity	Change from Base	Capacity	Change from Base
GFA (sqm)	57,029	79,319	**+22,290 +39.1%**	90,464	**+33,435 +58.6%**
Jobs	2,053	3,605	**+1,552 +75.6%**	3,451	**+1,398 +68.1%**

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Source: Inner West Council, 2019, HillPDA

This alternative scenario offers the highest theoretical employment floorspace capacity, but a lower theoretical job capacity. This is due to the retention of the IN2 Light Industrial lands, which are associated with a lower job density than B2 Local Centre lands.

Overall, the analysis is theoretical, and it cannot be assumed that this would eventuate, however it is worth noting that the employment outcomes under this hypothetical scenario deliver additional employment floorspace and greater diversity of jobs compared with the PRCUTS scenario.

The PRCUTS vision for the Leichhardt Precinct including the frame area is to build on the current Leichhardt Core Precinct as a vibrant people-oriented area, with increased amenity on Parramatta Road in the form of streetscape upgrades and pedestrian permeability.

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9.3.3.3 Issues and recommendations

Under current controls, there is a combined theoretical capacity for around 82,500 sqm commercial GFA and around 3,200 jobs across the Leichhardt core and frame area precincts. Under PRCUTS recommended controls, there is theoretical capacity for around 120,560 sqm GFA and around 5,480 jobs. The controls recommended by PRCUTS could potentially allow for approximately 38,000 sqm of additional employment floorspace and around 2,270 new jobs across the entire Leichhardt Core and Frame Area Precincts.

Alternative planning controls developed for the Leichhardt Precinct seek to increase the density of land zoned B2 Local Centre in line with the PRCUTS density controls, and increasing IN2 Light Industrial density to 1.5:1. This would have the effect of increasing the residential capacity and commercial capacity across the precinct, without reducing industrial lands. The modified combined theoretical capacity is around 131,700 sqm GFA and 5,330 jobs.

Table 68: Leichhardt Precinct (core + frame) scenario comparison

	Base case	PRCUTS recommendation		Alternative scenario	
	Capacity	Capacity	Change from base	Capacity	Change from base
Core Precinct GFA	25,492	41,257	15,765	41,257	15,765
Frame Area Precinct GFA	57,029	79,319	22,290	90,464	33,435
Total GFA	**82,521**	**120,576**	**+ 38,055 + 46.1%**	**131,721**	**+ 49,200 + 59.6%**
Core Precinct jobs	1,159	1,875	716	1,875	716
Frame Area Precinct jobs	2,053	3,605	1,614	3,451	1,398
Total Jobs	**3,212**	**5,480**	**+ 2,268 + 7.1%**	**5,326**	**+ 2,114 + 65.8%**

Source: Inner West Council, 2019, HillPDA

PRCUTS envisages a major transformation of the Leichhardt precinct with dense mixed use development replacing the fine grain, primarily two storey built form that currently exists. As noted in PRCUTS, the precinct is heavily constrained with small blocks, heritage considerations and a car-dominated environment. The built form around Norton Street and Parramatta Road presents barriers to permeability, which is partially offset by the low-scale nature of existing development in the area. There is potential for uneven development of the precinct, which would impact the character of the area without delivering the amenity benefits required to realise the PRCUTS vision.

The discussion below identifies challenges with implementation of the PRCUTS vision and concludes that

- Further precinct planning must be undertaken for the entire precinct before any changes to controls are made. Changes to controls without resolution of site specific constraints may limit uptake of higher floorspace controls and compromise the precinct as an employment area.
- A whole-of precinct approach is required, given the large demand for commercial floorspace in the Norton Street core of the precinct, high demand for employment and office floorspace in the frame area, and the low demand associated for additional retail uses in the frame area.
- Revisions to planning controls must consider the projected demand for office and retail floorspace forecast in this Study.
- Planning controls need to be developed for the Leichhardt Frame area that require flexible and usable employment floorspace so that redevelopment does not compromise its employment role.

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- Recommendations that would worsen the shortfall of employment floorspace and the supply of functional and well-located industrial and urban services lands should not be supported.

Consideration of Norton Street in context of Employment and Retail Lands Study

This Study has highlighted the need to deliver adequate and appropriate employment floorspace within the Inner West LGA. The Study forecasts that Norton Street would require around an additional 20,065 sqm of office floorspace and 11,511 sqm of retail floorspace by 2036. The opportunity to align planning controls with the intent of PRCUTS or any other study should respond to the overall demand for retail and employment land in the LGA.

Based on patterns of approval in recent years and the considerable urban design challenges facing the Centre, planning controls that enable the delivery of this floorspace within a mixed use environment should consider Council's strategic planning studies. This will update the studies that informed the development of PRCUTS which was prepared in 2016 (five years ago). It is essential that future planning controls support the centre in accommodating sufficient usable employment floorspace, and complementary commercial floorspace.

The nature of the employment floorspace fronting Norton Street will need to be carefully considered given the heritage conservation area that applies to parts of the street and its semi-residential built typology that exists. Further consideration, led by Council should also be given to the goals and potential outcomes of the heritage conservation area, and how those interact with the overall vision for the precinct.

While vacancies are relatively high in the Centre, the types of existing floorspace may not be adapting to trends in retail and office space. Council should consider if this is influenced by existing LEP or DCP controls, and potentially modify those controls to enable the provision of suitable space. As part of future redevelopment, above ground floor employment floorspace should be sought to accommodate forecast demand.

Recommendation: Establish a minimum FSR control for non-residential uses, to require ground floor retail and first floor business and office space in Norton Street. The former Leichhardt Council urban design and heritage studies provide a starting point for developing LEP and DCP controls. Refer to Action 1.2.2 in the Strategy.

Transition of Parramatta Road away from a movement corridor

Parramatta Road is currently a classified road under the Roads Act 1993 and therefore not under Council control. It is an impediment to enhanced amenity for pedestrians and businesses fronting the road, due to high speed limits and proximity of moving vehicles to the footpath. It impedes opportunity for outdoor dining, footpath trading and creates noise and air pollution impacts.

Recommendation: Council should explore options with TfNSW to increase pedestrian and business amenity along the corridor. This may include reducing the speed limit on Parramatta Road and introduce calming measures to improve amenity and vehicular access to businesses along Norton Street and Parramatta Road. Refer to Action 3.1.5 in the Strategy.

Future approach to master planning the overall Leichhardt Precinct

Master planning of Leichhardt Precinct has occurred as part of PRCUTS review by UrbanGrowth NSW and separately through comprehensive 2016 Urban Design and Heritage studies for the former Leichhardt Council. Both reviews make recommendations for revisions to the FSR and height controls, with the retention of the B2 Local Centre zoning.

While recommendations of both are well intentioned, implementation of recommendations through revisions to planning controls require careful consideration, given the potential for uneven development of the precinct, which could have an impact the character of the area without delivering the amenity benefits.

Preserving the small-grain built form within the heritage conservation areas, parking constraints and the lack of rear lane access within the precinct are examples of the urban design and heritage challenges that both studies sought to overcome.

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Many properties in the corridor, especially along Norton Street, lack rear lane or side street vehicular access. This results in poor outcomes for development applications for mixed-use development, notably unsuitably sized employment floorspace. The narrow frontage of these new developments means that what was an active street frontage becomes disproportionately dominated by driveway crossings and building services along Norton Street and Parramatta Road.

One potential solution is for redevelopment of sites is to consider no vehicular access for properties fronting Norton Street and Parramatta Road unless there is a rear lane. This would reduce development costs significantly and encourage retention of an active street frontage. An alternative option on the west side of Norton Street would be to facilitate vehicular access via Renwick Street. Ultimately, given the site consolidation challenges, parking and heritage constraints and development feasibility issues this example highlights the challenge of finding a workable solution.

Recommendation: Review planning controls for the overall Leichhardt Precinct in the context of studies undertaken (PRCUTS and Former Leichhardt Urban Design and Heritage studies, 2016) with the aim of delivering positive urban design outcomes for the centre. Undertake a feasibility study that determines the tipping point that makes a mixed-use development viable.

Recommendation: Review built form outcomes resulting from development approvals along Norton Street and Parramatta Road to understand issues that need to be overcome when developing new LEP and DCP provisions for the Leichhardt precinct.

Recommendation: Review the Leichhardt DCP Precinct Parking Strategy in relation to Norton Street Core to identify options for reducing or eliminating off-street parking requirements and delivery arrangements for properties without secondary vehicular access.

Refer to Strategy 1.7 of the ERLS for more detail.

Strengthen the night time economy of Norton Street

Norton Street has the potential to be a vibrant night time entertainment destination. It has several restaurants, bars and a cinema. It also has a sizeable population within walking distance.

Recommendation: Support the growth of the night time economy of Norton Street by:

- Reviewing planning controls to enable late night trading and encouraging the establishment of small bars, restaurants, and entertainment uses.
- Encourage the growth of markets and street festivals that bring people into the area
- Actively marketing and promoting the centre as places to establish businesses

These recommendations are addressed through Strategy 1.8 of the ERLS.

Loss of flexible and affordable employment floorspace under PRCUTS

Currently land within the Leichhardt Frame Area Precinct zoned B6 Enterprise Corridor and IN2 Light Industrial has a primary employment role. Rezoning to B2 Local Centre would shift the focus of the precinct to residential uses and potentially compromise the affordability and flexibility of employment floorspace within the precinct.

Due to the constraints of permitted land uses, mixed-use redevelopments' ground floor employment is typically unable to accommodate the diversity of land uses that can be achieved on sites with higher-order employment zones. Ground floor employment floorspace tends to be less flexible and smaller in size due to the need to accommodate retail development design requirements and infrastructure for residential components. Further, more intense employment uses are typically prohibited as they do not contribute to active frontages.

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The transition of B6 Enterprise Corridor and IN2 Light Industrial to B2 Local Centre land would generally limit employment capacity to ground levels. If developed, this would increase the proportion of retail and business services uses, compared to office, warehousing uses, or other urban services uses.

Retention of the IN2 Light Industrial and B6 Enterprise Corridor zoned land, without residential accommodation uses, would help retain and expand the existing mix of uses in the future as land is consolidated and redeveloped.

The majority of employment floorspace within the existing B2 Local Centre zone consists of older building stock. This has the potential to provide affordable space for urban services, creative uses and niche retail outlets with fewer customers and lower turnover. The nature of these businesses means that they do not need to be located within a centre, and are best placed in a location where they can achieve lower rents but remain relatively accessible to customers and staff. Examples of these businesses include music shops and bridal stores which have benefitted from clustering in this area.

However, redevelopment of older stock within the precinct is necessary in the longer term to ensure that employment space remains usable as a number of these properties are in disrepair. This may result in unaffordable commercial spaces with which could displace these businesses. Development would also be subject to feasibility of finding and retaining suitable tenants. There is also a risk that there may not be an immediate market for the new, more expensive commercial spaces. This could temporarily reduce business activity along the corridor.

If not designed appropriately, mixed use development has the potential to reduce floorspace for businesses, offices and light industry premises. This has been observed by Council in recent applications across the Inner West LGA, where newer mixed-use development results in smaller, irregularly shaped and less usable ground floor commercial space compared with the previous commercial spaces that existed on these sites.

It is also noted that the Leichhardt Frame Area Precinct has a different role and function to Norton Street, and is not expected to have significant retail (non-office commercial) demand in its current form. It therefore requires more flexible employment areas that are not typical of the core of a centre. This corridor requires spaces that can support a broader business mix, with controls that promote flexibility in tenancies, particularly those at ground level.

Recommendation: PRCUTS recommended planning controls which would result in loss of flexible and affordable employment floorspace are not supported. Consider adoption of the above alternate scenario with the goal of retaining industrial and high order business zones to encourage employment, lower-value retail and urban services over higher-value centre uses.

Recommendation: Revisions to controls along the Leichhardt Frame Area Precinct should carefully consider:

- Built form requirements such as doorway widths, loading, parking and minimum floor to ceiling heights for ground floor tenancies following consultation with industry
- The impact of redevelopment on rental affordability for business
- The quantity and usability of the employment floorspace likely to result from future redevelopment.

Refer to Action 3.1.7 of the Strategy.

Loss of industrial and urban services land under PRCUTS

Adoption of the recommendation to rezone IN2 Light Industrial and B6 Enterprise Corridor land to mixed use under PRCUTS would result in a loss of industrial and urban services land for which, unlike commercial land, there is likely to be increased demand.

While adoption of the PRCUTS recommendations could in theory increase the number of jobs in the precinct, it would eliminate a substantial quantity of urban services land along the Parramatta Road corridor and replaces those sites with additional commercial floorspace that is not anticipated to be required. This increase in number

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of jobs would rely on the take-up of ground floor commercial space in these mixed-use developments. As described in the *Greater Sydney Region Plan* (Greater Sydney Commission, 2018), urban services lands may have a lower number of associated jobs but provide significant operational and functional benefits for surrounding businesses and residents.

This proposal is also inconsistent with the findings of this study which demonstrates shortage of industrial land in the LGA. Given these factors, the recommended transition away from urban services land in the precinct, as recommended by PRCUTS, is not supported.

Transition from B6 – Enterprise Corridor to B2 – Local Centre land is generally not supported. The widespread permissibility of residential uses in B6 – Enterprise Corridor land is not supported, nor is rezoning industrial land to residential uses. The alternative, being precinct-specific additional permitted uses or similar controls, presents long-term policy complications of maintaining site specific additional permitted uses strictly within the precinct. Further, inclusion of residential uses would reduce the theoretical employment capacity of the precinct. As such, the inclusion of residential uses on B6 – Enterprise Corridor land in the precinct is not supported.

This report documents a projected shortage in land zoned for industrial purposes including urban services land. Capacity modelling identifies that the current supply of industrial zoned land in the LGA is insufficient to meet future demand. In part, the projected shortage of industrial land arises from the cumulative effect of recent centre-based rezonings, like those recommended by PRCUTS. Future rezoning of industrial land elsewhere in the LGA in this way is not supported and should be carefully considered along Parramatta Road, given the findings of this Study.

Recommendation: Council's alternative scenario with modified PRCUTS recommendations discussed above should be developed more fully to demonstrate how it will retain and manage existing employment land zonings while still achieving the regeneration intent of PRCUTS.

Recommendation: The PRCUTS recommended planning controls for Leichhardt Frame Area should not be adopted by Council (as they relate to existing B6 – Enterprise Corridor and IN2 – Light Industrial zoned land) as their rezoning would worsen the projected shortfall of employment floor space in the Inner West LGA and undermine the supply of functional and well-located industrial and urban services lands. This includes the Kennards Storage site located at 606 Parramatta Road, Petersham.

Recommendation: Subject to completion of feasibility testing and place-based study consider adoption of the above alternative scenario.

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9.3.4 Camperdown Precinct

Camperdown Precinct is located in the eastern portion of the LGA, along Parramatta Road, generally between Johnstons Creek and Mallett / Booth Streets. The core is defined as Camperdown core precinct, with the parts to the west and south defined as the Frame Area Precinct.

Figure 47: Camperdown Precinct (core + frame area) context map

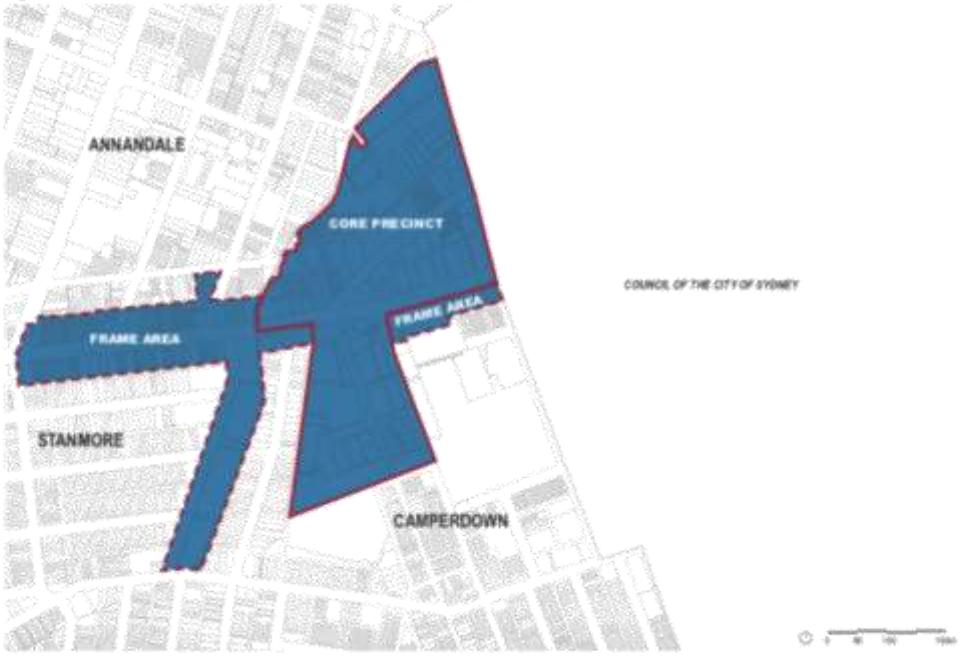

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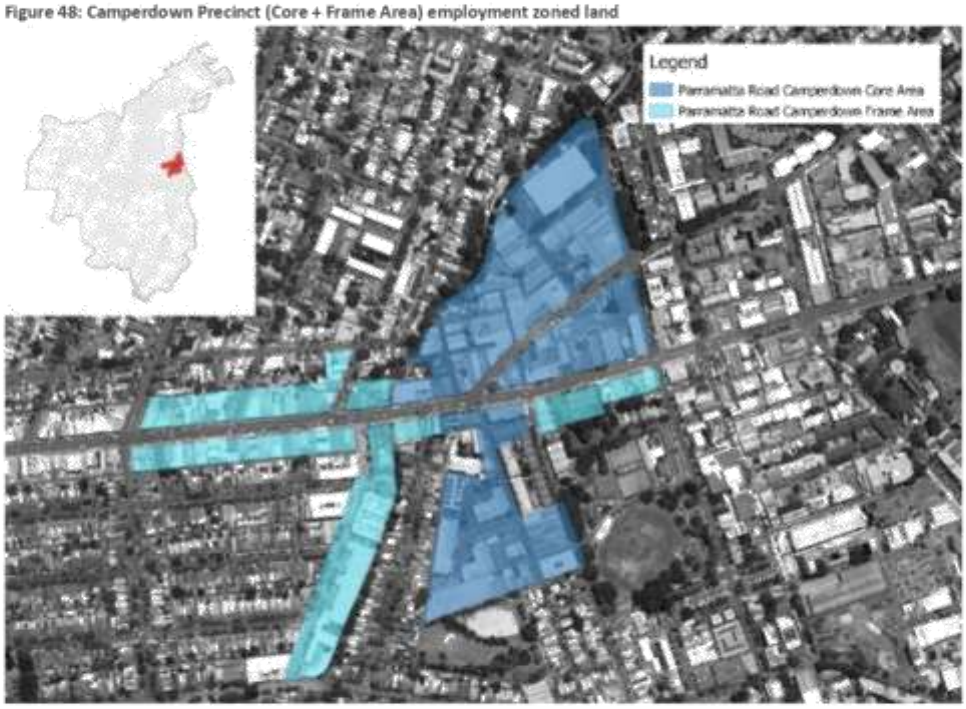
Figure 48: Camperdown Precinct (Core + Frame Area) employment zoned land



The core precinct includes the area around the intersection of Parramatta Road, Pyrmont Bridge Road, and Dennison Street and is characterised by semi-business park style development to the south, with mixed light industry and urban services to the north. The frame area extends to the east and west of the core precinct along Parramatta Road, as well as incorporating a stretch of light industrial uses on the eastern side of Bridge Road. The bulk of the eastern portion of the frame area is within City of Sydney Council.

PRCUTS Vision

The PRCUTS vision for the precinct is a transition from light industrial and warehousing uses to a specialised education and medical precinct which will leverage off its proximity to University of Sydney and Royal Prince Alfred Hospital. The Precinct will take on growth and support roles to the adjacent specialised activity institutions and their associated research centres by providing employment and ancillary floorspace. It will continue to evolve into an attractive, highly urbanised neighbourhood with high-quality amenities.

Key elements of the PRCUTS vision include:

- Prioritise Camperdown Precinct for biotechnology and employment uses that support the growth of the nearby institutions. Establish 'Camperdown Triangle' – land bound by Parramatta Road, Mallet Street and Pyrmont Bridge Road as a biomedical hub.
- Reinforce the Layton Street cluster of shops and services as a local centre expanding westwards to Bignell Lane.
- Develop Bignell Lane as a lively, mixed-use area with entertainment and other day/night social uses.
- Adapt, retain and celebrate the existing industrial heritage.
- Rehabilitate the Johnston's Creek corridor, connecting to the Bicentennial Parklands and harbour foreshore walks with active transport options

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- Improve linkages to rail stations to the south.
- Reduce car parking rates and incorporate unbundled and decoupled car parking in new developments

In the 2050 long-term horizon, PRCUTS identifies a:

- Proposed growth projection of 2,285 jobs
- Proposed indicative land use mix (additional employment GFA) of 213,000 sqm in the core precinct and 28,000 sqm in the frame area.

The assumptions for these projections are unclear from the available documentation. As the precinct is split with City of Sydney, these headline figures are of limited relevance for direct analysis. Notwithstanding, the Strategy states that no change is proposed within the frame area located within the City of Sydney LGA.

Consideration of potential jobs and additional floorspace arising for the proposed changes has been provided in this precinct profile.

The proposed zoning for the precinct, with land outside of the Council area shaded white, is shown below.

Figure 49: Camperdown Precinct (core + frame area) PRCUTS recommended land use zoning



Camperdown is the most complex of the PRCUTS IWC area precincts because the GSC and Council policy positions have evolved since adoption of PRCUTS. Greater Sydney Commission's Camperdown Ultimo Collaboration Area Place Strategy adopted in 2019 prioritises supporting the role and function of employment lands in the precinct through a series of actions including:

- Safeguarding business zoned land from conversion to zonings that might allow residential uses
- Establishing a biotechnology hub in the Parramatta Road, Mallett Street and Pyrmont Bridge Road triangle
- Safeguarding existing and potential innovative, incubator and research activities from unrelated commercial activities.

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Existing development in the area is more intense than the current controls permit, with an increased demand for floorspace capacity expected. 2036 demand may be as high as 250,000 sqm, representing a significant increase in both supply and capacity to meet that demand.

Inner West Council and its partners, the City of Sydney Council, Sydney Local Health District (RPA) and the University of Sydney are currently (at June 2020) completing a Camperdown Innovation Precinct Land Use and Strategic Employment Study to facilitate the next steps in the planning of this precinct.

Case Study: Parramatta Road music cluster

Parramatta Road from Camperdown through to Taverners Hill hosts a number of music related businesses. There are over ten music related stores along this strip. They include both contemporary and classical musical instrument stores, musical instrument repair shops, musical equipment stores, and vintage record stores. There is also a strong live music sector, with five live music venues operating along the strip, attracting visitors from further afield.

Solar Music, a musical instrument store in Annandale, sees itself as "Supporting local talent and creating a hub in which musicians feel free to express themselves and experiment with innovative ideas & technologies" by selling, repairing and providing tuition in brass and woodwind musical instruments.



Source: Solar Music 2019, *Solar Music manifesto*, Solar Music. Available from: <https://www.solarmusic.com.au/>

Inner West Local Business Awards 2019, *Solar Music & Woodwind*, Inner West Local Business Awards. Available from: <https://thebusinessawards.com.au/business/46426/Solar-Music-Brass-amp-Woodwind>

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9.3.4.1 Camperdown Core Precinct

Role and function

Parramatta Road Camperdown Precinct is on the eastern edge of Inner West LGA, comprising primarily industrial areas to the north and south of Parramatta Road. There is a small amount of high street retail fronting the southern side of Parramatta Road and some bulky goods on Pyrmont Bridge Road. The precinct consists of around 103,300 sqm of land, provides around 160,000 sqm of employment floorspace and is operating in line with the IN2 Light Industrial zone intent. The corridor is served by buses but lacks nearby train services.

The precinct provides a mix of large format warehouse premises, bulky good retailing and residential houses. Several large floorplate self-storage buildings are also located within the precinct. A WestConnex dive site has resulted in the demolition of a large proportion of industrial buildings between Mallett Street, Parramatta Road and Pyrmont Bridge Road. There is a small pocket of B7 Business Park contained within the precinct that incorporates SOHO type live/work uses.

There is a combination of old and new building stock, predominantly one to two storeys. Internal streets are relatively narrow and difficult for heavy vehicles to navigate, particularly when cars are parked.

The precinct is close to the CBD, Sydney University and Royal Prince Alfred Hospital adjacent to new high-density housing developments in the City of Sydney LGA and south of Parramatta Road in Inner West LGA. Parramatta Road and Pyrmont Bridge Road carry large volumes of traffic with Parramatta Road functioning as a major arterial road.

Camperdown precinct is a strategically important light industrial area for the Leichhardt area and the wider Eastern City District. It provides an affordable employment accommodation option for researchers and creatives. Knowledge intensive uses occupy 50,146 sqm of existing floorspace, which is approximately 32% of the total existing employment floorspace in the precinct. The precinct's proximity to the CBD and good arterial road access, coupled with its size and large floorplates make it a popular location for start-up businesses such as micro-breweries.

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Precinct map

Figure 50: Camperdown Core Precinct employment zoned land (existing)



Floorspace

Table 69: Camperdown Core precinct existing floorspace

Category	GFA (sqm)	Proportion
Knowledge intensive	**50,146**	**32%**
Administrative and Support Services	206	0%
Financial and Insurance Services	5,569	4%
Information Media and Telecommunications	-	0%
Professional, Scientific and Technical Services	39,375	25%
Public Administration and Safety	-	0%
Rental, Hiring and Real Estate Services	4,996	3%
Health and education	**8,623**	**5%**
Education and Training	1,186	1%
Health Care and Social Assistance	7,437	5%

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Population serving	**56,733**	**36%**
Accommodation and Food Services	3,133	2%
Arts and Recreation Services	10,834	7%
Construction	4,938	3%
Other Services	17,889	11%
Retail Trade	19,939	13%
Industrial	**38,162**	**24%**
Agriculture, Forestry and Fishing	-	0%
Electricity, Gas, Water and Waste Services	33	0%
Mining		0%
Manufacturing	13,569	9%
Transport, Postal and Warehousing	20,023	13%
Wholesale Trade	4,537	3%
Total occupied floorspace	**153,664**	**97%**
Vacant	**4,219**	**3%**
Total	157,883	**100%**

Source: HillPDA Desktop Audit, 2019

Business uses (B2 Local Centre zone)	GFA	Proportion
Non-food retailing	**978**	**71%**
Bulky goods	978	71%
Vacant space	401	29%
Total	**1,379**	**100%**

Source: HillPDA Desktop Audit, 2019

Development activity

- 1-5 Chester Street - Planning Proposal

A small IN2 – Light Industrial site at 1 – 5 Chester Street on the northern edge of the precinct has been the subject of an evolving Planning Proposal. The first version sought to rezone the site from IN2 – Light Industry to R3 – Medium Density Residential, increase the FSR from 1:1 to 2.6:1 and introduce a 17m height control. This proposal was not supported by the Inner West Local Planning Panel (IWPP) or Council, largely because of inconsistencies with the PRCUTS Implementation Plan and Council policies.

The second iteration sought to amend the LLEP 2013 to allow "boarding house" as a permissible use on this IN2 – Light Industrial zoned site, increase the FSR to 2.75:1 with a minimum FSR of 0.75:1 for non-residential employment uses on the ground and first floors and a 17m height limit.

After Inner West Local Planning Panel (IWLPP) decided not to support that proposal in July 2019 it was further amended to B7 – Business Park, an FSR up to 2:1 with a minimum non-residential FSR of 0.75:1 and a 17m height limit subject to consideration of the current PRCUTS Traffic and Transport Study and other Council policies.

Council officers presented a version of this to the IWLPP in March 2020 with the Johnstons Creek walkway part of the site rezoned to RE1 Public Recreation and the height limited to no more 5 storeys. The Panel supported this version and advised Council to submit this for Gateway determination. This proposal aligns well with the intention of the Camperdown Ultimo Collaboration Area Place Strategy and the PRCUTS Camperdown Precinct.

- 6/21 Chester Street – D/2019/81.

  Change of use from industrial to recreational facility (indoor gym) was approved by Council in 2019.

- 74-76 Pyrmont Bridge Road – D/2018/359

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This site was privately certified as a micro-brewery and tasting room in 2015. A portion of the site was Council approved as a small bar in 2018. It is in an industrial warehouse building.

Planning controls

Existing controls

Land to the north of Parramatta Road (except for a small B7 site) is zoned IN2 Light Industrial under Leichhardt Local Environmental Plan 2013. The FSR control is 1:1. While business premises and office premises are permitted in the IN2 zone, Leichhardt LEP 2013(cl. 6.9) restricts business and office premises to those that serve creative purposes such as media, advertising, fine arts and crafts, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related uses. Light industry and artisan food and drink industries are also permitted.

Notably, Leichhardt LEP 2013 permits specialised retail premises, small bars, timber yards, vehicle sale or hire premises, amusements centres, function centres and general industries. These uses make the Leichhardt IN2 Light Industrial zone quite broad in its range of permitted uses.

One site in the precinct north of Parramatta Road is zoned B7 Business Park under Leichhardt LEP 2013 and Clause 6.12 applies to this zone. This clause is similar in its intent to Clause 6.13 of Marrickville LEP 2011, by enabling live-work arrangements. The objective of Clause 6.12 in Leichhardt LEP 2013 is to, "provide for ancillary residential accommodation for small-scale live-work enterprises, to assist in the revitalisation of employment areas and to provide a transition between adjoining land use zones." This clause enables dwellings to be built if: the dwelling is part of a mixed-use development that includes office premises or light industries on the ground floor, and (b) the dwelling and ground floor premises will be occupied by the same person or persons. All other forms of residential accommodation and business premises are prohibited in the zone. Office premises, shops, garden centres, hardware and building supplies, and light industries are permitted in the zone. Notably, business premises are prohibited in the zone. There are some distinct differences regarding how the B7 Business Park zone in Leichhardt operates compared with Marrickville. The Marrickville LEP 2011 includes the permissibility of shops, residential flat buildings and the restriction of business/office premises to creative uses.

Most of the precinct to the south of Parramatta Road is zoned IN2 Light Industrial under Marrickville LEP 2011. The FSR control is 0.95:1 with a height limit of 9.5 metres. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts business and office premises to those that serve creative purposes. Light industry and artisan food and drink industries are also permitted within the precinct.

Two to three sites on the southern side of Parramatta Road are zoned B2 Local Centre. The FSR ranges from 1.5:1 to 2:1 and height controls from 14m to 23m. 'Light Industry,' 'artisan food and drink industry' and 'local distribution premises' are prohibited within this zone.

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Figure 51: Camperdown Core Precinct existing land use zoning



Controls recommended under PRCUTS

PRCUTS recommends rezoning the entirety of IN2 Light Industrial and B2 Local Centre land to a mix of R2 Low Density Residential /R3 Medium Density Residential, B4 Mixed Use, B5 Business Development and B6 Enterprise Corridor, and retaining the B7 Business Park zoned land. FSR based densities would vary, with the medium and high density residential areas being increased to 1.6:1 and businesses zones generally between 2:1 and 2.1:1. The exception would be businesses fronting the northern side of Parramatta Road, which would be 4:1. Heights would transition down, away from Parramatta Road, with the tallest buildings being at the intersection of Parramatta Road and Pyrmont Bridge Road at 32m, dropping down 24m away from the intersection and 16 to 17m to the northern and southern fringes.

The recommendations would result in a significant change to the current one to three storey shop and warehouse character of the area.

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Figure 52: Camperdown Core Precinct PRCUTS recommended land use zoning



Consideration of an alternative option

An alternative to the PRCUTS recommendations has been considered which intends to address an anticipated shortfall of employment growth caused by the PRCUTS recommendation to rezone large parts of the precinct currently zoned IN2 Light Industrial R3 Medium Density Residential and R4 High Density Residential. It amends the PRCUS recommendations as follows:

- Land currently zoned IN2 Light Industrial proposed to be rezoned by PRCUTS to residential:
  - Rezone instead to B5 Business Development
  - Increase FSR from 1:1 to 1.5:1

Note that the assumed FSR controls above have not been subject to place making and feasibility testing.

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Figure 53: Camperdown Core Precinct Alternative Scenario land use zoning



Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently around 160,000 sqm based on the HillPDA desktop audit
- Anticipated employment floorspace demand in 2036 is approximately 187,345 to 217,828 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Camperdown Core Precinct has been calculated under existing controls, PRCUTS and Council alternative scenarios. This is shown below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 96,300 sqm of employment floorspace and 1,080 jobs.
- PRCUTS scenario full utilisation:
    - Around 153,497 sqm of employment floorspace and around 3,682 jobs.
    - Increase of around 57,202 sqm and job capacity of around 2,605 in the precinct over the base case.
- Council alternative scenario full utilisation:
    - Around 192,640 sqm of employment floorspace and around 4,723 jobs
    - Increase of around 96,340 sqm and job capacity of around 4,010 in the precinct over the base case.

Table 70: Camperdown Core Precinct capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity

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IN2 Light Industrial	98	93,059	950
B2 Local Centre	22	2,363	107
B7 Business Park	38	873	23
Total		**96,295**	**1,080**

Source: Inner West Council, 2019, HillPDA

Table 71: Camperdown Core Precinct capacity– PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B4 Mixed Use	28	2,363	84
B5 Business Development	38	126,666	3,333
B7 Business Park	38	873	23
IN2 (existing strata)	98	23595	242
Total		**153,497**	**3,682**

Source: Inner West Council, 2019, HillPDA

Table 72: Camperdown Core Precinct capacity – Alternative Scenario

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B4 Mixed Use	28	2,363	84
B5 Business Development	38	165,807	4,363
B7 Business Park	38	873	23
IN2 existing strata	98	23595	242
Total		**192,638**	**4723**

Source: Inner West Council, 2019, HillPDA

The PRCUTS and alternative scenario assume that the existing strata lots are constrained to redevelop in the short to medium term and would not contribute to additional employment floorspace capacity.

The PRCUTS recommendations would increase theoretical employment floorspace capacity in the precinct compared to the base case as a consequence of transitioning IN2 Light Industrial lands to B5 Business Development uses with higher FSR controls. The increased theoretical capacity of these rezonings partially offsets the loss of approximate 50,000 sqm of IN2 Light Industrial land to residential development, as recommended under PRCUTS. The theoretical job capacity is increased by approximately 2,605 because of transition to more employment dense B5 Business Development floorspace. The transition of IN2 Light Industrial lands to B5 Business Development uses is aligned with GSC's strategy to redevelop Camperdown as a biotechnology hub, as outlined in actions E8 of the District Plan and 27 of the Camperdown-Ultimo Collaboration Area Place Strategy (C-U CAPS). However, PRCUTS also recommends rezoning IN2 Industrial Lands to R3/R4 Medium-high density residential which is inconsistent with GSC's vision for Camperdown to safeguard business zoned land from conversion to residential development (Action 26 and Priority 8 of C-U CAPS).

Table 73 provides a comparison of the employment capacity under existing controls, proposed PRCUTS controls and alternative scenario:

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Table 73: Camperdown Core Precinct employment capacity comparison

Core area	Current	PRCUTS		Modified	
	Scenario 1	Scenario 2		Scenario 3	
	Capacity	Capacity	Change from Base	Capacity	Change from Base
GFA (sqm)	96,295	153,497	57,202 59.40%	192,638	96,343 100.05%
Jobs	1,080	3,685	2,605 241.20%	4,723	3,643 337.31%

Source: Inner West Council, 2019, HillPDA

Issues and recommendations for the core precinct are provided in Section 9.3.4.3

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9.3.4.2 Camperdown Frame Area

Role and function

The Camperdown Frame Area Precinct is an employment corridor stretching for 800 metres along Parramatta Road between Johnston Street Annandale to the west and Mallet Street Camperdown to the east. The area contains around 55,000 sqm of land, provides around 69,450 sqm of commercial/industrial floorspace. The area is well served by buses but is far from train services.

The employment spaces in the corridor are relatively affordable compared with the key centres in the Inner West. As a result, Parramatta Road has evolved to support a diverse range of businesses. The clusters of creative industries, specialised retail premises and music related businesses are notable.

Land to the west of Bridge Road is primarily B2 Local Centre and B4 Mixed Use and has a similar role and function to the Leichhardt Frame Area Precinct located west of Johnston Street. Its proximity to the City, UTS and University of Sydney makes it an attractive location for businesses to establish. Building stock is relatively affordable and flexible, drawing in an eclectic mix of businesses.

This retail strip is a base for the Inner West's live music scene and creative industries. The Annandale Hotel and Empire Hotel are well known live music venues. A cluster of specialised music related businesses exists along this stretch of the road, for example selling custom preamplifiers and vintage records.

These forms of cultural infrastructure are provided by the private sector as studios, creative manufacturing spaces, co-working spaces, music and performance venues, studio and community spaces for rehearsal and presentation activities. In addition to these specialisations, there are a number of wedding dress businesses, furniture stores, the headquarters of a mannequin and visual merchandising display retailer, interior design art studios, bicycle retailers and repairers, furnishing and homeware retailers, hardware and building supply retailers, a veterinary hospital, fast food retailers and restaurants and a not for profit organisation. Some premises appear vacant from the street, some of these are sex services premises.

The built form comprises two and three story commercial buildings on small lots with retail businesses on the ground floor. The first and second floors tend to be a mixture of commercial office space, storage space, used by ground floor businesses and some shop-top residential apartments. A number of these properties are in heritage conservation areas or are heritage items. These buildings provide the corridor with a historic fine grain character. The buildings are of aging stock ranging from average to poor condition. The majority of properties benefit from rear lane access.

Parramatta Road is an area of low amenity with a poor pedestrian environment due to high traffic volumes, noise and air pollution. Footpaths are narrow and there is a lack of space for street trees or footpath activities.

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Precinct map

Figure 54: Camperdown Frame Area employment zoned land



Floorspace

Table 74: Camperdown frame area existing employment floorspace

Category	GFA (sqm)	Proportion
Knowledge intensive	**6,136**	**26%**
Administrative and Support Services	863	4%
Financial and Insurance Services	396	2%
Information Media and Telecommunications	-	0%
Professional, Scientific and Technical Services	4,877	21%
Public Administration and Safety	-	0%
Rental, Hiring and Real Estate Services	-	0%
Health and education	**-**	**0%**
Education and Training	-	0%
Health Care and Social Assistance	-	0%
Population serving	**6,238**	**27%**
Accommodation and Food Services	1,259	5%
Arts and Recreation Services	396	2%
Construction	2,148	9%
Other Services	-	0%
Retail Trade	2,435	10%
Industrial	**10,991**	**47%**
Agriculture, Forestry and Fishing		0%
Electricity, Gas, Water and Waste Services		0%
Mining		0%
Manufacturing	793	3%
Transport, Postal and Warehousing	2,922	13%

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Wholesale Trade	7,276	31%
Total occupied floorspace	**23,365**	**100%**
Vacant	-	0%
Total	**23,365**	**100%**

Source: HillPDA Desktop Audit, 2019

Table 75: Camperdown frame area existing commercial floorspace

Category	GFA (sqm)	Proportion
Occupied Retail Floorspace	**26,754**	**58%**
Supermarkets & Grocery Stores	99	0%
Specialty Food Stores	163	0%
Fast-Food Stores	-	0%
Café/Restaurants	808	2%
Department Stores	-	0%
Clothing Stores	1,386	3%
Hardware and Bulky Goods Stores	15,306	33%
Other Personal & Household Goods	7,251	16%
Selected Personal Services	1,741	4%
Occupied Non-Retail Floorspace	**16,398**	**36%**
Accommodation	-	0%
Pubs, Taverns & Clubs	4,253	9%
Rental, Hiring & Real Estate Services	-	0%
Health Care & Social Assistance	389	1%
Financial & Insurance Services	-	0%
Administrative & Support Services	4,054	9%
Arts & Recreation Services	1,578	3%
Education and Training	2,547	6%
Public administration and safety	-	0%
Industrial	735	2%
Other	2,842	6%
Occupied floorspace total	**43,152**	**94%**
Vacant floorspace	2,935	6%
Total floorspace	**46,087**	**100%**

Source: HillPDA Desktop Audit, 2019

Development activity

There have been a number of development proposals between 2014 and 2019, which are at varying stages of completion including:

- 80-84 Parramatta Road - This 5-storey mixed use development was approved by Council in 2016 and completed in 2017. It consists of a 140 sqm ground floor commercial space, three 39 sqm ground floor office spaces and 20 apartments. It replaced a 2-storey commercial building.
- 113 Parramatta Road - DA201600538. This 5-storey mixed use building was approved by Council in 2017. It is currently under construction (November 2019). It consists of a 50 sqm ground floor commercial space and 22 apartments. It replaces a 2-storey commercial building.
- 111 Parramatta Road - DA201700110. This 4-storey mixed use development was approved by Council in 2018. Construction is yet to commence (November 2019). It is approved for a 78 sqm ground floor commercial space and 12 apartments. It will replace a 1 storey commercial building.
- 1-13 Parramatta Road - D/2017/161. This 4-storey mixed use development was approved on appeal in 2018. Construction is yet to commence (April 2020). It is approved for a 682.2 sqm ground floor commercial space and 41 apartments. It will replace a large 2 storey Victorian shop-top housing commercial building that was demolished in 2012.

Planning Controls

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Existing controls

Properties to the east of Bridge Road, Stanmore are zoned IN2 Light Industrial under Marrickville LEP 2011 with an FSR control of 0.95:1 and a height control of 9 metres. While business premises and office premises are permitted in the zone, Marrickville LEP (cl. 6.12 and 6.13) restricts these business and office premises to those that serve creative purposes such as media, advertising, fine arts and crafts, design, film and television, music, publishing, performing arts, cultural heritage institutions or other related uses. Light industry and artisan food and drink industries are also permitted within the precinct.

Properties to the south of Parramatta Road, Stanmore between Johnston Street and Bridge Road are zoned B4 Mixed Use under Marrickville LEP 2011 with a FSR control of 1.5:1 and a height control of 14 metres. Notably, the zone permits 'light industry' and 'artisan food and drink industry.'

Properties to the north of Parramatta Road, Annandale between Johnston Street and Johnston's Creek are zoned B2 Local Centre under Leichhardt LEP 2013. A maximum FSR of 1.5:1 can be achieved, subject to a number of considerations, including that all floorspace on the ground floor of the building facing the street is used for a purpose other than residential accommodation. 'Light Industry' and 'artisan food and drink industry' are permitted within the zone. Local distribution premises are prohibited within the zone.

There are a number of sites zoned B2 Local Centre zoned land under Marrickville LEP 2011, located to the south of Parramatta Road, east of the McDonalds site with FSR controls ranging from 1.5:1 to 2:1 and height controls ranging from 14 m to 23 m. Unlike B2 Local Centre zoned land in the former Leichhardt LGA, the B2 Local Centre zone in Marrickville does not permit light industry, including artisan food and drink industry. This places on pressure for these low impact activities to locate in the industrial zones rather than within Marrickville Centre. 'Local distribution premises' uses are also prohibited in the zone.

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Figure 55: Camperdown Frame Area existing land use zoning



Controls recommended under PRCUTS

South of Parramatta Road, PRCUTS recommends rezoning the eastern portion of the frame area from B2 Local Centre/SP2 Infrastructure to B4 Mixed Use, and the Bridge Road IN2 Light Industrial area to B6 Enterprise Corridor. FSRs and heights along Parramatta Road would transition from 1.5:1 and 14 m in the west and 3:1 and 22 m in the east, with B6 Enterprise Corridor land on Bridge Road being 2.1:1 with a height of 17 m.

PRCUTS also suggests rezoning of Bridge Road School on Parramatta Road from SP2 Infrastructure to B4 Mixed Use but makes no associated FSR/height recommendations. It is assumed that the rezoning of the school does not reflect an intent to transition it to employment lands.

North of Parramatta Road, PRCUTS recommends keeping the B2 Local Centre zoning with increasing FSR to 1.5:1 and 14m height limit.

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Figure 56: Camperdown Frame Area PRCUTS recommended zoning



Consideration of an alternative scenario

An alternative scenario has been considered below, which is identical to the PRCUTS scenario, with the exception of retaining land zoned B2 Local Centre at the corner of Cardigan St and Parramatta Road instead of transitioning it to RE1 Public Recreation. This option also rectifies PRCUTS recommendation to rezone the Sydney Water assets associated with the Johnstons Creek stormwater channel from SP2 Special Infrastructure lands to B5 Business Development by retaining these as SP2 Special Infrastructure Lands. Refer to the map below.

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Figure 57: Camperdown Frame Area alternative scenario land use zoning



Employment floorspace demand and supply

The employment precinct capacity has been assessed below:

- Existing gross floor area in the precinct is currently around 69,450 sqm based on the HillPDA desktop audit
- Anticipated floorspace demand in 2036 is approximately 85,000 to 90,000 sqm.

Theoretical supply of employment floorspace and the equivalent number of jobs for Camperdown Frame Area Precinct has been calculated under existing controls, PRCUTS and Council alternative scenarios. This is shown below:

- If existing planning controls were fully utilised, hypothetically the precinct could accommodate around 33,600 sqm of employment floorspace and around 500 jobs.
- PRCUTS scenario full utilisation:
    - Around 50,601 sqm of employment floorspace and around 1,600 jobs.
    - Increase of around 23,600 sqm and job capacity of around 1,100 in the precinct over the base case.
- Council alternative scenario full utilisation:
    - Around 48,200 sqm of employment floorspace and around 1,520 jobs
    - Increase of around 21,250 sqm and job capacity of around 1,000 in the precinct over the base case.

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Table 76: Camperdown Frame Area capacity – Base case

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
IN2 Light Industrial	98	18,085	185
B2 Local Centre	22	6,506	296
B4 Mixed Use	28	8,996	321
Total		**33,587**	**506**

Source: Inner West Council, 2019, HillPDA

Table 77: Camperdown Frame Area capacity – PRCUTS Recommendation

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2 Local Centre	22	8,552	389
B4 Mixed Use	28	8,739	312
B6 Enterprise Corridor	37	33,311	900
Total		**50,601**	**1,601**

Source: Inner West Council, 2019, HillPDA

Table 78: Camperdown Frame Area capacity – Alternative Scenario

Zone	GFA per employee	Estimated floorspace capacity (GFA sqm)	Estimated job capacity
B2 Local Centre	22	8,552	389
B4 Mixed Use	28	9,254	331
B6 Enterprise Corridor	38	30,396	800
Total		**48,202**	**1,519**

Source: Inner West Council, 2019, HillPDA

The table below compares employment capacity under existing controls, proposed PRCUTS controls and alternative scenario.

Table 79: Camperdown Frame Area capacity comparison

Frame area	Current	PRCUTS		Modified	
	Scenario 1	Scenario 2		Scenario 3	
	Capacity	Capacity	Change from Base	Capacity	Change from Base
GFA (sqm)	26,954	50,601	23,647 87.73%	48,202	21,248 78.83%
Jobs	506	1,601	1,096 216.70%	1,520	1,014 200.62%

PRCUTS recommendations would increase the theoretical floorspace capacity in the precinct by approximately 23,600 sqm and job capacity by 1,096 sqm. This is the consequence of recommended rezoning of IN2 Light Industrial Lands to B5 Business Development with higher FSRs and associated higher job densities. There is a hypothetical loss of employment floorspace between the PRCUTS and alternative option due to retention of SP2 Special Infrastructure Lands which is an anomaly in PRCUTS.

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9.3.4.3 Issues and recommendations

Under current controls, there is a combined theoretical capacity for 123,249 sqm employment GFA and around 1,586 jobs across the whole Camperdown precinct including core and frame area. . The controls recommended by PRCUTS could potentially allow for approximately 80,849 sqm of additional employment floorspace and around 3,700 new jobs across the combined Camperdown Core and Frame Area Precincts. Under PRCUTS recommended controls, there is theoretical capacity for around 204,098 sqm GFA and a total of around new and existing 5,283 jobs.

Alternative planning controls developed for the Camperdown Precinct could achieve a theoretical capacity of around 240,840 sqm and 6,243 jobs. This is an increase over the base case of around 117,590 sqm and around 4,657 jobs, respectively. Additional details are shown in Table 80.

Table 80: Camperdown precinct (core + frame) scenario comparison

	Current	PRCUTS		Modified	
	Capacity	Capacity	Change from base	Capacity	Change from base
Core area GFA	96,295	153,497	57,202	192,638	96,343
Frame Area GFA	26,954	50,601	23,647	48,202	21,248
Total Precinct GFA	**123,249**	**204,098**	**+80,849**	**240,840**	**+117,591**
Core area jobs	1,080	3,682	2,602	4,723	3,643
Frame area jobs	506	1,601	1,096	1,520	1,014
Total precinct jobs	**1,586**	**5,283**	**+3,698**	**6,243**	**+4,657**

Source: Inner West Council, 2019, HillPDA

The Greater Sydney Commission and Council policy positions have evolved since adoption of PRCUTS. The Camperdown Ultimo Collaboration Area Place Strategy adopted in 2019 prioritises supporting the role and function of employment lands in the precinct through a series of actions including:

- Safeguarding business zoned land from conversion to zonings that might allow residential uses
- Establishing a biotechnology hub in the Parramatta Road, Mallett Street and Pyrmont Bridge Road triangle
- Safeguarding existing and potential innovative, incubator and research activities from unrelated commercial activities until the precinct is master planned.

Camperdown-Ultimo Collaboration Area Place Strategy and PRCUTS

These recommendations are reflected in Strategy 3.3 of the ERLS.

Recommendation: A masterplan for Camperdown Precinct should be prepared to implement the productivity priorities of the Camperdown Ultimo Collaboration Area Place Strategy. All employment zoned land in the Camperdown Precinct should be protected from unrelated residential or commercial land uses until the following actions are completed:

- Establish a biotechnology and biomedical hub in the Camperdown Triangle bounded by Parramatta Road, Mallet Street and Pyrmont Bridge Road;

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- Work with Greater Sydney Commission to nominate the area as a 'Health and Education Precinct'
- Work with the Camperdown Ultimo Collaboration Area Alliance to ensure the Camperdown-Ultimo Collaboration Area Place Strategy productivity and industry cluster growth outcomes are prioritised in the Camperdown Precinct;
- Work with the NSW State government and the Camperdown Ultimo Collaboration Area Alliance to redevelop the WestConnex construction site at Camperdown as a biotechnology and biomedical hub;
- Apply the outcomes of the 2020 Camperdown Innovation Precinct Land Use and Strategic Employment Study and the associated Camperdown Masterplan to inform planning controls and policies for establishment of this biomedical and biotechnology hub and the wider health and education precinct;
- Prepare LEP and DCP provisions to deliver the biomedical and biotechnology hub and affordable spaces for medical innovation and research, health services and other supporting uses, while safeguarding these activities on an ongoing basis from unrelated residential and commercial uses.

Recommendation: Implement the priorities above to support the transition of Camperdown precinct into the health, education and biotech hub and research area as recommended by PRCUTS and the measures recommended below will reinforce this policy objective:

- Safeguarding existing employment floorspace for health, education and creative industries;
- Develop a pilot project that introduces a minimum percentage requirement for affordable space in new developments for tech start- ups, innovation, creative industries, artists, cultural and community uses in the new LEP and DCP planning controls.

Loss of employment lands

While the transition of land zoned IN2 Light Industrial to B5 Business Development could be appropriate for some sites in the precinct; rezoning IN2 Light Industrial land to a zone which enables residential uses is inconsistent with the overall Eastern City District Plan principle of retaining and managing existing industrial land and with Camperdown's future as a health and education precinct.

Current floor space ratio controls in the precinct, particularly for IN2 Light Industrial zoned land do not reflect actual development density of the existing buildings. These already have more gross floor area (approx. 160,000 sqm in Camperdown Core) than what is allowed under the existing planning controls (theoretical capacity is around 96,300 sqm in Camperdown Core).

An increased demand for employment floorspace capacity beyond the existing observed gross floor area is expected. 2026 demand may be as high as 250,0000 sqm. This would require a significant increase in FSR and height controls.

Recommendation: Address the need of additional employment floorspace identified in the Camperdown Innovation Precinct Land Use and Strategic Employment Study and the Camperdown Masterplan.

Bridge Road, Stanmore

The PRCUTS recommendation to re-zone the IN2 Light Industrial land on Bridge Road to B6 Enterprise Corridor could have unintended implications for innovative, incubator and research activities, especially in terms of the affordability of property.

Council should reconsider this deferred MLEP 2013 Housekeeping Amendment to re-zone 5 - 43 Bridge Road from IN2 Light Industrial to B5 Business Development in light of PRCUTS objectives. The need to protect opportunities for innovative, incubator and research activities and maintain existing industrial land zoning to encourage provision of affordable employment spaces, needs to be taken into account in the Camperdown Innovation Precinct Land Use and Strategic Employment study and the Masterplan for the precinct.

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Recommendation: Due to the success of Bridge Studios at 43 Bridge Street (as discussed in the case study below), consideration should be given to the retention of the IN2 Light Industrial zone with additional permitted uses for the east side of Bridge Road or rezoning to B5 Business Development to complement possible rezoning of IN2 land elsewhere in the precinct, should this be recommended by the Camperdown Innovation Precinct Land Use and Strategic Employment study. Refer to Action 3.4.6 of the Strategy.

Loss of flexible and affordable employment floorspace under PRCUTS

The majority of employment floorspace within the existing B2 Local Centre and B4 Mixed Use zones is older building stock. This provides affordable space for urban services, creative uses and niche retail outlets with relatively fewer customers and low turnover. The nature of these businesses means that they do not need to be located within a centre, and are best placed in an accessible location with low rents. Examples of these businesses include music shops and bridal stores which have benefitted from clustering in this precinct.

A number of these properties are in disrepair so redevelopment of older stock within the precinct will be necessary in the longer term to ensure that employment space remains usable. Redevelopment could result in unaffordable commercial spaces, which could displace existing businesses. There is also a risk that there may not be a market for new, more expensive commercial spaces so redevelopment could reduce business activity along the corridor.

If not designed appropriately, mixed-use development has the potential to reduce the overall amount of floorspace available for business, office and light industry premises. This has been observed in recent applications across the Inner West LGA, where newer mixed-use development results in smaller and less usable ground floor commercial spaces compared with the previous commercial spaces that existed on these sites.

The Camperdown Frame Area currently has a distinct role and function that is unlike a typical centre. It requires more flexible employment floor spaces than the retail-focused nature of standard B2 Local Centre zoned areas. New development is currently delivering smaller floorplate premises with minimum floor to ceiling heights. This can limit the opportunity for specialised retail premises, urban services and creative industries to locate on ground floors as they often require higher clearances. This corridor requires space that can support a broader business mix.

Recommendation: Revisions to planning controls along the Camperdown Frame area should carefully consider:

- Built form requirements such as doorway widths, loading, parking and suitable minimum floor to ceiling heights for ground floor tenancies following consultation with industry stakeholders;
- The potential impact of redevelopment on rental affordability;
- The quantity and usability of the employment floorspace likely to result from future redevelopment.

Case Study: Annandale creative cluster

The inner city suburb of Annandale contains an important cluster of creative businesses and spaces. The cluster is made up of Art Fusion Art Gallery and Studio, Chilli Rooms Art Studio, Nauti Studios, Space Art Gallery, and The Happenstore. These businesses range from traditional art galleries, to creative shared workspaces, to premises that provide art classes and custom made artworks.

Nauti Studios describes itself as a place "To sustainably create affordable workspaces where people of varied industries are productive, engaged and inspired by their work space and co-workers" by providing offices, studios, co-working desks and casual spaces for hire.

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Nauti Studios 2019, *about Nauti Studios*, Nauti Studios. Available from: <https://nautistudios.com.au/about>

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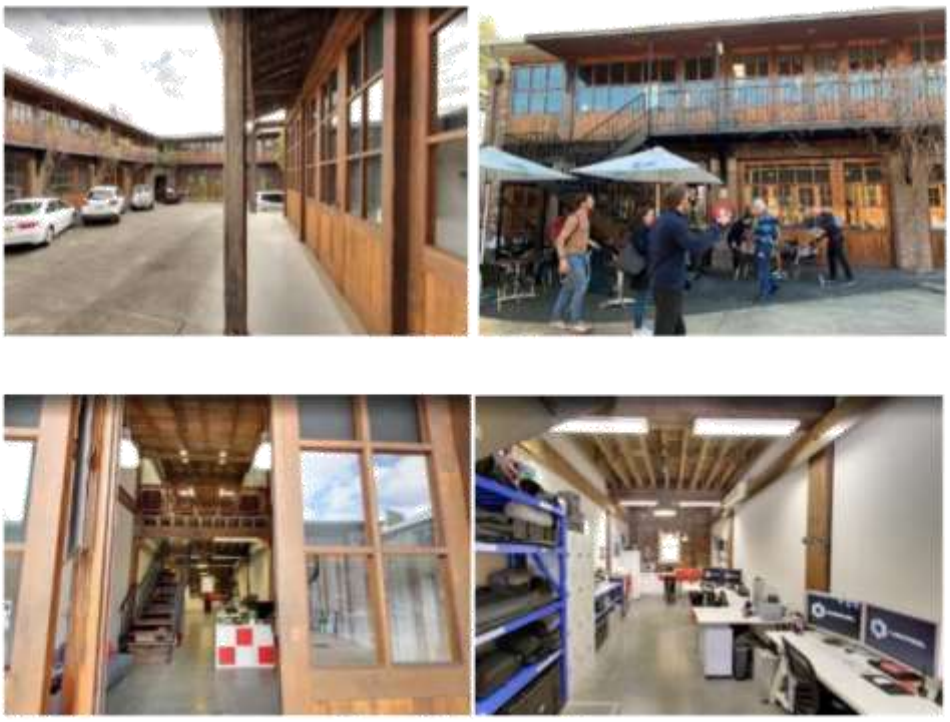
Case study: Bridge Studios 43 Bridge Road, Stanmore

Bridge Studios located at 43 – 53 Bridge Road, Stanmore provides suitable spaces for creative businesses. The former ginger factory has been transformed into contemporary work suites which host variety of creative businesses such as photography studios, production studios, acoustic studios, café, non-for-profit business (Quaker service), design agencies (Ink project, Bentley Design, Outhouse design etc.). The former industrial warehouses and old factory sites have created unique places that are attractive to creative businesses.



Source: Inner West Council, Google, Lumapixel creative production studio

Bridge Studios is a unique example of how creative business can co-locate and a creative ecosystem can be fostered.

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9.4 Other employment areas

9.4.1 Employment outside of Business and Industrial zones

A large amount of employment takes place outside of the business and industrial zones in the Inner West Local Government Area. Key land uses represented include:

- Health – private hospitals, medical practices, aged care and other specialist services
- Education – public and private schools, as well as TAFE and other training colleges
- Home businesses/home industries – e.g. artists, graphic design, information media.

The land use zones that these uses range from residential zones to special purpose zones.

Employment outside of business and industrial zones are important to consider and understand as they play a crucial role in supporting the daytime economy within the Inner West's local centres. For those that have home businesses, it provides an affordable alternative to renting out office space within a business centre.

Home businesses

Of those that work in the Inner West, 6.4 per cent work from home, which equates to 4,000 people (ABS, 2016). This number could include people that have home businesses/industries or individuals who have flexible work arrangements with their employers.

Notably, 25.4 per cent of local workers who identified as being part of the arts and recreation services category then stated they also work from home, as did 24.3 per cent of those working in the Professional, Scientific and Technical services sector and 21.5 per cent of those in the Information Media and Telecommunications sector (ABS, 2016). As detailed in sections 4.5 and 4.6 these industries are growing in the Inner West with an increase in number of businesses between 2015 and 2017 and all three increasing in value added to the local economy between 2007-08 and 2017-18.

Percentage of those working from home is higher across all industries when compared with those across Greater Sydney, particularly in these above mentioned sectors. Employment in key industry sectors in the Inner West are being accommodated within the residential zones in addition to the business and industrial zones.

There are benefits associated with those who either work from home and/or operate a home business or industry. It supports the local centres near these homes, as it is the local source of services and retail.

The Balmain Peninsula had a substantially higher proportion of those who identified as working from home compared with the Greater Sydney average including Birchgrove (10%), Balmain East (7.2%), and Balmain 7.3%.

How to support this trend

While home businesses and home industries can operate out of dwellings, the encouragement of 'live-work' type developments can also support the growth of office space within a residential context. This is addressed in Action 1.6.4 of the Strategy.

Encouraging creative uses (that are not industries) in residential zones would have to have some interaction with the *Inner West Local Housing Strategy* but could potentially be a solution to issues surrounding commercial floorspace on ground floors (esp. sites facing a secondary road) for the B1 - Neighbourhood Centre, B2 - Local Centre and B4 - Mixed Use zones.

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Key employers operating outside of Centres and Employment Precincts

Health and Education are major industries that operate within the Inner West. Their customers (students/patients) as well as the staff at these locations provide the local centres with a catchment of customers. Large employers in the LGA include:

- Public schools – numerous public schools in the LGA. In addition, public schools located close to centres provide businesses with a degree of patronage.
- Private schools – for example, PLC Croydon, Newington College, Trinity Grammar. These schools support the Centres of Stanmore, Petersham and Croydon.
- Child care centres – these are able to locate in residential zones and provide considerable employment.
- Hospitals – including Sydney Private Hospital site 63 Victoria Street Ashfield and Wesley Hospital Ashfield. These are close to Ashfield Centre.
- Nursing homes. For example, there are around 1200 nursing home beds in the former Ashfield local government. These places provide considerable employment.

The majority of these uses represent population serving, social infrastructure and these will need to cater for demand generated by increased population and an ageing population.

What does this mean?

There are implications of this trend identified within the inner west which should be acknowledged and planned for into the future. Key implications are discussed below:

- Suburbs with high proportions of people working from home and areas with large sources of employment provide catchments supporting centres, particularly during the day
- Key industries, particularly professional and creative industries are more likely to involve people working from home. This has implications with regard to suitability and affordability of employment spaces for these industries, or merely that these types of businesses are appropriate to be operated from home.
- The relatively high figures for the Balmain peninsula demonstrate its appeal for those who prefer to operate their business from home.
- Precinct planning and planning for centres should factor in the role that employment outside of business/industrial zones play in supporting the centre.
- It is important to maintain the viability of key sites in the LGA that house large employers by maintaining appropriate planning restrictions that reflect their use.

Action 1.6.4 in the Strategy encourage home business and home industry as well as supporting services for home workers. Action 1.6.7 flags further research to account for employers outside of the business and industrial zones.

9.4.2 Industrial properties in residential zones

A number of properties zoned residential across the Inner West LGA were identified as currently serving an industrial and/or urban services function. This floorspace is considered 'at risk' as the loss of this floorspace would create a demand deficit from existing needs.

Role and function

The historical development of land in the Inner West resulted in residential, commercial and industrial uses occurring in close proximity to each other. With the advent of zoning in the twentieth century, a number of industrial properties were zoned residential in line with the prevailing land use in the area.

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While most of these properties have been redeveloped for residential purposes, a number of these properties continue to serve an industrial or urban services function, with existing use rights applying. It is important to acknowledge the land and floorspace that these spaces represent, as the loss of these spaces will result in the further displacement of a number of businesses.

There are approximately 65 sites across the LGA located within residential zones that currently have an industrial and/or urban services role. This amounts to a total of 42,917sqm of land.

There is also a further 54,057sqm of land across the LGA zoned recently rezoned from industrial to residential with an existing urban services/industrial function.

Development activity

38-40 Henry Street Leichhardt

Demolition of existing structures and erection of a three storey boarding house building comprising 22 rooms with basement car park and associated works

Currently in the Land and Environment Court

40-76 William Street, Leichhardt – "Cyclops toy factory"

This site contains a number of industrial and warehouse buildings ranging from single to four storey buildings with a site area of 6,931sqm. It contains a self-storage facility as well as other smaller businesses across 10,060sqm of floorspace. The site has a R1 - General Residential zone and an FSR development standard of 0.5:1.

The site is currently for sale. It is being marketed for the residential development potential. It is likely to be sold on for residential redevelopment purposes.

Analysis

Due to the high levels of development pressure on these sites to convert to residential, they are considered to be at a high risk of loss. The slow loss of these sites creates further pressure on existing employment lands to accommodate the business in these sites.

Due to this, further accommodation needs to be made for this floorspace in existing employment areas, or new employment areas must be identified. This additional space needs to be made on top of the forecast demands. The loss of these spaces is unlikely to be captured in forward demand estimates made by the Greater Sydney Commission.

This has the potential to lead to a greater shortfall in employment land than currently expected.

Issues and recommendations

Use of purpose-built buildings for non-residential uses

There is an additional local provision (clause 6.10) under the Leichhardt LEP and Marrickville LEP which addresses the use of non-residential buildings in residential zones for non-residential purposes. This allows a range of uses including office premises, business premises and multiple retail premises in existing buildings without relying on existing use rights.

Currently the clause only extends to certain uses under the 'commercial premises' umbrella but does not extend to light industrial uses.' Action 4.1.7 of the Strategy recommends the provision described above be extended across the Inner West LGA and expanded to allow for light industrial uses within purpose-built buildings.

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9.4.3 The 'Bays Precinct'

The Bays Precinct comprises of 5.5 kilometres of harbour front land and 94 hectares of waterway in Sydney Harbour. The Bays Precinct includes Blackwattle Bay (Sydney Fish Market & Wentworth Park), as well as areas within the Inner West: White Bay Power Station & White Bay; Rozelle Bay and Bays Waterways & Rozelle Rail Yards and Glebe Island, including the Cruise Passenger Terminal. These Inner West lands are not managed under an LEP, rather they are under *Sydney Regional Environmental Plan 26 – City West* (SREP 26).

The NSW Government's ambition for The Bays Precinct is to drive an internationally competitive economy, by providing world-class destinations on Sydney Harbour. UrbanGrowth NSW is leading the strategic planning for this precinct, on behalf of the NSW Government. A metro station is planned for the Precinct as part of the Metro West project.

The lands within the Inner West LGA are to be used as a staging and construction area for the WestConnex and likely for the future Metro West project. The Rozelle lands within the Bays Precinct contains the almost completed Light Rail Stabling and Maintenance Yard, while Glebe Island is proposed to support the relocation of 2 concrete batching plants, as well as Longitude Tower (an office tower). The latter is currently subject to a state significant development application. UrbanGrowth NSW is preparing a master plan for the West Bays part of the Precinct (i.e. the Inner West SREP lands).

Redevelopment is not expected for at least 10 years, and many of the details are not yet developed and there is uncertainty about the anticipated development mix. Urban Growth have advised that Glebe Island is likely to support a mix of uses, including residential, commercial and port related uses, with around 10 hectares of open space west of Glebe Island. The potential for improved employment opportunities and movements may will be stronger now that a Metro station is proposed for the precinct, and other public transport options. Any future land use plans will need to factor in increased need for connectivity from existing networks through to the edge and within the precinct.

The Greater Sydney Commission Eastern City District Plan stresses the important role of this precinct (p70), *'The port precinct at Glebe Island is critical to the bulk construction supply chain for concrete, the cruise industry and the provision of essential services to the harbour economy. It offers a land/ water interface, essential to current and future industrial/heavy commercial uses, which could not be easily replaced within Sydney Harbour and for which there are few, if any, feasible and sustainable alternatives'*

There is uncertainty around how the precinct will be master planned in the future to accommodate for port functions and industrial activities as well as potential residential and commercial development. Action 30(n) of the District Plan states 'protect and grow the trade gateways by developing a strategy for the management of port and related land side activities as part of the masterplan for the Bays Precinct.'

Actions 2.5.1 and 2.5.2 of the Employment and Retail Lands Strategy address how Council should engage with stakeholders on the future of the Bays Precinct.

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APPENDICES

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APPENDIX A: COMMUNITY ENGAGEMENT SUMMARY

A.1 Democracy Workshop Minutes: Inner West Employment Lands Strategy Workshop

Location: Ashfield Administrative Centre

Date: Wednesday 20 March, 6:00 pm –7:30 pm

Attendees:

Workshop attendees consisted of members from the Planning and Heritage Advisory Committee as well as Arts and Culture Advisory Committee.

- Marjorie O'Loughlin
- Ali Wright
- Hellen Morgan-Harris
- Paul Hurst
- Kath Wawatai
- Terri Southwell (Inner West Council)
- Barbara Becker (Inner West Council)
- Elizabeth Griffin (HillPDA)
- Tony Clapton
- Subash Gurram
- John Weston
- John Osmond
- Sharon Laura
- Gibran Khouri (Inner West Council)
- Billy Cotsis (Inner West Council)
- Alex Peck (HillPDA)

Purpose of workshop

The purpose of the workshop was to seek local perspectives on issues regarding land used for employment and retail. This feedback will inform the development of the Inner West Employment and Retail Lands Strategy.

A number of key issues were foreshadowed in the invitation to the workshop as matters for discussion including:

- Local business trends
- Challenges to locating and expanding a business here
- Opportunities and constraints for our centres, industrial and employment areas
- The future of ground floor retail and our industrial lands
- Commercial rent affordability
- The role of artisan food and drink industry

Format of workshop

The workshop was structured in the format of a round table discussion. Attendees were divided into three groups to provide their feedback on:

- What is good about our retail centres and employment lands?
- What could be improved within our retail centres and employment lands?

The Inner West LGA was divided into three separate areas, with these maps rotated amongst the three groups to ensure that feedback was evenly allocated across the area.

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Council staff were distributed across the three groups to provide assistance with identification of locations containing employment lands and to capture feedback.

The workshop concluded with a general discussion of the key issues affecting employment lands and retail centres.

Feedback summary

An outline of workshop feedback is detailed in the tables below. It is a collation of the written notes which formed part of the round-table discussions. More detailed summaries of the key issues raised in discussion have also been provided.

Feedback from round table discussion

Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
Darling St, Balmain (retail/food)	• Old Sydney heritage • Great pub, history, heritage • Restaurant strips • Heritage pubs, shops and markets • Excellent main street • Ballast Point – Pleasant	• Nowhere to park – businesses closing • Unaffordable rent for retail in Darling Street • Rent are high for retail • Traffic – access • Workers pushed out • Expensive supermarket and retail • Slums of the future (near the bay) • Residency overuse
Darling St-Victoria Road, Rozelle (retail/food)	• Restaurant strips • Shops, cafes and services • Abundant open space is positive	• Limited parking • Leagues Club mess • Narrow streets for big buses • Traffic: City Westlink intersections with Norton, Balmain and James St
Booth and Johnston Street, Annandale (retail/food)	• Open Space: – Whites Creek • Johnston St – witches houses • Booth St/Annandale Rd: useful food and retail (chemists, takeaway, etc) • Fine dining • Village-like, very attractive and useful variety of businesses	• Residential neighbours not as supportive as previously – demographic change • Parking • Charles Street – no more flooding at light rail bridge • Underutilised heritage buildings with potential cultural/community uses

Marrickville (retail/food)	• Entertainment precinct
	• Marrickville Road/Addison Road
	  – Lots of small businesses and useful services (eg chemist, newsagents)
	  – Community group
	  – Restaurants
	  – Galleries
	  – Coffee
	  – Fruit & veg
	  – Transport
	• Marrickville Road and Livingstone Road
		• Difficult access to Ti Chi Mondays (across Cooks River?)
		• Lack of transport (north near Henson Park)
		• Loss of markets, community and cultural integration (north east)
		• Insecurity for live music venues and spaces
		• Overcrowding
		• Rental affordability in new development and for longstanding businesses
		• Illawarra Road

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
	– Good food – Individual shops (i.e. not chain) • Cultural/retail	– New development old tenants leave and retail space remains empty • Not-for-profit retail needs protection
Petersham village centre (retail/food)	• Portuguese vibe – restaurants, culture • Petersham ethnic food centres	• Rent hikes
Haberfield (retail/food)	• Open space – Wadim Bill Jegorow Reserve – Reg Coady Reserve – Haberfield Heritage Conservation Area – Algie Park active and passive sports – Yasmar Heritage Estate and Gardens • Haberfield heritage: community, leadlights, food	• Parking for business loading zones • Haberfield Village – Empty shops to be leased out – Seats on streets – Too many empty premises – Failing businesses • Tunnelling along Parramatta Road feels like LGA is fractured
Ashfield (retail/food)	• Art studios, niche creative businesses • Good Asian eatery • Thirning Villa – Artists Ashfield • Great lanes, backstreets, small businesses • Pramby Park Music Hub -cultural and community role • Retail and food hub • Ashfield Park heritage park	• Difficult to get through LGA on Saturdays with many people on roads and no clearways • Pratter in danger • Maintain streetscapes amidst high rise • Small sports club underutilised • Open pedestrian access and use of laneways/backstreets • Affordability • Losing the "community feel"
Summer Hill (retail/food)	• Creative and community-minded represented through retail • Community village feel, sweets • Creative population/ community • Lackey Street – Awesome for lovely and useful retail shops. My dentist, doctor and hairdresser are all here • Rare butcher still exists here (been there for a long time)	• Retail under threat as more service shop fronts take over creative shops • Access – Traffic management required • Parking difficult on garbage day
Hurlstone Park (retail/food)	• Cafes and wool shop, businesses and Greek sewing school developing under the apartments	•
Enmore (retail/food)	• Enmore Theatre, restaurants • Strip shopping • Buses Food • Great art and live music scene	• Lack of infrastructure • Development potential • Public transport overcrowding
Newtown (retail/food)	• Diverse collection of shops • Transport • Community groups	• Very congested

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
	• Cafes • Cinema • Great art and live music scene • Important role of old strips • Parklands, bootcamp businesses • Great music and other venues for performance	
Parramatta Road (retail/industrial)	• Older industrial stock with potential • Haberfield • Parramatta Road after hours pop-up food vans in carwashes, music after hours	• Dilapidation • Protect heritage awnings • Parking • Shops on Parramatta Road -restrictions on uses – tenancy • Older industrial stock under threat/ being demolished • Retail leases impossible to negotiate, area in "development limbo" • Rent hikes • Haberfield – More bus shelters and seating along transport route – More trees, more shelter – Building setbacks and awnings ▪ For chase ▪ Tree canopy – WestConnex ▪ Destruction of business • Ashfield – WestConnex ▪ Destruction of business ▪ Tunnelling along Parramatta Road feels like LGA is fractured • Crystal Street – Not utilised – Access/parking issues for businesses – Run down – Very congested at any time • Summer Hill • Art establishments under threat
Camperdown (health/education)	• RPA hospital, medical services and agencies • RPA excellent and convenient services • Crown lands, Art – Camperdown gallery and recreation co-located • Lots of sports and education	• Medical too concentrated • Need to revitalise all aspects of Camperdown
HJ Mahoney Memorial Reserve (open space)	• Tempe/Marrickville Golf Course	• Need to clean up and protect the Cooks River • Sporting groups are taking over public space

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
Leichhardt (retail/food/industrial)	• Transport heritage depot • Pioneer park • Heritage scenery • Artisan businesses • Eat streets	• Needs more than just food (eg music) • Access – Parking – Lack of heavy rail access to Leichhardt centre to connect with other areas – Hectic – needs calming • Empty shops with high ceilings being utilised • Moore Street Precinct – No secure tenants – Assumption of impending development • Norton Street – Empty shops – Businesses moving out • Lack of seating in rest areas (particularly in shopping centres, but also around small eateries) for older residents and others – people aren't encouraged to "hang around"
Balmain East/White Bay (industrial)	• Keep public access to waterfront • Bays Precinct – spaces with potential for cultural production • Good to preserve history/heritage of boat making • Spaces with potential for cultural production (warehouses)	• High employment cruise ship area that has noise pollution issues • Uncertain future over cement industry – pollution • Overdevelopment of residential • Cruise terminals noise pollution (diesel) – disturbance
Callan Park (creative industries)	• Callan Park: Crown land, vital green space, creative uses and sports fields • Diversity of use • Casual space for creatives • Historic perspective	• Being allowed to deteriorate • Do they want to raze it? • Needs protection • Lack of community control • Disused buildings • Garden (henkise) Japanese neglected • Access from the west
Canal Road (creative industrial)	• Creative cluster • Zoning reinforces use • Leichhardt/Bay Walk/Canal Road – wetlands/greening • Public transport/light rail • Legs on the Wall, Sydney Opera House and Art Gallery storage 91 Canal Road • Closeness to parks and major arterial	• Film centre inaccessible to some due to regular flooding • Canal Road under threat • Art and cultural nature spine: – Secure leases – Affordable space • Lease under threat • Art establishment under threat (far west)
Leichhardt (remnant industrial)	• Older industrial stock interspersed with residential	• Pockets of industrial space amongst residential at risk of overdevelopment

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
		• More profile and support for heritage buses (depot)
Lords Road, Leichhardt (industrial)	• Important employment lands maintain manufacturing • Factories	• Certainty in zoning
Petersham (creative industrial)	• Older industrial stock – creative incubator	• Rent hikes
Lewisham (industrial)		• Creative industries pushed out • Insufficient understanding of cultural production • New "creative spaces" utterly inappropriate
Arlington Rd, Dulwich Hill (community)	• Heritage • Community • Light rail • Open space – Dog park – Arlington Reserve – Yeo Park – Jenner Park	• New creative industries need protection from rent hikes • Greenway must be finished to connect employment lands along Cooks River • Protect new businesses from rent hikes • Access – Traffic management – Arlington Reserve sports parking are taking over local streets
Stanmore village centre (retail/food)	• Education and centres	• Traffic congestion impacts businesses
St Peters (industrial)	• Open space – Sydney Park • Positive reuse of industrial spaces – Old warehouse spaces very successful – Tortuga Studios – Traditional manufacturers working with new creative – Diversity of creative and cultural – Industrial workspaces, small businesses • The Factory live music	• Residential overdevelopment • St Peters Triangle creative spaces all gone • Negative impact of WestConnex – No busways on WestConnex • Preservation of industrial buildings as heritage significance , but for use in perpetuity • St Peters industrial space at risk, seen as ugly and ripe for residential development • Cost of airport trains and parking • No services
Sydenham (industrial)	• Can be open 24 hours, arts • Frazer Park 24 hour license, NB live music concerts and events • Get great fresh fish • Warehouse • Foods • Many creative studios and live music venues – Red Rattler	• Traffic • Zoning certainty for food production/manufacturing
Tempe (industrial/bulky retail)	• Important role of IN1 -General Industrial • IKEA and local business	• Lack of fun stuff

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Location	What is good about our retail centres and employment lands	What could be improved within our retail centres and employment lands?
Marrickville (industrial)	• Important urban services	• Needs protection from rent hikes • Potentially losing valuable work space to residential development • IN1 -General Industrial zoning vital • Victoria Road – Risk of manufacturing/urban services changing to residential zoning
Carrington Road, Marrickville (industrial)	• IN1 -General Industrial zone • Many businesses with workers from the local area, diverse, busy on weekdays	• Keeping services for aerospace production/servicing • Certainty of zoning

Discussion

The following points were raised during discussion.

Loss of cultural production space

Cultural production defined as a subset of creative industries that require larger industrial spaces for their work. Significant concerns over residential overdevelopment around St Peters encroaching on these areas and pushing cultural production out. This trend has also been noted in on Carrington Road in Marrickville. A lot of industrial spaces formerly creative spaces have now disappeared. Flow on affects to smaller industries if creative industries vanish? Protecting diversity.

Suggested options:

Protect employment land from residential development.

The advantage of these areas has been in older manufacturing and industrial sites linking up with newer creative industries. This isn't seen by public necessarily.

Representation

Large group of "unknowns" in Sydenham who are often creative incubators, not captured by census (because they are employed in one off multiple role – gig economy?) and hence would often write "unemployed" on census. Individuals like this would be found in areas like the creative sublets in Carrington Road.

What about the areas where creatives don't have strong advocates?

Perception of creative spaces

Sometime a seemingly "run down" industrial area needs to be run down to attract creative industries. Noise conflicts in residential make these industries mixing with residential quite difficult. High ceilings and unusual layouts make these older spaces uniquely attractive to creative industries, generating agglomeration and fostering collaboration. Proximity to creative industries in the city like fox studios or vivid.

Suggested options:

Rent protection, protecting the zoning. Protection of some of the older buildings (eg sawtooth buildings). Protecting first use.

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A more consistent commitment is needed from Government on the importance of arts and creative industries within in the hierarchy of decision making, with emphasis on a consistent commitment to maintaining and protecting arts space.

The government acquisition of spaces for use by creative industries. SP zoning of areas specifically for use by creative and cultural production industries (eg the Canal Road space). Identify key precincts for support.

Retail areas

Empty shops in Haberfield, Illawarra road, Parramatta Road. Rents become too high or 4-5 month bond with no guarantee beyond.

Traffic and parking impact on business particularly in areas like Balmain and Summer Hill. New housing has meant that there is insufficient parking to cater for extra housing (all centres).

Opportunity in Haberfield and Ashfield with rebuilding... existing heritage assets in Haberfield which could be leveraged through development of heritage industry in that area to complement these heritage items.

Live-work options

Some spaces where people have been able to do that with existing areas (live above work space). Would it be too easy to manipulate-would live and work be in competition? Council would need to closely monitor and manage any such arrangements in IN areas. Would not work for cultural production (creative manufacturers), could work for design and creative. Council should say "shall be" not as business says "would suit".

A.2 Key stakeholder phone calls

Key stakeholder phone calls have been undertaken to gauge the general perception of businesses and industry groups in the local government area. Businesses requested that they remain anonymous and therefore the notes from engagement have been categorised by industry types. Please note that the information is in note form and reflects the conversations that were had with businesses.

Manufacturing/other

- Lots of delivery trucks and stock, as well as container movements, this could lead to noise complaints if there were nearby residents.
- Pressure to rezone arising from increasing land values.
- There is little room for expansion, with newer developments typically comprising smaller spaces not appropriate to larger industrial use.
- Yes there is suitable space but not much available. There is a mix of older and new stock. New mixed use developments will not however support the type of space that businesses in the area need.
- Artists need cheaper rent they share warehousing space without that there is no room for them and they don't want to go out west. It isn't their vibe.
- Good mix of new developments that are more expensive to rent. You also have smaller spaces like Carrington Road where the rent is cheaper.
- The developments are putting retail areas under them and they generally remain empty – the spaces aren't working. If Carrington puts shops and supermarkets it will totally change the streetscape of the area. It will draw away the trade from other areas and you lose the character of the area.
- The B4 -Mixed Use going back in doesn't work as the retail spaces doesn't have enough demand. The industrial land is more required.
- Rise of artisan spaces in industrial areas (eg St Peters), not actually industrial in nature.

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- Micro-breweries are not a significant concern, but further encroachment (eg restaurants) would be detrimental, food trucks have not been an issue. Micro-breweries can also attract young people, adding more vibrancy to the area.
- Some businesses reported synergies with other artisan food. They are open to the public when the warehousing isn't at peak.
- Companies share kitchens.
- Being able to live and work in the area is beneficial.
- Beneficial availability and range of goods and expertise in area (eg designers, printers, manufacturing, design, photography film, display stands and lighting), leading to very strong synergies between businesses.
- If the industrial space begins to be fragmented by new mixed use development it will erode the whole character of the area and push out businesses.
- Need some more subsidised and key worker housing. A lot of places around station will be redeveloped and this is where the lower cost housing is.
- The developments are putting retail areas under them and they generally remain empty – the spaces aren't working. If Carrington puts shops and supermarkets it will totally change the streetscape of the area. It will draw away the trade from other areas and you lose the character of the area.
- With the pressures that are coming from the large developments – if they develop it to housing – all the warehousing on the other side of the road will also go. Victoria Road – when you look at the surrounding area there are silly gaps where there are warehousing – they will be squished out because of the new residential. Once you let one go it will continue to fragment and it will just become another Wolli Creek.
- Less than 1 per cent of underutilised industrial land in Marrickville, this is more than there was in the 50s.

Creative industries

- Parking in the area is quite limited and quite expensive – affects clients when they come and visit them. It has recently been metered.
- Public transport access is difficult. Closest bus stops are on Glebe Point Road – quite a walk from public transport to where they are. Better access to public transport closer place of work.
- Would like to see more cafes and restaurants and retail closer to their place of work. High density residential doesn't affect business.
- Rent is too high – recently gone up. Before that it was relatively affordable. Largely driven by demand. A lot of creative businesses moving to the area. In an old warehouse – there isn't many places like this left.
- Lots of good retail outlets around.
- Do utilise sole traders and contractors in the area, but don't have ongoing relationships.
- Not a retail facing business but do have very unique requirements. Would like to see more cafes and restaurants and retail closer to their place of work. High density residential doesn't affect business.
- Need loading docks for gear and sound proofing. But could move into an office space.
- Rent is too high, having recently increased from a relatively affordable level. These increases have been largely driven by demand with a lot of creative businesses moving to the area. Many of these businesses are looking for old warehouse spaces, which are increasingly rare.

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Start-ups

- Attracting talent and recruiting is one of the biggest challenges for start-ups. A lot of people don't know how to get in to the industry and move from bigger corporates.
- The affordability of office space and warehousing is an impediment. Reducing cost in any way would really help.
- Start-ups require spaces that also foster collaboration. For start-ups to succeed they need a network around them – access to events, speaking to suppliers and customers, space to collaborate and share ideas.
- Opportunities for start-ups:
  - Newtown co-working spaces may work really well.
  - Camperdown has a nice combination of being close enough to the city but far enough away that rents aren't too expensive.
  - A lot of start-ups are already based in Pyrmont and Surry Hills
  - Camperdown has nice open areas that create a different vibe
  - Proximity to university could be attractive for start-ups due to access to research and new talent.

Co-working

- More parking availability would be beneficial.
- Good public transport services contribute positively to operations.
- Surrounded by similar businesses that have the same needs as them.
- Restaurants and bars in the surrounding area are good for co-workers as they create unique spaces for meetings.
- Synergies with other businesses in the area. Colocation with other businesses with similar focus makes it a lot easier to collaborate (eg creative co-working spaces situated near businesses focussing on sustainability, arts and cultural engagement).
- Some of the creative uses of the spaces should be able to have multiple tenancies in a building.
- Co-working spaces need to be able to be noisy, being located near other late night businesses creates synergies.
- Pressure to redevelop in the future – a lot of owners are thinking about selling because of the profit margin that they could get.
- Many of these operators would prefer to remain in their spaces and stated it was their intent to buy if they were able to generate sufficient capital.
- If there was something that said new developments must include creative spaces someone might just set up an office with a creative agency in it.
- If there was more flexibility in building height it would be better for operations.
- There are a lot of buildings are quite large and if they were able to be split out it would be a lot easier for smaller businesses to utilise.
- There is more demand for 200-500sqm spaces, the demand for larger spaces is significantly less. For example photography studios can need larger spaces, while others can make do with smaller.
- Having the ability to break larger spaces into smaller areas would be advantageous.

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- There are probably a lot of illegal businesses that are acting as surrogate co-sharing spaces. The regulation about lifts and fire proofing and structural changes is when it creates the issues.
- Business support system and framework that have a viable business and contribute back to the economy, however the building isn't currently compliant. No motivation for building owners to become compliant. Need support from Council to navigate the system – if council came in to the business and says you can't operate business because the building is not up to code, which leads to the potential loss of the business and potential closure.
- Spaces stated that having participation in the DA process in the past has been difficult. In one instance the application was for a change of use but found that the planners didn't understand what the operator was trying to do. People thrive on diversity and there wasn't a defined use that could be easily categorised.

Night-time entertainment

- The mix of entertainment uses should not be overlooked. How do you have an industrial zoned warehouse and host a weekend event? Temporary community licensing could enable this kind of activation. Temporary change of use, legitimate alcohol license and live music. If there are vacant warehouses that people could apply for temporary usage, why not have the buildings activated to support local culture? Lease for 3 months – temporary use as cultural venue etc.
- Already warehouse parties happen all the time and often. At present they are completely illegal/unsafe. The reuse of warehouses in Sydney Fringe Festival is a good example of adaptive reuse.

Artisan food

- Residential would be undesirable in immediate area, owing to the potential increase in rents.
- Ad-hoc approach to venue restrictions (eg some microbreweries have been granted different restrictions on venue capacity than they have and are able to capitalise on that).
- Landlords are typically waiting for developer buyout and lack a long term vision for the space (eg not willing to invest in minor capacity upgrades). Some certainty from the market to demonstrate that there is a longer term plan would give long term security on the spot. More certainty from government to say that area will remain industrial and will not be changing.
- There has been a lot of pressure for redevelopment on the fringe of the industrial areas, this displaces businesses and drives up the rent as more businesses are competing for the same place. Businesses want to stay in the location however affordability will become an issue.

Key landholders and tenants

- There is uncertainty around ongoing operations of the Port in the context of continuing urbanisation in the area. An integrated solution is required to ensure that surrounding development and ongoing changes to the port's operations are responsive to each other (eg changes in operations arising from Hanson's proposal).
- State Government are looking for ways to deal with the increase in cruise ships. Growth of the White Bay Cruise Terminal is limited. It won't necessarily mean that there is an increase in cruise activities.
- There is a need to retain the area as port land, despite a lot of pressure to redevelop into high density residential.
- Agreed to continued operation of the port for at least the next 10-15 years, beyond that there is a commitment to an integrated Port outcome. This would comprise some kind of urban renewal on Glebe

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Island, to be then integrated with the Port. In other words, land would be rezoned to commercial and residential, with the retention of White Bay for port use. Intention is that White Bay remains the same.

- One impact of this would be reduction in employment land and port land, likely generating a potential conflict of land uses arising from the presence of residential development in a port environment. There is going to have to be a lot of work to determine how this is going to be managed and there are already a lot of problems.
- There are also significant risks associated with losing any of the remaining port land within the harbour, with the city increasingly relying on services from the port (eg back of house harbour services limited to non-seagoing vessels).
- Piecemeal zoning erodes the usefulness of industrial land, which can introduce conflicting land uses driving out industries and businesses.
- Developments in Council land are considering the port in how they may impact the port and existing operations – reverse amenity impact. Need to designate the port as a priority infrastructure area.
- Reasonable and feasible noise impact – the port is currently undertaking doing a lot of strategic noise assessment at the moment and looking at Infrastructure SEPP (buffers around the infrastructure) think there should be something similar around the Port at Glebe Island and White Bay which would trigger extra consideration both ways. Constructive engagement on this topic would be beneficial.

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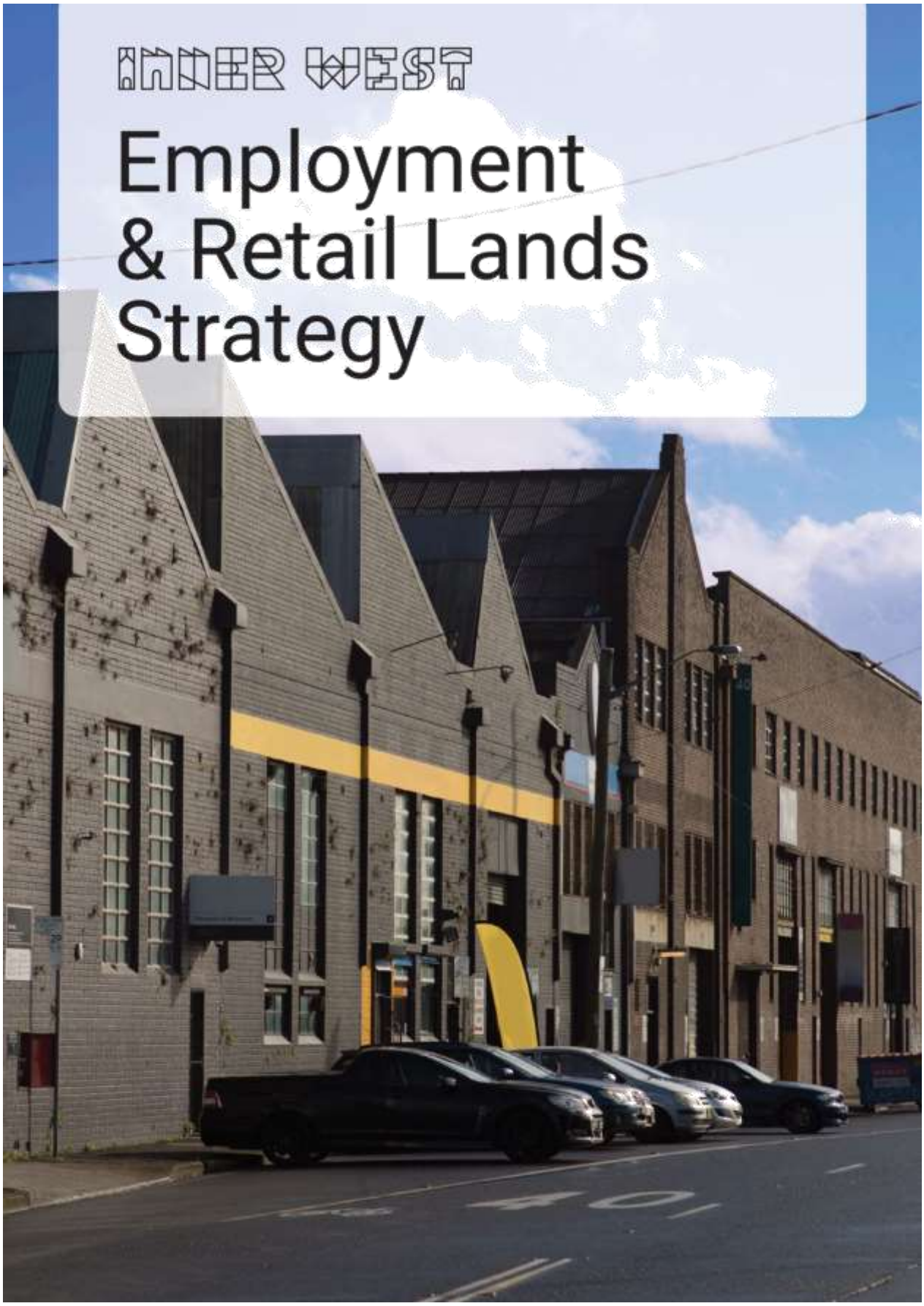
INNER WEST
Employment
& Retail Lands
Strategy

Executive summary

The Inner West Employment and Retail Lands Strategy provides a strategic approach for the management of land:

- to maximise productivity;
- facilitate job growth; and
- to contribute to the long term prosperity of the Inner West Local Government Area.

The ability of businesses to respond to the changing needs of the population will be influenced by their location, accommodation and the available infrastructure.

The effective management of land supply for employment and commercial uses will benefit businesses, residents and the local economy of the Inner West.

The Strategy is based on a substantial Employment and Retail Land Study.

The Study contains detailed research findings, discussion of findings and fine grain conclusions and recommendations that underpin the core analysis and recommendations in the Strategy.

Our local economy

The Inner West Local Government Area (LGA) in 2019 provides around 75,500 jobs and hosts around 19,000 businesses. Each year the LGA contributes over $10 billion in gross regional production. Professional scientific and technical services, along with health care and social assistance, provide around 20% of the LGAs jobs. The creative and cultural sector employs more than 8.8% of the local workforce. Our food and beverage production is recognised throughout NSW as a growing industry. Appropriate planning controls and local infrastructure delivery will support these growth industries.

Our employment land

The Inner West LGA is strategically located, having good access to Sydney CBD, Sydney Airport and Port Botany. The LGA has over 300 hectares of land in employment precincts.

This includes land zoned:

- B5 Business Development;
- B6 Enterprise Corridor;
- B7 Business Park;
- IN1 General Industrial;
- IN2 Light Industrial; and
- SP Special Purpose.

Projections, based on recent trends, indicate that by 2036 an additional 271,245 sqm of gross floor area will

be needed to accommodate industries and businesses in the employment lands.

One of the key uses of the employment lands in the Inner West is the provision of essential urban services for local residents. It is important to protect these areas from competing land uses in order for the local population's needs to continue to be met.

The larger employment precincts including Marrickville-Sydenham, the Parramatta Road corridor, and Princes Highway Enterprise Corridor and its associated airport industrial land, serve the broader regional economy. These employment lands also support a significant cultural and creative production sector that supports both local and regional needs. The protection of lands for these industries has become more critical as they have been mostly lost in the City of Sydney LGA. Ensuring transport services to these precincts can support businesses to improve productivity and reduce costs.

A significant extent of industrial and urban service lands has been lost to residential uses in Inner West in recent years. Inner West needs to not only protect the remaining employment lands, but to seek additional opportunities to provide for light industrial and urban services uses, that are compatible with more vulnerable land uses, in other zones.

Our centres

Over twenty-four commercial centres in the LGA occupy over 1.6 million sqm of land and deliver a diverse range of retail, office space and personal services. Our growing population and trends in retailing, as well as demand for office space mean that an additional 236,000 sqm of gross floor area will be required to service the LGA by 2036.

Establishing Ashfield as the LGA's primary business and administration centre will make good use of the existing commercial floorspace in the centre. Our town centres in Newtown, Leichhardt, Marrickville and Balmain will continue to offer unique places for the community to enjoy shopping, eating and night-time entertainment. Recognising the important role of smaller centres for convenience shopping and specialist services will help to protect the viability of these centres in the long term.

Our principles

This document sets four principles to guide planning for the future of the Inner West employment and retail lands.

1. **Centres are distinctive and productive**	Development in centres will prioritise employment and will be complemented by quality public space.
2. **Industrial and urban services lands are protected and managed**	Employment lands will be retained and managed so that industries have confidence to locate and expand.
3. **Spaces for business are suitable and available**	A pipeline of new, well-located suitable employment floor space will be delivered in employment corridors and key precincts.
4. **The planning framework is clear**	The planning framework supports local business and minimises land use conflict.



Intent and role of relevant land use zones

Zone	Role
B1 Neighbourhood Centre	Provide for small-scale retail, business and community uses serving people who live or work in the surrounding neighbourhood.
B2 Local Centre	Provide for retail, business, entertainment and community uses serving people who live in, work in and visit the local area, encouraging employment opportunities in accessible locations.
B4 Mixed Use	Provide a mixture of uses, integrating business, office, residential, retail and other development in accessible locations.
B5 Business Development	Provide a mix of business, bulky goods and warehouses requiring a large floor area that are located to support centres.
B6 Enterprise Corridor	To promote businesses along main roads and encourage a mix of compatible uses, provide a range of employment uses (including business, office, retail and light industrial) and maintain the economic strength of centres by limiting retailing activity.
B7 Business Park	Provide a range of office and light industrial uses, encourage employment opportunities, while enabling other land uses that provide facilities or services to meet the day to day needs of workers in the area.
IN1 General Industrial	Provide a wide range of industrial and warehouse land uses, encourage employment opportunities, minimise adverse effects of industry on other land uses while supporting and protecting industrial land for industrial uses.
IN2 Light Industrial	Provide a light industrial, warehouse and related land uses, while encouraging employment opportunities, supporting the viability of centres, minimising any adverse effect of industry on other land uses, provide facilities or services to meet the day to day needs of workers and supporting and protecting industrial land for industrial uses.
IN4 Working Waterfront	Specialised zone provides for maritime-specific activities and complementary industries which require direct waterfront access.
SP1 Special Activities	Provide for special land uses that are not provided for in other zones (e.g. Canal Road).

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Regional context

Eastern City District Plan

The Greater Sydney Commission's Eastern City District Plan is a 20-year planning document that contains the planning priorities and actions from the Greater Sydney Region Plan. The planning priorities for productivity have helped shape the development of this strategy and in particular those elements shown in brackets below:

E7 - Growing a stronger and more competitive Harbour CBD (including Glebe Island, parts of Camperdown, Rozelle, and Balmain);

E8 - Growing and investing in health and education precincts and the Innovation Corridor (the Camperdown – Ultimo Collaboration area);

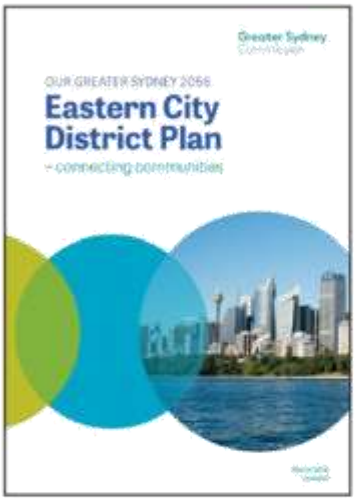
E9 - Growing international trade gateways (with the airport and Port Botany directly adjoining the LGA to the east);

E11 - Growing investment, business opportunities and jobs in strategic centres. (This Priority also provides principles for local centres); and

E12 - Retaining and managing industrial and urban services land;

E13 - Supporting growth of targeted industry sectors, including industries that support a circular economy.Target industries for the Inner West include:

- Urban services;
- Specialised food manufacturing;
- Logistics and other uses associated with the airport and Port Botany;
- The cultural and arts sector;
- Night-time economies in centres like Newtown-Enmore, Marrickville and Balmain; and
- Biotechnology and innovation in Camperdown.



Local context

Our Inner West 2036

Our Inner West 2036 Community Strategic Plan provides a clear vision and direction for the future of Inner West.

Our neighbourhoods have unique character and heritage, reflecting the waves of migrants that helped shape the neighbourhoods they called home. The density of housing and population gives Inner West its distinct vibrancy.

In some areas liveability is high, and it's easy to get to and around through multiple options of active and public transport. Parks and open spaces provide relief from the urban environment and are ideal for active and quiet recreation. Other areas will require further work to achieve these outcomes.

Busy urban centres and main streets are lively and accessible, and offer a range of quality shopping and places to gather. The street life connects the community and welcomes Sydneysiders and visitors who come to experience Inner West's uniqueness. The night-time economy is thriving.

As a hub of independent arts and strong artistic communities, Inner West is an incubator for new ideas, innovation and emerging technologies. It is a magnet for artists, writers, musicians, designers, filmmakers and knowledge workers seeking an inspiring atmosphere and space to live, work, visit and play in.

Strategic directions and associated outcomes have been established to describe where the community wants to be in 2036. The following strategic direction is of particular relevance to employment lands:

Strategic direction 3: Creative communities and strong economy

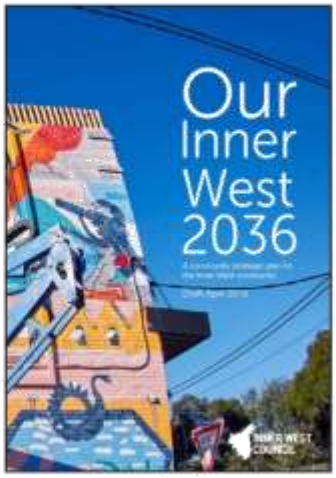
3.1 Creativity and culture are valued and celebrated

3.2 Inner West is the home of creative industries and services

3.3 The local economy is thriving

3.4 Employment is diverse and accessible

3.5 Urban hubs and main streets are distinct and enjoyable places to shop, eat, socialise and be entertained.



Our Place Inner West

The Inner West Council was formed in May 2016 when the former Ashfield, Leichhardt and Marrickville Councils were merged. The Council covers an area of 36 square kilometres stretching from the airport in the south to the harbour, and from the City of Sydney to the borders of Burwood, Canada Bay and Canterbury Bankstown Councils.

The current local planning framework for the Local Government Area (LGA) is separate Local Environmental Plans (LEPs) and Development Control Plans (DCPs) for each of the former councils. The relevant LEPs are Ashfield LEP 2013, Marrickville LEP 2011, Leichhardt LEP 2013 and Leichhardt LEP 2000.

The purpose of the Inner West Employment and Retail Lands Strategy is to deliver sound policy and land use planning outcomes for the Inner West Local Government Area (LGA). The Strategy will be used as a key evidence base to inform:

- The Local Strategic Planning Statement (LSPS);
- A single comprehensive Local Environmental Plan (LEP) that both consolidates the existing LEPs and is consistent with state government and Inner West Council planning priorities; and
- A single comprehensive Development Control Plan (DCP).

The Inner West Local Housing Strategy (LHS) was adopted 3 March 2020. Actions within the LHS regarding the location of future housing delivery will influence demand for commercial space in centres. Future reviews of planning controls to increase housing delivery within or adjacent to centres must also consider employment priorities.

Council's Local Strategic Planning Statement was made (finalised) on 31 March 2020. Objectives and actions in Council's Draft Employment and Retail Lands Strategy (the Strategy) have informed the LSPS.

The strategy also seeks to leverage the strategic location of the Inner West LGA to maximise employment opportunities and cater to the lifestyle preferences of the Inner West community. These lifestyle preferences include access to creative opportunities and the ability to work from home in highly accessible locations close to attractive local centres. Figure 1 illustrates the study area.

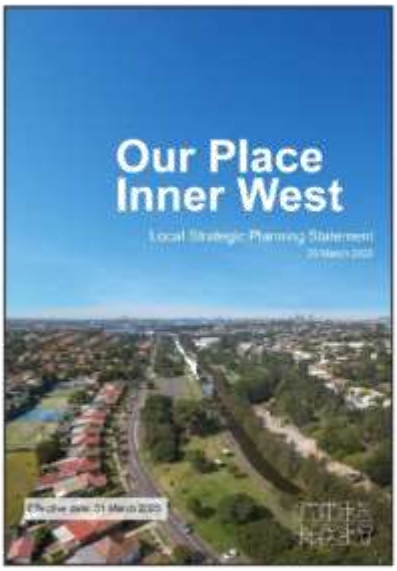
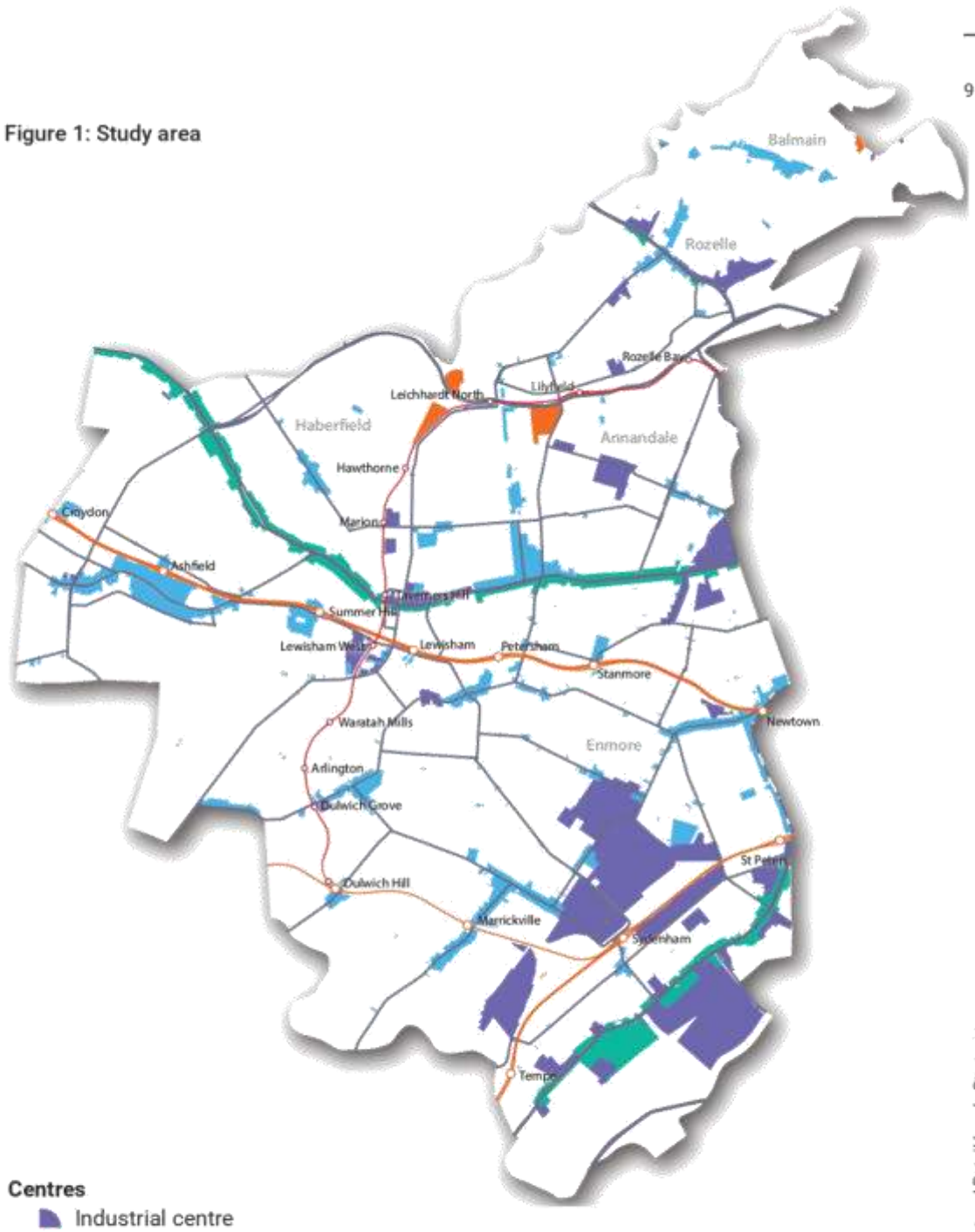


Figure 1: Study area



Source: HillPDA

Employment and economic profile

The following figures provide an overview of the employment and economic characteristics of Inner West LGA.



Employment location

- Residents employed locally **19.6%**
- Residents that leave the LGA for work **80.4%**



Labour force age groups

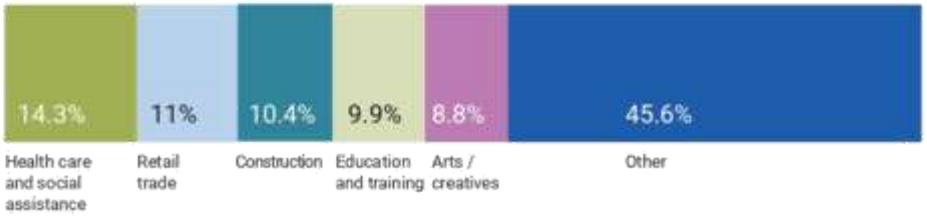
- 15-24 **12.8%**
- 25-34 **25.2%**
- 35-44 **22.2%**
- 45-54 **20.8%**
- 55-64 **14.4%**
- 65+ **4.6%**



Industry value added

- Professional, scientific and technical services 10.1% ($771.4m)
- Health care and social assistance 9.9% ($759.8m)
- Manufacturing 8.5% ($651.9m)
- Construction 7.8% ($593.6m)
- Retail trade 7.5% ($574.5m)
- Other 56.2% ($4,304.9m)

Industries of employment



Item 1
Attachment 2


GRP (year ending 2018) $10.41 billion
Population (2018) 198,024
Businesses (2018) 19,014
Jobs (2018) 75,447
Unemployed (2016) 4.6%
Arts/creative community (2018) 8.8% of workforce
Major specialisation Arts and recreation services
Tourism international visitor nights (2017/18) 2,922,039
Employed residents (2018) 117,737

Centres

Within the Inner West LGA there are over 24 local centres providing a range of retail and personal services. These centres provide for important local economic and employment opportunities that build on the distinctive local character. The LGA contains over 1,600,000 sqm of land zoned for retail floor space. This includes land zoned as B1 Neighbourhood Centre, B2 Local Centre and B4 Mixed Use.

The pie charts within Figure 2 illustrate the diversity of floorspace in each notable centre under broad use categories. They do not represent the size of the centre.

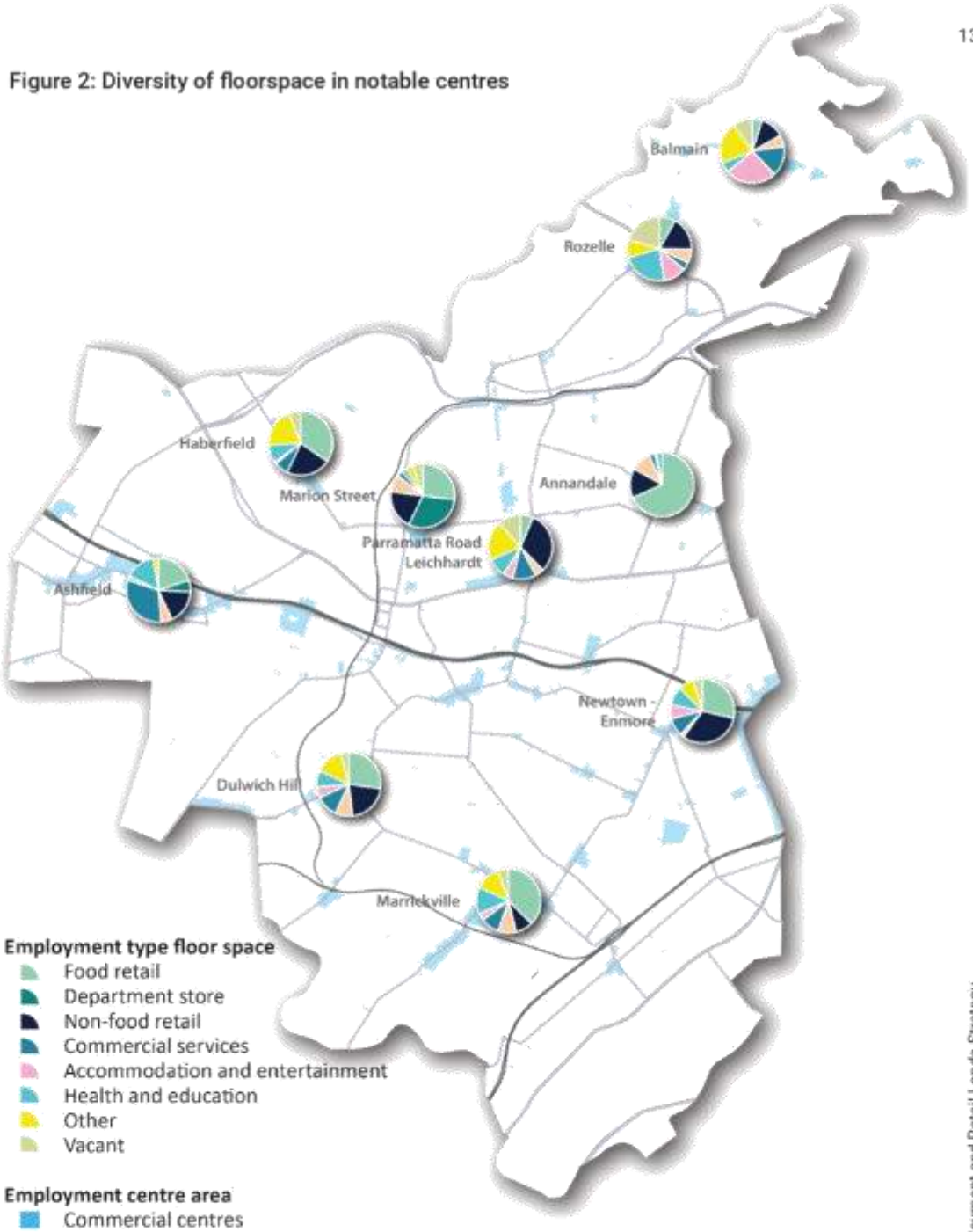
1,615,000sqm
of existing zoned centres and mixed use

578,067sqm
of existing gross floor area within centres and mixed use



Photo credit:
Inner West Council

Figure 2: Diversity of floorspace in notable centres



Source: HillPDA

Employment precincts

The Inner West LGA has over 3,000,000 sqm of land in employment precincts. This includes land zoned B5 Business Development, B6 Enterprise Corridor, B7 Business Park, IN1 General Industrial, IN2 Light Industrial and SP Special Purpose. Most of the employment precincts in the Inner West provide essential urban services for local residents. There are a number of larger employment precincts that serve the broader regional economy including Marrickville-Sydenham, Princes Highway Enterprise Corridor and its associated airport industrial land and the Parramatta Road corridor. Table 1 presents the floorspace and demand projections for the employment precincts. Figure 3 illustrates the existing employment type floorspace characteristics of the notable employment precincts.

over 3 million sqm
of existing zoned employment precincts in use

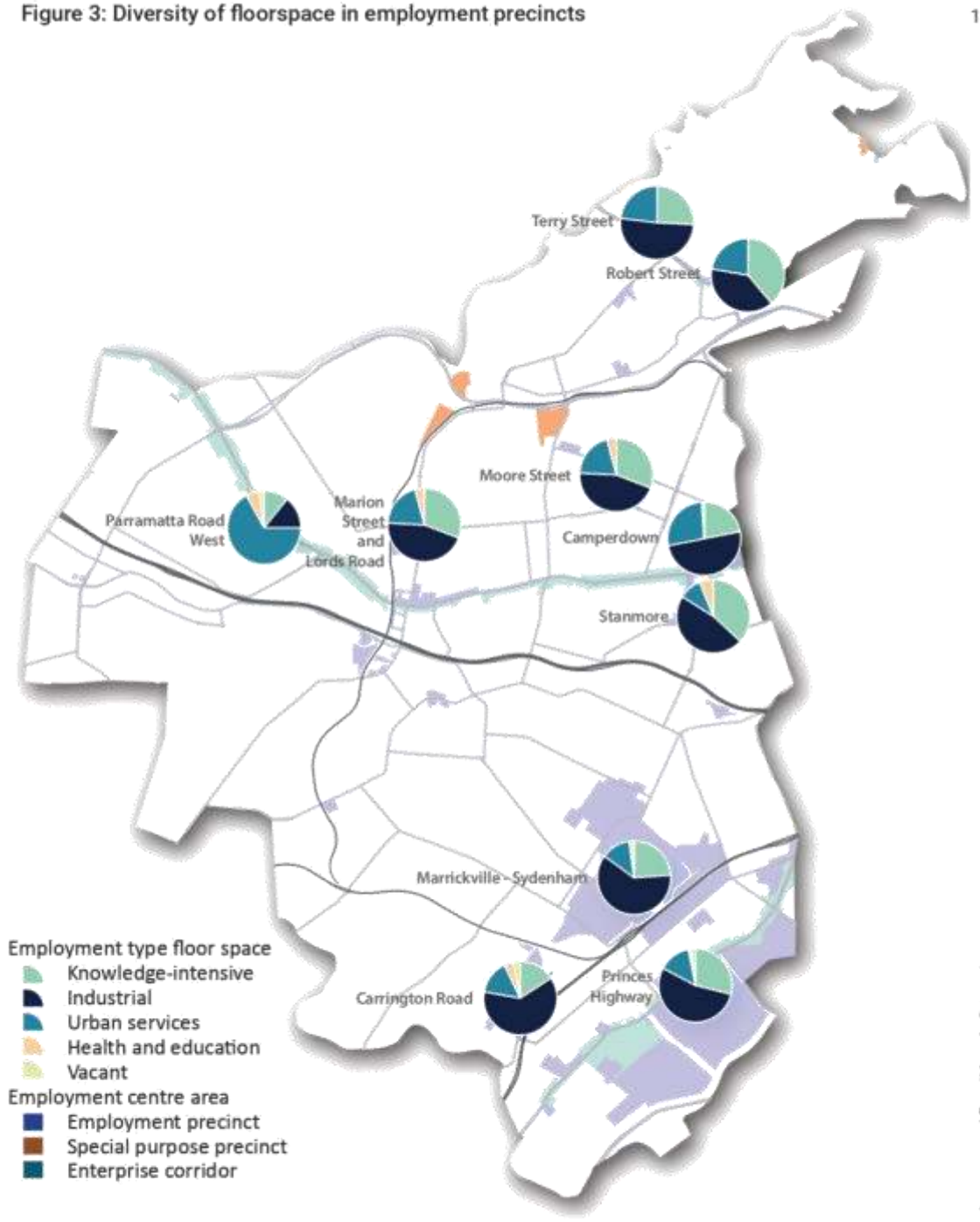
1,800,000 sqm
of existing built gross floor space within employment precincts

Table 1: Employment precinct additional floor space demand to 2036 (GFA)

Industry		Net change in floor space demand to 2036 (sqm)
Population serving	Construction	24,376
	Retail Trade	6,060
	Accommodation & Food Services	4,263
	Arts and Recreation Services	3,036
	Other Services	18,294
Knowledge intensive	Information Media & Telecommunications	4,656
	Financial & Insurance Services	1,030
	Rental, Hiring & Real Estate Services	4,041
	Professional, Scientific & Technical Services	7,556
	Administrative & Support Services	1,305
	Public Administration and Safety	5,015
Industrial	Agriculture, Forestry and Fishing	1,186
	Mining	-67
	Manufacturing	67,938
	Electricity, Gas, Water and Waste Services	6,357
	Wholesale Trade	964
	Transport, Postal and Warehousing	46,401
Health & edu.	Education & Training	6,329
	Health Care & Social Assistance	8,986
	Inadequately described	NA
TOTAL		217,727

Source: HillPDA

Figure 3: Diversity of floorspace in employment precincts



Source: HillPDA

Influences

Industry and market trends



Retail and office floor space

- Historic undersupply of supermarket floor space driving growth in smaller format 'metro' supermarkets and pursuit of larger sites by major supermarkets for full-line supermarkets;
- Large number of mixed-use developments in recent years increased supply of small ground floor retail spaces that have limited demand and are slow to be leased;
- Continued evolutions of online retailing resulting in pursuit of suitable sites for dark stores and changing the make-up of businesses operating in centres and shopping centres;
- Growth in demand for affordable office space in CBD fringe locations;
- Rise in demand for co-working and flexible office spaces;
- Shift in lifestyle choice with more people working from home;
- Potentially large increase in office supply in medium-long term at the Bays Precinct; and
- Increasing housing growth, focused on centres and key public transport hub.



Industrial, urban services and creative industries

- Loss of industrial and urban service land at a subregional level placing pressure on the availability and affordability of space;
- Deterioration and poor maintenance of older buildings creates affordable entry points for some businesses (e.g. creative industries) but can result in building compliance issues;
- Growth in small medium enterprise businesses and start- ups driving demand for smaller and scalable premises;
- Rising inner city land values generating speculative development pressure, shortened lease terms and affordability issues;
- Significant loss of creative spaces in the City of Sydney, resulting in high demand for affordable creative spaces in the inner city, with limited available premises;
- Increasing competition for the few available affordable spaces in industrial lands, with creative and cultural production finding it increasingly difficult to afford rents;
- Synergies between creative industries and manufacturing industrial activities are increasingly high-value-added, tied to niche production, limited batch runs, and a combination of manual, creative and digital work;
- Growth in transport and logistics driven by demand from online retailing, international trade and software driven processes;
- Growing demand for larger sized parcels of industrial land required to support logistics infrastructure such as customs processing centres, intermodal terminals, distribution centres and last mile warehousing;
- Growth in the establishment of microbreweries and artisan food production with associated retail;
- Multi-storey industrial facilities to enable greater productivity in infill locations;
- Loss of businesses from residential zoned lands in Inner West, as old warehouses and urban services convert to housing; and
- Growing interest in synergies between universities and hospitals supporting the evolution of Camperdown into a medical and research hub.



State government urban renewal locations and new infrastructure

- Sydenham to Bankstown Metro catalysing housing and jobs growth;
- The Parramatta Road Corridor Urban Transformation Strategy driving renewal in this corridor;
- The planning for the West Metro, with a station at the Bays Precinct to support a major transformation of this precinct;
- Wests Connex resulting in:
  - barriers to local access;
  - improved regional access from some locations;
  - loss of industrial lands; and
  - new opportunities on 'dive sites' after completion.
- Refer to Figure 4 for map of state government urban renewal locations and new infrastructure.

Figure 4: Inner West Influences



Vision

The Inner West LGA has a rich industrial and urban services economy and is a leading destination for creative industries and entrepreneurship. It leverages strategic connections from the Eastern City's trade gateways and Harbour CBD. The thriving local economy provides a diversity of employment opportunities and services for local residents. The industrial precincts and employment corridors are productive and well managed, providing businesses with the confidence to invest and expand. The centres are enjoyable locations to visit, live and work in, with high amenity, quality services and strong transport connections supporting their growth.



Photo credit:
Inner West Council

Principles

1

Centres are distinctive and productive

The location and mix of offices, business and retail, entertainment and creative uses combined with improved public space and cultural infrastructure support the centres hierarchy and long term economic productivity.

2

Industrial and urban services lands are protected and managed

Employment lands will be retained and managed so that businesses have confidence to locate and expand there. A diversity of industrial parcel sizes and versatile spaces ensures that growth of industry clusters can be supported.

3

Spaces for business are suitable and available

Loss of industrial and urban services land in the wider Inner Sydney region means the protection of urban services corridors is more important than ever. Prioritising employment outcomes in out-of-centre mixed-use development can deliver a pipeline of well-located and suitably configured employment floor space. Successful implementation can be achieved through considered stakeholder involvement.

4

The planning framework is clear

The planning framework will give clarity for business on where to locate and invest and what to expect when locating close to sensitive uses such as residential. Appropriate zoning of employment precincts will reduce speculation, support longer tenures and increase certainty for tenants.

1

Centres are distinctive and productive

Strategy 1.1: Establish a clear centre hierarchy across the LGA

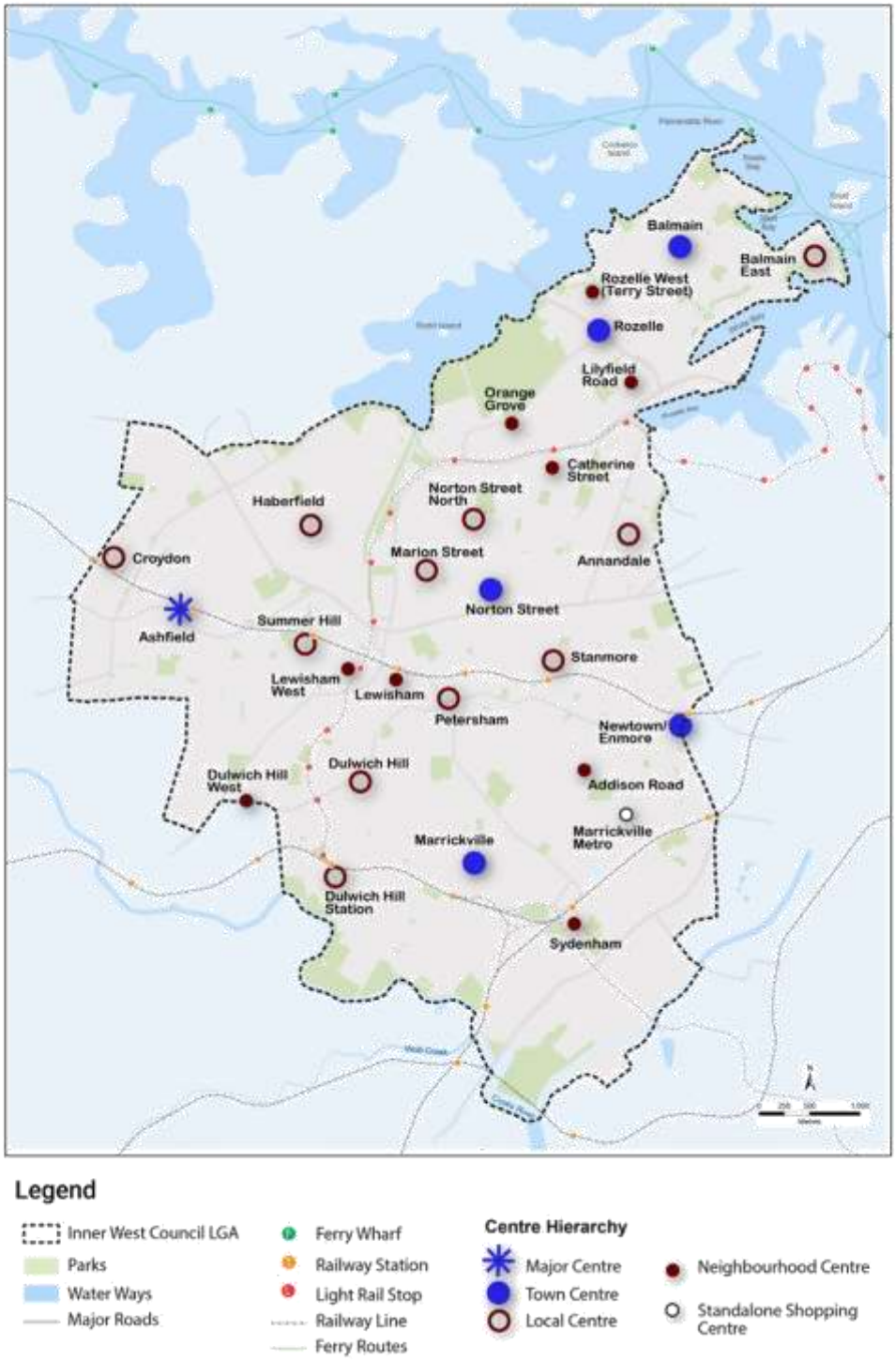
Establishing a clear centre hierarchy provides clarity to the market around growth expectations and the desired role and function of centres.

Action 1.1.1: Adopt the recommended centre hierarchy as defined in Table 2.

Table 2: Centre hierarchy role and function

Hierarchy	Centres	Future role
Major centre	Ashfield	The major centre is the highest order centre in the Inner West LGA, comprising the largest mix of retail, commercial, administrative, entertainment and community facilities. The centre will emerge into an employment and economic generator servicing an LGA wide catchment. Ashfield has the best public transport access in the LGA, both on the rail line and with feeder buses.
Town centre	Balmain Marrickville Newtown - Enmore Norton Street Rozelle	These town centres provide essential access to goods and services close to where people live. They are serviced by good public transport which increases their accessibility from the surrounding community. The town centres provide a mix of retail, commercial and community space with retail space and are usually anchored by a supermarket of 1,000sqm or over. They generally contain over 10,000sqm of retail, business premises and office premises.
Local centre	Annandale Croydon Dulwich Hill Dulwich Hill station Haberfield Marion Street Norton Street North Petersham Summer Hill Stanmore Balmain East	Local centres provide a range of business, retail and community uses that serve the local community. The centres generally range in size from 3,000sqm to 10,000sqm of floorspace associated with retail, business premises and office premises.
Neighbourhood centre	Addison Road Rozelle West (Terry Street) Lewisham West Lilyfield Road Orange Grove Catherine Street Dulwich Hill West Lewisham Sydenham	Neighbourhood centres provide a range of small-scale retail and other services that serve the convenience needs of people that live and work in the surrounding neighbourhood. Higher order retail and commercial uses that serve the wider community are not located in neighbourhood centres. Neighbourhood centres generally comprise less than 3,000sqm of overall floorspace associated with retail, business premises and office premises. Note: All other existing B1 - Neighbourhood Centre zoned centres not listed
Stand Alone Shopping Centres	Marrickville Metro Leichhardt Market Place	Stand-alone centres provide for the weekly or monthly shopping needs of the local community. They generally serve a broader catchment and provide a diversity of retail uses including department and grocery stores. The size and offering of stand alone shopping centres needs to be carefully managed to avoid adverse impacts on nearby street-based centres.

Figure 5: Centre hierarchy



Action 1.1.2: Continually monitor the delivery and provision of new retail and office floorspace to inform future decision making to support the centre hierarchy.

Action 1.1.3: Discourage the growth of retail and stand-alone shopping centres outside of centres

Strategy 1.2: Establish a pipeline of retail and office floor space.

The Employment and Retail Lands Strategy forecasts that an additional 60,000 sqm of retail and 176,000 sqm of office floor space will be needed within the Inner West LGA by 2036. Planning intervention is necessary, particularly in larger centres in the Inner West to stabilise and grow the supply of retail and office floor space. This would require a minimum non-residential floor space requirement.

Based on observed patterns of development, current planning controls would at best, retain existing commercial floor space, particularly as redevelopment continues to only deliver ground floor employment floor space and large standalone commercial buildings are being converted to mixed-use in key centres such as Ashfield.

Modern building standards, vehicular access requirements and access and services for residential uses above the ground floor is reducing the amount of ground floor and first floor space allocated to employment uses in redevelopments.

Specific types of retail space will also need to be catered for in centres, particularly where growth is occurring. This includes floor plates and lot sizes that are not consistent with the existent fine-grain patterns of centres. Careful consideration of potential centre expansion to accommodate these spaces is required.

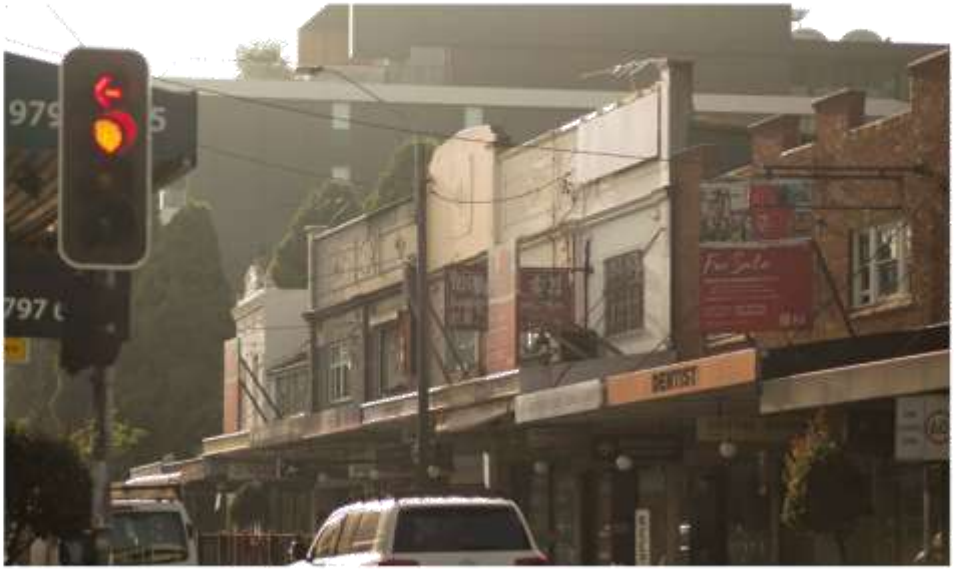


Photo credit:
Inner West Council

Action 1.2.1: Permit development at a scale that balances the need for additional office and retail floorspace, outlined in Table 3 and 4 considering character, environmental matters and the centre hierarchy.

Table 3: Forecast Commercial office floorspace in the centres 2019-2036

Commercial Centre	Required GFA		
	2019-26	2026-36	2019-36
Ashfield	8,606	8,905	17,511
Balmain	0	2,019	2,019
Leichhardt	16,816	3,249	20,065
Rozelle	17,553	28,797	46,350
Marrickville	18,756	9,670	28,426
Newtown-Enmore	5,260	2,828	8,088
Petersham and Stanmore	6,402	4,142	10,543
Leichhardt Frame	8,472	3,574	12,045
Camperdown Frame	1,753	943	2,696
Others	18,399	10,166	28,565
TOTAL	**102,017**	**74,291**	**176,309**

Source: HillPDA

Table 4: Forecast demand and current supply of retail floorspace (sqm)*

Centre	Current supply**	Demand in 2036	Additional GFA***
Ashfield	53,205	61,485	9,741
Marrickville	27,650	44,567	19,902
Newtown/Enmore	43,730	46,396	3,137
Leichhardt Core	26,707	36,492	11,511
Balmain	19,627	19,293	-392
Rozelle	18,520	18,994	558
Marrickville Metro	19,136	27,446	9,777
Marion Street Leichhardt	14,934	25,726	12,697
Leichhardt Frame	26,793	23,838	-3,476
Camperdown Frame	26,041	18,110	-9,331
Other	70,281	77,353	8,320
TOTAL	**346,624**	**399,701**	**62,443**

Source: HillPDA

* excludes pubs and taverns

** Sources: Various including: Leichhardt Commercial and Retail study: Norton Street and Parramatta Road, SGS 2016
Ashfield, Sydney Retail Impact Assessment of proposed Woolworths supermarket, Location IQ 2019
Marrickville Metro Economic Impact Assessment, Pitney Bowes 2010
IBECON land use data across Greater Sydney 2004
HillPDA land use audit

*** Assuming 15 per cent of GFA is non-leasable.

Action 1.2.2: Protect and increase non-residential floor space in centres by implementing minimum non-residential FSR provisions and initiating planning responses prescribed in Table 5.

Action 1.2.3: Consider aligning the zoning of residential zoned properties within or adjacent to centres that comprise employment uses with the zoning of the centre.

Action 1.2.4: Undertake a review of planning controls in centres to achieve better employment outcomes where site constraints apply. For example, reducing/eliminating off-street parking requirements can enable a functional ground floor commercial use on a narrow site.

Action 1.2.5: Encourage the delivery of new supermarkets and discount department stores in appropriate centres as outlined in Section 7.4 of the Study.

Table 5 - Recommended planning response - non-residential FSR

Level in hierarchy	Centre	Recommended planning controls
Major Centre	Ashfield	• Incorporate a clause within the LEP specifying no net loss of commercial floor space, applied on a site-by-site basis • Establish a minimum non- residential FSR of 1.3:1 on land west of Victoria Street and east of Thomas Street as an interim measure and review following the completion of design and feasibility testing • Prohibit residential uses from being located on the ground and first floors • Safeguard employment floorspace from inappropriate residential/associated development
Town Centre	Balmain Marrickville Netown-Enmore Norton Street Leichhardt (includes Norton Street North) Rozelle	• Undertake a design and financial feasibility review to determine an appropriate minimum non- residential FSR for Town Centres • Undertake urban design studies and a feasibility tipping point analysis to determine controls required to secure commercial floor space at ground floor and at podium level along Norton Street Leichhardt and Illawarra Road Marrickville
Dulwich Hill Centres	Canterbury Road Enterprise Corridor Dulwich Hill Station Dulwich Hill Centre Dulwich Hill West	• Undertake a design and financial feasibility review to determine the viable tipping point for establishing a minimum nonresidential FSR for Dulwich Hill Centres and Canterbury Road Enterprise Corridor
Other Centres	N/A	• No non-residential FSR proposed

Strategy 1.3: Develop quality public domain space that can support business and cultural activity

This Strategy recommends the expansion and revitalisation of public spaces in centres so that they are capable of supporting a wider variety of activities.

Key centres in the LGA are reliant on footpaths and smaller public squares to accommodate activities in the public domain. A future public domain strategy can seek to enhance underutilised spaces and create larger public spaces to support a wider variety of activities.

The Greater Sydney Commission's Eastern City District Plan highlights the importance of having high quality public places in and around centres, *'streets, plazas, parks and recreation spaces provide places for community events, markets and festivals and for encouraging social interaction and active lifestyles.'*

Action 1.3.1: Investigate opportunities to increase civic space and improve amenity including:

- a program of public domain improvements to be delivered through development contributions, planning agreements and/or bonus floorspace incentives for new development to create additional public spaces;
- encourage provision of commercial and enterprise space, plus cultural infrastructure in employment centres through planning agreements for new developments; and
- provide access to open space for workers.

Action 1.3.2: Require employment generating development to contribute to additional open space, cultural and recreational facilities for workers.

Action 1.3.3: Establish a program of increasing tree canopy along main streets in centres, identifying space for new plantings and selecting appropriate species.

Action 1.3.4: Expand public domain space in centres by repurposing existing road space.

Action 1.3.5: Work with Transport for NSW under its 'Movement and Place Framework' to designate certain classified roads running through centres as 'vibrant streets.'

Action 1.3.6: Review the Leichhardt and Balmain precinct parking strategies in consultation with Transport NSW to identify options for increased turnover of on-street car parking, improved vehicle circulation and alternative delivery arrangements for business premises without secondary vehicular access.

Action 1.3.7: Invest in streetscape improvements and active transport links at Orange Grove centre to encourage pedestrian traffic and provide space for events.

Action 1.3.8: Pursue a programme of pedestrian connectivity and public domain enhancements between Lewisham Station and Lewisham West including:

- working with Transport NSW to deliver a signalised crossing on Old Canterbury Road to increase the legibility of the route between the two centres and public transport nodes; and
- consider potential closure of Jubilee Lane and the end of Henry Street to provide usable public domain space in-between the two centres.

Strategy 1.4: Encourage the use of the public domain to support centre vibrancy

The recent formation of Inner West Council provides an opportunity to develop a robust and supportive system for managing spaces in the public domain. This should extend beyond facilitating use of the space to measuring, benchmarking and incentivising a diversity of activities.

Traditionally, use of the public domain is associated with static licences for recurring activities; however, there is an opportunity to enable spaces that are more dynamic and versatile to accommodate different uses at different times.

Hosting ongoing markets and free events encourages visits to a centre by families and customers that would otherwise not visit it. Providing spaces within the public domain that can accommodate cultural infrastructure supports Objective 9 and Strategy 9.1 of the Greater Sydney Region Plan. The Plan discusses multi-functional and shared spaces as cultural infrastructure and highlights how great places are made when artistic, cultural and creative works are visible, valued, distinctive and accessible.

Action 1.4.1: Engage with local businesses to understand their needs and whether there would be a take-up of expanded public domain spaces if provided.

Action 1.4.2: Monitor and review licensing of public space within centres across the Inner West to maximise use for outdoor dining, markets, street festivals and other community and cultural activity.

Action 1.4.3: Implement the draft Inner West Local Approvals Policy and supporting processes to support the use of public domain space.

Strategy 1.5: Maximise employment and public domain outcomes from the renewal of Council assets within centres

Council has recently prepared an Inner West Land and Property Strategy that provides strategic direction for the management, review and decision making around Council assets. Council owns a number of assets that can generate opportunities for increased utilisation for employment purposes. These assets also provide opportunities to establish larger public spaces, providing centres with usable cultural infrastructure.

Employment and public domain benefits delivered by renewal of Council assets are rare opportunities, but in some

instances crucial for the long term performance of centres. There are examples in local government areas across Sydney (e.g. Woollahra, North Sydney and Mosman) where Council assets have been redeveloped to provide public benefits that support the role and function of centres.

Action 1.5.1: Consider the actions contained within this strategy when implementing the actions of the Inner West Land and Property Strategy including:

- reviewing existing Council assets and whether they can be repurposed to facilitate or support employment uses and the amenity of centres;
- delivery of employment floor space for uses identified as growth industries;
- support for the circular economy;
- delivery of affordable co-working space; and
- space for creative industries.

Action 1.5.2: Assess the feasibility of development options for Council owned land that would yield public domain improvements with the costs of development offset to a private developer or undertaken in partnership with a private developer.

Action 1.5.3: At-grade car parks should generally be zoned to align with the zoning of the relevant centre. This will ensure appropriate zoning applies to the sites to enable employment and community-oriented uses which will support the role and function of our centres.

Strategy 1.6: Diversify business activity

Centres across the Inner West are commonly associated with its café culture, small bars, pubs and its eclectic range of shops. Local workers visiting the centre are imperative to the vitality of the centre during the daytime, whereas residents can increase activation after hours. Supporting the growth of businesses such as offices, medical, professional services, creatives and artisan producers will make centres stronger, livelier and more resilient.

Supporting home businesses/home industries within and adjacent to centres can create a reliable catchment of customers for local businesses. Developing attractive new office floor space, with incorporation of co-working space and networking spaces can assist in making a centre more appealing for businesses to locate in. The establishment of these spaces will help centres across the Inner West stand out within the metropolitan office market.

The planning framework needs to maximise the range of permitted employment uses in centres and act proactively to support the establishment of these businesses. These uses include 'light industry' and 'local distribution premises.'

Action 1.6.1: Support the role of smaller centres (such as Croydon, Lewisham station and Stanmore) as clusters for office and other specialist services by tailoring planning and public domain considerations.

Action 1.6.2: Permit 'Light industry' group term in all business and industrial zones.

Action 1.6.3: Permit local distribution premises in B2 Local centre zone and consider local provisions that limit impacts on character and amenity of centres (refer to Section 8.2 of Study).

Action 1.6.4: Boost activity in centres by encouraging home business and home industry in the surrounding residential zones.

Action 1.6.5: Revise planning controls to support the establishment of co-working spaces in centres.

Action 1.6.6: Encourage the provision of space for co-working and other evolving office workplace trends as part of redevelopments of major privately owned and Council owned assets in centres.

Action 1.6.7: Undertake further research to identify large employers in the Inner West located outside business/ industrial zones so that their role can be accounted for as part of the future planning of centres and employment precincts.

Strategy 1.7: Establish a targeted planning response to support employment growth in key centres

The actions below are designed to strengthen employment outcomes in key centres through targeted review of planning controls and zoning. The actions are supported by analysis undertaken in the Study underpinning this Strategy, as well as complementing actions within the Inner West Local Housing Strategy.

The context behind the actions below are detailed extensively within the Employment and Retail Lands Study. Actions range from expanding permitted employment uses by consolidating zoning, addressing site specific constraints at key locations, updating controls to support employment in emerging centres and ensuring any planned future housing growth in a centre is supported by strong employment outcomes. Delivery of these actions reduces the risk of lost opportunities regarding delivery of new employment floor space in areas undergoing change.

Evolving and emerging centres addressed in the below actions include Ashfield, Dulwich Hill Station, Dulwich Hill centre, Addison Road, Rozelle West, Norton Street North, Petersham, Lewisham West and Lewisham Station.

Action 1.7.1: Support the evolving centres at Dulwich Hill through the delivery of a centres and Corridor Study (Section 8.1.14 of the Study) which will consider:

- the economic impact of the potential expansion of Dulwich Hill Station centre on the broader trade catchment;
- strategic role of Dulwich Hill centre and Dulwich Hill Station together with the delivery of Sydney Metro;
- growing office and retail floor space at Dulwich Hill Station and Dulwich Hill centre; and
- improving urban design and employment outcomes along Canterbury/New Canterbury Roads (refer to Action 3.1.1).

Action 1.7.2: Investigate the opportunity to expand or intensify Ashfield centre with a focus on new office and retail space, public domain improvements, cultural infrastructure, creative spaces, co-working spaces, entertainment facilities, pedestrian links and new public open space.

Action 1.7.3: Prepare a place-based study to review planning controls for the overall Leichhardt Precinct in the context of studies undertaken (Parramatta Road Corridor Urban Transformation Strategy and Former Leichhardt Urban Design and Heritage studies, 2016) with the aim of delivering positive urban design outcomes for the centre. Undertake a feasibility study that determines the tipping point that makes a mixed-use development viable (refer to Section 9.3.3 of the study).

Action 1.7.4: Review business zones that apply along Addison Road, with the aim of harmonising the range of permissible employment uses that can operate within the centre.

Action 1.7.5: Consider zoning properties around the intersection of Margaret and Terry Street, Rozelle as B1 – Neighbourhood centre zone.

Action 1.7.6: Review planning controls, including zoning along Norton Street north of Allen Street to enable evolution of the area into an office/professional services, mixed use precinct with improved development and urban design outcomes.



Photo credit:
Inner West Council

Action 1.7.7: Address key employment and public domain considerations for Petersham centre (refer to Section 9.2.11 in the Study) as part of a future place-based analysis of the Petersham Station Precinct/Crystal Street Precinct as recommended by the Inner West Local Housing Strategy.

Action 1.7.8: Support the employment role of the emerging Lewisham West centre by:

- reviewing planning controls for properties along Edward Street currently zoned B4 - Mixed Use to deliver appropriate employment outcomes;
- rezoning the Mungo Scott building to B5 – Business Development;
- rationalising the zoning of the properties to the east of the light rail; and
- rationalising the zoning of the properties that form part of the completed Flour Mill development.

Action 1.7.9: Undertake a review of the Lewisham Station centre addressing:

- LEP and DCP controls; and
- reviewing business zoning that apply to residential dwellings.

Action 1.7.10: Rezone Orange Grove and Catherine Street centres from B2 - Local centre to B1 - Neighbourhood Centre

Strategy 1.8: Support a vibrant night-time economy

The night time economy is generally considered any business use operating outside of the typical nine to five business hours. The Inner West has a patchwork of areas with thriving and emerging night time economies, the most significant of those being the Newtown and Enmore precinct. This is a vibrant hub of activity with a range of uses and trading hours and businesses feeding off the services provided by other businesses to create a multiplier of economic activity. There are also a number of emerging night time economies, including Marrickville, Summer Hill and Dulwich Hill.

Planning initiatives should maintain a balance between the amenity of sensitive residential land uses with nearby night-time uses. Night time uses also suffer from a high level of burdensome regulation including noise restrictions, liquor licensing and building codes. Identifying low-risk opportunities to reduce the regulatory burden is key to invigorating this industry.

The actions identified in this section will require a high level of consultation with industry and the community to strike the right balance between residential and commercial interests. Implementing these actions will have a major benefit to the cultural and creative industries sector throughout the Inner West and New South Wales.

Action 1.8.1: Embed the agent of change principle into Inner West planning regulations to protect live music venues and late night precincts as well as employment and industrial areas. Note this principle states that a person or business (the agent) introducing a new land use is responsible for managing the impact of that change.

Action 1.8.2: Identify areas with existing and expected higher noise levels, including both industrial and entertainment noise. Implement a means of managing the expectations of noise amongst existing and future residents in and around these areas.

Action 1.8.3: Investigate exempt development approval pathways for night time trading by certain commercial uses.

Action 1.8.4: Investigate exempt and/or complying development approval pathways for small scale, low impact cultural use and production venues.

Action 1.8.5: Develop comprehensive late night trading management DCP controls for the Inner West. They should deliver clear direction on expectations for land use within the night time economy for both assessment officers and the community.

Action 1.8.6: Work with the City of Sydney to develop a joint strategy for land use planning and night time economy on King Street, Newtown.

Action 1.8.7: Advocate for reforms to the National Construction Code to reduce regulatory requirements for smaller scale cultural venues and production spaces.



Photo credit:
Inner West Council

2

Industrial and urban services lands are protected and managed

Strategy 2.1: Build on the existing and evolving roles and functions of employment precincts to strengthen the local economy

Industrial and urban services land play an important role in providing goods and services to meet the local communities' needs. The size and scale of employment precincts vary, depending on the types of services they provide and the catchment they serve.

Figure 6 illustrates existing and evolving roles and functions of employment precincts.

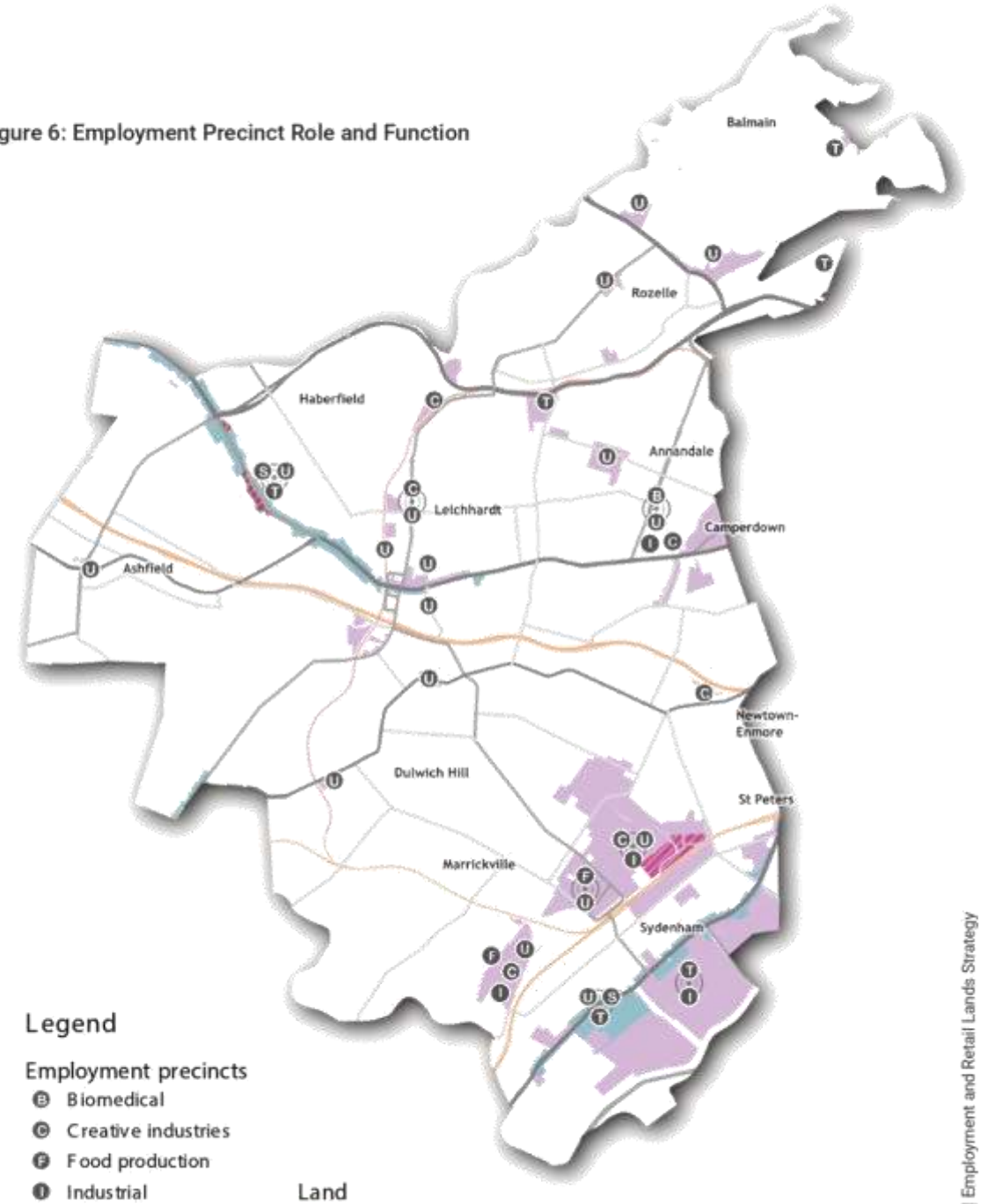
The Inner West holds an advantageous presence of clusters in sectors such as creative industries, small-scale manufacturing and food production. Given their importance, it is crucial that future planning decisions acknowledge, recognise and support these clusters.

Action 2.1.1: Support existing and evolving employment clusters in future planning decisions.

Photo credit:
Inner West Council



Figure 6: Employment Precinct Role and Function



Source: HillPDA

Strategy 2.2: Protect employment lands from being eroded by conflicting and incompatible uses

The Eastern City District Plan and the demand and capacity assessment underpinning this strategy (refer to Chapter 7 of the Study) show that Council must retain, manage and where possible increase the industrial land and floorspace supply in the LGA.

There has been a loss of industrial and urban services land within the Inner West LGA in the past few decades. This is part of a wider trend occurring across Inner Sydney with industrial and urban services land being lost to commercial and residential development as well as major infrastructure projects. This is likely to continue as a result of planning proposals currently at various stages in the approvals process. Furthermore, the Study identified a further 96,000 sqm (approx.) of industrial and urban services activity occurring on residential zoned land (Section 9.4.2 of Study), which is expected to be lost to residential uses through redevelopment in the future.

The projected demand for industrial and urban floor space further compounds the supply constraints. The supply of floorspace in employment precincts is currently 1.77 million sqm with a projected demand of around 1.99 million sqm by 2036. This indicates a potential additional demand for 217,000 sqm to respond to population growth.

Overall, the projections demonstrate that under the 60 per cent capacity scenario (most likely scenario) there would be a shortfall in capacity in the Inner West LGA of around 432,540sqm by 2036. These actions seek to provide stability and confidence with regard to future expectations of activity occurring in Inner West LGA's industrial and urban services lands. The approval of rezoning and redevelopment of industrial and urban services land for incompatible uses can create instability for businesses as a result of business displacement, reduced floor space supply, and speculative behaviour by property owners who expect a future rezoning decision.

Businesses on short lease terms or in locations close to land being rezoned have less confidence to invest or expand, due to the potential for displacement in the future.

Action 2.2.1: The employment precinct demand and capacity assessment is outlined in Chapter 7 of the Study. In the context of this assessment adopt the following clear policy position:

- retain all industrial land for industrial purposes across the LGA;
- use the outcomes of the Employment and Retail Lands Strategy (and supporting Study) to demonstrate that retention of industrial land within the Parramatta Road Corridor will deliver better outcomes than those recommended in the Parramatta Road Corridor Urban Transformation Strategy (November 2016) and Parramatta Road Corridor Implementation Plan 2016-2023 (November 2016) having regard to the vision and objectives;

- Prohibit residential development in industrial, B5 Business Development and B6 Enterprise Corridor zones;
- Prohibit uses in industrial zones that could result in significant increases in land value or otherwise result in the loss of industrial uses, or the prevention of new industrial start ups; and
- Provide for industrial uses to be established in other zones.

Action 2.2.2: Prohibit tourist and visitor accommodation in industrial and B5 - Business Development zone.

Action 2.2.3: Prohibit all tourist and visitor accommodation, (apart from hotel or motel accommodation) in the B6 - Enterprise Corridor zone.

Action 2.2.4: Realign objectives in the B6 - Enterprise Corridor zone to focus on employment uses and not accommodation.

Action 2.2.5: Prohibit specialised retail premises in the B7 – Business Park and industrial zones.

Strategy 2.3: Retain a diversity of industrial land, urban services land and employment generating uses.

Protecting the diversity of spaces (land sizes and premises size) available for employment uses in industrial and business zones ensures that we can support a range of employment generating uses.

Industrial and urban services lands contain spaces ranging from small warehouse-lofts in strata developments, to warehouse buildings with high ceiling clearances to substantial landholdings of greater than 5,000sqm which can support warehousing, manufacturing, production and freight functions.

This diversity caters to Inner West's advantageous mix of industries, business uses and clusters in sectors such as creative industries, small-scale manufacturing and food production. Proximity to Port Botany and Sydney Airport means that strategically critical freight and logistics activities also operate on large landholdings on the south-eastern edge of the LGA.

Some industrial uses such as bus depots, concrete batching and construction material suppliers require significant open at grade land area as well as building floor space. It is also unlikely that 100% of the potential FSR and building height capacity of any site would be fully developed due to other planning controls for parking, access and setbacks.

Land values and rents can influence the use of land, with larger landholdings more susceptible to fragmentation through redevelopment. This results in the loss of certain types of spaces. It is highly unlikely that once a large landholding is redeveloped it can be converted back to its original function. Fragmentation reduces the diversity of parcels available to the market and the long-term ability to adapt to changing requirements.

The Inner West LGA should have a suite of business zones (B4 – Mixed Use, B5 – Business Development, B6 – Enterprise Corridor and B7 – Business Park zones) which have a central role in providing space for employment activity in denser typologies compared to the building formats required by uses in the industrial zones. Ensuring these zones are operating optimally will reduce the pressure for fragmentation of industrial zones.

Action 2.3.1: Establish a minimum subdivision lot size of 10,000sqm (including restricting strata subdivision) in IN1 General Industrial zone to reduce further fragmentation. This zone currently has a good diversity of lot sizes that provide opportunities for various sizes of businesses. Protecting the larger lots from further fragmentation, secures a pipeline of diverse land parcels to cater to changing industry needs.

Action 2.3.2: Implement a Council monitoring system for the ongoing review and effective management of its industrial land supply.

Action 2.3.3: Undertake a review of the out-of-centre business zones (B4- Mixed Use B5 – Business Development, B6 – Enterprise Corridor and B7 – Business Park zones) with the objective of establishing distinct employment roles for each zone.

Action 2.3.4: Rezone the Mort Bay IN2 - Light industrial zones to IN4 - Working Waterfront. This would require the addition of the IN4 - Working waterfront zone to the LEP.

Action 2.3.5: Rezone the Waterview Wharf Workshop precinct from B2 – Local Centre to B5 – Business Development.

Strategy 2.4: Floor space is flexible and adaptable

A uniform floor space ratio control, usually around 1:1, applies across most employment lands. This limits the capacity of lands to adapt to changing industry needs and trends.

The floor space capacity assessment identified key locations where the existing built form already exceeds the allowable FSR under the relevant LEP. This was noted particularly in Camperdown. Careful review of development standards is required to support employment growth in employment precincts whilst minimising unintended consequences with regard to land value impacts and pressure for fragmentation.

Action 2.4.1: Review development standards for land zoned IN1 - General Industrial and IN2 - Light Industrial and consider the potential for increases in or removal of height and/or floor space standards where feasibility studies demonstrate that this is required for redevelopment for industrial purposes.

Strategy 2.5: Maximise employment outcomes when negotiating outcomes from urban renewal/infrastructure projects

Several State transport infrastructure projects are currently under construction across the Inner West LGA. These will enhance the accessibility of some employment precincts. Shifts in traffic volumes and behaviours will also affect key road corridors. There are also possible employment use opportunities resulting from disposal of residual lands post-construction.

It is essential that employment lands close to major infrastructure are safeguarded from pressures to rezone for residential as these lands will be crucial in servicing future populations. There are also benefits from enhanced vehicular access to key road corridors. Employment lands that have been temporarily used for construction of infrastructure projects must be reinstated for employment use as much as possible to minimise loss of employment land.

Action 2.5.1: Work with the State Government to enhance the delivery of employment generating land uses at the Bays Precinct by:

- encouraging the ongoing and long term operation of the port to cater to growing freight demand; and
- lobbying the State Government to adopt the 'agent of change principle' for land at the port in relation to surrounding new residential development.

Action 2.5.2: Lobby for the retention of the White Bay Industrial precinct as industrial land and work with the State Government to establish multi-stakeholder engagement for the Bays Precinct renewal project.

Action 2.5.3: Work with State Government to rectify the loss of employment land to State infrastructure projects. Where that loss is permanent replacement employment land should be identified and secured by the State for use as employment lands.

Action 2.5.4: Work with Sydney Airport to support its vision for freight and logistics facilities within the Northern Lands Sector.

Action 2.5.5: Work with State Government to secure for Council the first right to residual land after infrastructure projects are complete.

Action 2.5.6: Explore opportunities to restore Sydney Metro post construction residual sites to employment uses.

Strategy 2.6: Manage the growth of artisan food and drink industries

The trend of introducing food and drink manufacturing combined with retail/ on-site consumption to industrial and non-mixed use business zones has the potential to cause a shift in the character of employment areas as detailed in the Greater Sydney Commission paper "A Metropolis that Works".

Permitting cafes and restaurants, such as those permitted by the land use term Artisan food and drink industry, may recast expectations for industrial and urban services areas. In the longer term this could result in these areas becoming unviable for traditional urban services.

Action 1.6.2 of this Strategy encourages artisan food and drink industries to operate in other business zones, particularly in centres, to reduce pressure on industrial zones. This will be supported with actions, detailed below which minimise the impact of these uses within employment zones.

Action 2.6.1: Include the following standard maximum land use sizes in the LEP for artisan food and drink industry in the B5 – Business Development, B6 – Enterprise Corridor, B7 – Business Park and Industrial zones:

- retail sales area at 100 sqm or 20% of GFA, whichever is the lesser;
- restaurant area at 150 sqm; and
- despite the above, combined restaurant and retail sales areas must not be more than 200 sqm or 20% of GFA, whichever is the lesser.

Action 2.6.2: Explore implementation provisions in the DCP (as discussed in the Study) to manage and support artisan food and drink industries across all business and industrial zones.



Photo credit:
Inner West Council

Item 1
Attachment 2

3

Space for business are suitable and available

Strategy 3.1: Key corridors are prioritised for urban services and industry clusters

Employment corridors of the Inner West include Parramatta Road, Canterbury Road, Princes Highway and Victoria Road. They support essential urban services, specialised retail premises and notable clusters of business activity. Built environment typologies range from traditional enterprise corridors at Tempe, Croydon and Rozelle to corridors of a fine grain character supporting a diversity of retail and business services at Annandale and Leichhardt. They complement rather than compete with centres and provide alternative premises for uses that would otherwise compete for space with industries in industrial zones.

The varied typologies and contexts need a targeted planning response to prioritise employment. In some instances, it means that residential uses should not be permitted. In other contexts employment floor space is in mixed-use developments that support a large range of employment uses, not just office and retail. This is addressed further in Strategy 3.2.

Some locations (e.g. Princes Highway Tempe and Victoria Road Rozelle) need reliable vehicular access to their premises from the main road. This is a major challenge in the constrained environment of the Inner West that should be addressed in collaboration with key State Government stakeholders.



Action 3.1.1: Improve urban design and employment outcomes along Canterbury/New Canterbury Roads through the delivery of the Dulwich Hill Centres and Corridor Study.

Action 3.1.2: Establish part of Victoria Road, Rozelle (identified within the Rozelle Centre Precinct Profile in the Study) as B6 - Enterprise Corridor to create additional employment opportunities close to the Bays Precinct which is proposed for significant growth.

Action 3.1.3: Work with Transport for NSW under the 'Movement and Place Framework' to deliver the land use planning vision for employment lands located along Classified Roads.

Action 3.1.4: Advocate for changes to the Infrastructure SEPP to allow easier direct vehicular access to businesses in enterprise corridors.

Action 3.1.5: Explore options with TfNSW to improve pedestrian and business amenity along Parramatta Road east of Taverners Hill Light Rail stop, including reducing the speed limit and traffic calming.

Action 3.1.6: Undertake detailed precinct planning for Kings Bay and Taverners Hill to improve urban design outcomes and resolve site-specific/ feasibility constraints to support redevelopment for employment uses. Refer to Section 9.3.1.3 and 9.3.2.3 of the Study for detail.

Action 3.1.7: Develop an innovative, planning response for the Leichhardt and Camperdown Frame areas to support renewal of employment floor space and achieve positive urban design outcomes. Refer to Section 9.3.3.3 and 9.3.4.3 of the Study for detail. Carefully consider the impact of redevelopment on floor space affordability for businesses, especially in the creative and wedding services sectors.



Photo credit:
Inner West Council

Strategy 3.2: Strengthen employment role in mixed use development

As discussed in Strategy 2.3, the employment roles performed by the B4 – Mixed Use, B5 – Business Development, B6 – Enterprise Corridor and B7 – Business Park zones and their current planning controls should be reviewed with the intention of reducing pressure on industrial lands.

The actions below expand on how controls for mixed-use development in these business zones can be designed to maximise the delivery of usable, flexible employment space. These actions are in turn reinforced by Strategy 3.1, for those key corridors that serve an employment role in the Inner West. The actions below will help plan mixed-use development in these corridors in places like the periphery of Ashfield Town Centre and sections of Parramatta, Canterbury and New Canterbury Roads determined by place based urban design studies as discussed in Actions 1.7.1, 3.1.1, 1.7.3, and 1.7.7.

These actions are focussed on mixed-use zones outside centres, but elements of the resulting urban design guidelines and controls could also be appropriate for some mixed use developments in centres. Completing the actions below will diversify and increase employment in these out of centre business zones, which in turn will expand the potential customer base of nearby centres.

Action 3.2.1: Develop planning controls to facilitate viable businesses within mixed use development based on the following design parameters:

- structural layout providing flexible open plans (to allow spaces to be partitioned as required);
- space needs including minimum floor to floor heights and minimum ceiling heights;
- site facilities (loading docks, service corridors and lifts, storage rooms, waste collection and removal, mechanical ducting for ventilation, horizontal and vertical shafts and substations);
- separation requirements to ensure acoustic amenity for upstairs apartments; and
- ensuring a compatible architectural fit within the building's surroundings.

Action 3.2.2: Explore planning provisions that allow for and encourage flexible floorplates and innovative creative spaces such as co-sharing regardless of a particular use category.

Action 3.2.3: Identify specific areas to implement initiatives referred to in Strategy 3.2 to deliver usable ground floor employment floor space.

Action 3.2.4: Consider opportunities for mixed residential-office development and live-work developments in appropriate locations on the periphery of centres, strictly outside industrial and urban services lands.

Strategy 3.3: Support the transition of Camperdown into a health, education and innovation precinct including a biomedical and biotechnology hub

The Camperdown industrial precinct is part of the Camperdown-Ultimo Collaboration Area identified by the Greater Sydney Commission. The close proximity of the precinct to the CBD, Sydney University and Royal Prince Alfred Hospital creates an opportunity to expand the research and knowledge based activities in the precinct.

The Greater Sydney Commission Camperdown Ultimo Collaboration Area Place Strategy Priority 8 is to "Support the role and function of employment lands". Actions under Priority 8 include safeguarding business zoned land from conversion to residential development, establishing a biotechnology hub and delivery of affordable space for innovation for tech start-ups, innovation, creative industries, cultural use and community uses.

Implementation of the priorities above will support the transition of Camperdown precinct into the health, education and biotech hub and research area recommended by Parramatta Road Corridor Urban Transformation Strategy and the measures recommended below will reinforce this policy objective.

A structure plan for Camperdown Precinct should be prepared to implement the productivity priorities of the Camperdown Ultimo Collaboration Area Place Strategy by protecting all employment zoned land in the Camperdown Precinct from unrelated residential or commercial land uses until the following actions are completed.

Action 3.3.1: Develop a structure plan for Camperdown Precinct to implement the productivity priorities of the Camperdown Ultimo Collaboration Area Place Strategy. (refer to Section 9.3.4 of Study).

Action 3.3.2: Continue working with the NSW Government and GSC to develop the area as a 'Health and Education Precinct.'

Action 3.3.3: Work with the Camperdown Ultimo Collaboration Area Alliance to ensure productivity and industry cluster growth outcomes are prioritised in the Camperdown Precinct.

Action 3.3.4: Work with NSW government and the Camperdown Ultimo Collaboration Area Alliance to redevelop the WestConnex construction site at Camperdown as a biotechnology hub.

Action 3.3.5: Implement prospective outcomes of the 2020 Camperdown Innovation Precinct Land Use and Strategic Employment Study and the associated Camperdown Structure Plan.

Action 3.3.6: Develop planning controls and policies to support the establishment of affordable spaces for medical innovation and research, health services and other ancillary uses in the Camperdown precinct.

Action 3.3.7: Develop a pilot project that introduces a minimum percentage requirement for affordable space in new developments through LEP/DCP provisions for tech start- ups, innovation, creative industries, cultural uses, community uses and artists.

Action 3.3.8: Address the need of additional employment floorspace in the Camperdown Precinct through the Camperdown Land Use and Strategic Employment Study and the Camperdown Structure Plan.



Photo credit:
Inner West Council

Strategy 3.4: Support innovation, culture and creative industries

Creative and cultural industries are a key component of the Inner West's identity and economy. By their very nature they are hard to define, however two main components of the sector are cultural production (e.g. noisy, messy activity) and creative services (e.g. office desk based activity).

Cultural production in the Inner West LGA is of regional importance. It often needs affordable, flexible spaces, with loading zones and higher ceiling clearances that can be used for lengthy operational hours. This makes this type of business vulnerable as suitable employment floor space is in short supply.

Unlike cultural production, creative services are largely technology and desk based and can easily be accommodated outside industrial zones. These activities should be encouraged within the centres and peripheries of centres as much as possible to relieve pressure on industrial zones.

The encroachment of residential and other higher order uses onto industrial land is having a direct effect on the supply of land and space available for creative industries. An important finding of Western Sydney University research indicated that there is a "...mismatch between the spatial needs of messier and noisier forms of cultural and creative production, and the so-called 'creative spaces' offered within existing and new, mixed use developments — often as shopfronts." (Pollio, A et. al. 2018).

Ultimately, supporting creative industries will need targeted initiatives by Local and State government, including the actions in this Strategy (particularly Strategy 3.1 and 3.2) to maximise availability of suitable floor space for employment activity and carefully address the range of permitted uses in each zone, so that each type of activity is supported.

The third component of this sector is cultural presentation which relates to

performance, exhibition and presentation. This sector relies upon the existence of cultural infrastructure, i.e. space for this activity to occur. Strengthening the night-time economy (Strategy 1.8) and developing quality public domain space with this sector in mind (Strategy 1.3, 1.4 and 1.5) will strengthen opportunities for cultural presentation in the Inner West.

Action 3.4.1: Amend clauses in LEP to limit creative industries in IN1 - General Industrial and IN2 - Light Industrial zones to industries that 'produce' an item.

Action 3.4.2: Introduce DCP provisions to provide a clear definition and policy position on what is considered a creative industry.

Action 3.4.3: Investigate mechanisms that will ensure redevelopment of properties used for creative and innovative industries retain a similar amount of affordable appropriately configured space for such uses.

Action 3.4.4: Consult with creative space providers to ensure that spaces provided through planning innovations are affordable, diverse and have appropriate built form.

Action 3.4.5: Advocate with the State Government, primarily Create NSW, to support the creative industry sector on State owned land by:

- Encouraging 'educational facilities' that support the creative industry sector within the Inner West (e.g. Writing NSW) to locate at Callan Park;
- Protecting the SP1 - Special Activities zone to retain specialist film and arts uses;
- Reviewing the requirement for approval for live performance and arts events;
- Agreeing to long term leases at affordable rents for suitable State government owned property, including the consideration of rent controls to protect the long term operations of creative businesses;
- Collaborating with the existing businesses in the Canal Road precinct to investigate the possibility of a wider range of live audience performances; and
- Working with the Canal Road Film Centre to boost the marketing, branding and investment in the area as a specialist film service precinct.

Action 3.4.6: Consider retention of existing IN2 zoning or rezoning to B5 Business Development along east side of Bridge Road, Stanmore and the expansion of permitted uses to reflect the success of Bridge Studios and support growth of businesses of a similar nature (refer to Section 9.3.4.3 of Study).

Strategy 3.5: Establish locations for evolving retail concepts

The zoning framework of the Inner West needs to be flexible to support the changing retail environment. Locations for specialised retail premises and evolving distribution models are limited within the Inner West LGA.

Actions to expand permissibility of key uses in out of centre business zones can help to reduce pressure to rezone industrial land for retail uses. It is also essential, that the uses do not compete with existing centres in the LGA.

Action 3.5.1: Permit specialised retail premises in B6 Enterprise Corridor zones and consider developing performance measures.

Action 3.5.2: Permit 'local distribution premises' in all out-of-centre business zones.

4 The planning framework is clear

Strategy 4.1: Provide certainty and clarity to businesses

Land use audits undertaken as part of the development of this Strategy identified a number of sites that are not appropriately zoned. Ensuring that land is appropriately zoned will strengthen the centres hierarchy, maximise employment opportunities and more accurately define the true availability of employment land in the LGA.

There is a need for Council to liaise with key stakeholders to ensure there is coordination between their strategic objectives and the strategic objectives of this Strategy.

Action 4.1.1: Protect the long term operational role of Sydney Airport from inappropriate development by giving effect to the National Airports Safeguarding Framework.

Action 4.1.2: Discuss the implications of the Site Compatibility Certificate process for industrial land in Inner West LGA with Department of Planning, Industry and Environment and advocate for a review of this process.

Action 4.1.3: Investigate the rezoning of key sites from B2 – Local centre to an employment zone that better aligns with their role:

- 77-79 Lilyfield Road, Lilyfield;
- 60-62 Justin Street, Lilyfield;
- 55 Lilyfield Road and 30 Gordon Street, Rozelle; and
- 47-51 Lilyfield Road, Lilyfield.

Action 4.1.4: Investigate rezoning IN2 – Light Industrial land at Duke Street, Balmain East:

- Consider the long-term feasibility of industrial uses where residential development has already occurred; and
- Develop options for providing pedestrian access to the waterfront.

Action 4.1.5: Rezone the land comprising the extension of Marrickville Metro from IN1 - General Industrial to B2 - Local centre. Consider the merits of a site specific clause for the shopping centre such as having a minimum commercial floor space ratio requirement, reflecting its core function as an employment centre.

Action 4.1.6: Rezone 237 Marion Street from IN2 - Light Industrial to R1 - General Residential to reflect its approval and use as an aged care facility.

Action 4.1.7: Extend the provision for 'use of purpose-built buildings for non-residential uses' across the Inner West LGA in a future LEP. The clause should also be expanded to allow for light industrial uses within purpose-built buildings.

Action 4.1.8: Harmonise retail floor space limits under the consolidated Inner West LEP as follows:

- 100sqm for 'neighbourhood shop';
- 100sqm or 20 % of gross floor area (whichever is the lesser) for 'industrial retail outlet'; and
- 30sqm for 'kiosk'.

Strategy 4.2: Manage land use conflicts between employment and residential uses

Land use conflicts can arise when sensitive uses are allowed in close proximity to intrusive uses i.e. residential uses near industrial. A clear planning framework is necessary to limit land use conflicts, prevent amenity impacts and meet business's operational needs.

Action 4.2.1: Uses that are sensitive to impacts generated from noise, odour, dust, vibration, heavy vehicle traffic and/or 24 hours operation should not be permissible in industrial zones.

Action 4.2.2: Zones that do not permit residential uses should be maintained as buffers for IN1 General Industrial zones to limit future amenity impacts.

Action 4.2.3: Remove dwelling house permissibility within industrial zones.

Action 4.2.4: Investigate incorporating an additional local provision that would require that new developments must demonstrate their compatibility with nearby industrial uses (see agent of change principle – Section 8.1.5 of Study).

Preparation and review

The pre-exhibition Study and Strategy were prepared by HillPDA and publicly exhibited alongside the Inner West Local Strategic Planning Statement in late 2019, providing further guidance to ensure the vision, principles and strategies are in line with community values and expectations. Post-exhibition amendments and further analysis was undertaken by Council with some HillPDA input. The final draft documents were subsequently reviewed and broadly endorsed by SGS Economics & Planning. SGS made several recommendations to finalise and inform the ongoing monitoring and review of the Strategy and Study.

Due to the current economic downturn and COVID 19, there are likely to be ramifications for office and retail floor space demand projections in terms of location, typology and quantity. A shift to online shopping and the current need to work-from-home may also have implications for what type of space is required in the future. While industrial floor space projections are also likely to change, given the metropolitan supply context, retention of industrial lands within the Inner West LGA will remain strategically important. Indeed, the growth of local business and industrial capacity may become more important in a post COVID environment.



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INNER WEST

Master Plan

Leichhardt Park Aquatic Centre



DRAFT - FEBRUARY 2020

Document control

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Executive summary

The Leichhardt Park Aquatic Centre is located on the Balmain Peninsula in the suburb of Lilyfield adjacent to the Parramatta River. It is a regional facility servicing not only local residents but people from surrounding LGAs. The facility sits in a larger recreation precinct with sporting fields, cycle ways and playground adjacent to the facility.

In 2016, the former Leichhardt Council gave in-principle support to develop a long term strategy for Leichhardt Park Aquatic Centre. In late 2017, following the amalgamation of the former Leichhardt Council with Ashfield and Marrickville Council to form the Inner West Council, additional resources allowed for the completion of the master plan in-house. The project was commenced by Public Domain Planning in November 2017.

Aquatic Facilities across the Inner West

The Inner West is well serviced with aquatic facilities and Council operates the following centres:

- Annette Kellerman Aquatic Centre, Enmore
- Ashfield Swimming Pool, Ashfield
- Dawn Fraser Baths, Balmain
- Fanny Durack Pool, Petersham
- Leichhardt Park Aquatic Centre, Leichhardt

At least 37% of the people consulted during the development of the draft Recreation Needs Study – A Healthier Inner West, visit an aquatic facility weekly. Usage data for the 2018-19 financial year shows that Leichhardt Park Aquatic Centre achieved 755k visits. Aquatics facilities form part of a diverse range of recreational opportunities that respond to the modern demands of Australian communities. These facilities provide services which promote health and fitness, water safety skills and confidence, and community. They are a place for competition and play; as well places to seek relief from the summer heat. Each of Inner West's aquatic facilities has a different offering for the community and they work together to fulfil the Inner West community's aquatic recreation needs.

The draft needs study highlights that while Council already has a high provision of aquatic centres increasing capacity at existing facilities to meet future population needs is recommended, including upgrades at Leichhardt Park Aquatic Centre. The recommendations of the draft LPAC Master Plan align with and support the recommendations in the draft Recreation Needs Study – A Healthier Inner West.

Asset Condition

In 2011, Leichhardt Council completed the LPAC Lifecycle Cost Analysis report. The scope of this report reviewed structural elements at the Centre including the 50m lap pool, diving pool /program pool 3) and children's 'mushroom' water play pool. The report outlined the following life expectancy of the assets and the current age left has been added for reference:

Asset	Condition and life expectancy (2011)	Condition and life expectancy (2018)
50m lap pool concrete control joints	5 years	2 years past life expectancy
50m lap pool walls, floor and metallic fittings	10 years	3 years
Diving pool (program pool 3) control joints and metallic fittings	5 years	2 years past life expectancy
Diving pool (program pool 3) walls and floor	20 years	13 years
Children's 'mushroom' water play pool control joints, metallic finishes, gutter and grating	5 years	Upgraded completed in 2016
Dive tower	Unknown	Defunct

Both the 50m lap pool and the diving pool (program pool 3) are past their life expectancy and require replacement to ensure continued usability.

Project Scope

The scope of the master plan has included a review of all Leichhardt Park Aquatic Centre facilities and the context in which they are located. Specific elements of the master plan scope includes:

> The existing Leichhardt Park Aquatic Centre building including gym, cycle studios and associated fitness areas
> Layout of the administration areas, entry and cafe
> Pool facilities including the program pool 1, program pool 2, diving pool (program pool 3) and 50m lap pool
> Existing turf and recreation areas
> Seating and shade opportunities
> Access pathways and circulation to the facility from nearby streets and Leichhardt Park and internally within Leichhardt Park Aquatic Centre
> A review of car parking, access to the Bay Run, and access for maintenance vehicles to and from the site
> Public domain elements that impact the design and construction of these listed elements

The aim of the master plan is to develop a ten year plan of improvements for the facility users and staff, while maintaining the existing character and sense of place. The master plan will provide an illustrative representation of the proposed improvements and include text, images, plans and diagrams that are easily understood by a variety of audiences. The master plan is indicative costed to understand budget requirements and integrated with Council's Forward Financial and Asset Plans.

The report is divided into eleven sections for easy reading:

01 Introduction - Overview of the demographic context of the inner west community and snapshot of aquatic facility key programs.
02 Project Context - The project context provides an introduction and background to the project including definitions, framework, strategic alignment, project methodology and objectives.
03 Regional Context - The physical characteristics of the Inner West Council LGA and analysis of regional aquatic centres across Sydney are discussed through plans, words and images.
04 Precinct Site Analysis - The physical characteristics of the Balmain peninsula and Leichhardt Park are described in plans, works and images. The region is analysed for transport connections, infrastructure, heritage, zoning and topography.
05 Site Analysis - The physical characteristics of the site are described in plans, words and images. The site is fully analysed capturing Council strategies, existing facilities, trees, asset condition and other items that influence the designed outcomes.
06 Benchmarking Study - Summary of current aquatic facility strategies and analysis of regional facilities.
07 Community engagement - Outcomes from community engagement and how they influence the design outcomes are briefly described in the document. Reference is made to the Community Engagement Report which incudes detailed community engagement outcomes.
08 Design Principles - The design principles establish the lens through which decisions are made for Leichhardt Park Aquatic Centre upgrades. The principles provide a spatial representation of the objectives.
09 Precinct Planning - Design outcomes for the Leichhardt Park recreation precinct are outlined to better connect existing facilities.
10 The Master plan - This section of the report outlines the overall design outcomes, with strategies described in text supported with images and illustrative plans.
11 Implementation Plan - The proposed upgrades are costed via an opinion of probable costs. The costs are grouped as potential projects and are prioritised according to asset condition, cost benefit, related strategy priorities and need as requested through community feedback.
Appendix A - Benchmarking Study - A detailed study of aquatic facilities including: desktop review of current aquatic facility strategies and site visit and analysis of similar regional facilities within Sydney. The benchmarking study develops evidence based current best practice outcomes.

The LPAC master plan has been developed from a collaborative process involving both the community and Council staff. Regular meetings and workshops have resulted in a plan that has multifunctional outcomes, benefiting both Council and the community.

Master plan summary

A summary of some of the key Master Plan strategies include:

> New nature based recreation zone with water play, toddler water play and water jet area. The proposed design is integrated into the foreshore setting of trees and vegetation
> Picnic areas with BBQs, picnic settings and turf recreation spaces
> New unisex family change rooms
> New 50m, 8 lane lap pool with movable boom
> New 25m, 6 lane lap pool to replace current diving pool
> Enclosing of the 'mushroom' children's water play pool area with new sliding doors – so the facilities can be used in winter as a closed area
> Refurbished Program Pool 2 with new hand rails and ventilation
> Provision of spectator seating overlooking the 50m lap pool, improved shade structures, outdoor showers and new planting
> Co-location the male and female pool change rooms, toilets and showers.
> Co-location of the fitness studios
> Relocated cafe
> Relocated crèche, reception area and administration rooms
> Renovated entry design with new landscaping and arrival sequence

The master plan is to be used as a guiding document for future improvements at the facility. It has been carefully crafted with input from many Council disciplines, the community and stakeholders. Much consideration has been given to produce design strategies that improve the experience of using the facility, while retaining the much loved qualities of the place.



Leichhardt Park Aquatic Centre, 50m swimming pool

Photo by Inner West Council

Item 2

Attachment 1

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01

Introduction

Inner West Community
Aquatic Facilities Key Programs



01 Introduction

The aquatic centres of the Inner West are much loved focal points of community life – from our first experiences of learning to swim to the ritual of early morning laps, to playing team sports or fitting in a quick workout, joining friends and family for a dip on a hot day – our aquatic centres are places for everyone to come together, to exercise, relax and have fun.

The 2018 Inner West Recreation Needs Study (RNS): *A Healthier Inner West* revealed that at least 37% of the community used one of the Inner West's 5 aquatic centres at least weekly – combined, over 500,000 people visit our centres each year, making them one of Council's most popular facilities.

Inner West Council is in a unique position with its broad suite of aquatic centres with one regional facility at Leichhardt Park Aquatic Centre (LPAC); two local facilities at Ashfield Aquatic Centre (AAC) and Annette Kellerman Aquatic Centre; a seasonal pool at Fanny Durack Aquatic Centre and seasonal harbour bath at Dawn Fraser Baths (DFB). While AAC, LPAC and DFB are internally operated, the AKAC and FDC are currently managed through service contracts with Belgravia Leisure..

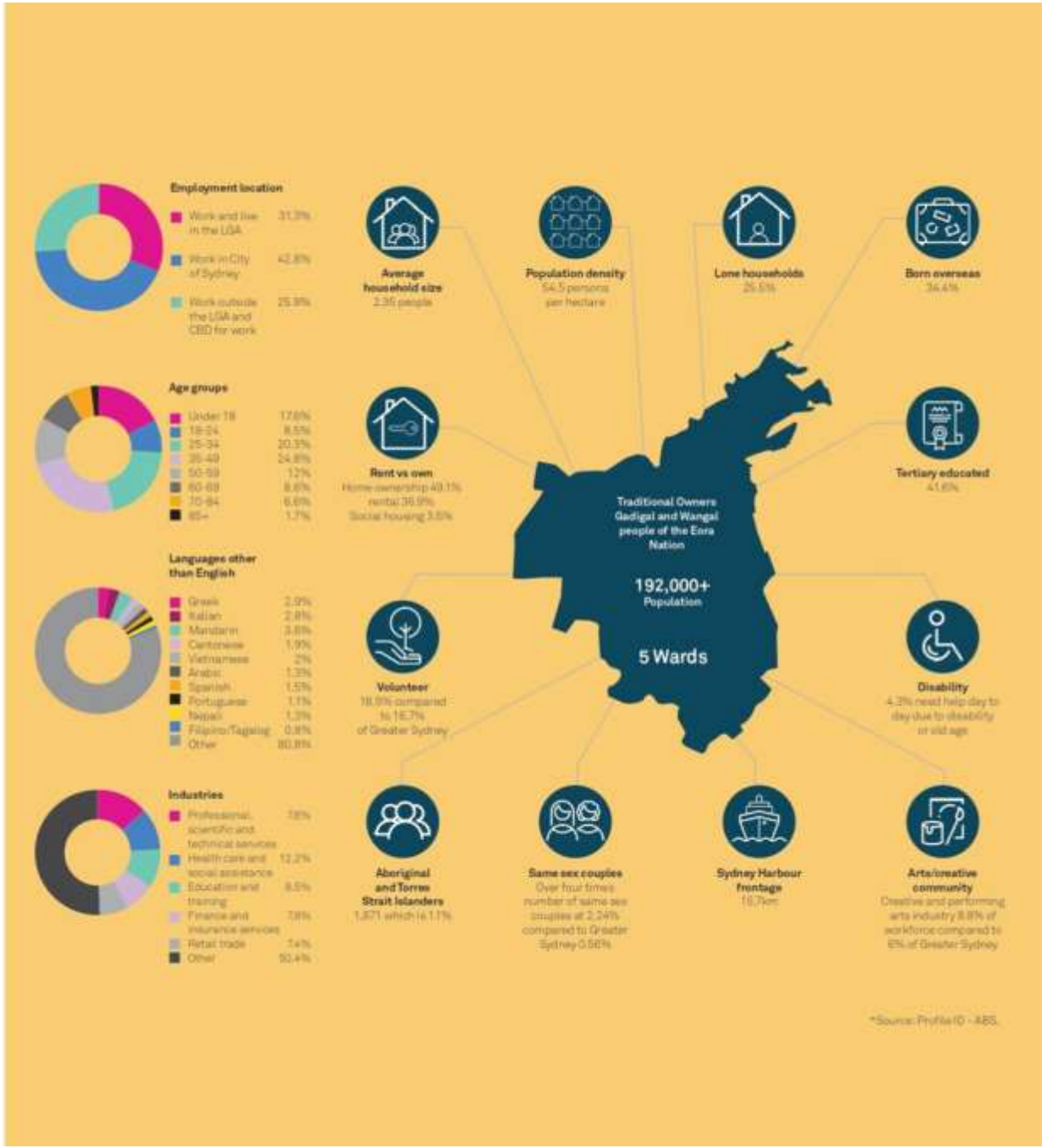
Inner West Community

Inner West is home to over 192,000 residents. By 2036, the population is forecast to grow to 228,000 people (an increase of 36,000 or 20% growth from 2017). The greatest growth will be in the age category 70 - 84, but all other age categories are anticipated to experience growth, including under 24s with an expected growth of 23%. As the population increases, the demand for new dwellings will put pressure on what is already a high density local government area.

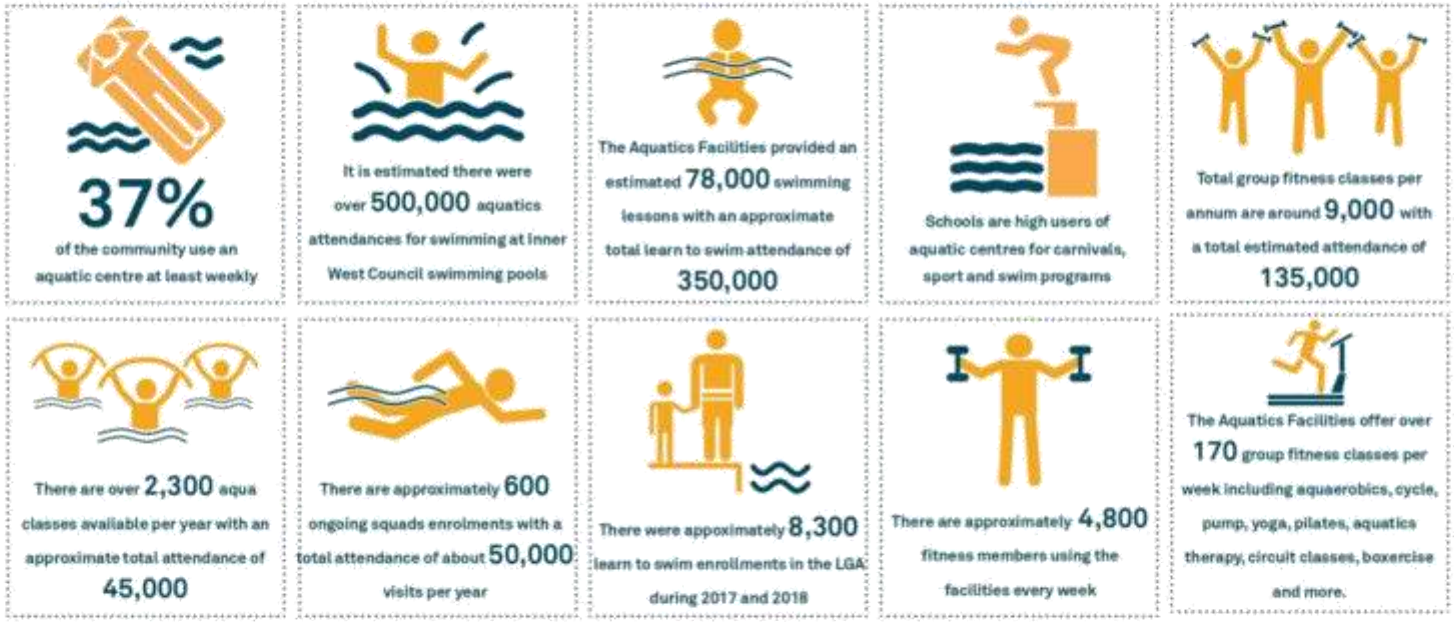
This means Council's aquatic centres will need to be ready to adapt their services to meet increased and changing needs and expectations.

Some key facts:

- Inner West is still ethnically diverse but shifting. While the number of residents born overseas remains steady, where they are coming from is changing. In 1991, 51% of residents were from non-English speaking backgrounds, compared to 35% for Greater Sydney. By 2016, the number had significantly decreased by over half to 24%, compared to a decrease of only 6% for Greater Sydney to 29%.
- The community values the maintenance of cultural diversity as a key characteristic of the area.
- Diversity relates not only to culture but also to other characteristics – Inner West remains an enclave for same-sex couples, double the Sydney average.
- In terms of age, while over 46% of the community are between 25 and 49 years old, the Inner West population is projected to get older. In 2016, 17% of the population was over 60 years of age. It is expected that by 2036, there will be 50% more people of retirement age.
- The community is becoming more affluent. More than 35% of households earned a high income (over $2,500 per week) compared to Greater Sydney's 28%.
- 10% of households live on under $500 per week, representing older people and households with low incomes.
- Inner West has a higher proportion of people living alone - 30% compared to Sydney's 23%.
- Couple-only households is 25%, compared with Sydney's 26% – but the numbers are expected to grow, likely from empty nesters or couples with dual incomes and no children, who tend to have a higher disposable income to support cafés, retail and bars in the area.



01
Introduction
Aquatics Facilities Key Programs



02

Project context

Overview
Community Strategic Plan
Methodology
How to use this document



02 Project Context

Overview

In 2016, the former Leichhardt Council gave in-principle support to develop a long term strategy for Leichhardt Park Aquatic Centre. Council awarded the works for a Leichhardt Park Aquatic Centre Master Plan, to an external consultant. In late 2016 the community were asked to give feedback on the current facility.

In late 2017, following the amalgamation of the former Leichhardt Council with Ashfield and Marrickville Council to form the Inner West Council, additional resources allowed for the completion of the master plan by Council's Public Domain Planning Team.

The project was re-initiated in November 2017. The Inner West Council undertook further community engagement in 2018 to develop a comprehensive understanding of the communities vision for the facility. Concurrently Council completed benchmarking studies and desktop reviews to better understand current best practice design in aquatic facilities to inform the Leichhardt Park Aquatic Centre Master Plan design.

Master plan strategies in this report will provide a holistic plan for the facility. The master plan will enhance and support the existing uses in the facility as well as future demand, complementing the strategic vision for the area.

Previous works

In 2008 and 2016 the former Leichhardt Council completed extensive works to the program pool and a new gym. The works included;

- Cardio and weights area
- 2 new group fitness studios
- Change room facilities
- Administration offices
- New pathways
- New enclosure to the existing program and spa pools
- Refurbished pool concourses
- Re-tiling of program pool, children's mushroom pool and spa pool, and upgrade of spa pool water feature.
- New separate water efficient pool filtration to program pool, spa pool and leisure pool to enhance water quality
- New reconfigured female, male and unisex accessible change spaces
- Refurbishment of existing male, female and accessible change rooms, including new finishes and fixtures.

Asset condition

In 2011 the former Leichhardt Council completed a lifecycle cost and compliance report on the Leichhardt Park Aquatic Centre. The scope of the report reviewed structural elements at LPAC including the 50m lap pool, diving pool (program pool 3) and children's 'mushroom' water play pool. The report outlined the following life expectancy of the assets and the current age left has been added for reference:

- 50m lap pool concrete control joints - 5 year life expectancy (2011) - 2 years past life expectancy (2016)
- 50m lap pool walls, floor and metallic fittings - 10 year life expectancy (2011) - 3 years until replacement required (2018)
- Diving pool (Program pool 3) control joints and metallic fittings - 5 year life expectancy (2011) - 2 years past life expectancy (2016)
- Diving pool (program pool 3) walls and floor - 20 year life expectancy (2011) - 13 years until replacement (2018)
- Children's 'mushroom' water play pool control joints, metallic finishes gutter and grating - 6 year life expectancy (2011) - upgraded in 2016.

Both the 50m lap pool and the diving pool (program pool 3) are past their life expectancy and the dive tower is defunct.

Aquatic Facilities across the Inner West

Inner West Council operates the following public aquatic facilities:

- Annette Kellerman Aquatic Centre, Enmore
- Ashfield Swimming Pool, Ashfield
- Dawn Fraser Baths, Balmain
- Fanny Durack Pool, Petersham
- Leichhardt Park Aquatic Centre, Lilyfield

At least 37% of the people consulted during the development of the draft Recreation Needs Study - A Healthier Inner West, visit an aquatic facility weekly. Aquatics facilities form part of a diverse range of recreational opportunities that respond to the modern demands of Australian communities. These facilities provide services which promote physical fitness, water safety skills and confidence. They are a place for competition and play; a place to seek relief from the summer heat. Each of Inner West's aquatic facilities has a different offering for the public and they work together to fulfil the Inner West community's aquatic recreation needs.

The needs study articulates that Inner West Council needs to cater for one additional facility based on population forecasts by 2026. It highlights that Council already has a high provision of aquatic centre and therefore acknowledges that a new facility may not be viable. Instead it recommends increasing capacity at existing facilities, including implemented upgrades at Leichhardt Park Aquatic Centre. Therefore recommendations in this master plan align with the recommendations in the draft Recreation Needs Study - A Healthier Inner West.

The Draft Recreation Needs Study

The Draft Recreation needs Study provides an analysis of the current and projected recreation needs of the Inner West community. The study will provide the evidence base to inform the development of Council policy and strategy in relation to recreation. Swimming is one of the most popular recreational activities amongst adults and children both nationally and locally in the Inner West. Aquatics facilities form part of a diverse range of recreational opportunities that respond to the modern demands of Australian communities. The facilities provide services which promote physical fitness, water safety skills and confidence. They are a place for competition and play; a place to seek relief from the summer heat.

While the Recreation needs study did not specifically analyse Aquatics requirements or a review of membership and attendance, the research into existing use highlighted the facility received over 700,000 visits in the 2016/2017 financial year.

Business operations review

The review of the existing aquatic facilities across the Inner West, in combination with the Recreation Needs Study, highlights opportunities in the user experience at Leichhardt Park Aquatic Centre.

Based on this, the following can be assumed;

- Providing indoor and outdoor water play and recreation at Leichhardt Park Aquatic Centre is expected to generate an additional 47,000 visits per year.
- Indoor water play would allow for year round recreation swimming for children in the community. It is expected that providing this could generate an additional 15,000 visits per year.
- The inclusions of nature based water play and recreation spaces could expect to generate an additional 31,000 visits to the site.

Leichhardt Park Plan of Management

The Leichhardt Park Plan of Management was adopted by the former Leichhardt Council in 2004.

The Plan of Management provides an integrated approach to the management of Leichhardt Park to ensure its place as a premier recreational venue within the Inner West Council.

The Leichhardt Park Plan of Management is due to be updated by the new Inner West Council. The Leichhardt Park Aquatic Centre Master Plan will provide suggestions for future connection between Leichhardt Park and Leichhardt Park Aquatic Centre.

People with Disabilities 2017 - 2021

The Inner West Council Inclusion Action Plan (for People with a Disability) 2017-2021 (IAP) outlines Council's commitment to respecting the rights and improving opportunities for people with a disability of all ages, to participate fully in community life. The IAP also meets Council's obligations under the Disability Inclusion Act, 2014 (NSW) and other similar instruments that identify its role in reducing discrimination and improving participation opportunities for people with a disability. Following Council mergers, staff from each of the former Council areas (Ashfield, Leichhardt and Marrickville) merged actions from existing Council access plans into this plan. The opportunity was also taken to revise actions that needed updating or that could be extended to facilitate best practice access and inclusion outcomes. The design process of the master plan has used the IAP to ensure the plan better meets the needs of the community.

Strategic Alignment

In June 2018, the Our Inner West 2036, Community Strategic Plan was endorsed by Council. The plan will guide the direction of services within the Inner West Council local government area (LGA). The plans guiding vision statement is:

"We are Inner West, land of the Gadigal and Wangal peoples, whose rich cultures, heritage and history we acknowledge and respect. We are defined by our diversity of people, places and ideas. We are an inclusive, vibrant, caring and progressive community where everyone is welcome, people and nature live in harmony, and creativity is a way of life."

Council's aquatic facilities service multiple community needs as demonstrate by the extensive list of relevant outcomes in the Community Strategic Plan (CSP).

The ongoing management of the Council's aquatic facilities are consistent with the CSP, promoting a shared vision with the community and Council. It also provides us with a focus, enabling Council to allocate the required resources to translate our vision into action. The following pages outline how this report and its proposals will integrate with and support our community's strategic outcomes.

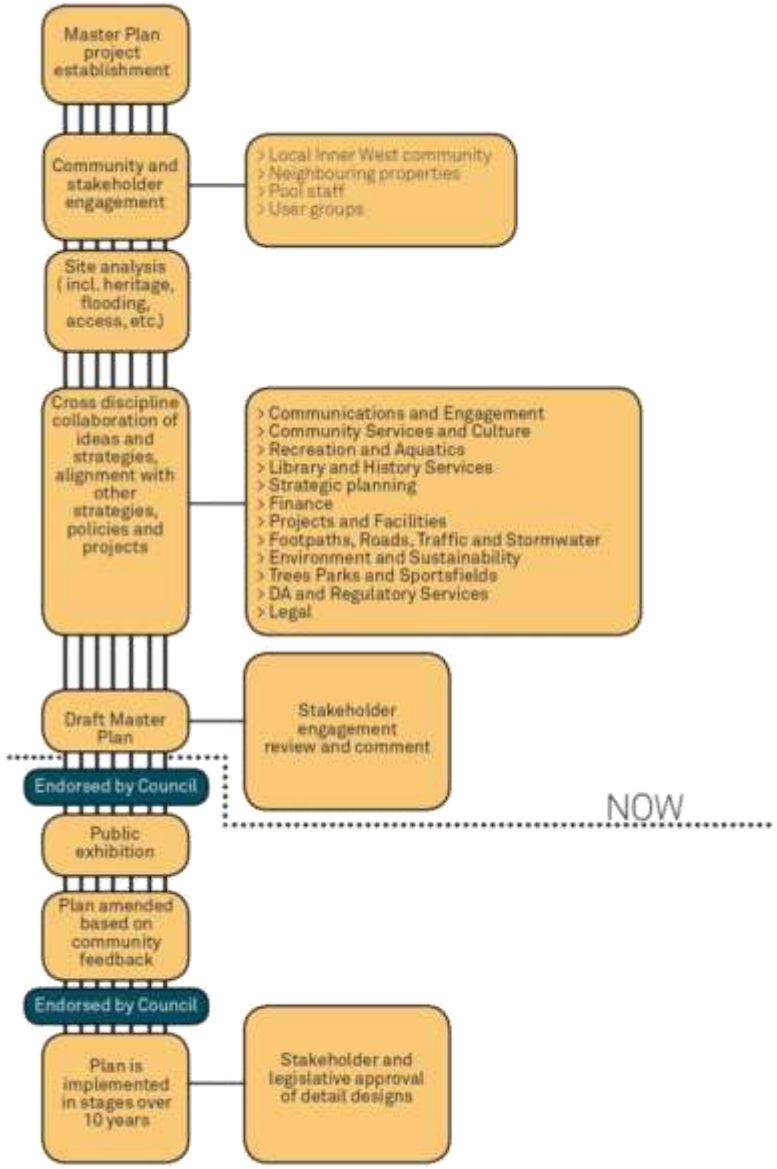
Community Strategic Plan

Our Inner West 2036 A community strategic plan for the Inner West community	ALIGNMENT OF THE LEICHHARDT PARK AQUATIC CENTRE MASTER PLAN WITH THE DRAFT INNER WEST COMMUNITY STRATEGIC PLAN
STRATEGIC DIRECTIONS These are the big picture results which the community would like Council and its many partners to focus on achieving	**KEY RESULT AREAS** **Strategic direction 1:** An ecologically sustainable Inner West. **Strategic direction 2:** Unique, liveable, networked neighbourhoods. **Strategic direction 3:** Creative communities and a strong economy. **Strategic direction 4:** Caring, happy, healthy communities. **Strategic direction 5:** Progressive local leadership.
OUTCOME STATEMENT These are detailed outcomes under each strategic directions. They are more specific than the strategic directions, but still focus on the end result rather than how to get there	**OUTCOMES** **1.1** The people and infrastructure of Inner West contribute positively to the environment and tackling climate change **1.2** Inner West has a diverse and increasing urban forest that supports connected habitats for flora and fauna. **1.3** The community is water sensitive, with clean, swimmable waterways **1.4** Inner West is a zero emissions community that generates and owns clean energy **1.5** Inner West is a zero waste community with an active share economy **2.1** Development is designed for sustainability and makes life better **2.2** The unique character and heritage of neighbourhoods is retained and enhanced **2.3** Public spaces are high-quality, welcoming and enjoyable places, seamlessly connected with their surroundings **2.6** People are walking, cycling and moving around Inner West with ease **3.1** Creativity and culture are valued and celebrated; **3.2** Inner West is the home of creative industries and services **3.3** The local economy is thriving **3.4** Employment is diverse and accessible **4.1** Everyone feels welcome and connected to the community **4.2** The Aboriginal community is flourishing, and its culture and heritage continues to strengthen and enrich Inner West **4.3** The community is healthy and people have a sense of wellbeing **4.4** People have access to the services and facilities they need at all stages of life **5.1** People are well informed and actively engaged in local decision making and problem-solving **5.2** Partnerships and collaboration are valued and recognised as vital for community leadership and making positive changes **5.3** Government makes responsible decisions to manage finite resources in the best interest of current and future communities

Our Inner West 2036 A community strategic plan for the Inner West community	ALIGNMENT OF THE LEICHHARDT PARK AQUATIC CENTRE MASTER PLAN WITH THE DRAFT INNER WEST COMMUNITY STRATEGIC PLAN
STRATEGIES These guide the specific strategies related to this plan and define how to achieve outcomes	**STRATEGIC OBJECTIVES** **1.1.1.** Provide the support needed for people to live sustainably **1.1.2.** Reduce urban heat and manage its impact **1.1.5.** Provide green infrastructure that supports increased ecosystem services **1.2.1.** Support people to protect, restore, enhance and connect with nature in Inner West **1.2.2.** Maintain and increase Inner West's tree canopy and urban forest, and enhance biodiversity corridors **1.2.3.** Protect, conserve and enhance existing natural area sites for species richness and diversity **1.3.1.** Collaborate to deliver water-sensitive plans, decisions and infrastructure **1.4.1.** Support local adoption of clean renewable energy **1.5.1.** Support people to avoid waste, and reuse, repair recycle and share **1.5.2** Provide local reuse and recycling infrastructure **2.1.1.** Pursue integrated planning and urban design across public and private spaces to suit community and local environment needs **2.1.2.** Identify and pursue innovative and creative solutions to complex urban planning and transport issues **2.1.3.** Improve the quality, and investigate better access and use of existing community assets **2.1.3.** Improve the quality, and investigate better access and use of existing community assets **2.2.1.** Provide clear and consistent planning frameworks and processes that respect heritage and the distinct characters of urban villages **2.2.2.** Manage change with respect for place, community history and heritage **2.3.1.** Plan and deliver public spaces that fulfil and support diverse community needs and life **2.6.1.** Deliver integrated networks and infrastructure for transport and active travel **2.6.3.** Ensure transport infrastructure is safe, connected and well-maintained **3.1.1.** Grow Inner West's reputation as a leading creative and cultural hub, celebrating and supporting diverse creative industries and the arts **3.1.2.** Create opportunities for all members of the community to participate in arts and cultural activities **3.2.1.** Position Inner West as a place of excellence for creative industries and services and support them to thrive **3.2.4.** Facilitate the availability of affordable spaces for creative industries and services **3.3.1.** Support business and industry to be socially and environmentally responsible **3.3.3.** Promote Inner West as a great place to live, work, visit and invest in

02 Project Context

Our Inner West 2036 A community strategic plan for the Inner West community	ALIGNMENT OF THE LEICHHARDT PARK AQUATIC CENTRE MASTER PLAN WITH THE DRAFT INNER WEST COMMUNITY STRATEGIC PLAN
STRATEGIES These guide the specific strategies related to this plan and define how to achieve outcomes	**STRATEGIC OBJECTIVES** **3.4.2.** Encourage social enterprises and businesses to grow local employment **4.1.1.** Foster inclusive communities where everyone can participate in community life **4.1.2.** Embrace, celebrate, respect and value difference by building awareness and appreciation of Inner West's diversity **4.1.3.** Empower and support vulnerable and disadvantaged community members to participate in community life **4.1.4.** Increase and promote awareness of the community's history and heritage **4.2.1.** Celebrate Aboriginal and Torres Strait Islander cultures and history **4.2.4.** Actively engage Aboriginal people in the development of programs, policies and strategies **4.3.1.** Provide the facilities, spaces and programs that support wellbeing and active and healthy communities **4.3.2.** Provide opportunities for people to participate in recreational activities they enjoy **4.4.1.** Plan and provide services and infrastructure for a changing and ageing population **4.4.2.** Ensure the community has access to a wide range of learning spaces, resources and activities **5.1.1.** Support local democracy through transparent communication and inclusive participatory community engagement **5.2.3.** Collaborate with partners to deliver positive outcomes for the community, economy and environment **5.3.1.** Undertake visionary, integrated, long term planning and decision making, reflective of community needs and aspirations **5.3.2.** Ensure responsible, sustainable, ethical and open local government **5.3.3.** Deliver innovation, excellence, efficiency, effectiveness and probity in Council processes and services



Project process and collaboration flow diagram



Leichhardt Park Aquatic Centre entrance

Photo by Inner West Council

Project Methodology

The project methodology was undertaken in eight phases, with some occurring concurrently to meet project deadlines. The methodology produced a process that ensured best practice outcomes and provides for user needs.

The eight phases include:

Phase 01_ Project establishment: During project establishment, the project brief including project program, methodology, project objectives, aims, and the engagement strategy and stakeholders were established.

Phase 02_ Community Engagement: Community engagement was undertaken to understand what the community like and dislike about the facility and understand how it is being used. Investigations and discussions were had on what the community would like to see changed or upgraded.

Phase 03_ Site Analysis: Site analysis was completed to establish opportunities and constraints. Elements reviewed included: access, safety, legislative requirements, Council policies, existing trees, vegetation, site history, bicycle proposals, vehicle access, maintenance, flooding, drainage issues, topography, geology, biodiversity and microclimate.

Phase 04_ Draft Master Plan Development: Draft plans including design options and strategies were developed and coordinated across multiple disciplines. Precedent imagery and detailed text support illustrative plans to articulate the master plan design and proposed improvements at the facility.

Phase 05_ Internal Feedback and refinement: Further feedback from internal stakeholders was sought and documents updated to ensure all disciplines were considered.

Phase 06_ Project Costings and Budget: An opinion of probable costs with proposed upgrades grouped as potential deliverable projects were developed based on the draft master plan design. The master plan strategies were coordinated with Council's forward budgets to integrate project costs with the long term financial plan and forward capital works plans.

Phase 07_ Public Exhibition: The draft documents are used for community comment through an exhibition period. The feedback obtained is used to update the documents to ensure the plans meet community expectations.

Phase 08: Finalised documents are reported to Council for adoption.

How to use this document

This report is proposed to be a holistic reference guide for the proposed 10 year capital works plan for Leichhardt Park Aquatic Centre. The document is divided to different sections for ease of reference.

01 Introduction
Overview of the demographic context of the inner west community and snapshot of aquatic facility key programs.

02 Project Context
The project context provides an introduction and background to the project including definitions, framework, strategic alignment, project methodology and objectives.

03 Regional Context
The physical characteristics of the Inner West Council local government area and analysis of regional aquatic centres across Sydney are discussed through plans, words and images.

04 Precinct Site Analysis
The physical characteristics of the balmain peninsula and Leichhardt Park are described in plans, works and images. The region is analysed for transport options, infrastructure, heritage, zoning and topography.

05 Site Analysis
The physical characteristics of the site are described in plans, words and images. The site is fully analysed capturing Council strategies, underground services and classifications of streets, ownership and other items that influence the designed outcomes.

06 Benchmarking Study
The benchmarking study is a desktop review of current aquatic facility strategies and site visit and analysis of similar regional facilities within Sydney. The benchmarking study develops evidence based current best practice outcomes.

07 Community engagement
Outcomes from community engagement and how they influenced the design outcomes are briefly described in the document. Reference is made to the Community Engagement Report which includes detailed community engagement outcomes.

08 Design Principles
The design principles establish the lens through which decisions are made for street upgrades. The principles provide a spatial representation of the objectives.

09 Precinct Planning
Design outcomes for the Leichhardt Park recreation precinct are outlined to better connect existing facilities.

10 The Master Plan
This section of the report outlines the overall design outcomes, with strategies described in text supported with images and illustrative plans.

11 Implementation Details
The proposed upgrades are costed via an opinion of probable costs. The costs are grouped as potential projects and are prioritised according to asset condition, cost benefit, related strategy priorities and need as requested through community feedback.

03

Regional context

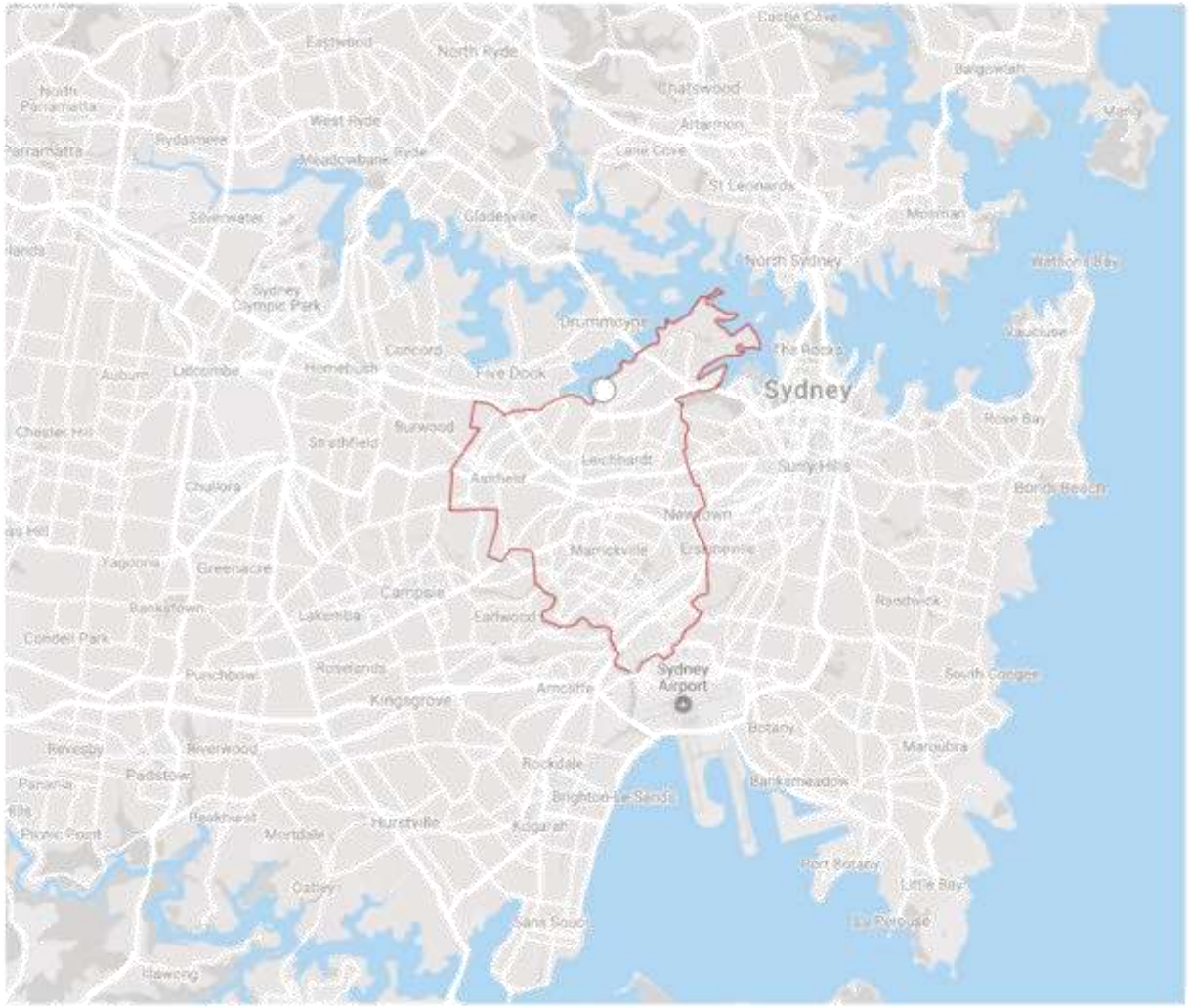
Location
Regional context of aquatic facilities



03 Location

The Inner West Council area is located five kilometres west of the Sydney Central Business District (CBD) and includes the former Marrickville, Ashfield and Leichhardt Local Government Areas (LGA).

The Inner West Council has a resident population of 185,000 people and extends from near Sydney Airport and the Cooks River to the south, borders Erskineville and Redfern to the east, Sydney Harbour to the north and adjoins Five Dock, Burwood and Campsie to the west.



Plan of the Inner West Council Local Government Area (LGA) within the context of greater Sydney.

Legend

Leichhardt Park Aquatic Centre

Inner West LGA Boundary

0 1000 2000 5000 metres



The location of the study area within the context of the greater Inner West Council Local Government Area (LGA).

03 Location

The study area is located to the north-west of the LGA, adjacent to Iron Cove in the suburb of Lilyfield. The site is located within Leichhardt Park. Nearby areas include Callan Park to the north east, City West Link/M4 and Leichhardt North Light Rail Station to the south.

Legend

- Inner West LGA Boundary
- Marrickville Road East Area
- Residential Area
- Industrial Area
- Parkland

0 1000 2000 metres

Item 2

Attachment 1

03
Regional Context

Regional context of public aquatic facilities

The adjacent plan shows the spread of publically accessible aquatic facilities over the Sydney region. There is a general spread throughout the central ring of the city with less facilities throughout the western and eastern areas of Sydney. This may be due in part to access to the beach and larger lot sizes with private pools.

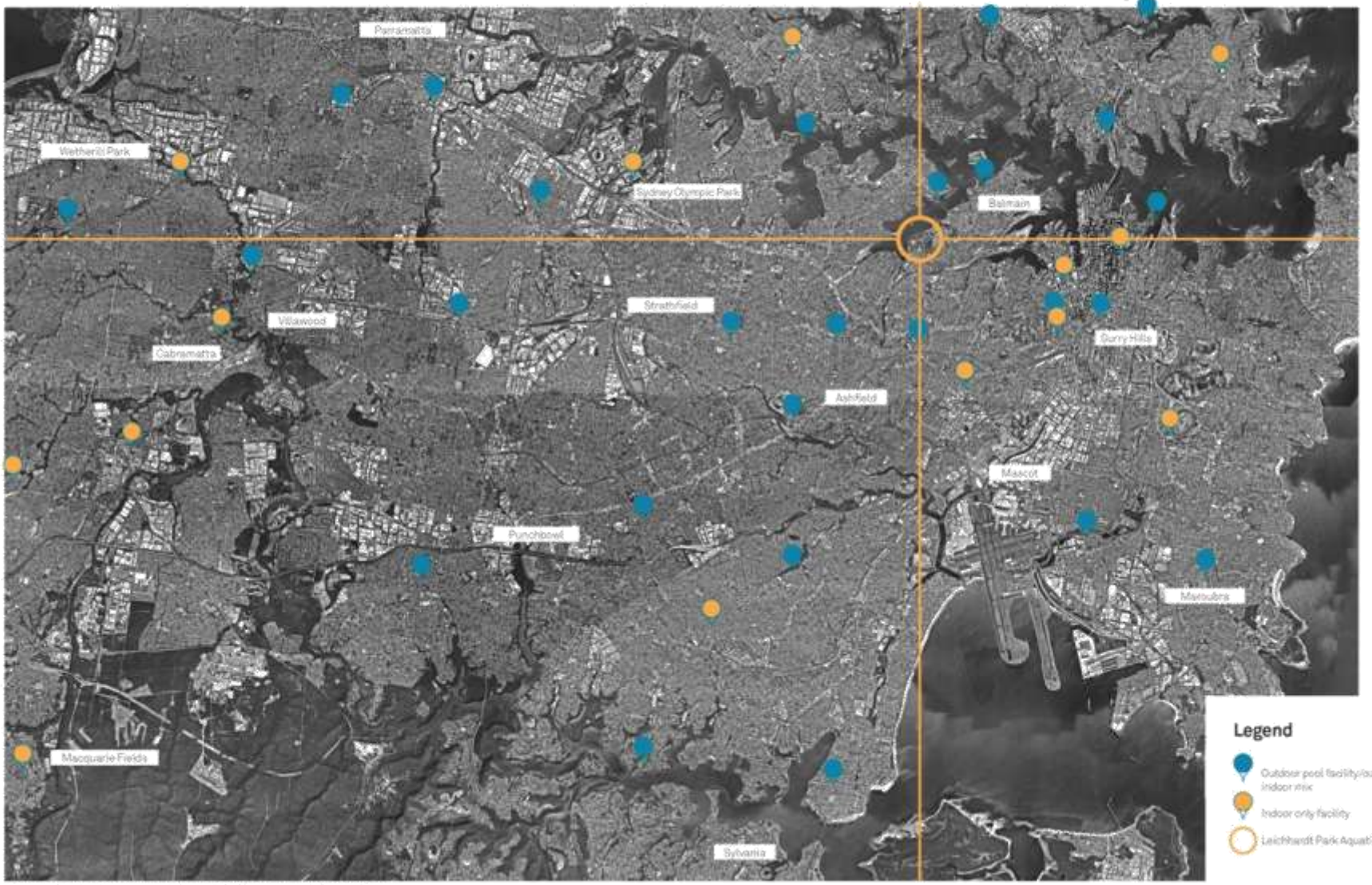
There is an increase of facilities in higher density locations, more than likely due to higher populations and a lack of space for private pools. The analysis suggests that in a densifying urban location, the aquatic centre plays a major role in recreation. Not only are aquatic facilities important for fitness and learn to swim programs, but they are important recreation and leisure facilities for residents.

Item 2

Attachment 1

03
Regional Context

Regional context of aquatic facilities



Context plan showing the spread of aquatic facilities across the Sydney Region

04

Precinct
Site analysis

Suburbs and context
Topography
Road network
Public transport
Cycle networks
Parklands
Town centres
Uses
Heritage Items
LEP Zoning



04
Site analysis

Overview

The location of Leichhardt Park Aquatic Centre has been reviewed within its regional context.

Analysis is shown on the following pages and includes:
- Suburbs and context
- Road network
- Topography and landform
- Active transport
- Public transport
- Town centres
- Heritage items
- Local environment plan and zoning

In addition Leichhardt Park has been reviewed for its local context. Analysis layers include:
- Leichhardt Park site uses
- Leichhardt Park contours
- Car parking
- Pedestrian access, circulation and bicycle network.

The analysis has been used to inform the design decisions that have been used in the proposed Leichhardt Park Aquatic Centre Master plan.



Leichhardt Park Aquatic Centre, 50m swimming pool. Photo by Inner West Council

04
Site analysis

Balmain Peninsula - Suburbs and context



The site is located on the Balmain Peninsula in the suburb of Lilyfield adjacent to the Parramatta River.

The plans have been rotated to show the whole peninsula on one page.

Legend

Leichhardt Park Aquatic Centre

Suburb extent

0 500 1000 metres

04
Site analysis

Balmain Peninsula - Road Networks

The site is located between two arterial roads:
>Victoria Road to the north
>M4 City West Link to the South

These two roads are major connectors between the Sydney CBD and Sydney's western suburbs. However they act as barriers for local pedestrian and cycle traffic, reducing the permeability of the area.

The plans have been rotated to show the whole peninsula on one page.



Item 2
Attachment 1

04

Site analysis

Balmain Peninsula - Topography and landform

The site lies at the bottom of a ridge, adjacent to the Parramatta River and is characterised by steep embankments and a small sandstone escarpment running the length of the site.

The plans have been rotated to show the whole peninsula on one page.



Item 2
Attachment 1

04
Site analysis

Balmain Peninsula - Cycle Networks

The site sits adjacent to the Bay Run (A) which links the Inner West LGA and Canada Bay LGA. The main cycle links to the town centre are up Glover Street (B) and along Lilyfield Road (C). The future Greenway (D) will connect Hawthorn Canal to the Cooks River and has the potential to provide greater permeability and access to the area.

The designated cycle connections divert from the facility, either connecting Lilyfield to the bay, or along the water front. Cycle connections to the facility are poor.

The plans have been rotated to show the whole peninsula on one page.



Legend

- Leichhardt Park Aquatic Centre
- Cycle route
- Cycle route through parkland
- Bay Run — A
- Glover Street — B
- Lilyfield Road — C
- The Greenway — D

0 500 1000 metres

04

Site analysis

Balmain Peninsula - Public Transport



The site is poorly connected to public transport networks and is a 8 minute walk from its nearest bus stop on Lilyfield Road and an 16 minute walk to Leichhardt North light rail station.

The lack of public transport options means that other than walking or cycling, the only method of transport to the site is via private car.

The plans have been rotated to show the whole peninsula on one page.

Legend

- Leichhardt Park Aquatic Centre
- Bus Route
- Bus stop
- Light rail line
- Light rail stop

0 500 1000 metres

04
Site analysis

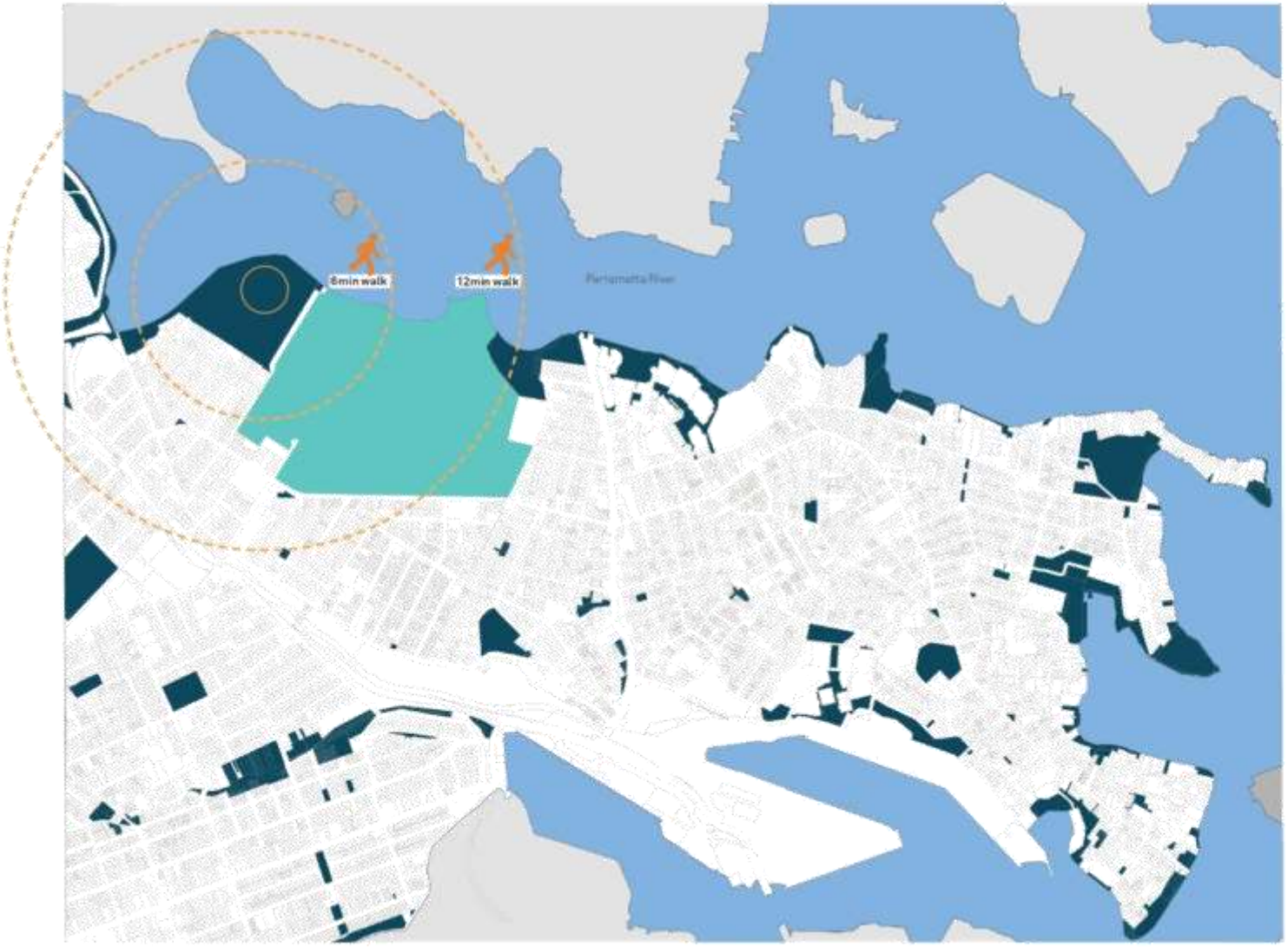
Balmain Peninsula - Town centres

The closest retail precinct is located in Lilyfield (A) at Orange Grove Plaza. Rozelle (B) and Lilyfield (C) town centre are located 1.5 kilometers or a 20 minute walk from the site.

The Leichhardt Park Aquatic Centre is a destination recreation facility which is not directly influenced by other commercial facilities.

The plans have been rotated to show the whole peninsula on one page.





04 Site analysis

Balmain Peninsula - Parklands

The site sits within the larger recreation precinct of Leichhardt Park and adjacent to Callan Park. The facility is adjacent to the Bay Run and part of the green ribbon lacing much of the harbour foreshore. Connections to adjacent recreation facilities and open space is essential for the future success of the facility. Unfortunately, the facility is not well integrated with its surrounds, and turns it back on its context and relationship with Leichhardt Park.

The plans have been rotated to show the whole peninsula on one page.

Legend

- Leichhardt Park Aquatic Centre
- Parkland
- Callan Park (State Government)

0 500 1000 metres

04
Site analysis

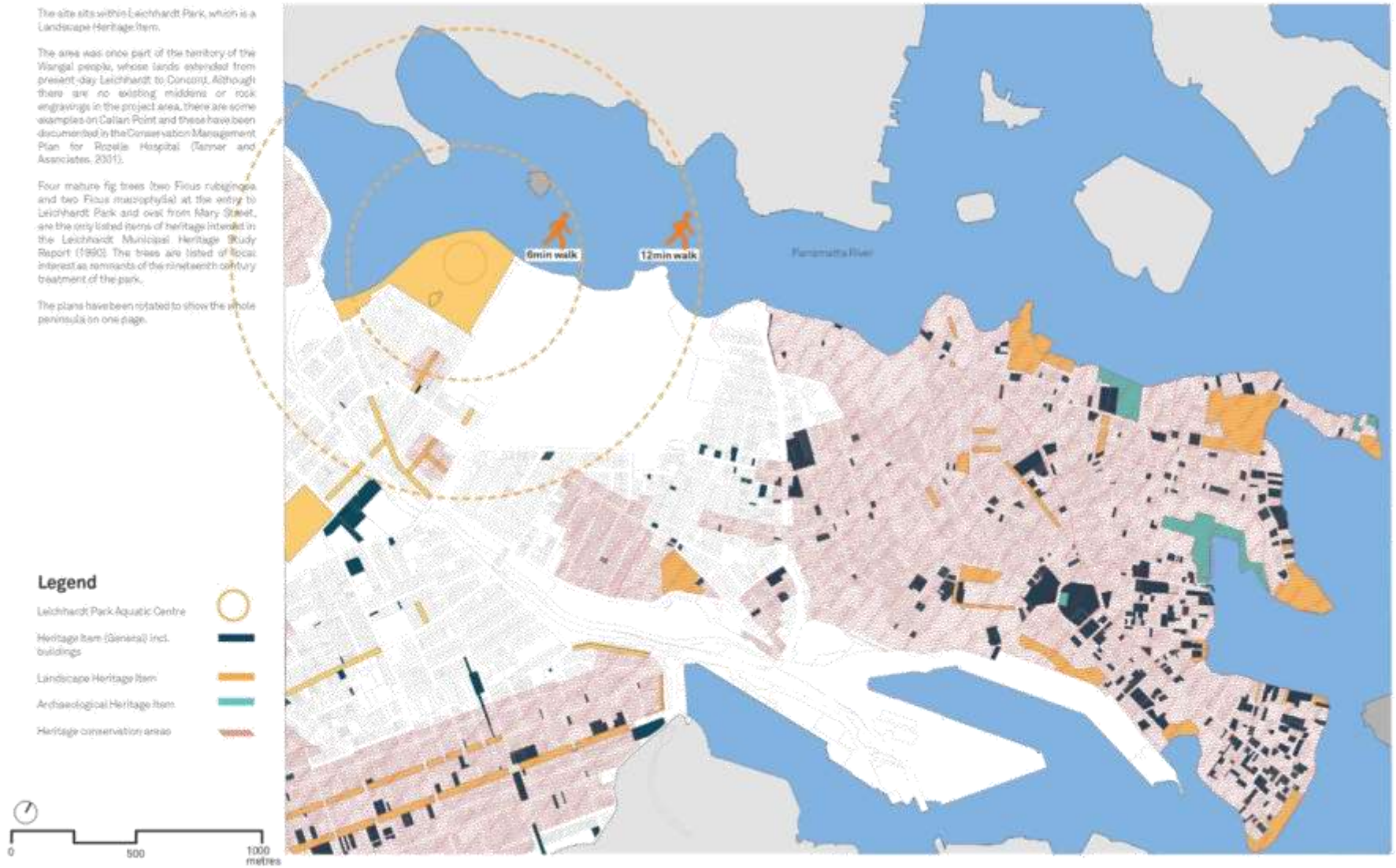
Balmain Peninsula - Heritage Items

The site sits within Leichhardt Park, which is a Landscape Heritage Item.

The area was once part of the territory of the Wangal people, whose lands extended from present-day Leichhardt to Concord. Although there are no existing middens or rock engravings in the project area, there are some examples on Callan Point and these have been documented in the Conservation Management Plan for Rozelle Hospital (Tanner and Associates, 2001).

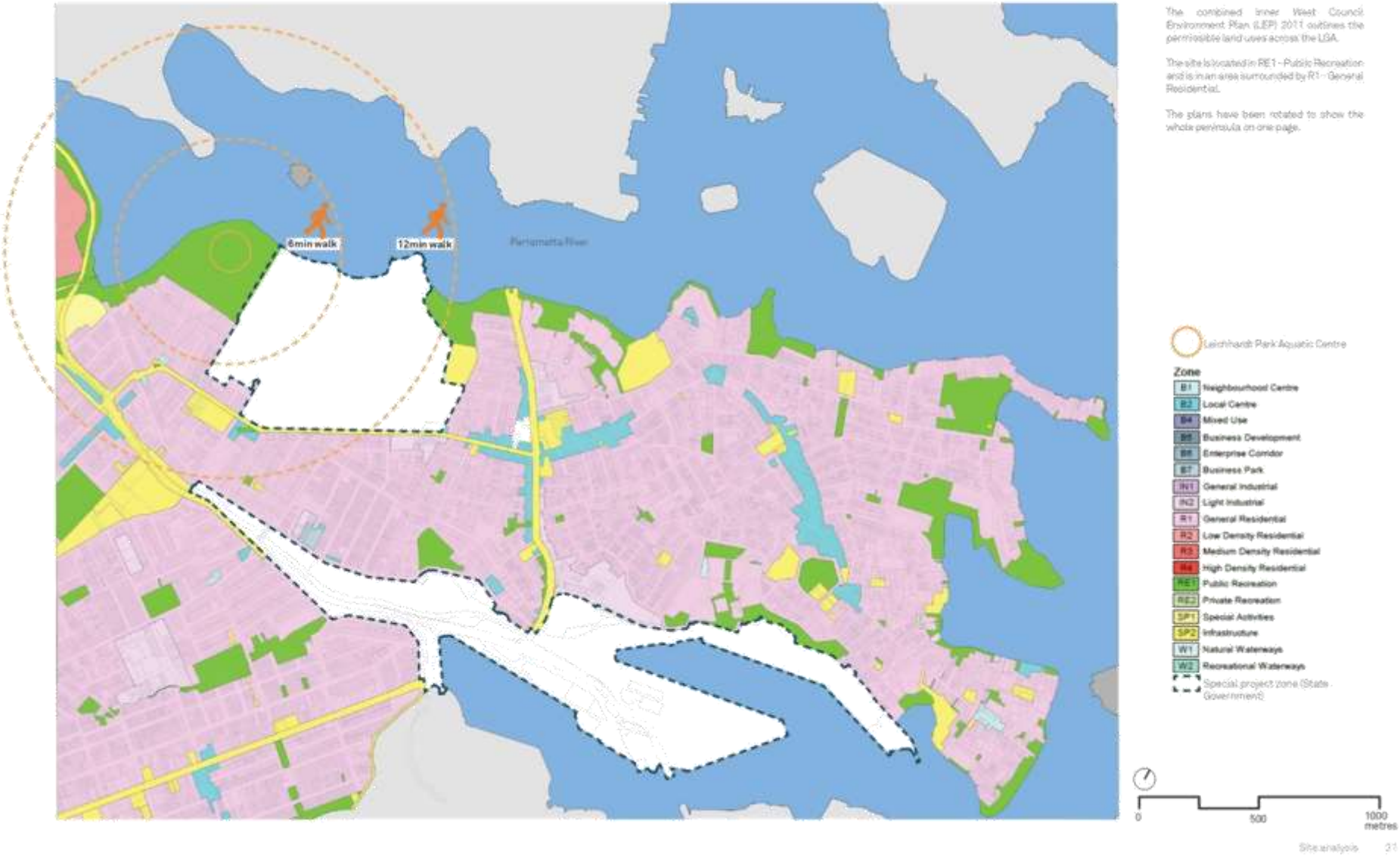
Four mature fig trees (two Ficus rubiginosa and two Ficus macrophylla) at the entry to Leichhardt Park and oval from Mary Street, are the only listed items of heritage interest in the Leichhardt Municipal Heritage Study Report (1990). The trees are listed of local interest as remnants of the nineteenth century treatment of the park.

The plans have been rotated to show the whole peninsula on one page.



04
Site analysis

Balmain Peninsula - Local Environmenal Plan Zoning



The combined Inner West Council Environment Plan (LEP) 2011 outlines the permissible land uses across the LGA.

The site is located in RE1 - Public Recreation and is in an area surrounded by R1 - General Residential.

The plans have been rotated to show the whole peninsula on one page.

04 Site analysis

Leichhardt Park - Site Usage

The adjacent diagram outlines site usage.

Leichhardt Park Aquatic Centre is located in a residential, park and recreation precinct. The area is home to recreation facilities including the Bay Run and Leichhardt Oval 1, 2 and 3.

Leichhardt Park Aquatic Centre has the potential to connect more efficiently both visually and physically to its adjacent recreation facilities.



Typical residential housing



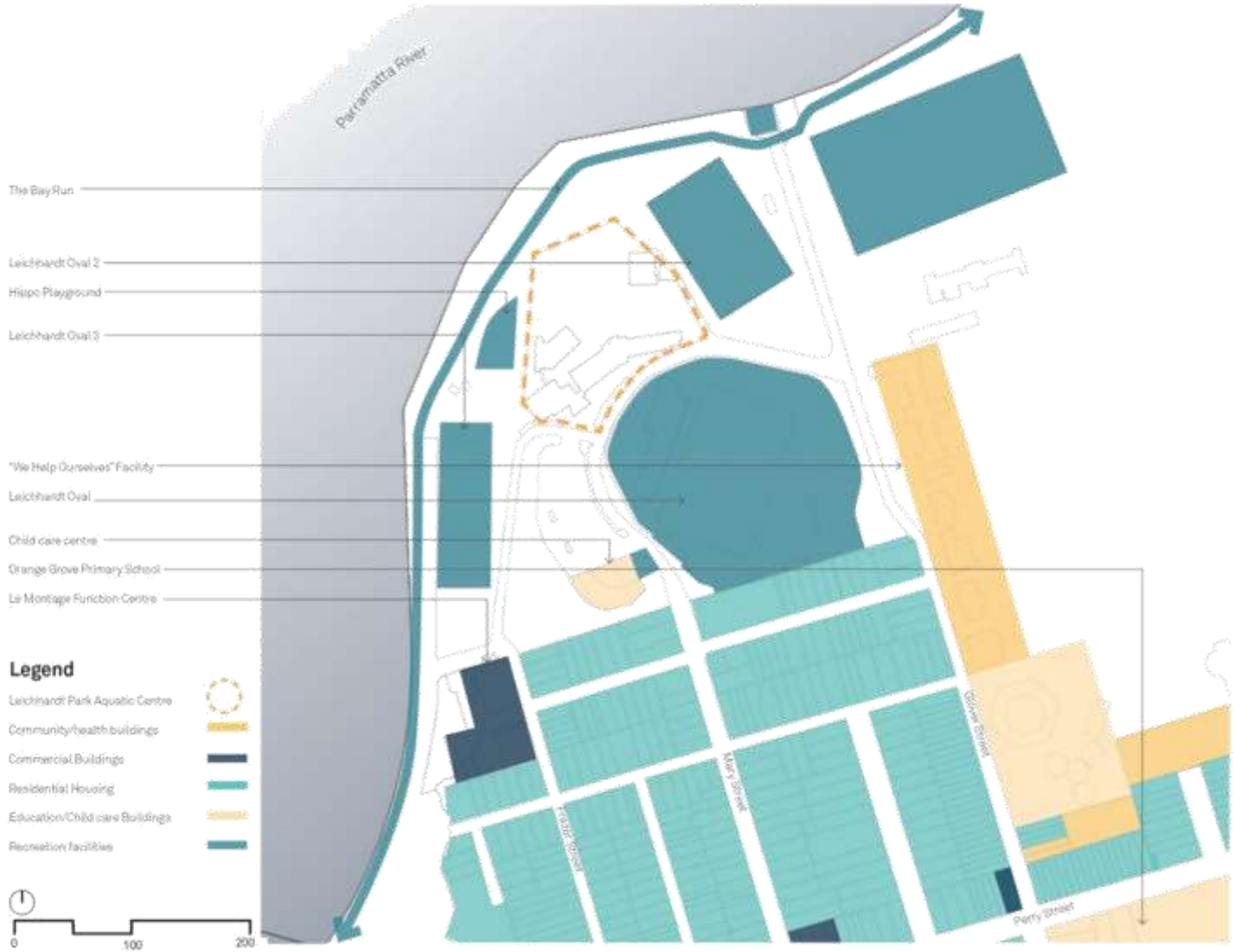
Le Montage Function Centre



Leichhardt Oval



Adjacent to the Bay Run on Sydney Harbour





04 Site analysis

Leichhardt Park - Contours

The adjacent diagram outlines 2m and 10m contours across the site.

Leichhardt Park Aquatic Centre sits on a steep terraced site, dropping approximately 15m from the entrance to the rear of the facility.

The topography poses many accessibility challenges, but also has the potential to inform interesting design outcomes.



Turf embankment at the rear of Leichhardt Park Aquatic Centre.



Leichhardt Oval 2



Embankment of Leichhardt Oval.

04 Site analysis

Leichhardt Park - Parking

The adjacent diagram outlines the current parking situation at Leichhardt Park Aquatic Centre.

Parking within the precinct is limited due to competing space for recreation, roads, footpaths and parking. During peak periods, parking within the adjacent car park is at capacity. Informal parking along roads has become commonplace to cope with peak demand.



A. Vehicle drop off area at facility entrance



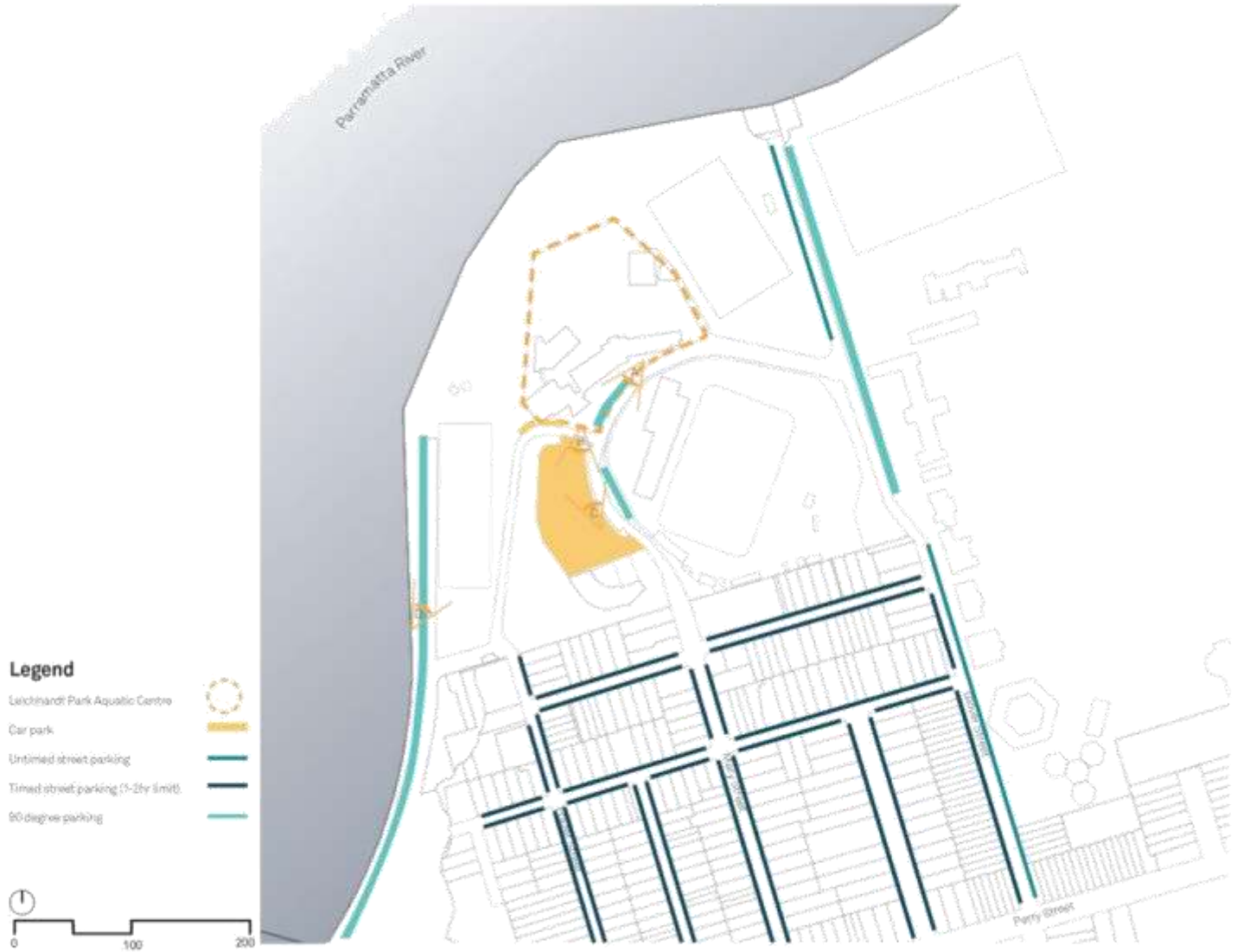
B. Car park



C. Car park pedestrian footpath



D. Car park adjacent to Bay Run



Item 2
Attachment 1

04

Site analysis

Leichhardt Park - Pedestrian access, circulation and bicycle network

The adjacent diagram depicts current pedestrian connections and disconnections throughout the precinct.

Pedestrian links throughout Leichhardt Park are generally poor. Links between the Bay Run, Leichhardt Oval 2, Leichhardt Oval 3 should be improved to better connect recreation facilities and encourage active transport solutions.



Legend

- Leichhardt Park Aquatic Centre
- Formalised pedestrian footpaths
- Informal footpath
- Footpath disconnection and potential future formalisation
- Main cycleways

0 100 200 metres



A. Informal footpath from the Bay Run to the project site. Adjacent to Leichhardt Oval 2



B. Disconnected footpaths between Le Montage and the project site.



C. Disconnected footpaths alongside Leichhardt Oval, adjacent Leichhardt Oval 2

0 100 200 metres

05

Project Site
site analysis

Planned use analysis
Recreation typology
Seating analysis
Fencing/balustrade
Views
Seating and gathering
Topography
Vegetation
Vehicular access
Maintenance



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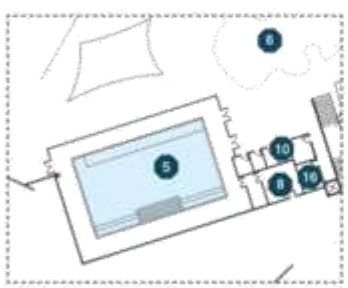
05 Site Analysis

Recreation usage

The existing building uses have been mapped to understand how it is currently used and what the existing relationships between uses are.



Legend

1	50m Pool	13	First Aid Room
2	Diving Pool	14	Lifeguard room
3	Program Pool 1	15	Cafe
4	Storage	16	Office
5	Program pool 2	17	Crèche
6	Childrens Pool	18	Reception
7	Storage	19	Retail
8	Plant room	20	Gym
9	Toilet	21	Group fitness studios
10	Change room	22	Informal recreation
11	Family change facility	23	Informal seating
12	Staff room	24	Open unused recreation space
		25	Entry
		26	Diving platform

Internal building space

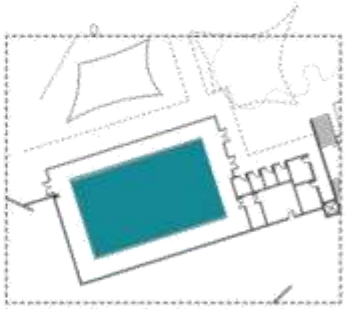
Water body

Turf

05 Site Analysis

Asset condition

The site is located adjacent to Sydney Harbour and the Bay Run. The main concourse, gym, group fitness studios and cafe have filtered views to the harbour. Currently the semi-circle awning interrupts many of the potential views. Potential views can be found at the existing childrens waterplay picnic area. However most views are interrupted by dense weed vegetation.

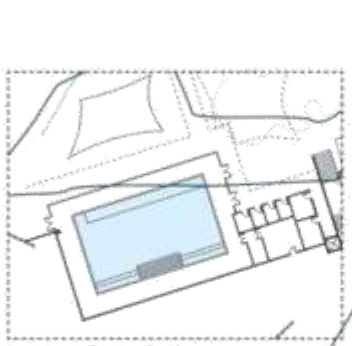


Lower level - Program Pool 2

Refer to Plan: Lower level - Program Pool 2

LEGEND

- Poor asset condition (3 year replacement)
- Fair asset condition (10 year replacement)
- Good asset condition (15-20 year replacement)
- Internal building space
- Water body
- Turf



Lower level - Program Pool 2

05 Site Analysis

Topography and geotechnical investigation

The site sits on a steep slope and creates access constraints which need to be addressed in detail. The site also has geotechnical constraints which were investigated by the former Leichhardt Council.

The 1:100,000 geological map of Sydney indicates that the site is underlain by Hawkesbury Sandstone.

In 2011, the former Leichhardt Council undertook fieldwork for geotechnical investigation. The fieldwork comprised of an auger drilling six boreholes (BH1 to BH6) to depths between 1.1m and 3.5m.

The boreholes revealed a generalised subsurface profile below the concrete paving, comprising of fill over sandstone bedrock at relatively shallow to moderate depth. Some groundwater seepage was also encountered locally.



A. Topography terracing from building level to 50m pool



B. Turf embankment looking east



C. Turf embankment looking west

05
Site Analysis

Pedestrian access and circulation

Due to the steep nature of the site, access throughout the facility encompasses many ramps and stairs. There is poor access to the northern grass area and throughout the main entrance building to the pool level.



A. Entrance ramp and stair access



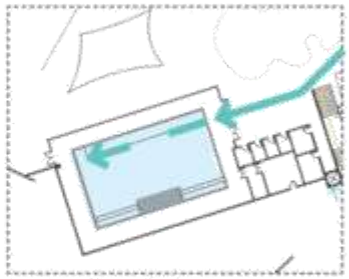
B. Ramp access to 50m and program pool



C. Covered walkway to crèche



D. 50m pool concourse

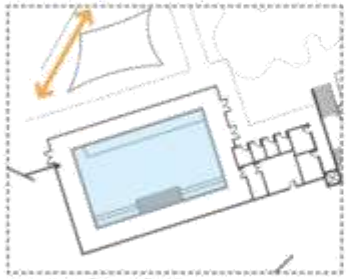


Lower level - Program Pool 2

05 Site Analysis

Vehicular maintenance access

There are three vehicle entrance gates along the eastern boundary of the site. Entrance Gate 1 accesses the 50m pool and program pool. Entrance Gate 2 accesses the plant room including co-gen plant. Entrance Gate 3 accesses the Program Pool 2 and plant equipment adjacent to the program pool.



Lower level - Program Pool 2

Refer to Plan: Lower level - Program Pool 2



A. Vehicle entrance adjacent to dive pool



B. Vehicle access to plant room

Item 2

Attachment 1

05 Site Analysis

Fencing / balustrade

There are 7 types of fencing/balustrades within the facility each with its own defined character. Future upgrade works must balance the requirement for safety, visual clutter and accessibility.



Galvanised Balustrade



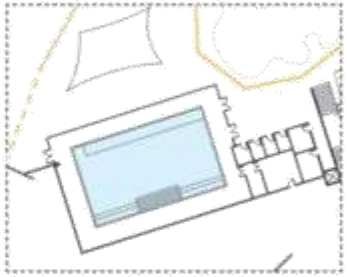
White horizontal handrail



Chainwire mesh fencing



White round top pool fencing



Lower level - Program Pool 2

LEGEND

- Chainwire mesh fencing
- Black flat top fencing
- Galvanised balustrade
- White horizontal handrail
- Timber 'X' balustrade
- White round top pool fencing
- Galvanised handrail/ grass balustrade
- Internal building space
- Water body
- Turf

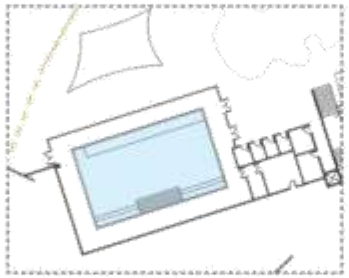
Refer to Plan: Lower level - Program Pool 2

05 Site Analysis

Seating and gathering spaces

Seating and gathering spaces need to be improved throughout the facility. Currently there is a long bench seat along the length of the pool which is considered cold and uncomfortable.

Three picnic tables adjacent to the program pool and two picnic tables on the rear grassed area provide the only formal picnicing facilities. Some moveable plastic chairs have been installed along the edge of the childrens mushroom pool to provide a comfortable environment for parents and carers.



Lower level - Program Pool 2



Refer to Plan: Lower level - Program Pool 2



Picnic table seating



Bench seating adjacent 50m pool



Informal recreation space

05 Site Analysis

Shade analysis

The facility presents multiple shade types including traditional awnings and shade cloth structures. The site also includes a small number of established trees. Shade was a major concern for the community with requests for additional shade and all weather protection a priority.



Advanced trees



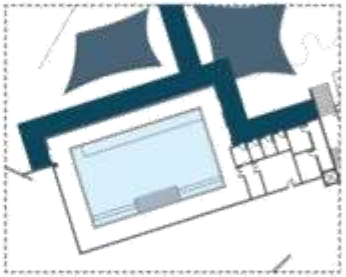
Awning to pool surrounds



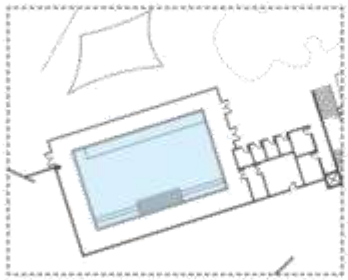
Awning to main building



Shade structure to Children's Pool



Lower level - Program Pool 2



Lower level - Program Pool 2

05 Site Analysis

Vegetation

The site consists of a patchwork of garden beds throughout the site. The northern third of the site is characterised by sloping turf areas which are currently underutilised. The central section of the site is characterised by a concrete pool concourse and small garden beds. The building entrance has a larger proportion of planting and its character is influenced by Fig Trees planted along the boundary of Leichhardt Oval.



A. Entrance garden bed planting



B. Access ramp planting



C. Embankment planting



D. Planter box planting

06

Benchmarking Study

Process and findings
History of the aquatic centre
Case Study Location Map
Benchmarking Study 1 - Des Renford Leisure Centre, Randwick
Benchmarking Study 2 - Angelo Anestis Aquatic Centre, Bexley
Benchmarking Study 3 -Victoria Park Pool, Camperdown
Benchmarking Study 4 -Prince Alfred Park Pool, Surry Hills
Benchmarking Study 5 -National Centre of Indigenous Excellence





Leichhardt Park Aquatic Centre 50m pool

Photo by Inner West Council

Overview

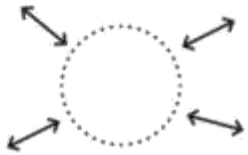
Council completed site visits to various Aquatic facilities within Sydney. Sites were selected based on:
- Recent renovations or upgrades
- Constrained urban environments
- Connection to wider recreation facilities
- Changing demographics/population and context.

During the site visits Council Officers met with pool staff, operations managers and facility managers to gain an understanding of items including:
- Facility layout
- Circulation
- Foyer and administration area design
- Service access
- Crèche location and requirements
- Cafe, retail layout and design
- Connections to the surrounding neighbourhood
- Change room design and layout
- Gym and group fitness considerations.

The combination of the desktop analysis and site visits produced the following conclusions:

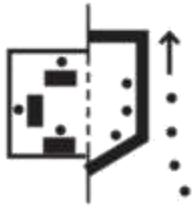
Connectivity to site

- Connection to site and supporting recreation facilities is essential for a successful facility.
- Visual connection to other facilities is important to ensure easy way finding.
- Access to the entrance of the building must be readable from the street, car park or surrounding parkland.
- Aquatic centres are often 'inwards' facing facilities. Connectivity to the surrounding site via views or pedestrian access improves design outcomes.



Foyer/Reception

- Reception desks should be set against a wall with 'cash up' office set directly behind the reception area.
- Clear sight lines between management offices and reception is required to ensure staff safety and monitor peak periods.



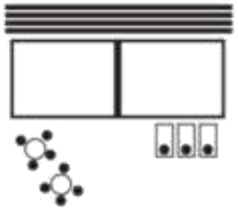
Learn to swim/program pool

- Comfortable spaces for parents and carers to watch swimming classes is important.
- Open space or water play adjacent to program pool for siblings to play is desirable.
- Change facilities located adjacent to the pool.



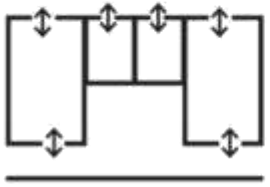
Outdoor pool

- Flat space around pool for picnicing and recreation important.
- Comfortable seating around pool for easy supervision.
- Spectator seating is important for attracting school carnivals and additional income streams.
- Moveable boom increases flexibility of pool programming by varying length of pool lanes.
- Moveable seating on the pool concourse is desirable for flexible recreation and gathering spaces.



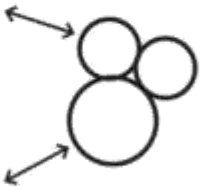
Changerooms

- Maximising the number of family change rooms.
- A minimum of four family change rooms should be provided with preference for 8-12 in larger community facilities. This is often most efficiently achieved by minimising the size of family change rooms by providing a bench and change table only, and providing pool-side toilets and showers.
- The separation of a dry and wet change room entry process minimises the incidence of dirt migration into the pool hall by keeping shoes out of the wet areas and results in better hygiene and cleaning of the facility.



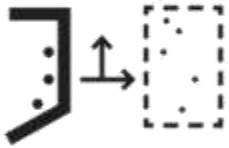
Gym and Group fitness

- Dry change rooms necessary
- Co-location of group fitness studios important for clear sight lines between management offices to ensure staff safety and monitor peak periods.



Crèche

- Standalone crèche adjacent to reception area is necessary to allow for efficient drop off of children prior to classes.
- Crèche with outdoor area or large windows desirable.



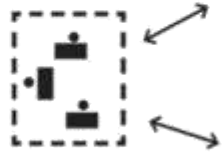
Cafe/retail

- Conflicting preference for cafe to be connected to the reception area to allow for reception staff to serve the cafe during quiet times.
- Cafe to connect with main thoroughfares to encourage passing trade
- Retail to be located near reception to allow for easy sale.



Staff office/meeting rooms/lunch area

- Office areas should be in close proximity to the reception desk.
- Offices should be co-located to ensure easy communication between staff departments.
- There should be good natural surveillance between reception and office space.
- Hot desks should be installed in offices to allow for casual staff to check emails and log timesheets.





07

Community engagement

Engagement approach
Common themes



Item 2
Attachment 1

07 Community engagement

Engagement approach

Methodology
The community engagement methodology aimed to be as inclusive as possible with a variety of forums for feedback. The process included 6 informal 'drop-in' style interactive workshops at the Leichhardt Park Aquatic Centre. These sessions were staggered over a variety of times and days with the aim to capture a broad spectrum of users. An online survey at 'Your Say Inner West' was also available during the entire engagement period.

Advertising
The community engagement events and online survey were advertised with a letter distributed to 10,000 households around Leichhardt, Lilyfield and Rozelle.
Advertisements were placed in the Inner West Courier, on the Inner West Council Website and posts on the Inner West Council Facebook page.

Engagement Events
Informal community engagement sessions were held at the facility. Six engagement sessions were held in the foyer of the building adjacent to the café, and one session was run concurrently in the breezeway of the gym. Two Council Officers were present and facilitated the activities, answered questions and outlined the proposed planning processes.
Community engagement sessions were run at a variety of times and on a variety of days to try achieve a broad of a spectrum of users. The morning sessions targeted early morning swimmers, gym users and squad's along with deep water aqua classes. The afternoon sessions targeted swim school, and gym users. The weekend sessions saw a high percentage of swim school participants, recreation pool users, gym and group exercise participants.
Over the 6 engagement sessions a total of 146 paper surveys were completed. In addition, a larger proportion of people stopped to note items and issues on sticky notes and coloured dots.
The community engagement sessions were held on:
- Wednesday 24 January 2018, 6am – 9am with approximately 20-30 people in attendance.
- Friday 9 February 2018, 6am – 9am with approximately 20-30 people in attendance.
- Thursday 15 February 2018, 4pm – 6pm with approximately 20- 30 people in attendance.
- Tuesday 20 February 2018, 4pm – 6pm with approximately 20- 30 people in attendance.
- Saturday 3 February 2018, 9am – 1pm with over 100 people in attendance.
- Saturday 17 February 2018, 9am – 1pm with over 100 people in attendance.

Online Survey
An online survey was launched on 22 January 2018 and ran for 5 weeks until 26 February 2018. The survey period ran over the summer school holiday break and part of term 1. During the survey period there were 1,220 visits to the site with 428 surveys completed. Throughout the survey period activity visiting the site was steady, though there were visitation spikes on 24 January 2018 and smaller spikes on 29 January 2018, 12 February 2018, 22 February 2018 and 23 February 2018.

Internal Council Stakeholder Workshops
A series of internal Council stakeholder workshops have been facilitated throughout the Leichhardt Park Aquatic Centre Master Plan Project. The initial workshops provided an overview of the project; key dates for staff input and initial feedback from multiple disciplines across Council. Further workshops provided comment and input on the development of the project design strategies and plans.
Who did we hear from during the community?
- The majority of engagement respondents visited the facility once or twice a week and mainly used the pool facilities;
- Respondents were generally aged between 35 and 49, however younger people responded well to the informal community sessions.


50m pool with filtered views of the harbour



Photo by Inner West Council

Common themes

Common themes from all of the engagement respondents feedback has been summarised below under public domain elements:

Pools

- Respondents regularly noted the pool was too busy during squad training and more public spaces were needed
- Respondents often suggested an additional 50m pool within the facility.
- Many respondents noted that Leichhardt Park Aquatic Centre distinguished itself from other facilities by providing deep water aqua aerobics. Respondents noted the diving pool was one of the few of its kind left in Sydney and appreciated it for its historical value. There were requests for opening the 5m platform, diving to occur more often and the introduction of a Diving Club. Some respondents requested expanding the deep-water pool to allow for Water Polo and additional deep water aqua. Responders also requested a dedicated Aquatic Sports Pool with the pool the correct size and depth for competitive water polo.
- Respondents regularly noted the program pool and Program Pool 2 required better ventilation and that it was often too hot to supervise children undertaking swimming lessons. There were also requests for the Program Pool 2 to be used for rehabilitation rather than children's play and swimming lessons.
- Ramp access into the 50m pool and a more accessible entry into the dive pool were requested. It was noted that access to the program pool could be improved by the installation of handrails.
- The swim club also requested to have access to a lap time recording room close to the pool for training.
- Respondents were generally unhappy with recent renovations undertaken in the pool.

Health and Fitness

- Respondents generally felt the gym met their needs; however, it was sometimes too busy in peak periods. There was a request to use the studio rooms for stretch and weights when there were no classes.
- Requests from respondents generally included 24 hour access, access from the car park, and the provision for massage or physiotherapy.
- Respondents requested additional classes throughout the day along with additional senior's classes and deep water aqua.
- Respondents were generally unhappy with the change facilities at the gym noting ongoing operational issues including broken locks on the showers, shower temperature and small cubicles.
- Respondents also said the change rooms needed more regular cleaning and the choice of tile made everything feel dirty.

Crèche

- Respondents requested longer crèche hours and allowing for stays of more than 1hour.

Shade

- Many respondents requested more shade around the pool and additional trees to be planted in the car park.
- Respondents suggested cover from the car park to the facility and additional shade sails on the grassed embankment. People also requested shade over the 50m pool, but expressed that they did not want the pool to be enclosed.

Children's play facilities

- Respondents requested additional child focused play activities and improvement of the existing water play facilities.
- Respondents requested improvements to the relaxation area adjacent to the mushroom pool.
- Respondents requested a nice looking playground, water slides, expanded water play, upgraded mushroom pool, children's games and recreation facilities. Many respondents felt the children's play and recreation within the facility was at capacity. Many respondents said that if the children's water play was in close proximity to a café it would encourage them to spend longer at the centre and attend more frequently.

Seating

- There was a consensus that there was not enough seating around the pool and the seating that was provided was uncomfortable for relaxing. The awning over the seating around the pool was poorly located as it does not extend over the seating. The current bench seating is cold and uncomfortable. Chairs, spectator seating and lounging areas around the pool were requested to allow people to relax.

Picnic facilities

- Picnic tables were requested, along with BBQs. A few people suggested the terraced site be used for spectator seating.

Informal recreation / Grass areas

- There was a consensus that there was not enough seating around the pool and that more comfortable areas for picnicking and sunbaking were required.
- Respondents requested grassed 'nooks' and better planting where parties and gatherings could occur.
- Respondents also requested the grassed area be used for a moonlight cinema and youth activities like beach volley ball and basketball.
- Respondents also requested a wine bar or restaurant in the evening.

Café

- Respondents mentioned the café layout could be improved. The café currently causes people lining up and waiting for their order to wait in the main foyer of the building. There is also conflict between people picking up food orders and making their way to the pool.
- Respondents also requested a greater variety of healthy food options.
- Respondents confirmed that staff at the café was friendly. There were also requests for a second café in the existing building near the grassed area. It was proposed that this could serve the Bay Run and Leichhardt Oval 2.

Building entry

- Respondents requested covered walkways from the carpark to the facility and an awning over the entrance.
- Many respondents said the entrance was crowded with many people trying to do different things.
- Respondents mentioned that staff at the reception are often busy serving other people and do not realise that there are other patrons behind them requiring assistance.

Toilets / Change rooms

- Respondents were generally unhappy with the change facilities at the gym noting ongoing operational issues including broken locks on the showers, shower temperature and small cubicles.
- Respondents also said that the change rooms needed more regular cleaning.

Parking

- Parking was considered an issue from respondents. Respondents generally said that parking was an issue when events were held at Leichhardt Oval.
- Some respondents had issues with parking during peak times including 5pm weekdays and Saturday mornings.



08

Design principles



Item 2

Attachment 1

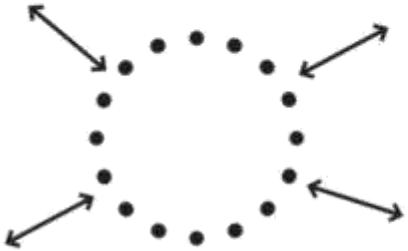
08 Design principles

Design principles have been developed to ensure project objectives are met during the design implementation phase.

Connected to site

01

The aquatic centre is an integral part of its larger site context. Connect the site visually and physically to it's context. Improve connections to the Bay Run, Leichhardt Oval's, Leichhardt Park and Lilyfield.



A place to play

02

Create a place to play, recreate and explore. A place which encourages the exploration of the natural environment, fitness limits and community spirit.



Access

03

Ensure access to, from and throughout the site. Ensure way finding around the site is easy and inclusive.



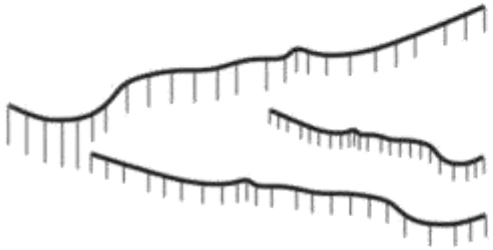
A community place

04 Create a space for the community to gather and recreate. Provide a diversity of spaces for a variety of community groups. Provide spaces for both informal and formal gathering and create a hub for the community to meet.



Within its landscape

05 Reinforce the terraced nature of the site by working with the slope to provide access and spaces for the users of the facility.



Health, fitness and sport

06 Support and maintain Leichhardt Park Aquatic Centres health, fitness and sport facilities so that all people can access high quality, inclusive sporting and health facilities.



Safety FIRST

07 Ensure the safety of staff and Leichhardt Park Aquatic Centre users.





09

Precinct planning



09
Precinct planning

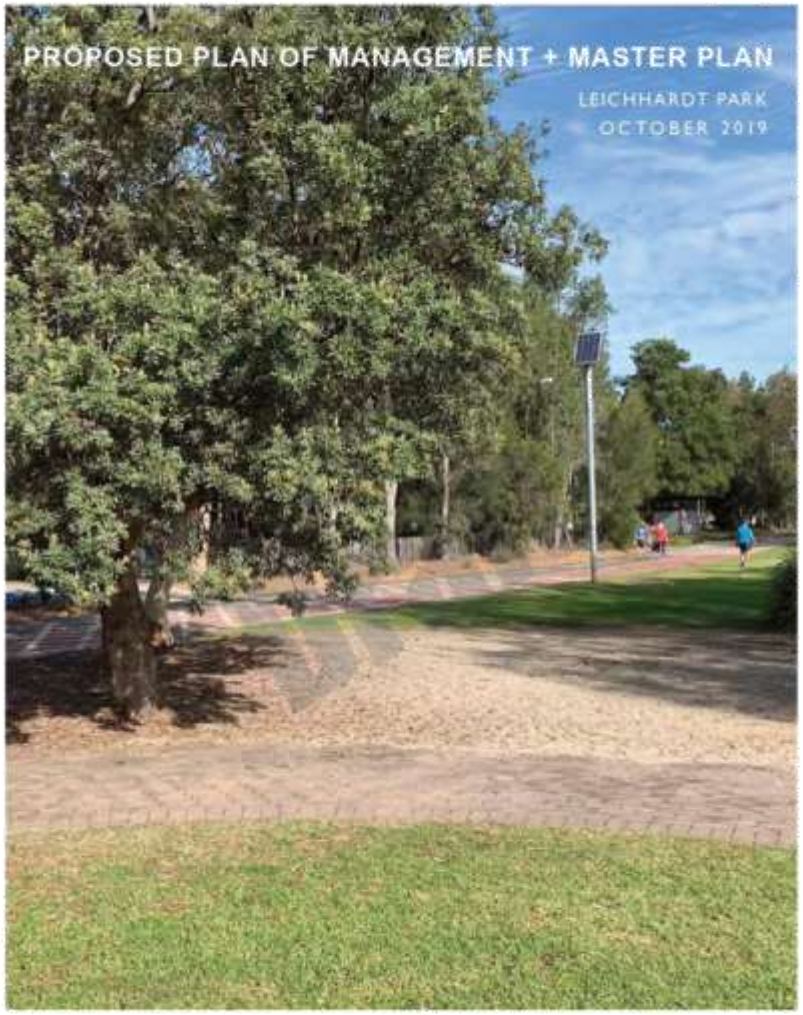
Leichhardt Park Aquatic Centre is an integral part of a larger Leichhardt Park recreation precinct including Leichhardt Oval, Leichhardt Oval 2 and 3, Hippo Park, the Bay Run and Leichhardt Rowing Club.

Callan Park sits to the east of the site and the future Greenway is located to the south west of the site.

Connectivity within the precinct and suburbs is essential for the future success of the aquatic facility.

A Leichhardt Park Plan of Management and proposed master plan has been developed and a draft placed on public exhibition for community feedback.

The Leichhardt Park Plan of Management and proposed master plan can be found on Inner West Council's your say website: yoursay.innerwest.nsw.gov.au/leichhardt-park-plan-of-management



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Version: 1, Version Date: 25/11/2019

09
Precinct planning

Appendix iii
LEICHHARDT PARK - PROPOSED MASTER PLAN





10

Short term upgrades



Fitness amenity upgrade

10
Fitness amenity upgrade

After a review of member feedback and ongoing consideration of trends and opportunities for improved fitness and wellness, it has become evident there are some health and wellness based program improvements that are readily available at the LPAC. These possible improvements are of a minor nature and largely relate to the reallocation of room space and the procurement of a small amount of fitness equipment. However, these improvements have significant potential for community benefit in two key areas, these being:

- General community - additional fitness training amenities which will improve group fitness, personal training and general community member use. This amenity may also provide a more appropriate range of fitness services for younger members who are currently underrepresented at the LPAC.
- General Wellness - a dedicated wellness space or studio that is private, quiet and can be adapted to a range of wellness based uses such as yoga, Pilates, seniors programs, exercise physiology, post-operative recovery, injury rehabilitation, personal training and small group fitness classes. The studio may also be available for occupational therapy and other allied health therapist clinics to support creation of participation plans for NDIS funding, and for group activities for people with a disability including general exercise, stretching and other group exercise type programs. The studio will be a valuable extension to other aquatics and fitness programs and services currently available for people with a disability at the LPAC.

These minor improvements are readily available and have the potential for a quick turnaround and implementation. Whilst they are listed in this masterplan for community comment, these minor improvements are not dependant on the adoption of the masterplan and may be pursued as part of general ongoing improvement and 'business as usual'.

Character Palette



Robot style stretch bars



Disability inclusive programs



High intensity fitness



High intensity fitness



Wellness classes



Seniors classes

10 Fitness amenity upgrade





11

the master plan

Overall Master plan
Master plan site strucutre
Master plan shade
Master plan access
Master plan details
Planting palette
Furniture palette
Material palette



Item 2
Attachment 1

11 Master plan

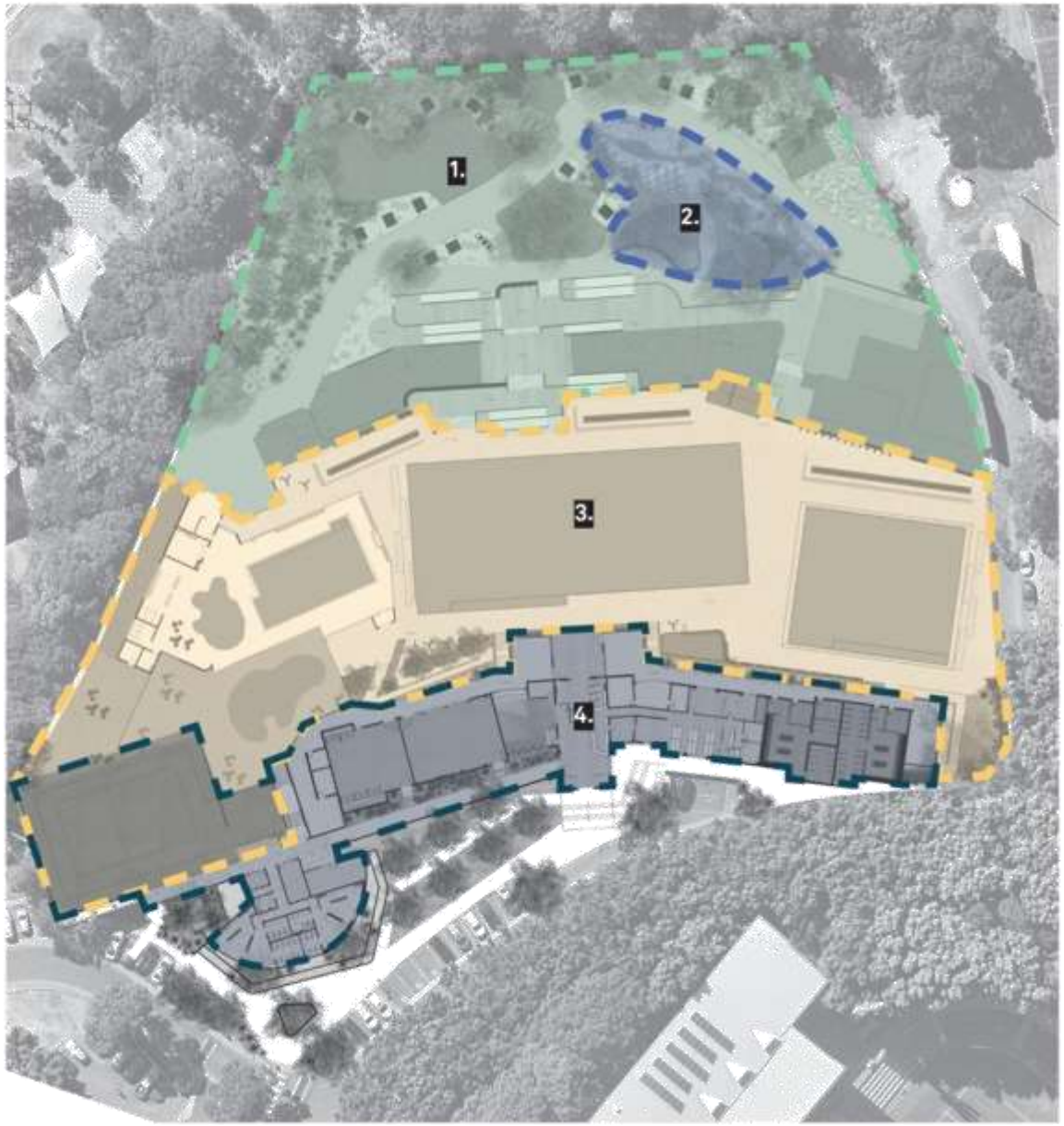
Overview plan

The illustrative overall master plan provides a holistic overview of the proposed improvements at the Leichhardt Park Aquatic Centre. The following pages of the report details 4 distinct zones:
1. Recreation and green space
2. Water play
3. Water fit
4. Entrance, amenities, Health and Fitness

Following the detailed plans, the strategies of the design outcome, proposed planting, furniture palette and sustainability goals are discussed.

The colours used in the following detailed plans are indicative only.





LEGEND

1. Recreation and green space
2. Water play zone
3. Water fit zone
4. Entrance, amenities and Health and Fitness

11 Master plan Structure plan

The master plan proposes 4 distinct areas of fitness and recreation which respond to the site topography and general length of stay at the facility. The 4 distinct zones are explored in more detail in the following pages.

1. Recreation and green space
The recreation and green space zone provides opportunities for enjoyment of the natural beauty and biodiversity of the surrounding area. The zone includes biodiversity planting, referencing bush regeneration planting adjacent to the site and provides passive recreation spaces for long stays at the facility.

2. Water play
The water play zone references the desire for nature based water play and the connection to Sydney Harbour. This area encourages playful recreation, picnicking, and early learning opportunities for children.

3. Water fit
This zone focuses on programmed and individual fitness in a water based environment. This zone includes Deep Water Aqua, 8 lane 50m pool, 8 lane 25m pool, 2 mushroom pools, swim club and squads, and learn to swim school. The Program Pool 2 and Hydro pool are also located within this zone, further expanding options for recreation, fitness and mindfulness within the facility. The aquatics zone remains located near the reception to facilitate quicker, shorter 'in and out' stays at the facility.

4. Entrance, amenities and Health and Fitness
This zone is located within the existing building. It includes co-located group fitness studios, and expansion of the gym to accommodate future demand for weights and Cardio. It also includes a potential therapy area for massage and physiotherapy.

11
1 - Recreation and green space

The adjacent illustrative master plan provides a more detailed overview of the proposed improvements at the Leichhardt Park Aquatic Centre. The following plan illustrates the north section or the recreation and green space zone of the master plan.

Character Palette



Stepping stones through garden bed



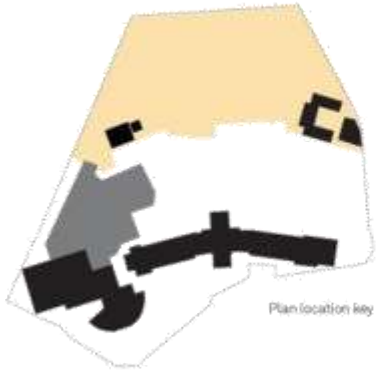
Passive green spaces



Gallatin Point Park - urban roads kaleidoscopic



Plan-alkale wet pools - design inspiration for tiered landings



Plan location key


Existing canopy to be extended with new trees to create natural shade
New shallow root plantings over existing underground water tank
Vehicle pathway
Grated road section to allow service access to pipe between plant rooms
Stepping stones through garden bed
Combination of concrete and timber tiered landings painted in various shades of blue to create connection between green space and blue space
Renovated function room for event hire
Gate for service vehicle entrance
Service vehicle entrance to operational facilities
Recreation
Nature based play including water play
Toddler water play area
Water jet splash zone
Water maze
Turf picnic areas
Water education interactive signage and play elements
Operations
Maintenance vehicle entrance
Service access/path for vehicles
Plant room/operations facilities
Furniture
Low height seating wall
Bar ledge
Bar ledge with fixed seating
Timber seating along retaining wall
Bins
Water station/drinking fountain
Lockers
Picnic table settings
BBQ Facilities
Uses
Pedestrian water crossing
Ramp access
Stair access
Rain garden (WSUD infrustructure). Catchment area from laneway and site run off. Install water education interactive signage with play elements.
0m
5m
10m
20m

11
2 - Water play zone

The adjacent illustrative master plan provides a more detailed overview of the proposed improvements at the Leichhardt Park Aquatic Centre. The following plan illustrates the water play zone within the north section of the master plan.

Character Palette

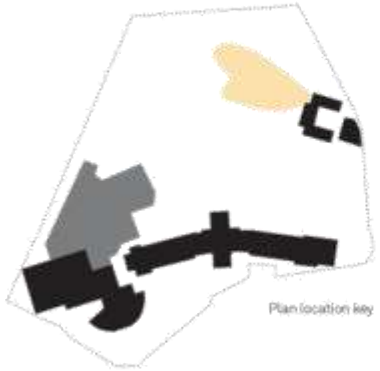


















Recreation
- Nature based play including water play
- Toddler water play area
- Water jet splash zone
- Water maze
- Turf picnic areas
- Water education interactive signage and play elements

Operations
- Maintenance vehicle entrance
- Service access/path for vehicles
- Plant room/operations facilities

Furniture
- Low height seating wall
- Bar ledge
- Bar ledge with fixed seating
- Timber seating along retaining wall
- Bins
- Water station/drinking fountain
- Lockers
- Picnic table settings
- BBQ Facilities

Uses
- Pedestrian water crossing
- Ramp access
- Stair access
- Rain garden (WSUD infrastructure). Catchment area from laneway and site run off. Install water education interactive signage with play elements.

0m 5m 10m 20m

11
2 - Water fit

The adjacent illustrative master plan provides a more detailed overview of the proposed improvements at the Leichhardt Park Aquatic Centre. The following plan illustrates the central section of the aquatic fitness zone of the master plan.

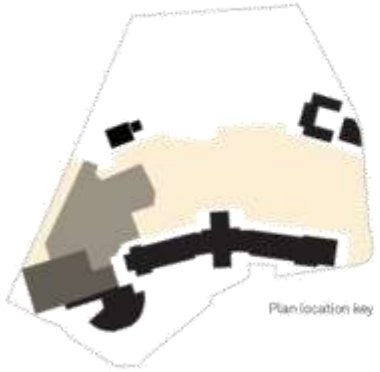
Character Palette











Plan location key

Section A
Section through new 25m pool, bar seating area and spectator seating with shade including lighting elements





Item 2
Attachment 1

11
3 - Entrance, Amenities, Health and Fitness

Character Palette

The adjacent illustrative master plan provides a more detailed overview of the proposed improvements at the Leichhardt Park Aquatic Centre. The following plan illustrates the southern section or the dry fitness zone of the master plan.



Reception desk against wall with wheelchair access



Indoor play to include traditionally outdoor play elements



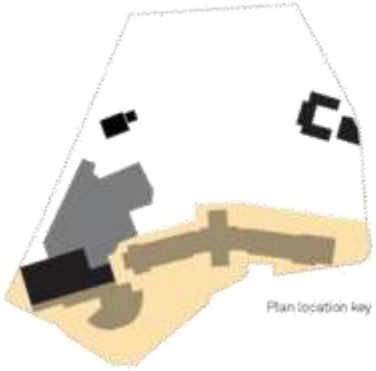
Indoor/outdoor blending of spaces in the creche area



Indoor/outdoor blending of spaces in the creche area



Entry with rationalised wayfinding signage



Plan location key



Section B
Section through accessible ramp including recessed lighting elements



Recreation
- Informal grass picnic area
- Outdoor covered cafe seating
- Indoor cafe seating
- Group fitness studio
- Gym floor
- Seating wall, garden bed with shade tree planting

Operations
- Cleaners store
- Staff bathroom
- Open plan administration offices
- Staff tearoom
- First aid room
- Storage
- Bin Storage
- Building entry with air lock doors and awning. New stair access allowing for a more open entrance

Furniture
- Lockers
- Water fountain
- Bins
- Existing stair access
- Proposed/upgraded stair access
- Existing ramp access
- Proposed/upgraded ramp access

Uses
- Reconfigured reception area
- Retail space
- Reception office with natural surveillance onto reception desk
- Cafe kitchen
- Cafe store
- Cafe service area
- New Crèche
- Physio/massage therapist
- Changeroom/showers
- Unisex change facilities
- Staff room/community meeting room/ swim club meeting room
- New planted roof garden with stepped garden beds to reduce gradient

0m 5m 10m 20m

11 Master plan

Shade

The master plan proposed 2 main types of shade:
> All weather shade structures; and
> Tree planting

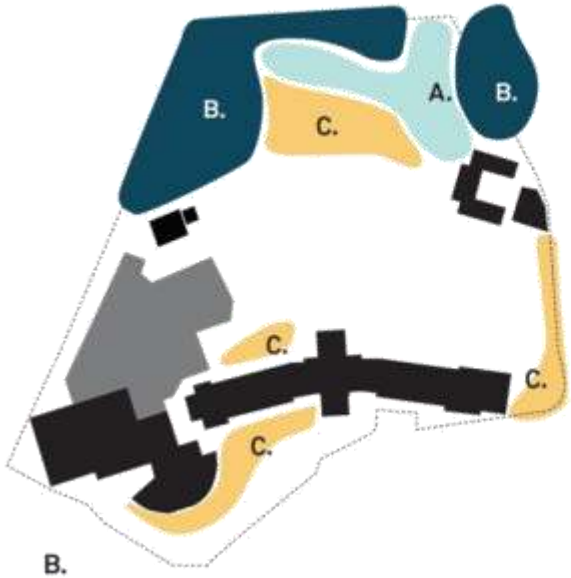
The main additional tree planting is located in the recreation zone, with biodiversity planting blending in with the adjacent bush regeneration site. A mix of native species will establish good shade over time. Planting of advanced stock is essential in ensuring sufficient shade earlier in the sites development.

Shade structures are located along the 50m pool, program pool, deck and main building. This will give all weather protection for swimmers. The shade structure adjacent to the program pool will provide a protected marshalling area for aquad swimming and school carnivals, along with seating spaces for families during swimming lessons and recreation times.



LEGEND

- Existing all weather protection (sun/rain)
- Proposed all weather protection (sun/rain)
- Proposed shade trees
- Proposed adult shade trees
- Existing shade trees
- Proposed palm trees



11
Master plan

Planting palette

A.


Carex breviculmis


Persicaria decipiens


Froinia nodosa


Juncus usitatus


Lomandra 'Tanika'


Centella asiatica


Viola hederacea


Hypolepis muelleri


Lobelia alata


Dianella caerula

Carex breviculmis
Centella asiatica
Froinia nodosa
Hypolepis muelleri
Juncus usitatus
Lobelia alata
Lomandra 'Tanika'
Dianella caerula
Dianella 'Little Jess'
Lomandra hystrix 'Tropic Belles'
Lomandra 'Tanika'
Phormium tenax 'Bronze Baby'

B.


Aristida sp.


Banksia integrifolia


Cheilanthes sieberi


Eriostemon australasius


Ceratopetalum gunniferum


Isopogon anemonifolius


Grevillea buxifolia


Imperata cylindrica 'Rubra'


Cymbopogon refractus

Acacia terminalis
Aristida sp.
Bursaria spinosa
Ceratopetalum gunniferum
Cheilanthes sieberi
Chrysocephalum apiculatum
Corynbia gunnifera
Cymbopogon refractus
Dianella sp.
Dichelachne crinita
Dillwynia retorta
Eriostemon australasius
Grevillea buxifolia
Grevillea sericea
Hakea dactyloides
Hakea sericea
Hardenbergia violacea 'Happy Wanderer'
Hibbertia scandens
Imperata cylindrica 'Rubra'
Isopogon anemonifolius
Kunzea ambigua
Leptospermum juniperinum
Leptospermum polygalifolium
Lomandra longifolia
Melaleuca thymifolia
Olearia microphylla
Ozothamnus diosmifolius
Platycerse lanceolata
Pteridium esculentum
Pultenaea daphnoides
Scaevola ramosissima
Themeda triandra
Viminaria juncea
Wahlenbergia gracilis
Zieria pilosa
Tristania laurina
Veronica plebeia
Zieria smithii
Dianella 'Little Jess'
Lomandra hystrix 'Tropic Belles'
Lomandra 'Tanika'
Phormium tenax 'Bronze Baby'

C.


Dianella caerula


Westringia fruticosa


Ozothamnus diosmifolium


Lomandra hystrix 'Tropic Belles'


Dietes grandiflora


Phormium tenax 'Bronze Baby'

Ozothamnus diosmifolium
Westringia fruticosa
Indigofera australis
Dietes grandiflora
Chrysocephalum apiculatum
Themeda triandra
Dianella caerula
Dianella 'Little Jess'
Lomandra hystrix 'Tropic Belles'
Lomandra 'Tanika'
Lomandra longifolia
Phormium tenax 'Bronze Baby'
Kennedia coccinea
Grevillea gaudichaudii
Westringia fruticosa 'Mundi'
Banksia 'Birthday Candles'

TREES


Angophora costata


Angophora hispida


Livistona australis


Eucalyptus racemosa

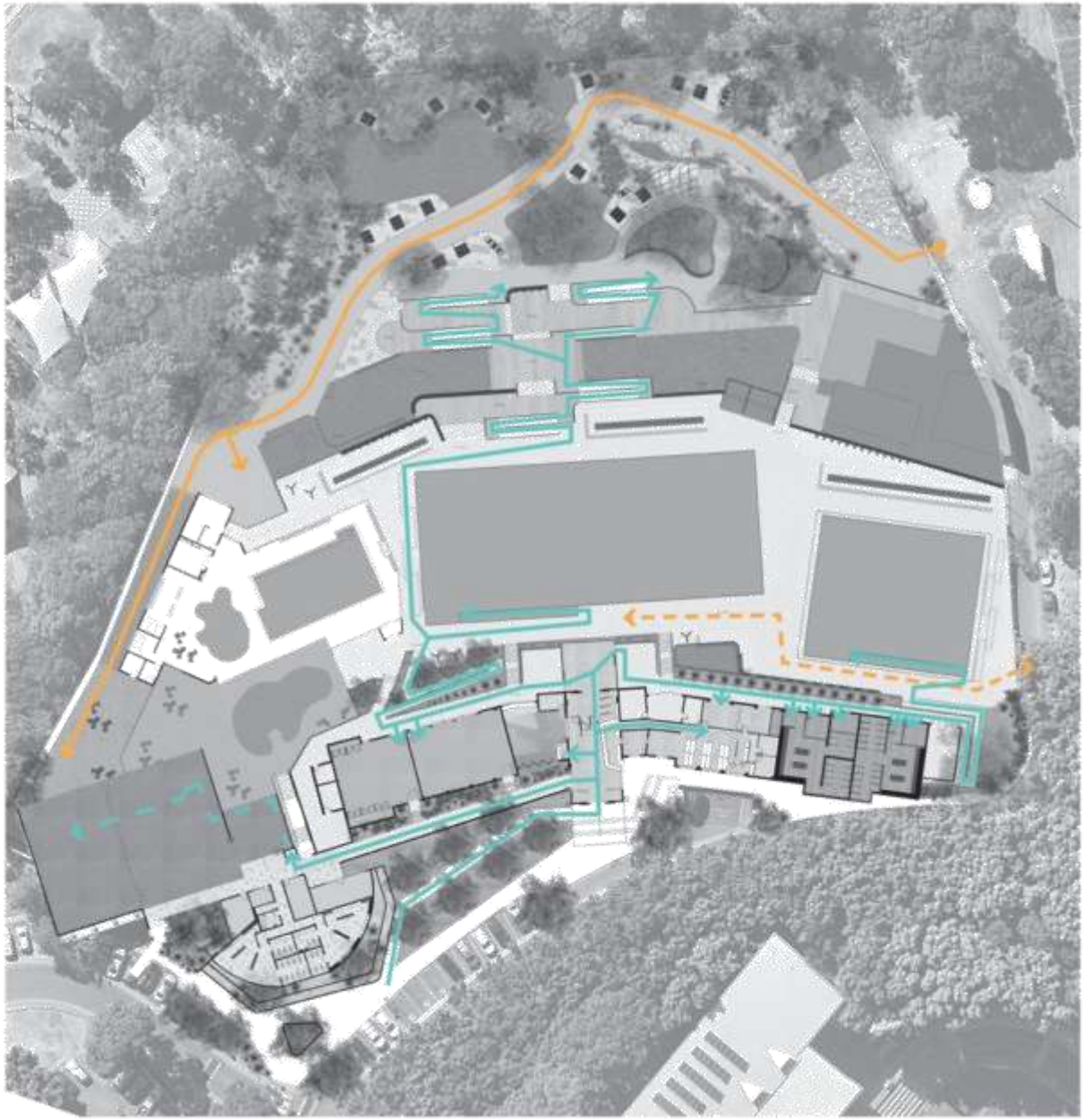
Angophora costata
Angophora hispida
Acacia binervia
Banksia integrifolia
Banksia serrata
Eucalyptus gummifera
Eucalyptus haemastoma
Eucalyptus oblionga
Eucalyptus racemosa
Livistona australis
Archontophoenix cunninghamiana
Howea forsteriana

11 Master plan

Access and circulation

The proposed master plan rationalises access and circulation across the site.

The master plan improves accessibility within the facility by:
> Improving access through the reception by removing steps at the internal seating area and installing new ramps to the pool concourse.
> Improving access into the 50m pool by including ramp access and wheelchair lift into the pool.
> Ramp access from the pool concourse to the recreation zone.



LEGEND

- Accessible path of travel
- Accessible path of travel in Program Pool 2 area
- Maintenance vehicle access
- Small maintenance vehicle access

Item 2

Attachment 1



Indicative colour palette



Vertically grooved cladding panels to main building, storage and first aid buildings



Timber decking and seating



Concrete terraced seating



Sandblasted poured concrete pavement to pool concourse

11 Master Plan
Materials palette

To ensure maintenance requirements are met throughout the upgrade process the following materials palette is proposed in the master plan:

Vertical grooved cladding: cladding to existing brick building to create a cohesive building frontage.

Concrete concourse and footpaths: pedestrian footpaths are to be 120mm thick concrete with reinforcement. Concrete paths to the pool and ramps are to be broom finished with no edge treatment. Pool concourse is to have a sandblasted finish in a pattern. Finish must achieve a P4 or R11 slip resistance rating.

Concrete paths with vehicle movements to be 150mm thick with 120mm subbase. Concrete vehicle path to recreation zone is to be dark grey coloured concrete with broom finish and no edge treatment. Finish must achieve a P4 or R11 slip resistance rating.

Timber elements: all bespoke timber furniture to only be Australian Spotted Gum in 140mm x 40mm profile to ensure ease of maintenance throughout the asset lifecycle.

All timber used must be Forestry Stewardship Council certified. Ensure appropriate lead times are built into projects to source certified Australian hard wood.

11 Master Plan

Furniture palette

Furniture
To increase recreation opportunities and meet community requests for additional seating options at the facility, a range of different furniture items are proposed. The proposed furniture includes:

Moveable tables and chairs: A selection of moveable tables and chairs are proposed at the facility. Moveable tables and chairs will increase the seating options at the facility and allow for peak period demands on the centre. Select tables and chairs that are stackable, light weight and can withstand regular use by the public and marine environment.

Fixed picnic tables: A selection of fixed picnic settings are to be installed in picnic areas within the recreation zone. Settings are to be in line with preferred park furniture suppliers to ensure a standard suite throughout the LGA.

Movable lounge chairs: A selections of movable lounge chairs are to be provided at the facility to provide a variety of recreation options. Chairs are to be light weight and stackable.

Concrete seating: Concrete seating with timber tops or recycled plastic slats located against retaining walls are proposed to provide additional seating options in the recreation zone of the facility whilst creating a barrier for toddlers and young children from running onto footpaths.

Outdoor showers: A series of outdoor showers are proposed to be located within the water fit zone. Showers are to be cold water only and constructed of 316 marine grade stainless steel and suitable for the facilities harbour location.



Fixed seating



Combination of concrete and timber seating



Movable seating



Picnic settings



Outdoor showers

All works at the Leichhardt Park Aquatic Centre must align with Councils endorsed Corporate Sustainability Goals.

Aquatic centres are among Councils most resource intensive facilities. Our Aquatic Centres consume almost twice as much energy as all our other facilities combined and use 1/3 of our water. Energy and resource sustainability must be the starting point in the long term plan for Leichhardt Park Aquatic Centre, to allow the site to grow without increasing our impact on the environment.

Key sustainability goals for Leichhardt Park Aquatic Centre are described in this section:

- Carbon neutral
- Water wise
- Zero waste
- Sustainable infrastructure

These sustainability goals will only achieved through inclusion at the design stage. Good design reduces impacts during construction and operation, and also reduces running costs. Electricity bills are a significant cost at aquatic centres.

Climate Friendly – A carbon neutral pool

Council is committed to becoming 100% carbon neutral. Our vision is for Leichhardt Park Aquatic Centre to achieve Australian best practice in energy generation and energy efficiency.

As part of the upgrade planning process, Council will understand and plan for the energy consumption increase associated with the upgrade.

Maximise generation of on-site renewable energy

Leichhardt Park Aquatic Centre infrastructure will be designed to maximise rooftop solar (via selection of key factors such as roof pitch, roof orientation, switchboard capacity, battery space and electrical connections). Integrated photo voltaic building materials such as energy-generating glass will also be considered. All installations will be battery-ready to allow storage of power for evening use. Solar hot water systems will be installed to preheat water in warm pools.

Minimise energy consumption

Energy efficiency will be addressed at design stage especially for high energy use components such as:

- Pool pumps and filters
- HVAC
- Building fabric and insulation
- Lighting

Leichhardt Park Aquatic Centre's design will align with 'A guide for Benchmarking Energy and the Indoor Environmental Quality of Aquatic Centres in Victoria' (Aquatic and Recreation Victoria 2016) or an updated/local equivalent.

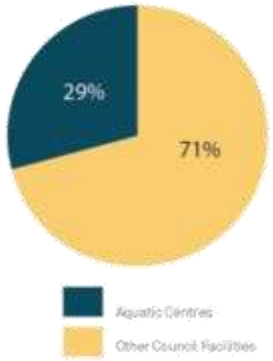
Council will monitor energy efficiency work to validate the outcomes.

Climate Friendly – Future-proof

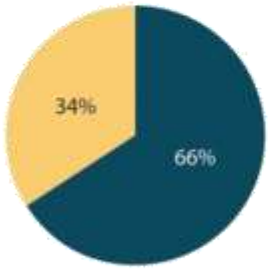
Climate change is bringing more extreme weather including more frequent hotter days. Climate adaption planning at Leichhardt Park Aquatic Centre will include hot weather risks such as:

- Plant failure (selecting equipment with appropriate tolerance to heat stress)
- Maximum safe customer numbers (when residents retreat to the pool in large numbers)
- Human thermal comfort of outdoor areas (appropriate shade, minimal reflective surface materials etc)

Water Consumption



Energy Consumption



Water Wise – Reducing water use

In the face of climate change and increasing population, water is becoming an increasingly precious commodity. Best practice water efficiency is key to future-proofing our aquatic centre.

Water efficiency, harvesting and recycling

Water efficiency starts with good pool design. Key principles that will be included at Leichhardt Park Aquatic Centre are:

- On-site water harvesting and water recycling will be incorporated into the design where feasible.
- Treatment of pool water will consider chemical hazards, public safety and the ultimate disposal point for the water.
- Water efficient infrastructure such as taps and showers will be used throughout the facility.
- Major infrastructure such as pool filters will be selected for water and power efficiency.
- Evaporation will be reduced through good practice such as pool coverings.
- Cleaning is both a significant cost and a significant user of water at pools and this can be reduced by considering the cleaning process at the design stage.

Leichhardt Park Aquatic Centre's design will align with 'Best practice guidelines for water management in aquatic leisure centres' (Sydney Water, 2011) or an updated equivalent.

Storm water

Rainwater from Leichhardt Park Aquatic Centre flows to bush care sites and the harbour. The master plan includes water sensitive urban design (see Overview section) to reduce on-site erosion and filter pollutants.

Zero Waste – Eliminating waste

Construction and demolition waste will be minimised during demolition and construction. Building materials will be salvaged for re-use where practical.

Zero operational waste

In line with the Community Strategic Plan, Leichhardt Park Aquatic Centre operations will be designed for zero waste generation. This will require creative thinking around anticipated 'waste streams and their management. Current waste management practices are likely to be superseded by the time the upgrade is undertaken, and it is expected that Leichhardt Park Aquatic Centre will avoid offering single use plastics and will compost organics. Space therefore will be allowed for recycling and organics collection across the facility.

Sustainable Infrastructure

The materials used in Leichhardt Park Aquatic Centre infrastructure consume energy and resources in their manufacture. This can be minimised by choosing:

- Materials with high recycled content, therefore supporting the market for these products
- Renewable materials, that is, agricultural products that are grown in less than 10 years and can be harvested sustainably (e.g. bamboo, hemp, organic cotton)
- Products that are certified lower-impact, such as Forest Stewardship Council certified wood
- Materials that can be recycled after use
- Materials that are durable in the marine environment
- Materials that are compatible with environmentally friendly cleaning products

Leichhardt Park Aquatic Centre's design will align with the Green Building Council of Australia's Green Star rating system, or equivalent for aquatic centres.

11 Future directions

The proposed master plan outlines priority works at Leichhardt Park Aquatic Centre over the next 10 years based on the evidence at the time. It also makes allowances for future upgrade works which have been requested by the community. In the future these upgrades could include:

Spa and sauna
The facility will house a unisex spa, steam and sauna. It is proposed that the facility will be located adjacent to the mushroom pool, in close proximity to the 50m pool, program pool 2 and gym. The facility will include hallway access from the lift, sound proofing to walls and air lock doors to reduce any noise from the mushroom pool and showers.

The facility will also include stackable sliding doors facing east. This will allow for views through biodiversity planting on the adjacent embankment and to Iron Cove beyond. The doors may be open on occasion to allow users to relax in a private outdoor setting.

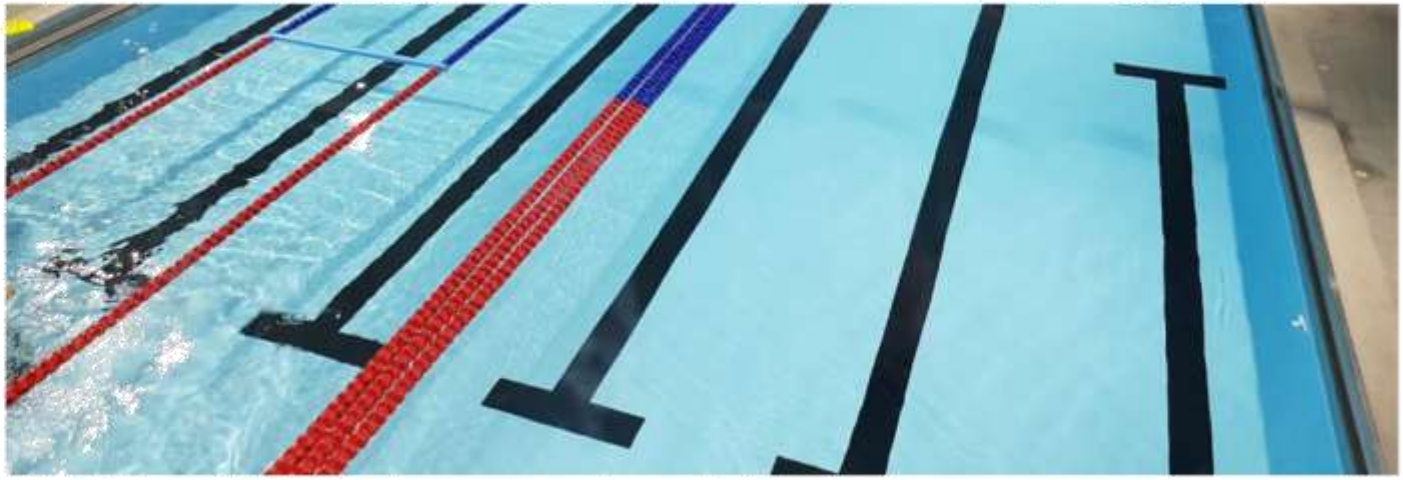
Expansion of the gym
Expansion of the gym is proposed over the existing mushroom pool. The gym would allow for additional Cardio space and free up space in the existing gym for additional stretch and weights areas. The gym expansion also proposes an outdoor work out area for yoga classes, stretching and individual work outs. This space would overlook the planted embankment and Iron Cove.

Expansion of Program Pool 1
Removal of the existing indoor splash pool to allow for the expansion of Program Pool 1 to a 25m pool is proposed. The additional length will allow for more programming opportunities including expansion of the current Learn to Swim program offerings.









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12

Implementation Plan



12 Implementation Plan

Introduction
The implementation plan is to guide the preferred implementation and staging of upgrades for the Leichhardt Park Aquatic Centre Master plan. The implementation plan has been used to influence the Long term Financial Plan.
Below which, each project item is listed with all the elements that require costing e.g. aquatic facilities, pathways, trees or furniture. Each listed item has a quantity provided, a unit rate, a cost rate and total costs. At the end of each subsection, a project subtotal is provided. The implementation of each project has been prioritised according to community engagement asset quality and funding available.
Each project costing has been broken down into financial year spending.

External and/or grant funding
Several projects will require external or grant funding from alternate sources and strong collaboration with stakeholders.
This document is to be used to secure this funding and help deliver the additional projects.

Financial Summary
A summary of the cost implications include:

TOTAL 2019/20: $ 760,000
TOTAL 2020/21: $ 695,000
TOTAL 2021/22: $ 3,128,125
TOTAL 2022/23: $ 8,614,875
TOTAL 2023/24: $ 2,365,750
TOTAL: $ 15,563,750

Exclusions and Assumptions
A series of exclusions and assumptions have been made within the costing.

Exclusions
> All site preparation and management activities including site management and safety plans, meetings, inspections, certifications, incidents register, traffic control measures, location of services, setout, service authority approvals, make good, environmental management including erosion control and dust suppression, portaloo and make good.
> Site safety and tree protection fencing.
> Completion documentation including as built drawings, certifications and warrantees.
> Geotechnical testing
> Soil testing and removal of contaminated soil from site
> Detailed site survey costs not included
> Review of fire safety and upgrade of fire safety systems
> Latent conditions – e.g. Rock, services, unknown
> Site safety and tree protection fencing.
> Completion documentation including as built drawings, certifications and warrantees.
> Geotechnical testing
> Soil testing and removal of contaminated soil from site
> Detailed site survey costs not included
> Review of fire safety and upgrade of fire safety systems
> Latent conditions – e.g. Rock, services, unknown underground, etc.
> Regulatory approvals and DA costs excluded
> Allowance for night and weekend work

Assumptions
> All costing is excluding GST
> Asset maintenance of the existing facility is not part of the capital works expenditure
> Works will be staged to ensure clear construction access
> No cranes will be required for works to be undertaken.

LPAC Capital Works Programme - High Level Estimated Costs 17 May 2019

1.00 Relocate Air Conditioning Equipment to Hydrotherapy Pool		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
Supply and Installation of new Air Cooled Package Units to provide cooling and heating to the Hydrotherapy pool environment - with up to date refrigerant						
The equipment should be located externally in a concrete footing in close proximity to the building						
New ductwork should be used to connect the existing internal ductwork to the new external units						
Power supply for the new units should be run from the existing switchboard located within the plant space adjacent the building						
Old units would be removed and disposed due to the redundant refrigerant						
Sound attenuation/screening should be constructed around the new units						
Cost breakdown:						
New units 2 No. @ 30kw each	$80,000					
Installation and ductwork	$25,000					
Power supply submains	$20,000					
Supervision, overheads, margin	$15,000					
Screening and builders works	$25,000					
Consultants fees	$15,000					
Total cost	**$180,000**	$180,000				

2.00 Upgrade building for BCA compliance		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
After a recent review of the fire safety and BCA compliance an independent consultant has advised a scope of works required in order to receive an annual fire safety certificate. This work includes fire services, air conditioning fire trip and alarm system, paths of egress alteration and other minor works.						
Cost breakdown:						
Estimate based on consultants advice plus contingency	$250,000					
Additional consulting fees	$10,000					
Total cost	**$260,000**	$260,000				

4.00 Removal of Dive Tower		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
Provide protective scaffolding to structure and fencing - 16 weeks	$76,000					
Dismantle tower by hand	$160,000					
Make good site - new slab	$15,000					
Refurbish (make good) dive pool	$10,000					
Preliminaries, fees and margin	$60,000					
Consultants fees	$20,000					
Total cost	**$320,000**	$20,000	$300,000			

3.00 50m pool and Dive Pool Replacement		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
Demolition of existing main 50m pool and dive pool, construct new 8 lane 50m pool with adjacent program pool, suitable also for water polo - assumes entirely new structure, constructed in the same location						
Cost breakdown:						
Complete demolition and replacement of 50m swimming pool with new 8 lane pool - this assumes retention of existing heating equipment and pool plant	$7,878,750			$787,875	$5,515,125	$1,575,750
Complete demolition and replacement of dive pool with new 25m pool	$2,050,000			$205,000	$1,435,000	$410,000
Preliminaries, consultants fees	$1,500,000	$300,000	$375,000	$375,000	$300,000	$150,000
Total cost	**$11,428,750**					

5.00 Landscaping and water play area		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
Construct new waterplay area including landscaping, picnic facilities, water play creek bed and general play equipment, as well as integration with the existing LPAC facilities, boundary fencing, lighting and sheltered areas.						
Cost breakdown:						
Warerplay creek bed	$250,000			$62,500	$187,500	
Play equipment and softfall	$125,000			$31,250	$93,750	
Landscaping	$200,000			$50,000	$150,000	
Picnic shelters and buildings	$100,000			$25,000	$75,000	
Amenities	$125,000			$31,250	$93,750	
Lighting	$75,000			$18,750	$56,250	
Sun shades	$150,000			$37,500	$112,500	
Consultants fees and preliminaries	$200,000			$50,000	$150,000	
Total cost	**$1,225,000**					

12 Implementation Plan

6.00 Enclosure of the Mushroom Pool and remove steps to hydrotherapy pool		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
To construct new roof and wall structures to enclose the mushroom pool and integrate the structure into the adjacent buildings including services, air conditioning, fire services, etc, with airport style door for fresh air circulation. Also remove steps at the southern edge of the hydrotherapy pool to create more capacity.						
Cost breakdown:						
New structure (Steel frame, lightweight cladding) - 800m2 @ $1,200/sqm	$960,000			$768,000	$192,000	
Services integration and door 800m2 @ $650/sqm	$520,000			$416,000	$104,000	
Demolition of existing hydrotherapy steps and make good	$220,000			$220,000		
Consultants fees	$100,000		$20,000	$50,000	$30,000	
Total cost	**$1,800,000**					

7.00 Amendments to building layout		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024
Scope:						
Refurbish reception area including new reception counter, floor finishes, security turnstiles and general furnishings						
Cost breakdown:						
Reception area refurbishment	$126,000				$37,500	$87,500
New change room upgrade	$100,000				$30,000	$70,000
General signage upgrade	$50,000				$15,000	$35,000
Consultants fees and preliminaries	$75,000				$37,500	$37,500
Total cost	**$350,000**					

Total cost of entire capital works programme	**$15,563,750**	**$760,000**	**$695,000**	**$3,128,125**	**$8,614,875**	**$2,365,750**
Year of capex (all in 2019 dollars)		2019/2020	2020/2021	2021/2022	2022/2023	2023/2024

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A

Benchmarking Study

Appendix A

Process and findings
History of the aquatic centre
Case Study Location Map
Benchmarking Study 1 - Des Renford Leisure Centre, Randwick
Benchmarking Study 2 - Angelo Anestis Aquatic Centre, Bexley
Benchmarking Study 3 -Victoria Park Pool, Camperdown
Benchmarking Study 4 -Prince Alfred Park Pool, Surry Hills
Benchmarking Study 5 -National Centre of Indigenous Excellence



01 Benchmarking Study

Process and findings

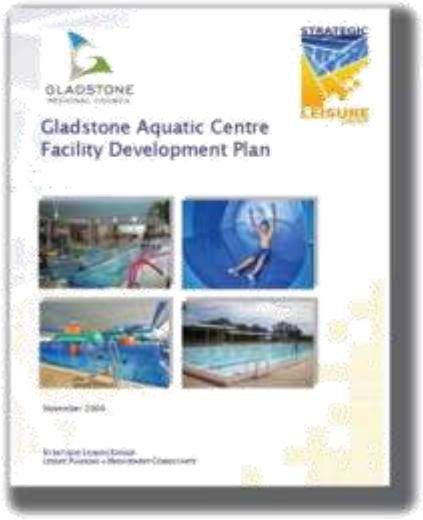
Overview
Council completed a detailed benchmarking study to understand current trends in facilities, best practice design and potential future demands.

The benchmarking study was conducted in 3 main parts:
1. Desktop review: the desktop review was a study of relevant strategies from a variety of sources including sporting organisations, government bodies and other aquatic facility master plans.
2. Historical understanding: research on the historical context of aquatic facilities was completed to better understand past trends and existing situation.
3. Site visits: site visits to other regional aquatic centres were conducted to understand how recent upgrades, previous works function and what lessons can be learnt.

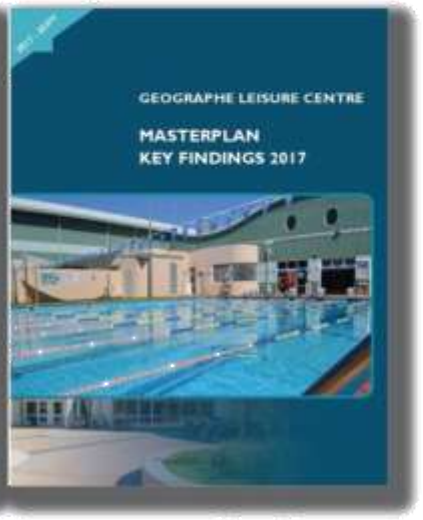
This thorough investigation developed a set of conclusions on best practice designs and outcomes which have informed the master plan design.



01 Evolution of the aquatic facilities













A desktop study reviewed the following Aquatic Centre strategies and guidelines.

The outcomes from the desktop review can be broken into three main parts:

Trends in recreation facilities

- Provide flexible recreation facilities including group and individual fitness and recreation facilities.
- More time is spent out of the water than in the water. Ensure recreation area service supervision of recreation out of the pool along with spaces for both individual and groups to gather.
- Provide a recreation venue with multiple functions that meet a diverse set of needs.
- There is an increase in participation levels of females and the disabled in physical activity. There are indications for a growing desire for families to share recreational activities or pursue related activities at one venue rather than different activities at different locations.
- People undertake physical activity at varying times, with daytime and night-time participation rates increasing. Residents, therefore, expect and require use of facilities at hours that suit them.

Facility requirements

- Entrance Lobby and Foyer
- Reception, Administration and Staff Facilities
- Meeting Room (25 persons)
- Café/Food and Beverage Area
- Retail
- Public Toilets - at foyer
- Wet change room - if facilities are shared between the pool and reception area, including both a wet entrance and dry entrance is desirable.
- Dry change room
- Cleaners' Stores
- First Aid Room
- Staff Room
- Spectator seating
- Pool Control
- Pool Storage - 6% of the pool area
- Accessibility - Sport wheelchairs are wider than normal wheelchairs and are not able to fit through 760mm clear door openings. All accessible routes should therefore provide 920mm minimum clear openings. Sliding doors are preferred to swing doors.

Design outcomes

- Move away from traditional 50m lap pool to recreation activities
- Inclusive and accessible
- Flexible recreation options
- Cater for a diversity in user groups
- Quality public active and passive recreation areas
- Provision of shade – sun safe movement
- Ease of surveillance

01
Benchmarking Study

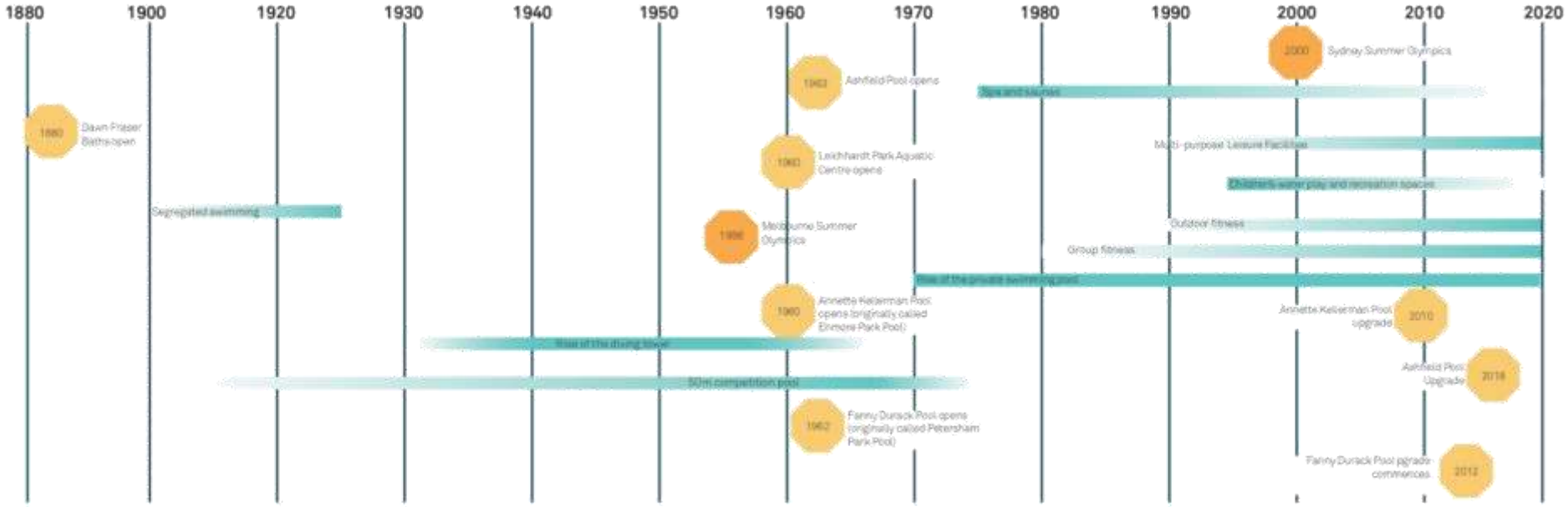
The history of aquatic facilties in the inner west

Aquatic recreation has changed its form and importance over time. In the past, aquatic facilities were limited to rock pools and the beach. The early 1900s saw the rise of Australian Olympic swimming with Frederick Lane winning two gold medals in the 1900 Olympics. In 1912 Women's events were added at the Olympic Games in Stockholm, with Fanny Durack and Wilhelmina "Mina" Wylie being Australia's first female representatives, winning gold and silver in the 100m freestyle. From the early 1900s, popularity in the 50m pool began to rise with the peak seen in the 1950s and 1960s. This is seen in the construction of Ashfield Pool, Leichhardt Park Aquatic Centre, Annette Kellerman Pool, Enmore and Fanny Durack Pool, Petersham. In the 1940s, the rise of the diving tower encouraged more diversity within Aquatics recreation. Additional recreation facilities including spas and saunas became popular within facilities in the 1970s. Multi-purpose facilities with gym and sporting facilities are a relatively new phenomenon and have grown in popularity over recent years.

With the densification of our cities and smaller backyards, the community swimming pool is re-establishing its importance.

There is also a current trend away from the tradition 50m lap pool with a move towards multi-purpose recreation facilities. These facilities often include, gym, group fitness, indoor and outdoor team sport facilities, athletics, community rooms, swimming and childrens water play. They have become the community centre with water.

With our densifying city, now is the critical time for high quality public recreation, including aquatic recreation.



01 Benchmarking Study

Location of visited aquatic facilities



Council completed site visits to various Aquatic Facilities within Sydney. The sites were chosen for their recent upgrade works, tight urban lot sizes, connection to wider recreation facilities and densifying surrounding populations.

During our site visits we met with staff, operations managers and facility managers to understand what worked well in the new upgraded facilities and areas which could have been improved. We developed an understanding of:

> Connectivity to the site
> Foyer and reception layout and circulation
> Administration area design
> Learn to swim and program pool requirements
> Outdoor pool facilities
> Layout and circulation of change facilities
> Location, materiality and layout of gym facilities
> Crèche location and requirements
> Café and retail location and design

A summary of each facility are on the following pages.

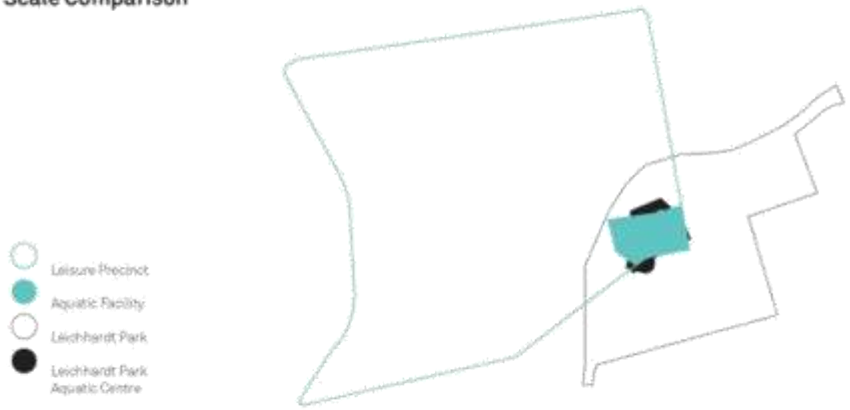
Legend

1. Des Renford Leisure Centre, Randwick
2. Angelo Anestis Aquatic Centre, Bexley
3. Victoria Park Pool, Camperdown
4. Prince Alfred Park Pool, Surry Hills
5. National Centre of Indigenous Excellence, Redfern

Context

SUBURB	Maroubra
ADDRESS	Jersey Rd & Robey Street, Maroubra NSW 2035
SITE DESCRIPTION	The Des Renford Leisure Centre is located within Heffron Park, Maroubra. The facility is serviced by bus routes 200m from the site. The facility is 1.5km from Westfield Eastgardens and Maroubra Beach. It is 800m from Pacific Square Shopping Centre. The Leisure Centre is part of a larger active precinct which includes: 28 Netball courts, Rugby fields, cycling, gymnastics facility, tennis courts and soccer fields, including one synthetic soccer field.
FACILITY DESCRIPTION	A new facility was built to replace the existing 1960's facility. The upgrade was completed in October 2013. It included a new fitness and health facility, cafe, reception area, foyer and offices. Landscaping works, BBQ area and shade structures were also upgraded.

Scale Comparison



OPENING HOURS	MON	5.30AM - 10.00PM
	TUES	5.30AM - 10.00PM
	WED	5.30AM - 10.00PM
	THU	5.30AM - 10.00PM
	FRI	5.30AM - 8.30PM
	SAT	7.00AM - 6.00PM
	SUN	7.00AM - 6.00PM
OPERATIONS TYPE	Operated by Randwick City Council	



Facilities

	50m outdoor heated pool	50m indoor heated pool	Heated indoor programme pool	Heated indoor 25 metre pool	Heated children's play area/pool	Spa	Steam room	Aquatics inflatables	Wave Ryder	Wave pool	Waterslide	Gym - weights and cardio room	Group fitness studio	Creche	Retail	Cafe/kiosk	Massage Therapist	Nutritionist	BBQ area and picnic facilities	Access friendly - ramp access, pool hoist	Birthday Parties	Group sporting facility
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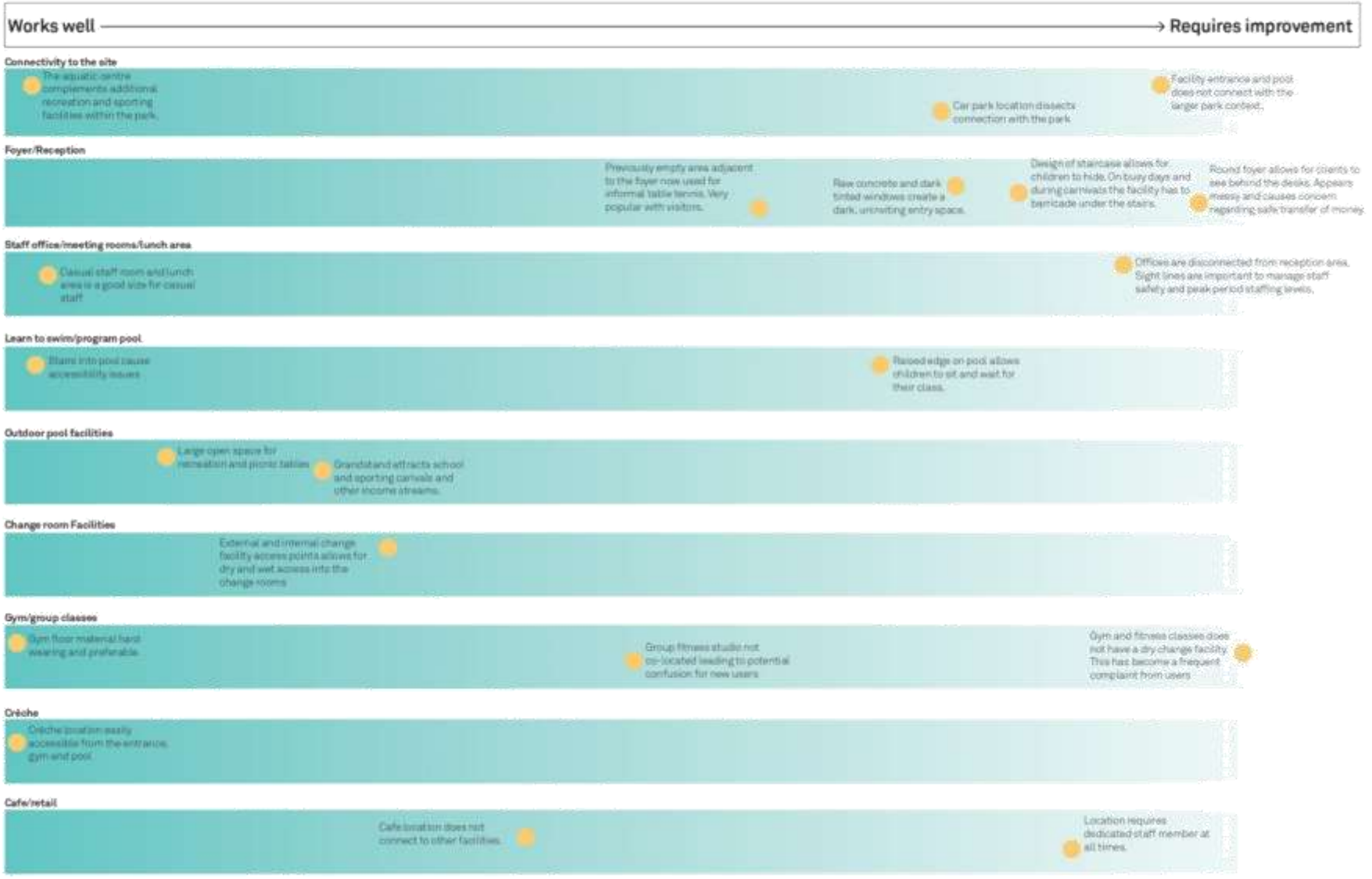
01 Des Renford Leisure Centre, Randwick

Analysis

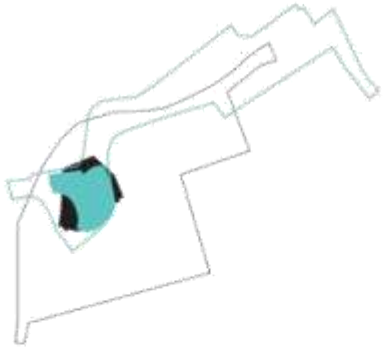


Context

SUBURB	Bexley
ADDRESS	980 Preddys Rd, Bexley North
CONTEXT	The facility is located within a suburban context. It sits adjacent to Bardwell Valley Parklands and is accessed from a dedicated aquatic centre car park or by bus on Preddys Road. The facility does not address Bardwell Valley Parklands and Bardwell Creek.
FACILITY DESCRIPTION	The facility was upgraded extensively in early 2017 and includes pool facilities, retail, cafe and gym facility.



Scale Comparison



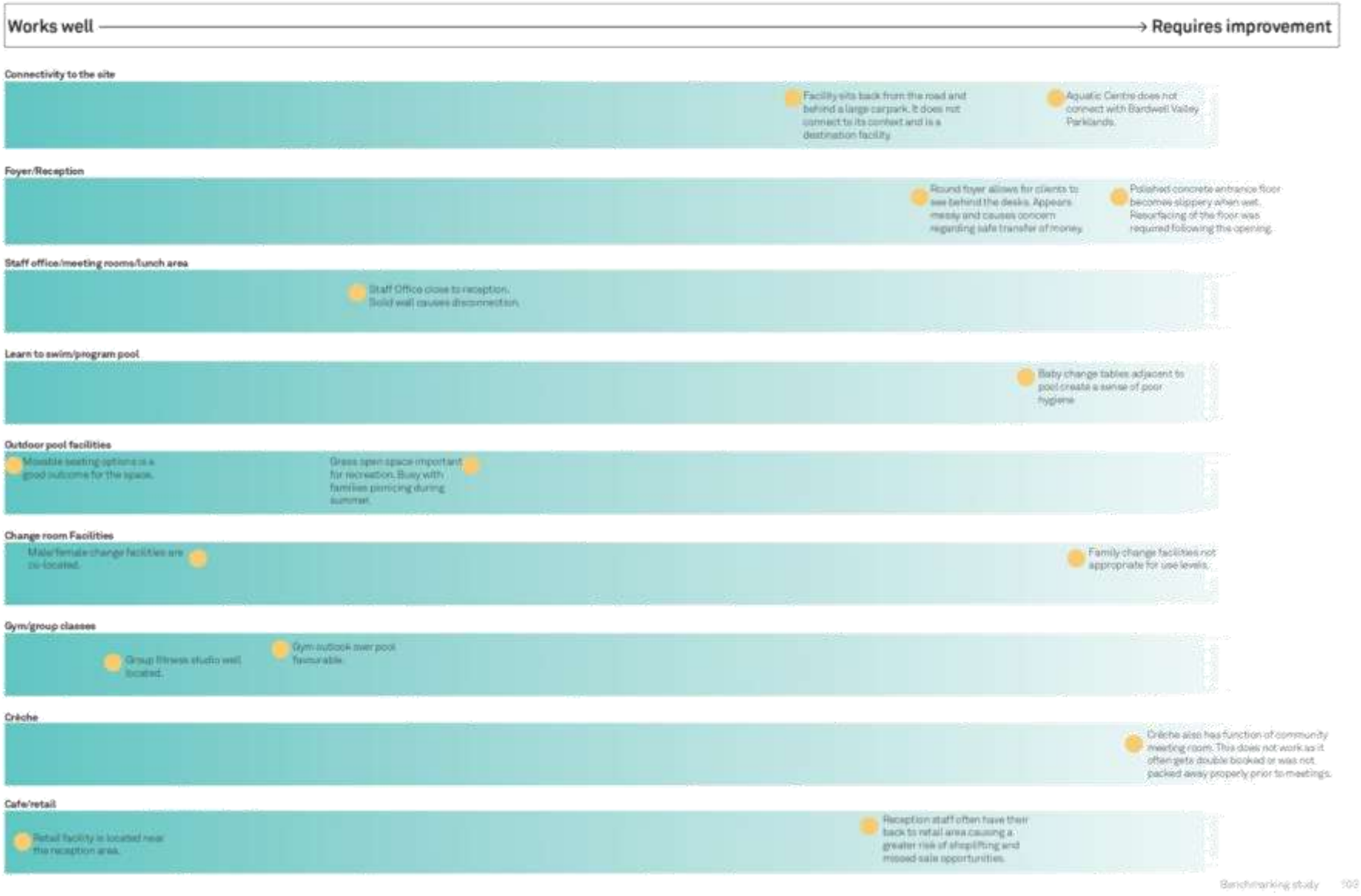
- Leisure Precinct
- Aquatic Facility
- Leichhardt Park
- Leichhardt Park Aquatic Centre

OPENING HOURS	MON	5.30AM- 9.00PM
	TUES	5.30AM- 9.00PM
	WED	5.30AM- 9.00PM
	THU	5.30AM- 9.00PM
	FRI	5.30AM- 9.00PM
	SAT	6.00AM- 8.00PM
	SUN	6.00AM- 8.00PM
OPERATIONS TYPE	Operated by Blue Fit/Owned by Randwick Council	

Available facilities

	50m outdoor heated pool	50m indoor heated pool	Heated indoor programs pool hydrotherapy pool	Heated indoor 25-metre pool	Heated indoor children's play area/pool	Spa	Steam/steam room	Aquatics inflatables	Wave Rider	Wave pool	Water slide	Gym – weights and cardio room	Group fitness studio	Creche	Retail	Cafe	Massage Therapist	Nutritionist	BBQ area and picnic facilities	Access-friendly - ramp access pool hoist	Birthday Parties	Indoor group sporting facility
	●	●	●	●	●	●	●		●	●	●			●		●				●	●	●

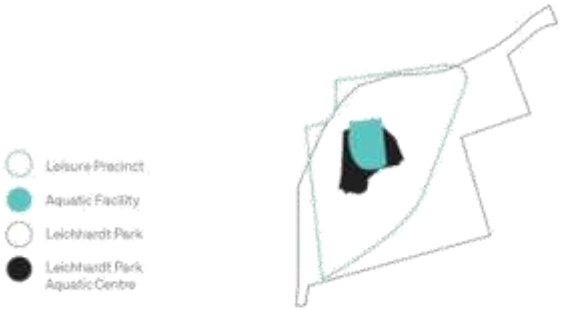
01 Angelo Anestis Aquatic Centre, Bexley Analysis



Context

SUBURB	Camperdown
ADDRESS	City Road (Corner of Parramatta Road) Camperdown, Camperdown
CONTEXT	The facility is located within a high density location in close proximity to Broadway shopping centre a regional shopping facility and adjacent to Sydney University's Camperdown Campus.
FACILITY DESCRIPTION	The facility includes retail, cafe and gym facility. It sits at the centre of Victoria Park and is accessed by foot from a small car park at City Road or bus stops at Parramatta Road or City Road. The facility takes full advantage of its park setting by positioning the building at the high side of the facility, focussing view out to the park.

Scale Comparison



OPENING HOURS	MON	6:00AM - 8:00PM
	TUES	6:00AM - 8:00PM
	WED	6:00AM - 8:00PM
	THU	6:00AM - 8:00PM
	FRI	6:00AM - 8:00PM
	SAT	7:00AM - 8:00PM
	SUN	7:00AM - 8:00PM
OPERATIONS TYPE	Operated by Belgravia Leisure owned by City of Sydney	



Available facilities

	50m outdoor heated pool	50m indoor heated pool	Heated indoor program pool/hydrotherapy pool	Heated indoor 25-metre pool	Heated indoor children's play area/pool	Spa	Steam room/sauna	Aquatics inflatables	Wave Rider	Wave pool	Water slide	Gym - weights and cardio room	Group fitness studio	Creche	Retail	Cafe	Massage Therapist	Nutritionist	BBQ area and picnic facilities	Access-friendly - ramp access, pool hoist	Birthday Parties	Indoor group sporting facility
	●											●		●		●						

01 Victoria Park Pool, Camperdown

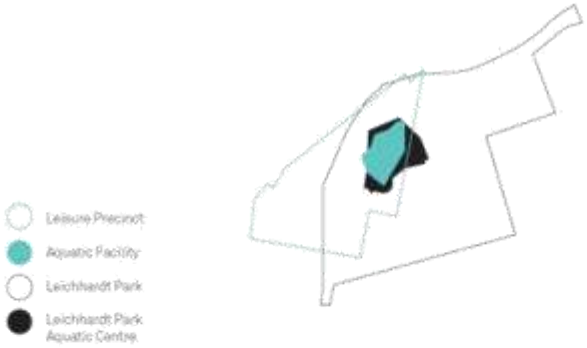
Analysis



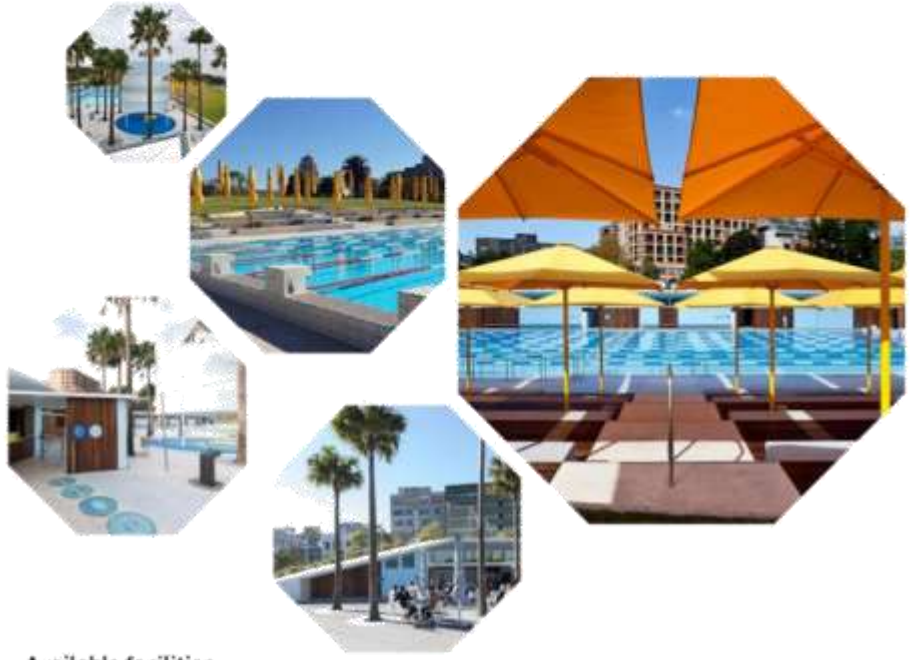
Context

SUBURB	Surry Hills
ADDRESS	105 Chalmers St, Surry Hills
CONTEXT	The facility is located within Prince Alfred Park and adjacent to a high density residential and commercial location. The facility is in close proximity to Central Train Station and major bus routes.
FACILITY DESCRIPTION	The facility includes a 50m heated outdoor pool, children's splash pad, retail and cafe servicing the park. The facility was upgraded in 2013 and the new facility was awarded the 2014 AIA National Architecture Awards: Walter Burley Griffin Award for Urban Design, 2014 AIA NSW Sulman Medal for Public Architecture, 2014 AIA NSW Lloyd Rees Award for Urban Design 2014 City of Sydney Lord Mayor's Prize, 2014 Australia Award for Urban Design, 2014 Good Design Awards (Best In Architecture + Interiors) 2013 AILA Award, 2013 Sydney Design Awards (Architecture Mixed use) 2013 WAF High Commendation (Landscape), 2013 CCAA State Award 2013 DA NSW High Commendation NSW medal at the Australian Institute of Landscape Architects state awards in December 2013.

Scale Comparison



OPENING HOURS	MON	6.00AM-9.00PM
	TUES	6.00AM-9.00PM
	WED	6.00AM-9.00PM
	THU	6.00AM-9.00PM
	FRI	6.00AM-9.00PM
	SAT	8.00AM-6.00PM
	SUN	10.00AM-6.00PM
OPERATIONS TYPE	Operated by National Centre of Indigenous Excellence	



Available facilities

50m outdoor heated pool	50m indoor heated pool	Heated indoor programme pool/Program Pool 2	Heated indoor 25-metre pool	Heated indoor children's play areas/pool	Spa	Steam/steam room	Aquatics inflatables	Wave Rider	Wave pool	Water slide	Gym - weights and cardio room	Group fitness studio	Crèche	Retail	Cafe	Massage Therapist	Nutritionist	BBQ areas and picnic facilities	Access friendly - ramp access, pool hoist	Birthday Parties	Indoor group sporting facility
●														●	●						

01 Prince Alfred Park Pool, Surry Hills Analysis

Works well → Requires improvement

Connectivity to the site

- Pool Facilities connect well to public transport.
- Connects well with its park context whilst still providing privacy to patrons.

Foyer/Reception

- Queuing for entry is simple and member access is operated on a swipe card system.
- Foyer and reception area often has a wind tunnel effect and is unpleasant for staff.

Staff office/meeting rooms/lunch area

- Staff Office close to reception for good natural surveillance.

Learn to swim/program pool (N/A)

Outdoor pool facilities

- Movable seating options is a good outcome for the space.
- Shaded tiered spectator seating and mounded grass area highly used.
- Additional flat turfed area required for picnicing.

Change room Facilities

- Male and female change facilities are located adjacent to each other.
- Two entrances allow for toilets and showers to be accessed seperately.
- Change facilities are open to the elements above showers. Allows for natural ventilation.
- Concrete surface within showers is hard to clean and maintain.

Gym/group classes (N/A)

Crèche (N/A)

Cafe/retail

- Cafe is rarely open. Cafe is located at the entrance to the pool and services the park rather than the pool.

Context

SUBURB	Redfern
ADDRESS	166-180 George St, Redfern
CONTEXT	The facility is located on a tight small site within a high density location in close proximity to Redfern Town Centre. The site is well serviced by public transport. The aquatic facility is part of a larger program of social enterprise including youth support and training services, hospitality services, conferences and social sporting events.
FACILITY DESCRIPTION	The facility includes community facilities, a 25m indoor heated pool, indoor basketball court facility, retail, cafe and gym. It sits at the centre of Victoria Park and is accessed by foot from a small car park at City Road or bus stops at Parramatta Road or City Road. The facility takes full advantage of its park setting by positioning the building at the high side of the facility, focussing view out to the park.



Scale Comparison



OPENING HOURS	MON	6.00AM-9.00PM
	TUES	6.00AM-9.00PM
	WED	6.00AM-9.00PM
	THU	6.00AM-9.00PM
	FRI	6.00AM-9.00PM
	SAT	8.00AM-6.00PM
	SUN	10.00AM-6.00PM
OPERATIONS TYPE	Operated by National Centre of Indigenous Excellence	

Available facilities

50m outdoor heated pool	
50m indoor heated pool	
Heated indoor program pool/Program Pool 2	
Heated indoor 25 metre pool	●
Heated indoor children's play area/pool	
Spa	
Steam/sbeam room	
Aquatics inflatables	
Wave Ryder	
Wave pool	
Water slide	
Gym - weights and cardio room	
Group fitness studio	
Crèche	●
Retail	
Cafe	●
Massage Therapist	
Nutritionist	
BBQ area and picnic facilities	
Access friendly - ramp access, pool hoist	●
Birthday Parties	
Indoor group sporting facility	●

01
National Centre of Indigenous Excellence
Analysis

